



KEY STATISTICS AND TRENDS

in Trade Policy 2019



RETALIATORY TARIFFS BETWEEN THE UNITED STATES AND CHINA





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NOTE

Key Statistics and Trends in Trade Policy is a yearly publication of the Trade Analysis Branch, Division on International Trade and Commodities, UNCTAD secretariat. The main purpose of this publication is to inform on the use and effects of a wide range of trade policies influencing international trade.

The series is part of a larger effort by UNCTAD to analyse trade-related issues of particular importance to developing countries in terms of their participation in the international trading system, as requested by the mandate of the fourteenth session of the United Nations Conference on Trade and Development. This study was prepared by Alessandro Nicita.

OVERVIEW

With the notable exception of the increase in bilateral tariffs between the United States and China, tariffs have remained substantially stable during the last few years with tariff protection remaining a critical factor only in certain sectors in a limited number of markets. On the other hand, the use of regulatory measures and other non-tariff measures remains widespread and, in some cases, resulted in tensions among major economies.

As of 2018, trade costs directly related to tariffs were at about 1 per cent for developed countries' and at about 4 per cent for developing countries. Tariff restrictiveness remains substantial in many developing countries, especially in South Asia and sub-Saharan African countries. Moreover, tariffs remain relatively high in some sectors and tariff peaks are present in important sectors, including some of key interest to low income countries such as agriculture, apparel, textiles and leather products. Tariffs also remain substantial for most South–South trade. International trade is subject to and influenced by a wide array of policies and instruments reaching beyond tariffs. Technical measures and requirements regulate about two thirds of world trade, while various forms of sanitary and phytosanitary measures (SPS) are applied to almost all agricultural trade. The past few years have also seen a general decrease in the number of trade defence investigations at the World Trade Organization (WTO), however the number of trade defence measures in effect has continued to increase.

The process of deeper economic integration has remained strong at the regional and bilateral levels, with an increasing number of preferential trade agreements (PTAs) being negotiated and implemented. Most of the recent PTAs address not only goods but also services and increasingly deal with rules beyond reciprocal tariff concessions to cover a wide range of behind the border issues. As of 2018, about half of world trade has occurred under some form of PTA. The economic turbulence of recent years has been reflected in exchange rate markets, both for developing and developed countries' currencies. Exchange rate movements are playing an important role in shaping international trade in the last few years as they have influenced countries' external competitiveness. While currency movement have been small, the value of the United States dollar has remained constant in 2018.

This report is structured in two parts. The first part presents a discussion on ongoing trade tensions between the United States and China. The second part discusses trends in selected trade policy instruments including illustrative statistics. The second part is divided into five chapters: tariffs, trade agreements, non-tariff measures, trade defence measures, and exchange rates. Trade trends and statistics are provided at various levels of aggregation illustrating the use of the trade policy measures across economic sectors and geographic regions.

DATA SOURCES

All statistics in this publication have been produced by the UNCTAD secretariat by using data from various sources. Data on tariffs and non-tariff measures originate from the UNCTAD Trade Analysis and Information System (TRAINS) database (<http://trains.unctad.org/>), while data on bound tariffs derive from the WTO's Consolidated Tariff Schedules database (<tdf.wto.org>). Trade data are from the United Nations Commodity Trade Statistics Database (COMTRADE; <comtrade.un.org>). Data on trade defence measures are sourced from the WTO I-TIP (<i-tip.wto.org>). Tariff and trade data are at the Harmonized System 6-digit level and have been standardized to ensure comparability across countries. Data related to preferential trade agreements are derived from various databases, including the WTO regional trade agreement gateway (<rtais.wto.org>) and the World Bank global preferential agreements database (wits.worldbank.org/gptad/trade_database.html). Yearly exchange rate data originate from financial statistics of the International Monetary Fund, and other macro level data used in the figures originate from UNCTADstat (<unctadstat.unctad.org>). Unless otherwise specified, aggregated data cover more than 160 countries representing over 95 per cent of world trade. Data on non-tariff measures covers around 80 countries, covering about 90 per cent of world trade. The data on retaliatory tariffs utilized in the first part of the report was kindly provided by <https://www.strtrade.com/>

Countries are categorized by geographic region as defined by the United Nations classification (UNSD M49). Developed countries comprise those commonly categorized as such in United Nations statistics. For the purpose of this report, transition economies, when not treated as a single group, are included in the broad aggregate of developing countries. Product sectors are categorized according to the Broad Economic Categories (BEC) and the International Standard Industrial Classification (ISIC). Preferential trade agreements that relate to both goods and services are counted as one. Non-tariff measures are classified according to UNCTAD classification 2019 (https://unctad.org/en/PublicationsLibrary/ditctab2019d5_en.pdf).

Further information relating to the construction of data, statistics, tables and graphs contained in this publication can be made available by contacting tab@unctad.org.

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