

ITC Trade and Market Intelligence

ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

GLOBAL TRADE HELPDESK

A new look, an enhanced user experience, and improved data coverage to help MSMEs identify, compare and leverage opportunities

Digital tools and virtually delivered services are the cornerstone of an inclusive global recovery. Providing timely, relevant and reliable information is crucial, especially for smaller global firms that may lack the market research capacities and resources. It helps them diversify market risks and adapt their business strategies in the constantly evolving global market. The [Global Trade Helpdesk](#) has improved its platform services to serve the information needs of firms of all sizes, and in particular, the smallest.

Continue reading on the next page.



NEW NORMAL = NEW CAPACITY BUILDING SOLUTIONS

The world is shifting online and so is ITC, as many remote solutions have been added to the capacity building activities on trade and market intelligence. Since January, 85 training activities took place and there are many more to come. For this quarter's sessions, please read more on p.9.



45 webinars
reaching +2,800
participants



E-learning courses
on trade flows and
market access



Video tutorials
now in Russian
and Myanmar

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JOIN OUR NEXT E-LEARNING COURSE ON ACCESSING INTERNATIONAL MARKETS ON THE 12TH OF OCTOBER THROUGH [THE SME TRADE ACADEMY](#)

On June 26th, at the WTO MSME Day event, ITC, UNCTAD and WTO began the rollout of the new version of the Global Trade Helpdesk platform through a [joint statement](#). The new platform successfully integrates information from across 11 different partner agencies (ITC, WTO, UNCTAD, AfDB, ICC, FAO, WIPO, UNIDO, IDB, WCO and WBG) to provide centralized access through one accessible platform. During the MSME Day celebration, the multiagency tool received considerable support from the WTO Informal Working Group on MSMEs, whose 91 members welcomed the tool as a key deliverable for MSMEs, providing access to key information in a digital format to ensure free access for firms around the globe.

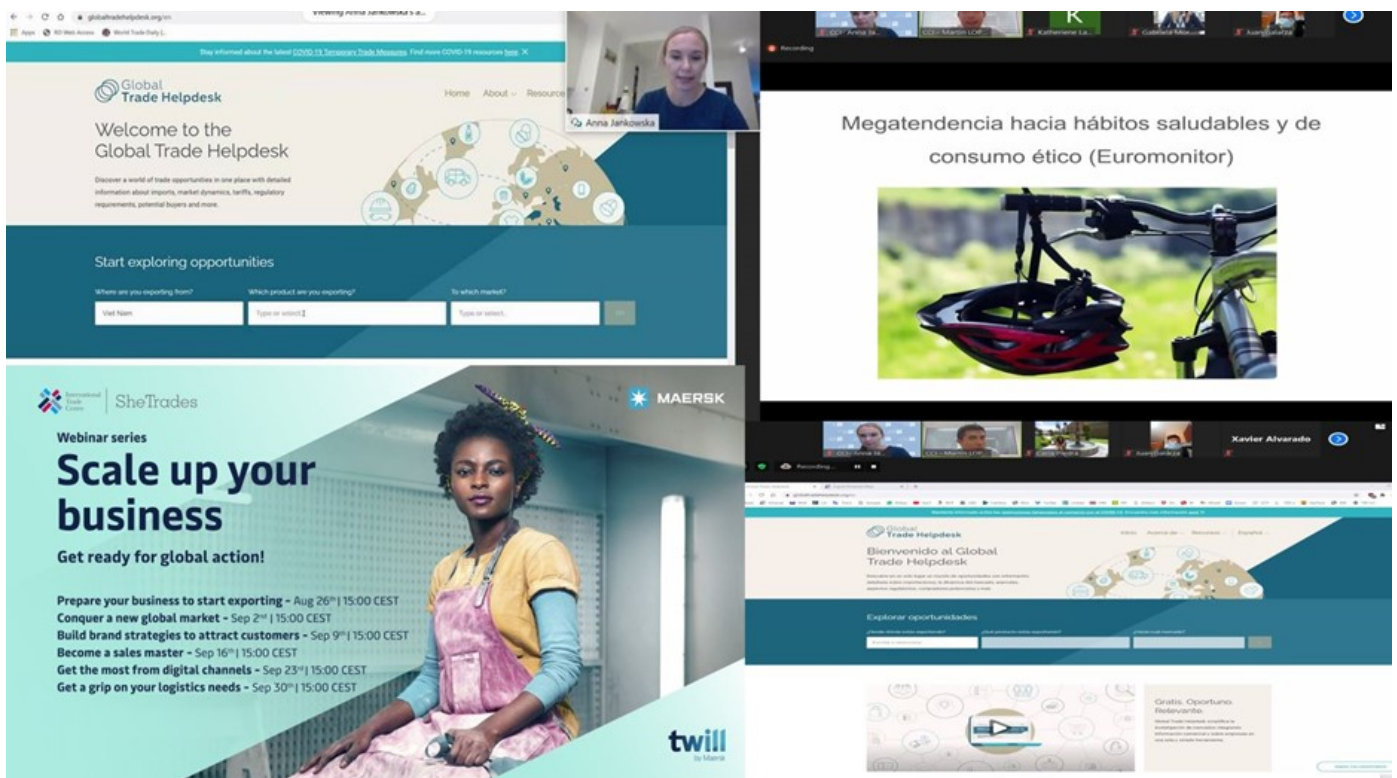
The platform, designed with the needs of MSMEs in mind, seeks to help firms of all sizes take advantage of emerging market opportunities and adapt to new COVID-impacted commercial realities. The updated and enhanced platform builds on user feedback received during the testing phase with business support organizations from around the world. The new version of the platform, available in five languages, now integrates:

- An intuitive and clean new design to help guide users through the market research process and provide tutorials and digital learning materials
- Intellectual property protection information from the World Intellectual Property Organizations (WIPO)

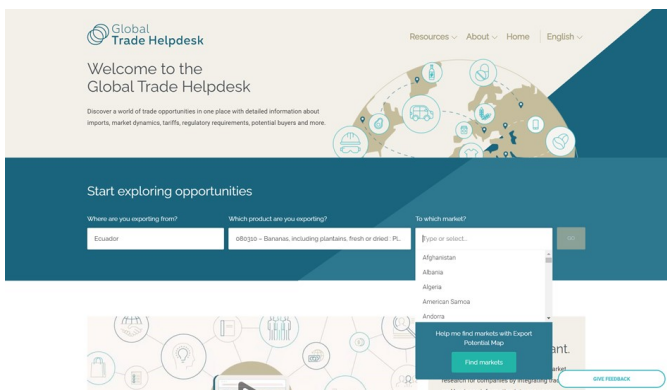
allowing firms to search for trademarks, patents and designs and to protect their intellectual property across markets

- Key resources relevant in a COVID-19-impacted global marketplace including temporary trade policies in response to COVID-19 from Market Access Map and ePing, the IMF Policy tracker, IDB's COVID product and service supplier map, among others
- Additional information on export, import and transit procedures from the WTO Trade Facilitation Agreement database and the World Bank,
- A new business directory integrating producers, retailers and importers from Connect Americas from the Inter-American Development Bank (IDB)
- As well as an enhanced search function which proposes markets with high export potential based on results from ITC Export Potential Map

In uncertain times, access to timely and reliable information is paramount. Since the start of the rollout in late June, the number of users of the platform has nearly doubled, signaling the relevance of the information provided to business users around the globe. The share of return users has also been growing over time.



Selected images from the Twill/She Trades and Ecuador Ministry of Commerce webinars on September 2nd which brought together over 280 participants from around the globe.



Government ministries and other Business Support organizations (BSOs) have also taken a strong interest in this user friendly and accessible platform to make their services more efficient. The information that otherwise would have been available across a dozen different tools and sites is now integrated into a single

search by exporter, product and importing market. Juarez Leal, Senior Advisor of the Business Directorate at APEX in Brasil noted “the Global Trade Helpdesk platform is unique in its integration of trade and market access information at the product level.” He also commended the platform for how it “manages to reconcile complex information in a simple way”, providing accessible and clear information in a business relevant manner.

Read up on the dedicated webinars to BSOs from Latin America, Africa and Asia, which can still be requested in the 4th quarter of the year. Check out the updated platform today, and see how simple comparing export opportunities has become at www.GlobalTradeHelpdesk.org.

INVESTMENT MAP

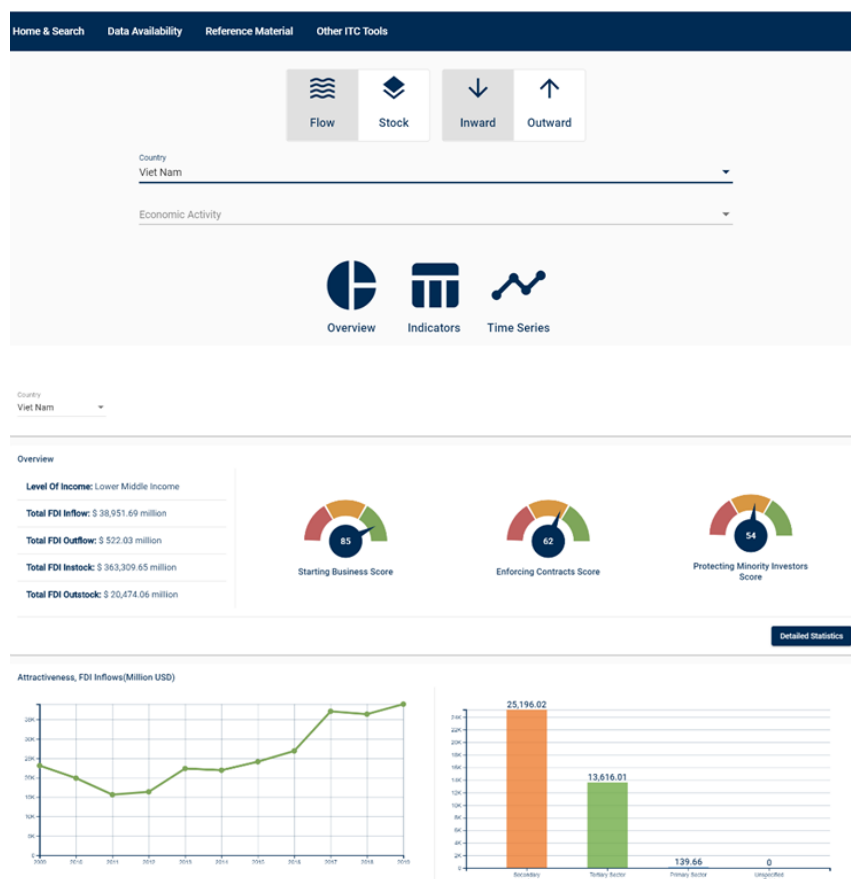
Discover what is new in the Investment Map Beta Version

Investment Map has been revamped based on users experience and the beta version is now available. With its new design and features available for both the foreign direct investment and the foreign affiliates sections, access to detailed and precise data is fast. Combo boxes and hyperlinks between elements of tables and charts, provide users with a more intuitive and friendly browsing experience.

In the foreign direct investment page, choosing between stocks and flows becomes simpler and access to indicators and time series is facilitated. The new overview module features a dashboard revealing the country’s attractiveness and presence abroad with new indicators by sector.

As for the foreign affiliates data, it is now easier to generate a list of a company’s foreign branches established in different countries, and in one click, to show mother-affiliates links.

With these new features, Investment Map is a reference tool to provide you with bilateral and sectoral foreign direct investment data. We are continuing to work on new components to increase the flexibility and improve site navigation. More features will emerge in the coming months.



Please share your experience using the beta version of Investment Map with us.

Try it now at www.investmentmap.org.

AFRICAN TRADE OBSERVATORY

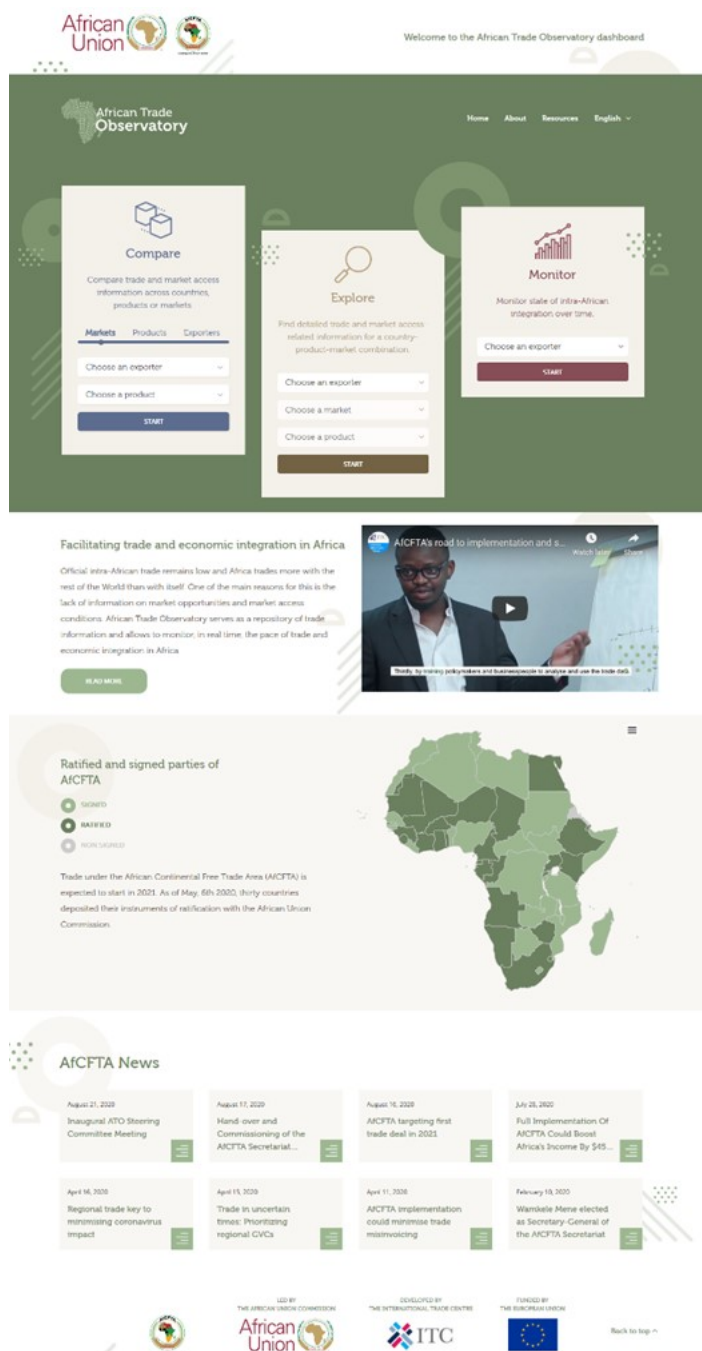
The African Trade Observatory (ATO) project organized its first Steering Committee

The ATO project held its first Steering Committee (SC) on August 21, 2020, gathering more than 20 representatives from ITC and African organizations - the African Union Commission, European Union delegation to the African Union, UNECA, and regional economic groupings. The primary function of SC is to oversee the implementation of the project and thus review its progress against the project objectives as well as provide suggestions on the various activities to be taken.

During the SC meeting, ITC team presented the various outputs that have been completed, are ongoing and would be completed in the upcoming years. Completed outputs include the development of the ATO dashboard mock-up and the AfCFTA Tariff Negotiation Tool, training provided to more than 100 AfCFTA negotiators, the completion of the first two Modules – Explore and Compare, and the design of the third module Monitor. Activities for the end of 2020 will mostly focus on (i) the setting up of automated data transfer system in additional countries, (ii) the treatment and visualization of new data (e.g. on the use of tariff preferences, on taxes and fees paid at the border) and (iii) the development of the third module (Monitor).

A live demo of ATO Dashboard (Explore and Compare Modules) was provided. The Explore and Compare Modules of the tool provide essential information for the business sector, including up-to-date information on market trends, applied tariffs, regulatory requirements, and taxes, as well as information on private standards and business contacts ranging from trade promotion organizations to trade finance providers.

Participants to the SC highlighted the efforts made by ITC in the development of the ATO dashboard and expressed their satisfaction with the good progress and excellent results made with the first two modules – Compare and Explore.



The beta version of the tool will be further demonstrated to public and private sector representatives of each RECs in the coming month.

NON-TARIFF MEASURES PROGRAMME

Over 1,000 businesses to attend trainings on non-tariff measures in Viet Nam



Following ITC training of trainers on ‘NTMs and Market Access’, the Viet Nam Trade Promotion Agency has launched a series of workshops aimed improving the knowledge of Vietnamese SMEs on key concepts and information tools related to non-tariff measures (NTMs) and market access.

The first 3 workshops gathered 282 participants, and 9 other workshops are planned until the end of the year in all regions of Viet Nam. The two daylong workshops are delivered by ITC local certified trainers and supported by both Vietrade and ITC through a formal agreement. Members of trade support institutions and government representatives constitute this network of certified trainers. Private consultants deliver trainings as well during their consultations to small and medium-sized businesses.

Due to Covid-19 restrictions, the training of trainers in Hanoi moved online last May. After the conclusion of the full distance learning sessions, the newly certified trainers were ready to deliver Vietrade plan to SMEs during the summer.

More details on the programme: www.ntmsurvey.org/vietnam

EU Gender Survey results unveiled to European member states

The European Commission invited ITC to present the EU Gender Survey to EU Member States during the meeting of the Expert Group on Trade and Sustainable Development held on 08 July via WebEx. The presentation included findings of the EU Gender Survey on Goods as well as some preliminary messages from the ongoing survey on Services to be concluded in the coming months.

This gender-oriented survey is also poised to cover other countries. After a successful collaboration last year, SheTrades requested Trade Market and Intelligence to team to join forces again to replicate the survey in Uganda and in other countries.

The findings and the methodology are available at <https://ntmsurvey.intracen.org/more/events/eu-women/>
<https://www.intracen.org/publication/Europe-to-world/>

New publications

New report on Pakistan’s export challenges

ITC and the World Bank have jointly published a new report "[Pakistan: Business Perspectives](#)" – which looks into non-tariff measures (NTMs) related obstacles to cross-border trade in Pakistan. This report is the latest addition to ITC’s [Invisible Barriers to Trade](#) series.

The report, based on a survey of close to 1,200 exporters, highlights that Pakistan can greatly improve its export competitiveness – among others by strengthening its quality and customs infrastructure. The report also recommends greater transparency and digital solutions, such as an integrated trade portal to give exporters the guidance and information they need to succeed.

The report contributes to the development of Strategic Trade Policy Framework (STPF) spearheaded by the



Ministry of Commerce of Pakistan with the assistance of the World Bank under Pakistan Trade and Investment Policy Program (PTIPP).

Download the report: www.intracen.org/NTM-Pakistan

Some findings of the NTM Business Survey in Pakistan have been incorporated in “Modernizing Trade in Pakistan: A Policy Roadmap” (World Bank publication) and “Women and Trade: The role of trade in promoting gender equality” (WTO – World Bank publication).

Download the reports here:

- https://www.wto.org/english/res_e/publications_e/women_trade_pub2807_e.htm
- <http://documents1.worldbank.org/curated/en/855261578376618421/pdf/Modernizing-Trade-in-Pakistan-A-Policy-Roadmap.pdf>



Jordan: Company Perspectives in Arabic

ITC’s country report on the constraints of cross-border trade faced by Jordanian enterprises is now available in Arabic. According to the report, more than two-thirds of Jordanian companies face difficulties with non-tariff

measures when exporting or importing. Inconsistent application of regulations creates major obstacles for Jordanian exporters. This report recommends strengthening officials’ capacity, increasing assistance to the private sector and deepening the dialogue with Saudi Arabia to facilitate transit and direct trade.

Get the report here: www.ntmsurvey.org/jordan



Jordan: Import and export procedure guide

With the aim of facilitating export and import procedures in Jordan, ITC has also developed “Jordan: Import and export procedure guide” and is available for download in English, Arabic and French. Get the guide here: <https://euromed.macmap.org/euromed/en/import-procedures>

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MARKET ACCESS MAP

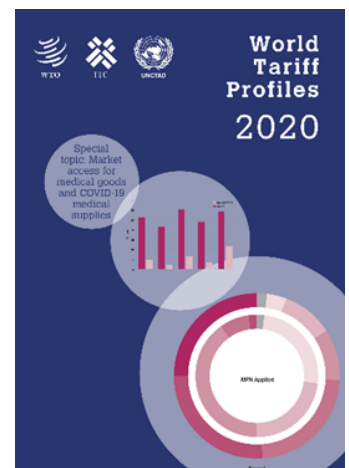
New edition of the World Tariff Profiles 2020

Jointly published by ITC, WTO and UNCTAD since 2007, this annual report presents tariff-based market access conditions for goods applied by 164 WTO member states and other countries. The report aggregates product-level statistics; tariffs imposed and faced by each economy; and an overview of trade remedies. ITC’s Market Access Map database is the main source of applied tariff data in the report.

The 2020 special topic overviews global tariff conditions (bound and applied) on COVID-19-related medical products and medicines. It also discusses statistical limitations, such as inability of the current version of the HS system to capture specific medical goods. For example, there is no stand-alone HS code

describing medical masks – they are bundled with miscellaneous textile products into a ‘catch-all’ code 6307.90.

The report can be accessed online free of charge in English, Spanish and French: <https://www.intracen.org/publication/World-Tariff-Profiles-2020/>



Market Access Map provides new ‘Compare’ indicator on extraordinary duties

Users can now improve their decision-making by integrating information about trade remedies applied on their exports using a new indicator “Trade remedies” in Compare modules of Market Access Map. Trade remedies, most commonly, in the form of additional punitive duties, can significantly raise the price of the product in overseas markets, and therefore impact the decisions by firms.

For example, Cambodian bicycle exporters are currently being targeted by an “anti-dumping” duty of 48.5% in the European market, essentially reversing the benefits of ‘Everything But Arms’ preferential program, which lifted EU’s MFN duty of 14% on bicycles and gave Cambodian bicycles a comparative tariff advantage in the EU market.

In 'Compare Products' module, users can instantly identify all products targeted by trade remedies in a given market. In 'Compare Competitors' module, users can view what other supplying countries are targeted by trade remedies.

The "Trade remedies" alert has also been activated in ITC-WCO-WTO Rules of Origin Facilitator due to requests from several WTO member states.

A global database on trade remedies has been collected and updated continuously by ITC since 2013 based on national sources.

Aggregated market access indicators

For product 871200 – Bicycles and other cycles (including delivery tricycles), not motorised
Exported from Cambodia

MARKET	MFN tariffs	Effectively applied tariffs	Pref. Margin	Tariff year	Import value in 2018	Trade remedies
Austria	14.57%	0%	14.57%	2020	18100	✓
Belgium	14.57%	0%	14.57%	2020	65222	✓
Bulgaria	14.57%	0%	14.57%	2020		✓
Croatia	14.57%	0%	14.57%	2020		✓
Cyprus	14.57%	0%	14.57%	2020		✓
Czech Republic	14.57%	0%	14.57%	2020		✓
Denmark	14.57%	0%	14.57%	2020	8223	✓
Estonia	14.57%	0%	14.57%	2020		✓

EXPORT FROM: 1 selected (Cambodia) | IMPORT TO: United Kingdom | PRODUCT NAME OR HS CODE: 8712003020 - Bicycles, not motorised, with ball bearings : Consigne

Exporters: Cambodia

Total 1 Agreements | FILTERS: In force (ON) | Roo Available (OFF) | Non-preferential regime (OFF)

ATTENTION: Trade Remedy
A Trade Remedy is applied by the United Kingdom on this product from Cambodia in addition to customs tariff.

Source: www.macmap.org (up) ; findrulesoforigin.org (bottom)

EXPORT POTENTIAL ASSESSMENT

New publications applying Export Potential and Diversification Assessment

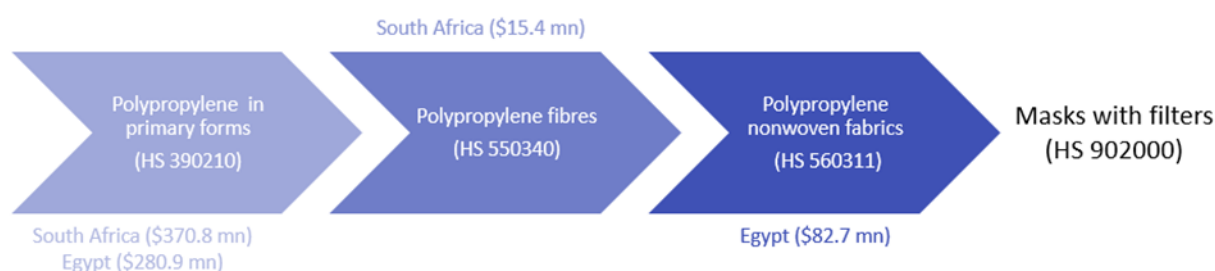
Medical industries in Africa – A regional response to supply shortages

COVID-19 has severely strained the supply of certain healthcare products. In a recently published ITC paper, we assess how Africa could position itself strategically and develop a regional response to avert future shortages of such products.

We argue that supporting health and positioning the continent strategically in the future trade landscape of the global medical industry are compatible objectives. Opening markets, diversifying supply and reinforcing regional value chains to combat COVID-19 would build resilience to future pandemics and help Africa become a competitive supplier of certain health-related goods.

To identify opportunities for regional value chain development, we leverage a new method to link inputs with outputs at the detailed product level. We find that while Africa possesses many of the key inputs used to manufacture health-related products – such as rubber, fabrics and ethanol – these goods are often exported without any transformation. Policymakers could support the development of regional value chains by channelling investments into these sectors and by leveraging negotiations in the context of the African Continental Free Trade Agreement (AfCFTA).

The full paper is downloadable at <https://www.intracen.org/publication/Medical-Industries-in-Africa/>. A summary of the report in French is also available.



South Africa and Egypt could supply inputs used to produce masks with filters

Tanzania's trade in times of COVID-19 – An analysis for the avocado, coffee, spices and tea sector

This trade brief – prepared under the EU-EAC Market Access Upgrade Programme – summarizes the situation of past, current and future trade of Tanzania in four key sectors: avocado, coffee, spices and tea.

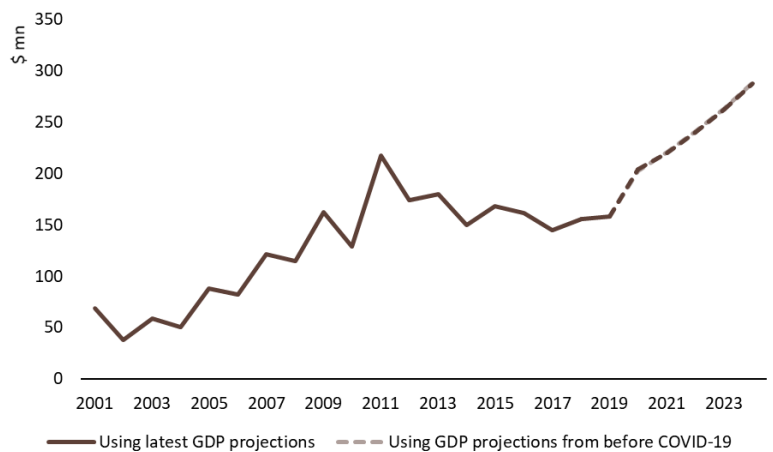
Coffee is the largest among the focus sectors, followed by tea and spices. Avocado is a relatively new export product with above world-average growth rates since 2009. Performance during the first months of 2020 suggests that Tanzanian avocado exporters might continue to gain market share, while for tea, the relative export declines of 2018-19 may aggravate under the impression of COVID-19.

While the World Trade Organization (WTO) predicts that the pandemic will dampen world trade in the range of 9% to 14% in 2020, the outlook of Tanzanian exports in the four sectors is more promising. First, Tanzania's economy is still likely to grow this year by 2%. Second, agricultural trade is generally more crisis-resistant as consumption patterns do not adapt as strongly as for manufactured items. Third, Tanzania

Update: Trade implications of Lao PDR's graduation from LDC status

COVID-19 weighs heavily on the world's economic outlook. To assess the impact of the pandemic on Lao PDR's graduation from the status of least developed country (LDC), we have recalculated the trade effects of future tariff changes using the IMF's revised GDP forecasts (for an initial presentation of the study, please see: <https://mas-admintools.intracen.org/newsletters/2020-Q1-Market-Analysis-Services-Update.pdf>).

We find that Lao PDR's projected exports are 5.5% down compared to the pre-pandemic scenario. The decline differs across markets: markets where Lao PDR will move from LDC preferences to a less preferential tariff regime on average see a larger reduction in import demand than markets where tariff conditions remain unchanged for Lao exporters. This



Projections of Tanzanian coffee exports until 2024

holds important export growth potential in these products that can be unlocked subject to targeted trade advisory and promotion. This would help to overcompensate the expected losses of \$3.8 million.

The report concludes that despite this comparably promising outlook, Tanzania may build further resilience to economic shocks by diversifying its exports in these sectors, the overwhelming share of which is composed of untransformed and single export items.

implies that the trade loss with COVID-19 GDP forecasts (\$102 million) is smaller than the trade loss that would have been expected with GDP forecasts prior to COVID-19 (\$109 million). Lao PDR thus already anticipates the changing market access conditions by gradually shifting its exports to faster-growing markets that have no LDC preference scheme in place.

The paper suggests three strategies for Lao exporters to mitigate the trade losses: first, attaining the EU Generalized System of Preferences Plus (GSP+) rather than the standard GSP could reduce the trade loss by 70%. Second, targeted trade promotion to remove market frictions will help sectors that currently do not exhaust their export potential in certain markets. Third, export diversification could help focusing resources on alternative products and markets that offer room to increase exports and thereby compensate the graduation-induced losses.

SUSTAINABILITY MAP

Register now: The Good Trade Summit 2020, 7-8 October - Online

The International Trade Centre's (ITC) "Good Trade Summit" arose out of this year's extraordinary circumstances. The virtual event, taking place on October 7 and 8, combines SheTrades Global, the

premier global event linking women entrepreneurs with buyers and partners, with the Trade for Sustainable Development (T4SD) Forum, one of the leading global events on sustainable value chains.

The Good Trade Summit

7 & 8 October 2020 | Online

Emerging Stronger from the COVID-19 Crisis

“Emerging Stronger from the COVID-19 Crisis” will spotlight the need to place sustainability and gender equality at the heart of the recovery from the COVID-19 crisis, while highlighting the potential of “good trade” as a catalyst for a more inclusive and equitable world.

Join us and our distinguished speakers for the first Good Trade Summit – and find out how inclusive and sustainable trade can be leveraged to “build back better”.

Check out our speakers and register [here](#).

CAPACITY BUILDING

Workshops in Niger compile over 40 recommendations to tackle trade obstacles

On 30th June and 8th July in Niamey, 70 members of trade support institutions and private sector representatives gathered to validate the results of a large-scale survey to identify the main obstacles encountered by companies in Niger. To adapt to the current travel restrictions, the ITC team joined the sessions directly from Geneva via video conference and unveiled the survey findings, as well as the recommendations coming from bilateral consultations with Nigerien institutions.

According to the ITC business survey, 76% of exporters are facing difficulties related to non-tariff measures. To respond to these challenges, the participants highlighted some key concrete actions, such as improving the transparency of regulations and procedures for SMEs and strengthening the ability of companies to comply with market requirements.

Those concrete recommendations and obstacles identified through the experience gathered of 580



businesses in Niger will be available soon in the report “Niger: Business Perspectives”.

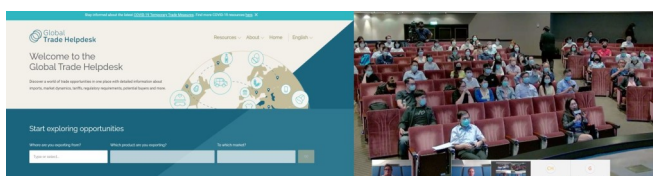
More details on the workshop: <https://www.youtube.com/watch?v=Bk9d6iA1cko&feature=youtu.be>

For more information on the programme on Non-Tariff Measures in Niger:

In English: <http://www.ntmsurvey.org/niger>

In French: <http://www.ntmsurvey.org/leniger>

Global Trade Helpdesk webinars for BSOs



BSOs from across Latin America, Africa and Asia have been requesting dedicated webinars focusing on products and markets of interest to help their staff quickly simplify their process of identifying and comparing export opportunities across markets. In addition, private partners including Twill, the SME-

focused logistics brand of Maersk have joined efforts in disseminating the tool via webinars and blogs to assist their clients in their market diversification efforts. Since the rollout began in late June, nine webinars with BSOs and private partners have taken place, training 1700 participants on how to leverage the new platform to make better-informed export decisions. More sessions are programmed to take place in the coming months, and dedicated sessions for interested BSOs and Ministries can still be requested in the fourth quarter of the year.

Inaugural online SME course on navigating market access



The course lasted two weeks and was delivered 100% online via SME Trade Academy platform. It covered the basics of market access, such as tariffs and non-tariff measures, and taught the participants practical strategies to make decisions based on market access information available in [Market Access Map](#).

865 participants successfully completed obligatory Forum discussion tasks and a take-home exam, and were granted a certificate of completion at the end of the course. The course took place during the global pandemic and equipped the participants with the basic skills to diversify international markets and improve global compliance. The main suggestions in

evaluations from participants focused on making the course available in other native languages, such as Spanish, improving local internet connection, and going deeper into market access issues.

Quotes from users

"The lesson was intriguing and challenging at the same time. It will help on my desk as a trade promotion officer. Thanks for bringing this at the comfort of our offices and home without leaving our jobs."
- user from Nigeria, 60

"I learnt a lot. I am looking forward to apply the knowledge gained in my daily work. Particularly in sub-Saharan Africa, I think it will be very helpful."
- user from Cameroon, 32

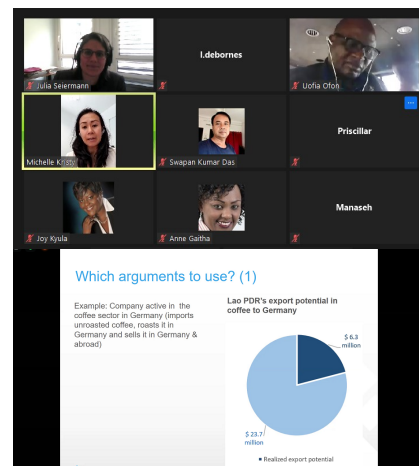
"It improved my understanding and application determinants of profitable export markets for specific products. The online approach accorded me learning time flexibility, as against face-to-face learning."
- user from Nigeria, 63

"I have learned new concepts which has changed my outlook and perception for international trade and would love to learn more in the following months"
- user from India, 36

Capacity Building services for the SheTrades Commonwealth project (STC)

As part of the project, ITC is working with Business Support Organizations (BSOs) to help them provide better services for women entrepreneurs. In August and September, the Trade and Market Intelligence section (TMI) worked closely with STC to strengthen the capacity of the representatives from BSOs in Bangladesh, Kenya, Ghana and Nigeria by providing a series of customized webinars. The main objective is to equip the audience with specific knowledge and empower them to provide advisory services on market diversification. The participants were strengthened in their use of investment data and potential assessment methodologies to identify new opportunities. They learned more about the importance of preferential

trade agreements and associated rules of origin in supply chain management, as well as regulatory requirements to help SMEs prepare for



ITC TOOLS UPDATES

Share in partner country's trade - A new indicator in Trade Map

Importers	Value exported in 2019 (USD thousand) ▼	Share in Viet Nam's exports (%) ⓘ	Share of Viet Nam in the partner's imports (%)
Total	39,424,157	100	
United States of America	10,601,590	26.9	19.4
Austria ⓘ	2,948,425	7.5	60.2
Slovakia ⓘ	2,948,366	7.5	61.5

Trade Map already provides information on the share of partner countries in the exports or imports of your reference country. From now on, it is possible to see at a glance through the mirror, in other words, the share of your reference country in partner country's imports or exports.

For example, the United States accounts for 27% of Vietnam's total mobile phone exports in 2019. However, for the United States, mobile phones from Vietnam only represent 19% of its total imports. In contrast, Vietnam's market share in Austria and Slovakia imports is much higher than the share of these countries in its total exports. Vietnam has a good positioning for mobile phones in these markets.



30 000

This is the number of newly integrated companies located in Uruguay, thanks to a national source.

Rules of Origin Facilitator & Market Access Map

ROO Facilitator has integrated rules of origin agreed under seven EU Economic Partnership Agreements (EPAs) and the 'rolled-over' UK EPAs (four out of seven have been agreed so far). Market Access Map expanded coverage of 2020 tariffs to 130 countries.

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EXPERTISE FRANCE