

MARKET ACCESS MAP PROVIDES EMERGENCY RESPONSE TO COVID-19

The COVID-19 pandemic has engulfed the world in the first half of 2020 and ushered in the “new normal”. It ignited a plethora of unprecedented trade policy reactions from governments in a chain reaction, sometimes within days or hours apart – something we could not imagine happening when we were in 2019. It made online trainings, teleconferencing and online commerce a mainstream. It made thousands of businesses, grounded in lockdowns, seriously rethink their product strategies, sourcing options and market diversification.

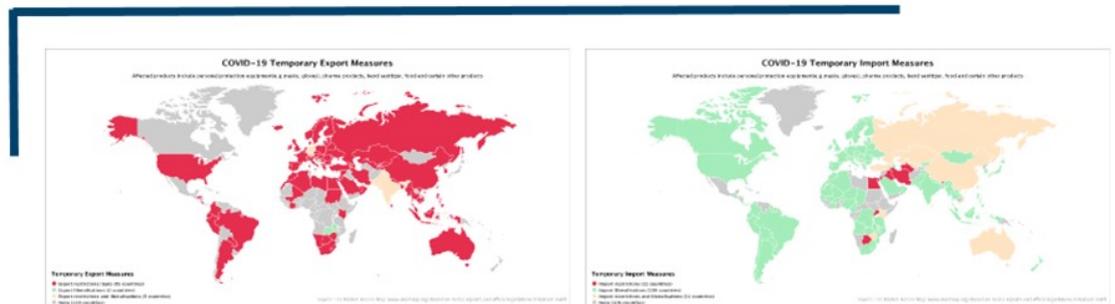
As the global pandemic chaos unfolded, Market Access Map responded by

1. Launching a daily tracker of COVID-19 temporary measures on exports and imports adopted by more than 150 governments;
2. Rolling out a free online ITC SME Academy course on how to access new markets;
3. Bringing new trade data on scheduled benefits of preferential trade agreements.

1. COVID-19 Temporary Measures Tracker

As the coronavirus pandemic spread out of control, a panic among government authorities ensued. By June 2020, Market Access Map identified more than 280 emergency export and import measures taken by more

COVID-19 Temporary Measures



than 150 countries, analysed them and published on the free regularly-updated monitoring page: <https://www.macmap.org/covid19>.

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The daily monitoring service was launched on April 9 and consists of three features:

- Global map overviewing enacted measures;
- Daily feed of new measures;
- Detailed searchable table with all adopted measures, which include covered products and copies of official decrees.

The majority of measures are export restrictions and import liberalizations on personal protective

equipment, such as masks, gloves and hand sanitizers, medicines and staple foods. These measures are extraordinary and override “normal” market access conditions in Market Access Map, therefore should be consulted in priority.

The Market Access Map’s COVID-19 trade measures have been integrated by Google team into their ‘Marker Finder’ business service (https://marketfinder.thinkwithgoogle.com/intl/en_ne/widget/trade-measures/).

2. ITC SME Academy Course “How to access international markets?”

Want to explore new markets for your products, but do not know how? Then enroll into this free online course overviewing various market access conditions and opportunities in international markets. The course is tailored for business audiences and is powered by Market Access Map tool.

The course, hosted on ITC SME Academy platform, introduces the basics of market access in goods, covering tariffs and non-tariff measures. Participants will acquire key concepts and terminology and carry out practical exercises in Market Access Map.

After completing the course, participants will be able to:

- Understand the importance of market access in international trade;
- Master terminology and concepts to analyse market access;
- Make informed decisions to export into international markets based on market access conditions;
- Navigate Market Access Map to analyse and compare market access for a particular country and a particular product.

Enrol into the course before July 12 – Places are still available!

<https://learning.intracen.org/course/info.php?id=1161>

📍 How to access international markets?



ITC | SME Trade Academy

 Course format	 Language
Online/Internet-based	English (en)
 Time required	 Next start date
4 hours over 2 weeks	13, Jul 2020



3. Forward-looking tariff database covering all preferential trade agreements in the world for 2014-2050 horizon

ITC completed the global dataset of future tariff rates as scheduled in preferential agreements in force before May 2019. The 5-year project has been financed by GRIPS (Japan).

The dataset is documented in a working paper (https://www.gtap.agecon.purdue.edu/resources/res_display.asp?RecordID=6112) and presented at the 2020 GTAP Conference (virtual), along with 140 other research presentations.

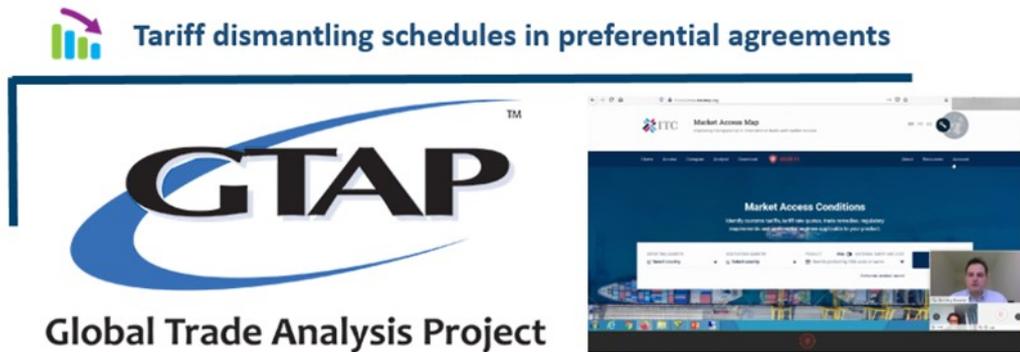
Forward-looking database of preferential tariffs offers a wide range of benefits for companies and research community:

- It can help companies plan international expansion in a forward-looking manner;
- It helps researchers simulate future impacts of preferential trade agreements based on actual legal tariff commitments rather than broad assumptions;

- It helps policymakers and negotiators assess remaining pockets of tariff protectionism which can be addressed through a series of new bilateral or regional negotiations;

The global database can be downloaded entirely free of charge in Market Access Map's Bulk Download module: <https://www.macmap.org/en/download>

Market Access Map team will continue to maintain and update the database with new and forthcoming FTAs, such as US-Japan, EU-Singapore, EU-Vietnam, RCEP, AfCFTA, EFTA-Mercosur, USMCA and others!



EXPORT POTENTIAL ASSESSMENT

Export potential in the wake of COVID-19

The coronavirus (COVID-19) pandemic has thus far inflicted severe burdens on global health systems and global economic activity, as a result of widespread lockdowns and trade restrictions. According to the IMF's World Economic Outlook (April 2020), "the global economy is projected to contract sharply by -3% in 2020, much worse than during the 2008-09 financial crisis". Assuming that the crisis will fade in the second half of 2020, the global economy is expected to rebound by 5.8% in 2021.

Export potential forecasts are down by 5.7% globally due to the COVID-19 pandemic

In light of these revised GDP forecasts, our outlook for world export potential by the year 2024 suffered a decrease of 5.7%. These results have been incorporated in the spring update of our Export Potential Map tool, available now online ([https://](https://exportpotential.intracen.org)

exportpotential.intracen.org).

The COVID-19 pandemic will likely have a disproportionate impact across different countries and regions. For instance, the IMF estimates a sharper contraction in GDP of 7.1% for the European Union, while for Sub-Saharan Africa and the Middle East & Central Asia, a reduction of 1.6% and 2.8% respectively is expected.

Developed countries are expected to see a greater reduction in export potential than developing countries

These changes in expected GDP affect export potential through two channels. First, they influence the projection of the exporting country's relative export performance. Second, they have an effect on the projection of import demand across potential target

Figure 1: Impact of COVID19-related GDP drop on export potential in 2024, by region / development level



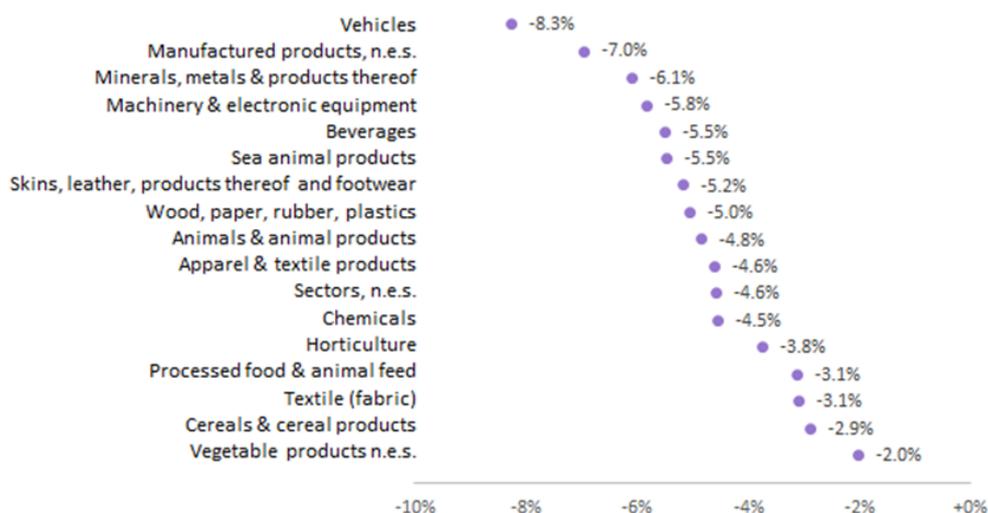
markets. In line with the gloomy GDP forecasts, Europe's export potential may see a reduction of 6.8%, followed by the Americas with 6.2% (Figure 1).

On the other hand, Africa is expected to have a drop in export potential of 5.3%, and the Pacific shows to be the least impacted continent (-4%). In fact, developed countries on average display a greater fall in export potential of 6.1%, whereas in least developed countries, export potential is expected to decrease by 'only' 4.7%. At the country level, there are a few examples of positive growth in export potential by 2024, most notably small African countries – including Equatorial Guinea (+6.7%), Burundi (+1.8%) and Djibouti (+1.5%).

Import demand for essential goods will likely remain relatively stable

Our estimations also show disproportionate impacts on export potential across different sectors, with manufacturing industries more strongly affected than agriculture. Cross-sectoral differences are often driven by variations in the responsiveness of import demand to GDP per capita changes. For instance, while the decision to purchase a luxury item or a capital good can easily be postponed, consumption of essential

Figure 2: Impact of COVID19-related GDP drop on export potential in 2024, by sector



agro-based products will hardly decrease in times of crises.

As a result, we find the vehicles sector to have suffered the most, with a projected decrease of 8.3% in export potential by 2024, followed by manufactured products with a 7% fall (Figure 2). On the other hand, vegetable products n.e.s. is consistently shown as one of the least affected sectors, with an average expected drop of merely 2%.

For more information on these results, please check out the spring update for the Export Potential Map online tool here: <https://exportpotential.intracen.org>.

SUSTAINABILITY MAP

ITC launches an online community for sharing real-time research and recommendations to build resilience against COVID-19



The COVID-19 Business Community page is an interactive platform for micro, small and medium-sized enterprises (MSMEs) to learn about best practices on how to respond, recover and thrive through the pandemic.

The unique resource allows business owners, policymakers and others to share experiences and access a wealth of detailed information on MSME recovery. The webpage is a global resource that 'crowdsources' news, articles, research and recommendations to help people overcome the impact of the pandemic.

It forms part of ITC's coherent response to the COVID-19 outbreak, which has disrupted economies throughout the world. ITC is committed to helping small and medium-sized enterprises (SMEs) to recover from the effects of the pandemic with several such proactive initiatives.

The COVID-19 Business Community is now live here: <http://www.intracen.org/covid19/business-community/>

2020 International Executive Programme: Registrations are open!



Due to the COVID19 outbreak, ITC is offering the 2020 edition of the International Executive Programme on Sustainable Sourcing & Trade as an online course, which will run on four Tuesdays (13, 20, 27 October and the 3rd November).

This year's edition is being developed in collaboration with SAI Platform and an international network of leading academic institutions in the field of sustainable agriculture and global value chains.

The executive programme is built upon four modules (each consisting of three hours), offering heads of sustainability, procurement executives and brand marketing professionals a practical skillset that cover the following topics (see brochure here: <https://bit.ly/3en32c9>):

- COVID-19 resilience: Green & inclusive recovery of the agri-food & beverages industry
- Technology & tools in Global value chains: best practices and solutions for sustainable sourcing & trade

The application fee is 300 EUR. For further information and registration details, please visit <https://bit.ly/3c5ZSIn>.

MARKET PRICE INFORMATION

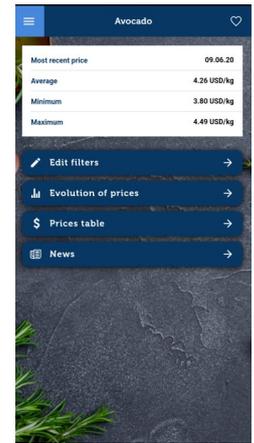
Market prices and news now also on your mobile phone

ITC Market Price Information (MPI) is now accessible through a mobile App available for Android. Mobile phone are widely used in low developed countries to access market information. This App will facilitate the access to real-time price information for all MSMEs located in these regions.

The MPI mobile App features the same search options and filters as in the website. Users can access to real-time market prices and news for more than 300 agricultural products, presented in tables and graphs. They can filter their research by product varieties, by product quality / certification and by many others criteria. The research criteria can be saved in "My favourites" to simplify the regular access to daily prices customized to the user's needs.

The mobile App provides daily market prices from various national and international sources including the United States Department of Agriculture (USDA), Thomson Reuters (Refinitiv), Mexico Sistema Nacional de Información e Integración de Mercado and South Africa Cape Town market.

The mobile App is accessible through the MPI website or directly in Google Play, <https://mpi.intracen.org/> or <https://play.google.com/store/apps/details?id=org.intracen.mpi&hl=en>.



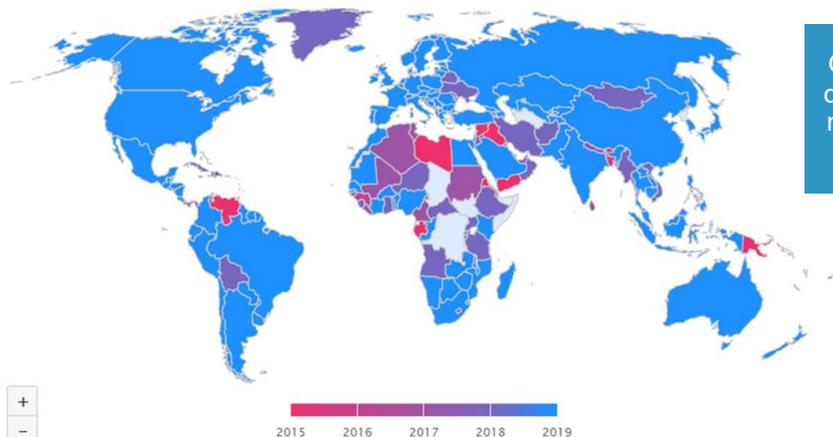
Avocado - Prices table					
Market	Origin	Period	Avg. Price	Unit	
United States of Ame	Mexico	15/06/2020	4.48	USD/kg	
United States of Ame	Mexico	12/06/2020	4.44	USD/kg	
United States of Ame	Mexico	11/06/2020	4.34	USD/kg	
United States of Ame	Mexico	10/06/2020	4.3	USD/kg	
United States of Ame	Mexico	09/06/2020	4.43	USD/kg	
United States of Ame	Mexico	08/06/2020	4.4	USD/kg	



TRADE MAP

2019 Trade Indicators available

Trade Map – Yearly data availability
Most recent years available in Trade Map



Global trade indicators for 2019 have been updated the 25th June 2020. These indicators are now based on 117 reporting countries, showed in light blue in the map.

INVESTMENT MAP

Foreign Direct Investment continues contracting worldwide. Get first-hand statistics to take the measure of it, country by country and sector by sector with Investment Map.

Investment Map continues improving its coverage of FDI statistics. Detailed FDI statistics by partner country or by sector are available for more than 100 countries. Over the last quarter, data have been updated for all

European Union and OECD countries, as well as 16 individual countries reporting through their national sources.

Most readers of this newsletter know that China is the main investor in Pakistan. This is true for construction or financial services, but is it also the case in textile or hotels and restaurants? Find out in [Investment Map!](#)

GLOBAL TRADE HELPDESK

Empowering firms and Trade Promotion Organizations with timely and relevant information in a post-COVID-19 marketplace



Trade policies and market conditions are evolving rapidly as governments respond to pandemic challenges and the epicentre shifts

across regions. Firms, and particularly smaller firms, are hard pressed financially due to economic lockdowns and falling demand, but may not have the resources to seek out new opportunities to diversify their market risks.

The Global Trade Helpdesk integrates both access to the latest temporary trade policies implemented by governments in response to the pandemic (available

via Market Access Map) as well as resources from across partner agencies summarizing economic policies and business resources. Furthermore, the platform integrates the latest export potential estimations taking into consideration updated market forecasts. In a single search, firms can access the key trade and market intelligence they need from across 11 partner agencies to simplify market research for firms.

To help firms make use of the platform to explore emerging trade opportunities in response to COVID-related challenges, the GTH team has been working with ICC National Chambers and other business support organizations to help facilitate their access to timely and relevant trade intelligence.

The GTH team has also started the rollout of a new version of the platform on June 26th. Stay tuned!

CAPACITY BUILDING

Swiftly pivoting to online solutions in light of COVID-19

While we and many of our clients were working from home, the export potential team continued to provide trainings virtually.

Export Potential Assessment

- Export Bahrain staff took part in an online training on export potential and the tailor-made export potential tool (<https://bahrain.exportpotential.intracen.org>). After an introduction to the methodology, ITC trainers familiarized participants with the customized website to identify promising products and markets for Bahrain's exports and support local companies to go global.
- A 16-hour online training over four days prepared staff from the Dutch Centre for the Promotion of Imports (CBI) to interpret and analyse the export potential and product diversification indicator with the help of detailed factsheets. The CBI team will utilize these factsheets to support the identification of promising value chains in over 70 developing countries.

Global Trade helpdesk

Our Panelists

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Business Development Advisor
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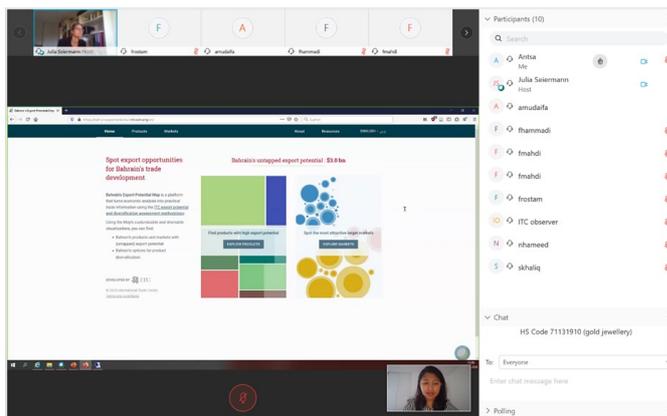
• In May, in partnership with ICC Colombia, the GTH team worked with firms to explore new export opportunities for market diversification. After enthusiastic participation and local promotion, Colombia is now the second highest

country in terms of numbers of platform users after the United States.

Non-Tariff Measures programme

The International Trade Centre and Vietrade joined forces to ensure the continuity of the Training of Trainers program in Viet Nam despite the restrictions posed by the COVID19 times. From April to June, all ITC workshops on non-tariff measures (NTMs) and market access moved online.

A group of 18 participants in Hanoi faced the challenge to assess their knowledge on customs tariffs, NTMs or rules of origin virtually. The ultimate goal of the series of trainings is to capacitate local trainers in Viet Nam



Not our usual workshop group picture... but it's been a great pleasure nonetheless!

Short quizzes during the presentations, and the active participation of the Export Bahrain and CBI teams during the Q&A sessions enabled a lot of interaction despite the virtual nature of the trainings. Nonetheless, we value the face-to-face contact with our participants and are looking forward to meeting them again in the future!

- In June, the GTH team conducted two webinars with ECOWAS Business Support Organizations working with the WACOMP project focusing on value chains related to mangos, cashews, cassava and textiles. Over 120 participants attended these webinars and 93 of them took advantage of the platform to identify new markets and explore new opportunities. This reflects firms' strong demand for reliable and relevant information as they work to adjust their business strategies.
- In the coming months, this effort to work closely with business associations and trade institutions will continue to support their market diversification efforts with upcoming webinars with ICC Argentina, AgExport Guatemala, COMESA Business Council, DTI Philippines, Jordan, as well as regional TPOs including Redibero and ETPA.

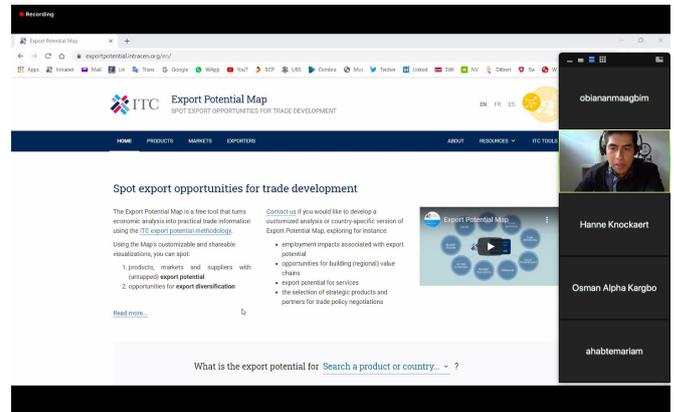
so that they can subsequently replicate trainings in various regions of the country. Vietrade announced a



plan to organize 12 trainings in Vietnam until the end of 2020. The new certified trainers will deliver these courses. More information here: www.ntmsurvey.org/vietnam.

Market Analysis Tools

In the framework of ongoing activities of ITC's Office for Africa in Sierra Leone, TMI organized a two week introductory training programme on how to utilize ITC's market analysis tools. The workshop, initially scheduled in Sierra Leone, was eventually delivered remotely to Sierra Leone-based staff from various business support organizations with the goal to familiarize them with methodologies and core tools of market analysis, for them to be able to better advise Sierra Leonean businesses in their international ventures.



EASTERN PARTNERSHIP TRADE HELPDESK

ITC launches initiative to increase economic ties in Eastern Europe

ITC has initiated the implementation of the Eastern Partnership (EaP) Trade Helpdesk with the support of the European Union. This five-year project falls under EU's EU4Business initiative that covers all EU support for small and medium-sized enterprises (SMEs) in the region of the Eastern Partnership which includes six countries: Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine.

The project aims to increase economic ties among the EaP countries and with the EU. ITC's intervention under this project will focus on six main components:



Development of **EaP Trade Information Portal**, which will provide trade information on the region and the EU on the following:

- Market trends: trade flows, trade indicators and export potential data.
- Market requirements: customs tariffs, trade agreements, rules of origin.
- Business contacts: list of trading companies and their contact details.



Development of an **Online Helpdesk**, which will allow companies to report on issues they face when exporting or importing. They will also be able to use the system to request information they have been unable to locate on the portal or in other sources.



Implementation of large-scale **business surveys on non-tariff measures** to identify regulatory and procedural trade obstacles experienced by companies in the six EaP countries. These surveys – covering all goods sectors and three services sectors – employ a well-established ITC methodology, adjusted to national circumstances through consultation with relevant stakeholders.



Preparation of **sector-specific guides on the administrative procedures** required to export from the six EaP countries to the EU market. These guides will be made available on the EaP Trade Information Portal.



Capacity building to collect and process services trade data in each of the six countries to address numerous challenges that currently exists to collect data on trade in services. ITC will first assess what data is available and identify the gaps that exist in identifying and collecting services data.



Delivery of **capacity-building programme based on the EaP Trade Information Portal's resources**, ITC's suite of market analysis tools and other trade information sources. This will assist public and private institutions in identifying market opportunities within the EaP region and in the EU.

NON-TARIFF MEASURES PROGRAMME

Tanzania takes stock of trade policy improvements

ITC organized a two-day consultation workshop on non-tariff measures (NTMs) with Tanzania's Ministry of Industry and Trade from 16 to 17 April 2020. During this session, ITC shared the preliminary results of the NTM Business Survey in Tanzania.

Tanzanian authorities pointed out key improvements

made in recent years, such as the implementation of electronic customs procedures, the establishment of one stop border shops and the improvement on trade-related information.

The NTM Business survey in Tanzania is part of the EAC Market Access Upgrade Program (MARKUP), an

New Business Surveys unveil challenges of EU services exporters

The obstacles faced by European Union (EU) services providers when exporting outside the bloc are the target of two new ITC Business Surveys. The first survey will analyze the information needs of services exporters trading outside the EU. The second one will unveil the participation and the obstacles faced by women-led services exporters when trading outside the EU.

Both surveys cover 15 countries in the EU. The data collection is ongoing in Belgium, Germany, Ireland, Italy, the Netherlands, Poland, Sweden and Spain. Companies exporting outside the EU in the telecommunication and computer related services, construction services, and professional services (including engineering, architectural, legal and research) are invited share their experience with us. Please write to: ntm@intracen.org.

UNITED KINGDOM TRADE PARTNERSHIP

The Caribbean prepares for exporting to UK and European markets



Plans for boosting exports from the Caribbean Forum reviewed with a focus on the current health and economic crisis.

Representatives from the Caribbean Forum (CARIFORUM) countries met virtually together with development agencies, public and private trade support institutions and exporters to make plans to boost the exports of Caribbean speciality foods and creative services.

Through the United Kingdom Trade Partnership project, these efforts will increase exports, promote a transparent trading environment by helping businesses conform with trade regulations and support businesses associated with these industries in the current health and economic crisis.

The project will be implemented in partnership with regional and national stakeholders who will also look at differing regional priorities and work to drive forward local growth using the principles of local ownership and

resilience-building through a market-based approach. The group will look at ways that increased diversification of market channels and new products can be the springboard for new market opportunities and sector development.

It is important for Caribbean firms and institutions to be aware and understand how to fruitfully utilize the preferences and potential benefits the Economic Partnership Agreement (EPA) with the United Kingdom.

By improving the overall accessibility and transparency in trade intelligence, policymakers and government officials will be able to monitor national trade performance and enhance trade policy design. ITC's trade intelligence interventions will address existing data gaps and build the capacity of institutions to update this information through customized tools and trainings. Additionally, a modular training programme will improve awareness and understanding of preferential market access conditions under the EPA. It will cover market export analysis to identify attractive markets and products and guidelines on EPA rules of origins. Through this increased capacity and new value-adding services, local trade and investment support institutions will be empowered to better assist economic operators in fruitfully utilizing preferences under the Economic Partnership Agreement (EPA) with the United Kingdom.

Finally, a unique component to track in response to the COVID-19 pandemic, temporary export and import measures in response to the COVID19 pandemic will help companies limit trade disruptions.

The project aims to provide evidence-based recommendations to improve the businesses environment in CARIFORUM, by addressing a.o. regulatory and procedural obstacles to intra and extra-regional trade in the CARIFORUM. This will be done through the well established ITC business survey which will evaluate the experiences of importing and exporting firms in 14 Caribbean countries and will document the diverse challenges they face in reaching their target markets. Operational mechanisms to monitor, identify and remove trade impediments in CARIFORUM were also presented during the meeting,

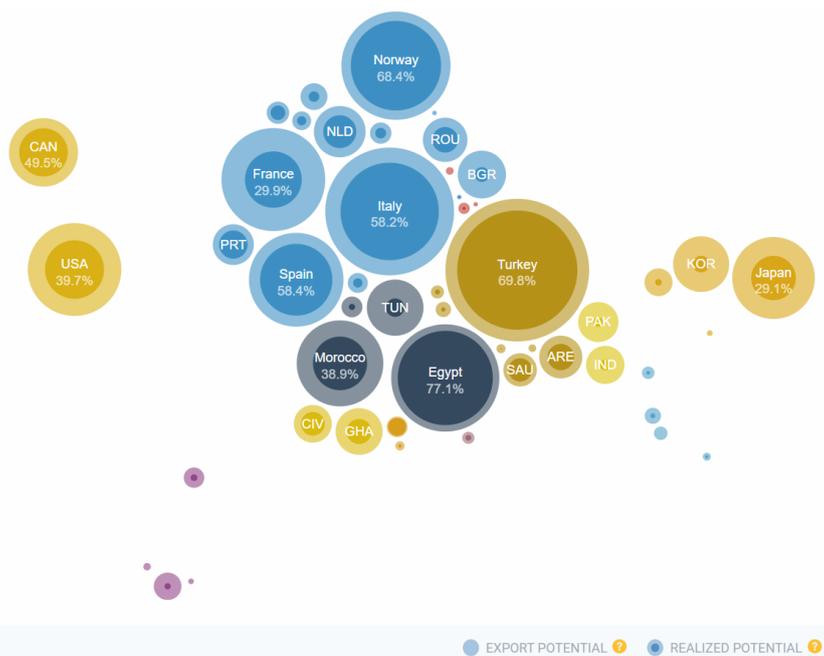
which will bring to light firm-level concerns to relevant policy makers and start a dialogue between the private and public sector.

By supporting trade and related activities, this project will contribute the Caribbean Forum’s efforts to achieve the targets under Sustainable Development Goals (SDGs). Acting Executive Director of the International Trade Centre Dorothy Tembo in her address said, “Through the UK Trade Partnerships Programme we will support CARIFORUM to explore new markets, prioritise value added products, digitalise, and strengthen the creative industries’ value chain. Concrete COVID-responses are being rolled out to support COVID-19 affected businesses in Caribbean Forum States.”

EUROMED TRADE HELPDESK

Launch of “Libya: Increasing trade transparency through the EuroMed Trade Helpdesk”

On the 19th May, ITC in collaboration with the Ministry of Economy and Industry, the General Union of Chambers of Commerce and Expertise France virtually launched “Libya: Increasing trade transparency through the EuroMed Trade Helpdesk”. Libya will be integrated into the established EuroMed Trade Helpdesk (<https://euomed.macmap.org/>), an online platform which provides MSMEs with essential trade intelligence information on markets for already nine Mediterranean partners. Libya will be joining this regional initiative aiming to strengthen trade ties between the European Union and the Mediterranean region. The programme will enhance transparency and access to information into these markets, build a network of local institutions and bolster the capacity of national stakeholders in their market analysis.

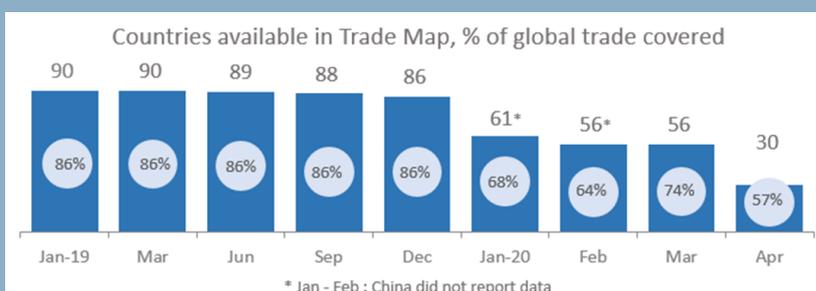


Source: Markets with export potential for Libya, exportpotential.intracen.org

ITC TOOLS UPDATES

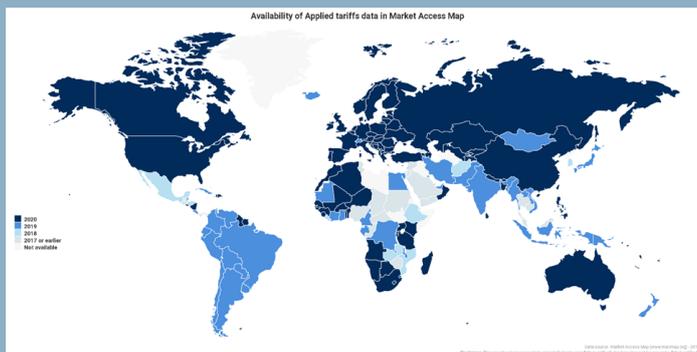
Trade Map monthly data

Regarding monthly trade data, as of 25th June, 86 countries are available up to December 2019 counting for 86% of global trade. The latest period covered in Trade Map is April 2020, with data available for 30 countries and counting for 57% of global trade.



Market Access Map has updated 2020 tariffs for 110 countries

Market Access Map has updated 2020 customs tariffs of 110 countries, including the United States, the EU and China. Check out if tariffs of your targeted market have been updated at Market Access Map's Data Availability page: <https://www.macmap.org/en/about/data-availability>.



Sustainability Map updated 10 standards

The Sustainability Map team constantly updates the data on voluntary sustainability standards (VSS) in the Standards module (www.sustainabilitymap.org/standards). In Q2 2020, ten standards were updated, namely:

- Aquaculture Stewardship Council (ASC) standard for Pangasius
- Aquaculture Stewardship Council (ASC) standard for Salmon
- Aquaculture Stewardship Council (ASC) standard for Shrimps
- Certified Wildlife Friendly
- Fair Stone
- Food Alliance
- Gold Standard
- Workplace Conditions Assessment (WCA)
- Predator Friendly Standard
- Sustainably Grown

These standards cover sustainable production practices in farming, food production and aquaculture. The Standards module allows users to identify relevant standards, compare information through tables and charts, and run self-assessments of their performance against standards' requirements. The module currently covers more than 260 standards initiatives applicable to more than 80 sectors and 180 countries.

New Single Sign On system for ITC Market Analysis Tools



A modern authentication Infrastructure has been implemented on ITC tools. This open-source platform that supports industry standards provides access to all ITC market analysis tools without having to log in and out each time.



This new centralised system also allows users to easily modify their profile (name, contact details, professional status, etc.), change their password and register using their phone (2 Form Factor) in a secure way.

On the same principle of the Google registration, this new user authentication service also offers opportunities to deep link in a secure way ITC's applications with ITC's partners' applications.

ITC Trade & Market Intelligence IdentityServer4	
Delete my account [Icon: Trash can] Delete my account	My profile [Icon: Person] My profile
Two-factor authentication [Icon: Smartphone] Two-factor authentication	Change password [Icon: Pencil] Change password

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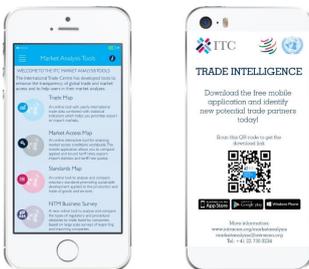
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