ITC survey on Non-Tariff Measures in Thailand

Understanding the non-tariff obstacles to trade exporters and importers experience when trading their goods

Ursula Hermelink
Monday, 5 August 2013
In close collaboration with national and international partners
Outline

1. Introduction to ITC
2. Introduction to non-tariff measures (NTMs)
3. The ITC programme on NTMs
4. The survey implementation in Thailand
5. How you can support us
6. Feedback / Discussion
7. Results from surveys in other countries
1. What is ITC?

**Mission**

ITC’s overarching goal is to help developing countries achieve sustainable development through exports. It is the only international organization focused solely on trade development for developing and transition economies, towards achieving «Export Impact for Good».
ITC Strategic Objectives

• Make enterprises more competitive
• Strengthen trade support institutions
• Facilitate dialogue between policymakers and private sector
NTM survey in Thailand: Assessment of current NTM issues across sectors and identification by product and partner country of those NTMs which companies face as trade barriers.
1. Introduction to ITC
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What are non-tariff measures (NTMs)?

• **Official policy measures on export and import, other than ordinary customs tariffs**, that can potentially have an economic effect on international trade in goods, changing quantities traded, prices or both

• **Mandatory requirements, rules or regulations** legally set by the government of the exporting, importing or transit country (in contrast to private standards which are not legally set)

• **Can affect both export and import**: import vs. export-related measures

• Include technical measures and standards, as well as regulations on customs procedures, para-tariff measures, financial measures, prohibition, etc.
Oranges with light green colour are allowed, provided the colour does not exceed one fifth of the total surface of the fruit.
Example: Mayonnaise for a Swiss supermarket – labeling requirements

- Mandatory requirements by Switzerland
- Information is provided in 3 languages
- BIO. Private standard by Swiss retailer MIGROS

![Nutrition Facts](image)

![Bio-Mayonnaise](image)
# The NTM Survey classification

## Non-tariff measures classification for surveys

### A to O. Import related measures

**Technical measures**

- A. Technical requirements
- B. Conformity assessment

**Non-technical measures**

- C. Pre-shipment inspection and other entry formalities
- D. Charges, taxes and other para-tariff measures
- E. Quantity control measures (e.g. licences, quotas, prohibitions)
- F. Finance measures
- G. Price control measures

**Non-technical measures**

- H. Anti-competitive measures
- I. Trade-related investment measures
- J. Distribution restrictions
- K. Restriction on post-sales services
- L. Subsidies
- M. Government procurement restrictions
- N. Intellectual property
- O. Rules of origin and related certificate of origin

### P. Export related measures

**Technical measures**

- P. Export related measures

**Non-technical measures**

- P.O. List of procedural obstacles

This list provides a categorization of the problems related to NTMs that exporters and importers experience.

August 2011
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NTM programme motivation

Greatest Challenge to Developing Exports
from Client’s Country/Company

Top Mentions by Organization Type, 2008

**TSO Respondents:**
- Lack of / access to market information
- Obtaining financing / attracting investment
- Non-tariff barriers (regulations, standards, etc.)

**Government Respondents:**
- Non-tariff barriers (regulations, standards, etc.)
- Lack of / access to market information
- Production capacity / productivity

**Large Enterprise Respondents:**
- Non-tariff barriers (regulations, standards, etc.)
- Transport issues
- Logistical issues other than transport

**SME Respondents:**
- Marketing/communications (finding buyers/contacts)
- Lack of / access to market information
- Non-tariff barriers (regulations, standards, etc.)
The ITC Programme on NTMs

OBJECTIVE: INCREASE TRANSPARENCY ABOUT NTMs

1. …by collecting, classifying and disseminating relevant information on NTMs

   → Joint effort of ITC, UNCTAD and World Bank: data is available in the ITC online analysis tool Market Access Map, at www.macmap.org. Free of cost for users in developing countries!

2. …by understanding the non-tariff obstacles to trade the business sector is facing when exporting or importing:

   ITC’s company-level survey on NTMs

   → In close collaboration with local partners
   → Leading to tailored initiatives to address the identified NTM-related trade obstacles
Why do we need the business perspective?: NTMs and other trade obstacles

**NTMs**
Regulations on trade and products, other than tariffs, which may negatively affect the international trade of goods.

**Excessively strict NTMs**
E.g.: pesticides levels set by the EU on imported tomatoes are hard to comply with for Moroccan exporting companies.

**Procedural obstacles (POs)**
E.g.: the analysis required by the EU to test the level of pesticides of imported tomatoes from Morocco is delayed because the laboratory in charge of the analysis in Morocco is overstrained.

**Business environment**: obstacles that are not related to NTMs but hinder international trade. E.g.: lack of port infrastructure.

**Trade obstacles**
“Consignments are sometimes destroyed upon arrival in the destination country if our product labels do not comply with local regulations.”

*Sri Lankan exporter of food, 2010*
ITC business surveys on NTMs

- **Business perspective in focus:** Exporters (and importers) have to deal with NTMs and other obstacles on a day-to-day basis – they know best which challenges they face and to which extent they are affected.

- **Direct empirical research through company level surveys:** Surveying directly the business sector in Thailand enables to assess the impact of non-tariff obstacles on products and sectors.

- **In-depth analysis of survey results as diagnostic of the current situation of companies** with regards to NTMs. Results shall help to assess needs and define action plans to overcome obstacles to trade.

- In close collaboration with national and international partners.

- In the framework of ITC’s programme on NTMs.
ITC business surveys on NTMs - where?

The survey in Thailand is part of a worldwide programme

As of 1 January 2013

9,339 phone interviews

3,290 face-to-face interviews

(plus 7 pilot countries)
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Why a survey in Thailand? And for whom?

Who will benefit from the ITC survey on NTMs:

1. Exporters
   - Channel for reporting the obstacles to trade they face in their daily business to raise awareness among other exports and importers, trade support institutions and policy makers
   - Exchange of experiences with other exporters and importers
   - → final beneficiaries of removal of NTM-related trade obstacles

2. Trade support institutions
   - Better understanding of sector-specific needs;
   - Better support for business sector; fostering of transparent and dynamic commercial activity

3. Policy makers
   - Understanding specific needs of business sector; better formulation of national and regional strategies and policies
   - Removal of procedural obstacles

4. Researchers
   - Better understanding of the impact of NTMs on international trade – from the perspective of the business sector
Selected questions we are able to answer

Who is affected and how much?
Sectors, products, types of companies (women/men-owned, size, region), trade flows with which partner countries, type of trade flow (export/import), etc.

Why are NTMs perceived as burdensome?
Strict regulations, procedural obstacles, both

Which NTMs are perceived as burdensome?
Technical regulations, conformity assessment, rules of origin, inspections, etc.

What procedural obstacles do exporters/importers encounter?
Delays, high fees and charges, large number of documents, limited testing facilities, problems with recognition of certificates, etc.

Where does the problem occur?
At home, in the partner country, institution(s) involved, …
Objectives of the survey

The NTM survey

…studies the private sector perspective on NTM-related trade obstacles with a view to identify feasible options to overcome these.

…is per definition “biased” as it concentrates on the company perspective. In the analysis of survey results, the views of additional stakeholders will however be sought and taken into account. The survey report will not be finalized and published before this stakeholder consultation has taken place through additional interviews and a final stakeholder meeting.

…aims at identifying concrete actions that enable Thailand to reach greater efficiency in the export process and reduced trade cost.

The NTM survey is NOT

…a collection of or platform for complaints.

…intended to single out specific institutions to blame for inefficiencies.
## NTM survey in Thailand – the process (tentative dates)

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<thead>
<tr>
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<tbody>
<tr>
<td><strong>Until Jul 2013</strong></td>
<td><strong>Aug-Nov 2013</strong></td>
<td><strong>Nov 2013-Jan 2014</strong></td>
<td><strong>Q1 2014</strong></td>
</tr>
<tr>
<td>In collaboration with the Department of Trade Negotiations, Ministry of Commerce</td>
<td>In collaboration with Rapid Asia, Ltd.</td>
<td>In collaboration with local expert(s) (economist, trade specialists)</td>
<td>In collaboration and coordination with the government, TSIs and other local stakeholders (customs, certification bodies, etc.)</td>
</tr>
</tbody>
</table>

### 1. Survey Inception and Preparation
- Survey design adjustment to country specific needs
- Sample size calculation*
- Face-to-face training of interviewers
- First stakeholder meeting to inform about survey objectives and encourage participation

### 2. Interview Period
- 1,100 phone-screen interviews with exporters and importers
- 400 face-to-face interviews with exporters and importers
- Data digitalization
- Data quality control*

### 3. Data Analysis and Draft Report
- Preparation of analytical tables (by products and sectors, partner countries, types of NTMs and procedural obstacles)*
- Additional research and complementing discussions and interviews with business associations and institutions involved in export / import process
- Drafting of country report

### 4. Results Validation and Dissemination
- Discussion and validation of survey results and formulation of policy options through a second stakeholder meeting
- Compilation of a matrix of action and definition of follow-up activities with a view to remove identified trade obstacles
- Finalization of country report

*Activities implemented by ITC*
ITC survey on NTMs – Methodology

• Global Methodology, adjusted to specific requirements of Thailand

• Confidential

• Focus on exporting and importing companies; if required, further actors taken into consideration

• Representative by sector: covers all export sectors excluding services, minerals and arms that accumulatively account for +90% of country’s export value. Import sectors are also covered. Several geographic regions included.
The 2 steps of the survey process

1. **Phone screens** with all exporting and/or importing companies in the sample
   - **Basic information**: address, main export product, status (exporter, importer or two-way trader), etc.
   - **Structure of the firm**: no. of employees, share of female employees, etc.
   - **NTB experience**: whether any of their products faced restrictive and burdensome regulations or related obstacles to trade during the last 12 months
   → 6-8 minutes, 1,100 interviews planned for Thailand

2. **Face-to-face interviews** with companies that report difficulties with NTMs to understand the details of the problems
   - **Additional characteristics of the firms**: such as share of exports in total sales and foreign ownership
   - **Exporting and importing activities of the company**: with all trade products (HS6-level) and partner countries recorded
   - **Relevant government-imposed regulations**: affected products (6-digit level of the HS), partner countries and the countries applying the regulation (partner, transit or home country), the institution(s) involved, the reasons making the regulation burdensome
   → 50-70 minutes per interview; in-depth discussion; depending on the results of the phone screening up to 400 interviews planned for Thailand
NTM survey implementation in Thailand

• In collaboration with our local partner, responsible for the implementation of interviews

• Rapid Asia Ltd. selected through ITC (UN) procurement process

• Training of interviewers and testing interviews: 29 July – 2 August 2013

➢ During the phone screening, Rapid Asia will randomly contact exporting and importing companies from the business register.
NTM survey Thailand: Sample

11,818
Registered exporting companies in Thailand

1,100
Companies to be interviewed by phone

400*
Companies to be interviewed face-to-face

*estimated number; actual number depends on results of phone screening and company willingness to participate in face-to-face interviews
Business register (exporters): sector coverage

Total: 11,818 exporters
## Sectoral coverage of the survey

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector's share in Thailand's export value (net of excluded sectors)</th>
<th>Sector is included*</th>
<th>No of exporting companies in this sector (cumulative)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh food and raw agro-based products</td>
<td>6.5%</td>
<td>Yes</td>
<td>1,287</td>
</tr>
<tr>
<td>Processed food and agro-based products</td>
<td>13.0%</td>
<td>Yes</td>
<td>1,800</td>
</tr>
<tr>
<td>Wood, wood products and paper</td>
<td>1.8%</td>
<td>No</td>
<td>245</td>
</tr>
<tr>
<td>Yarn, fabrics and textiles</td>
<td>1.7%</td>
<td>No</td>
<td>982</td>
</tr>
<tr>
<td>Chemicals</td>
<td>15.3%</td>
<td>Yes</td>
<td>1,370</td>
</tr>
<tr>
<td>Leather and leather products</td>
<td>0.8%</td>
<td>No</td>
<td>588</td>
</tr>
<tr>
<td>Metal and other basic manufacturing</td>
<td>6.3%</td>
<td>Yes</td>
<td>1,744</td>
</tr>
<tr>
<td>Non-electric machinery</td>
<td>8.6%</td>
<td>Yes</td>
<td>844</td>
</tr>
<tr>
<td>Computers, telecommunications; consumer electronics</td>
<td>14.0%</td>
<td>Yes</td>
<td>144</td>
</tr>
<tr>
<td>Electronic components</td>
<td>9.8%</td>
<td>Yes</td>
<td>170</td>
</tr>
<tr>
<td>Transport equipment</td>
<td>13.1%</td>
<td>Yes</td>
<td>564</td>
</tr>
<tr>
<td>Clothing</td>
<td>2.2%</td>
<td>Yes</td>
<td>1,292</td>
</tr>
<tr>
<td>Miscellaneous Manufacturing</td>
<td>6.8%</td>
<td>Yes</td>
<td>2,967</td>
</tr>
</tbody>
</table>

*per standard methodology – subject to discussion
Geographical distribution (business register)

- Bangkok: 69%
- Nonthaburi: 4%
- Chiang Mai: 4%
- Samut Sakhon: 4%
- Pathum Thani: 3%
- Nakhon Pathom: 2%
- Unspecified: 3%
- Other: 10%
- Chonburi: 1%
- Other: 10%
1. Introduction to ITC
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4. The survey implementation in Thailand
5. **How you can support us**
6. Feedback / Discussion
7. Results from surveys in other countries
Spread the word!

The methodology hinges upon enterprises being willing to participate in interviews.

Your potential role:

**Inform exporting companies that they may be contacted during the next weeks and months and encourage their participation in the survey.**
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Your feedback on the survey scope in Thailand and expected results

- Geographical coverage?
- Sector coverage? (e.g. textiles and leather)
- Current trade concerns related to NTMs?
- Specific expectations in relation to ASEAN economic integration?
- ...

ITC

EXPORT IMPACT FOR GOOD
Trade agreements in Asia-Pacific

- APTA (Bangkok Agreement)
- ASEAN
- ANZCERTA
- EFTA
- EU
- PICTA
- MSG
- SPARTECA
- SAARC
- MERCOSUR

APTA - Asia-Pacific Trade Agreement
ASEAN - Association of Southeast Asian Nations
ANZCERTA - Australia New Zealand Closer Economic Relations Trade Agreement
EFTA - European Free Trade Association (Iceland, Liechtenstein, Norway, Switzerland)
EU - European Union (27 members)
PICTA - Pacific Island Countries Trade Agreement
SAARC - South Asian Association for Regional Cooperation
SPARTECA - South Pacific Agreement on Regional Trade and Economic Cooperation
MERCOSUR - Southern Common Market (Argentina, Brazil, Paraguay, Uruguay)
MSG - Melanesian Spearhead Group
OCT - Overseas Countries and Territories

1 - -- // -- ASEAN-India but not yet applying preferential tariff
2 - -- // -- ASEAN-Japan
3 - -- // -- ASEAN-Japan
4 - -- // -- ASEAN-Korea
5 - -- // -- ASEAN-Korea
6 - -- // -- PICTA
7 - -- // -- SAARC

Partial scope agreements, Free Trade or Economic Partnership Agreements, Early Harvest Programme (1st step of FTA), Trade agreements with countries outside Asia-Pacific.
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How many are affected?

Share of companies facing burdensome NTMs and other obstacles to trade

ITC calculations based on Survey findings in 21 countries.
Who is affected?

Simple cross-country average based on 11 countries
Why are NTMs perceived as burdensome?

Simple cross-country average based on 11 countries
Which NTMs are perceived as burdensome? (1/2)

Burdensome NTMs by type of measure

Simple cross-country average based on 11 countries

- 30.6%
- 24.5%
- 17.0%
- 9.9%
- 6.3%
- 5.2%
- 4.1%
- 1.2%
- 0.4%
- 0.3%
- 0.4%
- 0.0%
- 0.3%
- 0.0%
- 0.4%
- 0.4%
- 0.0%
- 0.0%
- 0.0%
- 0.0%
**Legend (NTM survey classification)**

### Non-tariff measures classification for surveys

#### A to O. Import related measures

- **A. Technical requirements**
- **B. Conformity assessment**
- **C. Pre-shipment inspection and other entry formalities**
- **D. Charges, taxes and other para-tariff measures**
- **E. Quantity control measures (e.g. licences, quotas, prohibitions)**
- **F. Finance measures**
- **G. Price control measures**
  - **H. Anti-competitive measures**
  - **I. Trade-related investment measures**
  - **J. Distribution restrictions**
  - **K. Restriction on post-sales services**
- **L. Subsidies**
- **M. Government procurement restrictions**
- **N. Intellectual property**
- **O. Rules of origin and related certificate of origin**

#### P. Export related measures

- **P.O. List of procedural obstacles**

This list provides a categorization of the problems related to NTMs that exporters and importers experience.

*August 2011*
## Most reported types of SPS / TBT measures (import-related measures, Chapters A+B)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>37.3%</td>
<td>Product certification</td>
</tr>
<tr>
<td>8.7%</td>
<td>Testing</td>
</tr>
<tr>
<td>7.9%</td>
<td>Inspection requirement</td>
</tr>
<tr>
<td>6.0%</td>
<td>Labelling (e.g. product labels with information for consumers)</td>
</tr>
<tr>
<td>4.4%</td>
<td>Fumigation</td>
</tr>
<tr>
<td>4.1%</td>
<td>Origin of materials and parts</td>
</tr>
<tr>
<td>3.6%</td>
<td>Tolerance limits for residues of or contamination by certain substances</td>
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<tr>
<td>3.5%</td>
<td>Product characteristics, including quality or performance requirements</td>
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<tr>
<td>2.9%</td>
<td>Product registration</td>
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<tr>
<td>2.6%</td>
<td>Packaging</td>
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<tr>
<td>2.5%</td>
<td>Authorization requirement because of: national security; protection of human health or safety; environmental protection; or prevention of deceptive practices</td>
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<tr>
<td>2.5%</td>
<td>Restricted or prohibited use of certain substances in food and feed</td>
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<tr>
<td>14.0%</td>
<td>Other</td>
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</tbody>
</table>

Simple cross-country average based on 11 countries
Why are NTMs perceived as burdensome?  
- by types of NTMs

*Simple cross-country average based on 11 countries
Does the trade direction matter?

Example Cambodia: Types of burdensome NTMs reported

...by exporters

- Technical requirements: 78.0%
- Conformity assessment: 16.9%
- Inspections and other entry formalities: 2.4%
- Rules of origin: 2.4%
- Export-related measures: 0.2%

...by importers

- Technical requirements: 52.8%
- Conformity assessment: 16.3%
- Inspections and other entry formalities: 12.3%
- Charges, taxes and other para-tariff measures: 9.3%
- Quantity-control measures: 4.0%
- Price-control measures: 3.0%
- Other: 2.3%

Source: ITC survey on NTMs in Cambodia, 2012 – preliminary results.
Does company size matter?

Variation in type of burdensome NTMs experienced
- depending on partner countries, sectors and company sizes

Example Burkina Faso:

**Burdensome NTMs reported by exporters, by company size**

- **Micro-exporting enterprises**
  - n = 25
  - Technical regulations: 12%
  - Conformity assessment: 16%
  - Pre-shipment inspection and other formalities: 12%
  - Charges, taxes and other para-tariff measures: 60%

- **Small exporting enterprises**
  - n = 33
  - Technical regulations: 3%
  - Conformity assessment: 9%
  - Pre-shipment inspection and other formalities: 6%
  - Charges, taxes and other para-tariff measures: 64%

- **Medium and Large exporting enterprises**
  - n = 28
  - Technical regulations: 4%
  - Conformity assessment: 18%
  - Pre-shipment inspection and other formalities: 36%
  - Rules of origin: 39%
  - Export related measures: 3%
Does the sector matter?

Agriculture: Type of burdensome measures

- 23.3%
- 6.4%
- 3.2%
- 4.0%
- 2.7%
- 0.5%
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Does the partner country matter?

Burdensome NTMs applied by partner countries: developing versus developed

Simple cross-country average based on data from 11 reporting countries
Does RTA membership insulate from NTM-related problems?

Example Kenya:

**Burdensome NTMs reported, by partner**

- **EAC countries**
  - Export Share: 20.0%
  - NTM Share: 30.0%

- **Rest of the world**
  - Export Share: 70.0%
  - NTM Share: 80.0%
Where does the problem occur?

Large share of home-based problems

Example Malawi agricultural exports:
## Types of procedural obstacles

### Most reported types of procedural obstacles

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>32.9%</td>
<td>Delay in administrative procedures</td>
</tr>
<tr>
<td>18.6%</td>
<td>Unusually high fees and charges</td>
</tr>
<tr>
<td>8.6%</td>
<td>Large number of different documents</td>
</tr>
<tr>
<td>4.4%</td>
<td>Other inconsistent or arbitrary behaviour of officials</td>
</tr>
<tr>
<td>4.1%</td>
<td>Limited/Inappropriate facilities (e.g. storage, cooling, testing, fumigation)</td>
</tr>
<tr>
<td>3.4%</td>
<td>Informal payment, e.g. bribes</td>
</tr>
<tr>
<td>2.8%</td>
<td>Information is not adequately published and disseminated</td>
</tr>
<tr>
<td>2.7%</td>
<td>Large number of checks (e.g. inspections, checkpoints weigh bridges)</td>
</tr>
<tr>
<td>2.7%</td>
<td>Documentation is difficult to fill out</td>
</tr>
<tr>
<td>19.7%</td>
<td>Other</td>
</tr>
</tbody>
</table>

Simple cross-country average based on data from 11 reporting countries
Example Cambodia: company and respondent characteristics

- Low number of women-owned/managed businesses
  - 12.8% of phone-screened companies are owned or directed by a woman

- Location: high concentration of businesses in PP area
  - 95% of phone screened companies are located in or around Phnom Penh

- Foreign ownership of companies
  - 53% of companies interviewed face-to-face have no foreign ownership, another 10% report less than 50% foreign ownership

- Age: most companies more than 5 years in business
  - 57% of companies interviewed face-to-face are more than 5 years in business, another 33% between 1 and 5 years.

- High position of respondents
  - 42% of respondents are business owners, CEOs, directors, presidents or acting/managing directors

Source: ITC survey on NTMs in Cambodia, 2012 – preliminary results.
Example Cambodia: problems in the quality infrastructure

To export cassava, we are required by China to obtain a Certificate of Product Quality. To get the certificate, we normally have to wait for 5 to 7 days and spend $1,500 (for 3,000 tons) to the private company for the inspection process. It would be good if the government could strengthen the inspection capacity of competent national authorities because at the moment the certificates issued in Cambodia are not recognized internationally.

A Cambodian cassava exporter

To export rice, we are required to obtain a Phytosanitary Certificate. The certificate must be released by an international accredited laboratory. Due to lack of accredited laboratories in Cambodia, we have to hire a specialized company from Viet Nam or Thailand to test its rice. We have to spend normally around $300 to $500 to the testing company for their trip to Cambodia.

A Cambodian rice exporter
Example Palestine: Trade facilitation starts at home

...but so is getting to the border in the first place.

Crossing the border is complicated...

Source: ITC Survey on NTMs in Malawi, 2010-2011.
What can be done?

Selected examples from Morocco:

• Many companies unable to comply with SPS/TBT measures
  • harmonization of domestic technical regulations with international standards
  • Improvement of information about the norms and regulations in force

• Exporters are unable to prove compliance with NTMs at reasonable cost
  • Accreditation of national laboratories
  • Mutual recognition agreements
  • Improvement of inspection and certification procedures; capacity-building of officials; more transparency /better communication of procedures

• Problems related to customs valuation
  • Better training to officials to avoid wrong classification /valuation of products
  • Independent and regular control of customs valuation practices

⇒ Scope for action at the national level
Follow-up: examples

**Morocco**: creation of an inter-ministerial steering committee to address the identified obstacles

**Sri Lanka**: successful application to WTO STDF with a view to improve product quality and cost of exporting

**Mauritius**: elimination of the need for Tea Board clearance of Rooibos tea imports resulting in reduced time for importing

**Côte d’Ivoire**: continued public-private interaction through the creation of an online trade barriers reporter

**Jamaica**: request to ITC for assistance in addressing capacity building needs of SMEs as well as customs officials to increase compliance with NTMs and reduce procedural obstacles
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Improving the business environment for trade: Tackling non-tariff measures

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During the past decades bilateral and multilateral trade agreements have led to a reduction in tariff-related barriers to global trade. But during the same period the world has experienced a steady rise in the number of non-tariff measures (NTMs). These NTMs can provide major challenges to local, regional and global trade in both goods and services as many companies struggle to comply with an increasingly complex web of policies and at times opaque technical standards. Today NTMs are among the biggest barriers to international trade.

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