UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

Technical and statistical report

Key statistics and trends in trade policy 2024

United Nations

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

Technical and statistical report

Key statistics and trends in trade policy 2024

United Nations
Geneva, 2025

United Nations Publications
405 East 42nd Street
New York, New York 10017
United States of America

Email: publications@un.org
Website: https://shop.un.org

United Nations publication issued by the United Nations Conference on Trade and Development

UNCTAD/DITC/TAB/2025/1

ISBN: 978-92-1-003508-8
eISBN: 978-92-1-107283-9
ISSN: 2409-7713
eISSN: 2707-7160
Sales No. E.25.II.D.16

Acknowledgements

This publication was prepared under the guidance of Alessandro Nicita of the UNCTAD Division on International Trade and Commodities. The benefited from inputs and comments from division and statistics colleagues. Fabien Dumesnil, Denise Penello Rial and Rado Razafinombana contributed by providing and formatting data that originated from the Statistics Division of the United Nations, United Nations Comtrade database and the UNCTAD Trade Analysis Information System (TRAINS).

Desktop publishing and the cover were undertaken by Jenifer Tacardon-Mercado.

Note

Key Statistics and Trends in Trade Policy is a yearly publication of the UNCTAD Division on International Trade and Commodities. The publication informs 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 UNCTAD XV, as outlined in paragraphs 107 and 113 of the Bridgetown Covenant.

Table of contents

Data sources

All statistics in this publication have been produced by the UNCTAD secretariat using data from various sources. Data on tariffs and non-tariff measures originate from the UNCTAD Trade Analysis and Information System (TRAINS) database (https://trainsonline.unctad.org/home), 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). 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 80 per cent of world trade.

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. 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. (https://unctad.org/system/files/official-document/ditctab2019d5_en.pdf). Data on non-tariff measures (NTMs) is still fragmentary and therefore does not allow computation of comparative statistics across countries. Although the data may also not be fully representative of world trade, some preliminary statistics can be derived from the available data.

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.

Glossary

Antidumping: A trade policy instrument within the WTO framework to rectify the situation arising out of the dumping of goods and its trade distortive effect

Ad-valorem equivalent: the conversion in percentage terms of the cost of a trade policy measure not expressed in percentage terms

Applied tariff: The actual tariff rate in effect at a country's border (including preferential rates)

ASEAN: Association of Southeast Asian Nations is a trade agreement between Brunei Darussalam, Cambodia, Indonesia, the Lao People's Democratic Republic, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Viet Nam

Binding overhang: The extent to which a country's WTO bound tariff rate exceeds its applied rate

Bound tariff line: See tariff binding

Countervailing duty: A tariff designed to counteract the effect of export subsidies

Coverage ratio: The percentage of trade affected by a measure or set of measures

Deep trade agreements: Agreements that include provisions that go beyond reciprocal reductions of tariffs

Duty-free: Not subject to import tariffs

Export restrictiveness: The average level of tariff restrictions imposed on a country's exports as measured by the MA-TTRI

Frequency index: The percentage of tariff lines covered by a measure or set of measures

GDP: Gross domestic product

HS: Harmonized System – An international system for classifying goods in international trade

Import restrictiveness: The average level of tariff restrictions on imports as measured by the TTRI

LDC: Least developed country

MA-TTRI: Market Access Tariff Trade Restrictiveness index. An index measuring the average level of tariff restrictions imposed on exports

MFN (most favoured nation) tariff: The tariff level that a member of the General Agreement on Tariffs and Trade /WTO charges on a good to other members

Nominal exchange rate: The actual rate at which currencies are exchanged on the exchange market

NTM: non-tariff measure – Any policy, other than tariffs, that alters the conditions of international trade

Preferential scheme: An arrangement under which countries levy lower (or zero) tariffs against imports from members than outsiders

PTA: preferential trade agreement. This includes what WTO refers to as regional trade agreements and also free trade areas, custom unions and common markets.

RPM: relative preferential margin – A measure of the preferential margin for a given country relative to foreign competitors

Safeguard: A WTO-compliant import protection policy that permits restricting imports if they cause injury to domestic industry

Shallow trade agreement: Preferential agreements including mainly preferential tariffs

SPS: Sanitary and phytosanitary measures

Tariff binding: A commitment, under the General Agreement on Tariffs and Trade, by a country not to raise the tariff on an item above the specified bound

Tariff escalation: Higher tariffs on processed goods than raw materials from which they are produced

Tariff line: A single item in a country's tariff schedule

Tariff peak: A single tariff or a small group of tariffs that is/are particularly high (generally above 15 per cent)

Tariff water: See binding overhang.

TBT: Technical barriers to trade

Technical NTM: Non-tariff measure related to SPS and TBT

Trade defence measure: Policies within the WTO framework preventing or correcting injury to domestic industry due to imports

True tariff water: Tariff water that takes into account implicit bindings imposed by PTA obligations

TTRI: Tariff Trade Restrictiveness Index – An index measuring the average level of tariff restrictions imposed on imports

Unbound tariff line: See tariff binding

USMCA: United States, Mexico, Canada agreement

Weighted average tariff: Average tariffs, weighted by the value of imports

WTO: World Trade Organization

Overview

International trade is subject to and influenced by a wide array of policies and instruments. 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 products. Border measures contribute substantially to trade costs. On average the compliance costs of such measures are generally higher than tariffs. The use of trade defence measures has also increased significantly in recent years, although they have been largely concentrated in very specific sectors. Most of the trade defence measures currently in force have been imposed by developed countries and major emerging economies.

As of 2023, trade costs directly related to tariffs remained stable at below 2 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 Asian and African countries. Moreover, tariffs remain relatively high in some sectors, where tariff peaks are present. Those sectors include some that are of key interest to low-income countries, such as agriculture, apparel, textiles and leather products. Tariffs also remain substantial for most South–South trade.

The process of deeper economic integration has remained strong at regional and bilateral levels, with an increasing number of preferential trade agreements (PTAs) being negotiated and implemented. As of 2023, more than half of world trade has taken place between countries party to some form of PTA. 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. The share of trade under these PTAs continued to grow in recent years.

This report divided into four chapters: tariffs, trade agreements, non-tariff measures and trade defence measures. 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.

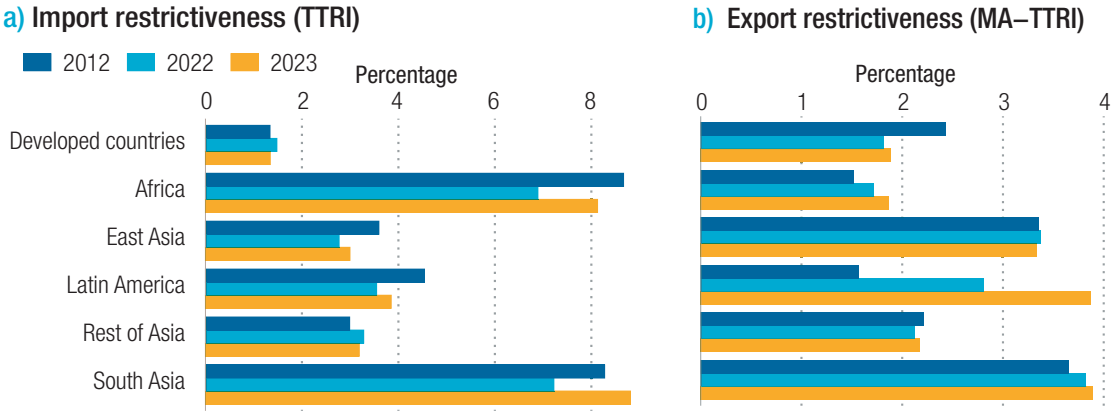
1

Tariffs

1. Tariffs

Import restrictiveness, a measure of the additional costs that tariffs add to the basket, has generally declined between 2012 and 2023, but for South Asia region. More broadly, import restrictiveness remains relatively higher in developing countries, especially in South Asia and in Africa. East and South Asian economies' exports face a relatively higher tariff restrictiveness in destination markets. Importantly, both Africa and Latin America export restrictiveness has increased, but mostly because of changes in the composition of their export baskets towards products facing higher tariff restrictiveness.

Figure 1
Average import and export restrictiveness, by region



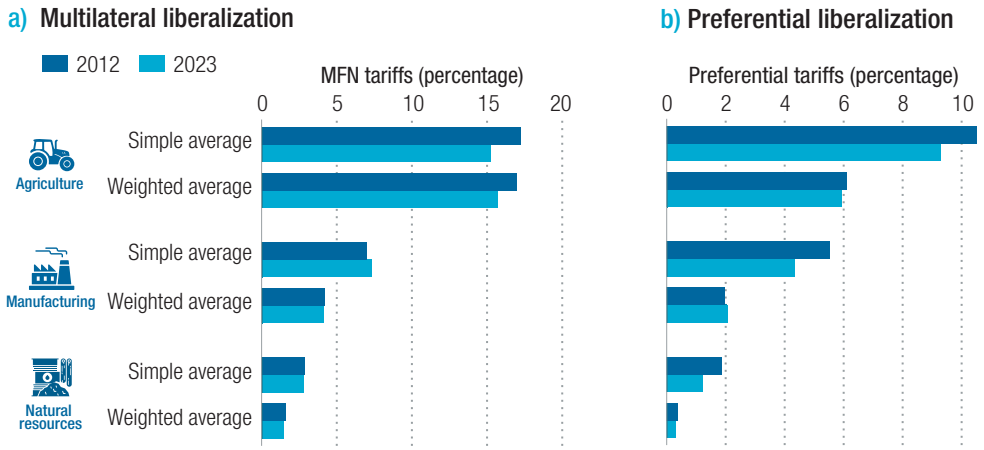
Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

Figure 1a portrays the tariff trade restrictiveness index (TTRI), which measures the average level of tariff restrictions imposed on imports. The index is weighed to control for different import values and import demand elasticities. The market access counterpart (MA-TTRI) summarizes the tariff restrictiveness faced by exports (Figure 1b). Both indices are calculated based on applied tariffs (ad valorem and specific tariffs), including tariff preferences.

As 2023, tariff restrictiveness on imports remains substantially higher in developing countries than in developed countries. Among developing countries, the tariff restrictiveness imposed on imports is highest in South Asia and Africa (about 8 per cent TTRI). Developed and African countries face the most liberal market access conditions with an MA-TTRI of less than 2 per cent in 2023. For developed countries this is both because the numerous trade agreements and the composition of the export basket oriented towards manufacturing products. For African countries this is largely due to unilateral preferences granted by developed countries and an export composition tilted towards natural resources that typically face low tariffs. In contrast, exports from Latin America and South Asia faced a higher average level of restrictiveness, almost 4 per cent.

Since 2012, applied tariffs have somewhat declined both on a preferential and MFN basis. The tariffs imposed on agricultural products remain higher but have declined by almost 3 per cent on an MFN basis. Applied tariffs on manufacturing and natural resources have also declined, especially on a preferential basis.

Figure 2
Multilateral and preferential tariff liberalization

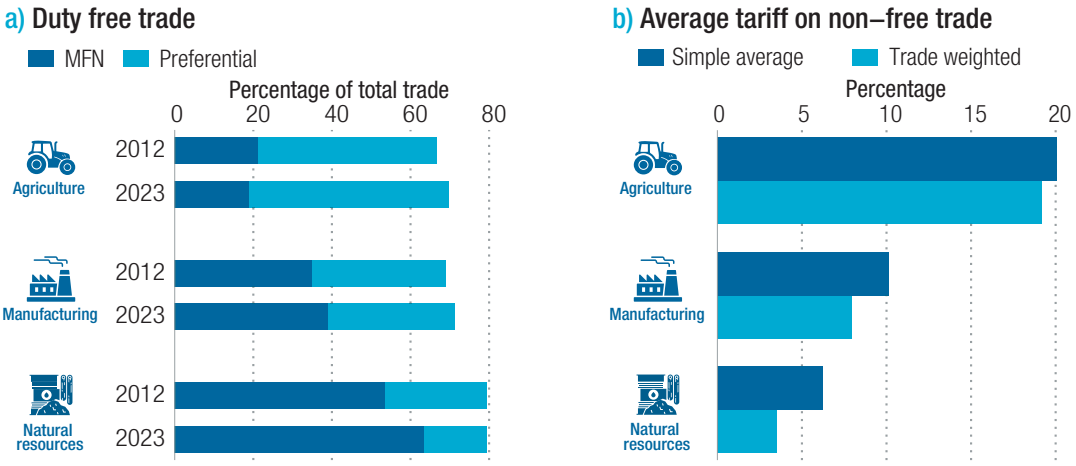


Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

Figures 2a and 2b illustrate average MFN and preferential tariffs for 2012 and 2023 in three main sectors. The decline in tariffs that has occurred since 2012 is a result of both multilateral and preferential liberalizations. Overall, agricultural MFN tariffs have been reduced on average by about 3 percentage points. Preferential liberalization has contributed to about 1.5 percentage points to the reduction of simple agricultural tariffs. The proliferation of preferential schemes in the manufacturing sector has resulted reductions amounting to about 1 percentage point on a simple average basis. Liberalization on preferential terms has also occurred in natural resource trade, further reducing the already low levels of tariffs in this sector. On the other hand, MFN tariffs reductions were minimal both in manufacturing and natural resources.

International trade continues to be largely free from tariffs both because of zero MFN duties and because of duty-free preferential access. However, tariffs applied to the remainder of international trade can be high. Preferential access continues to play a key role for agricultural market access, but also remains significant for manufacturing products.

Figure 3
Free trade and remaining tariffs, by broad category (2023)

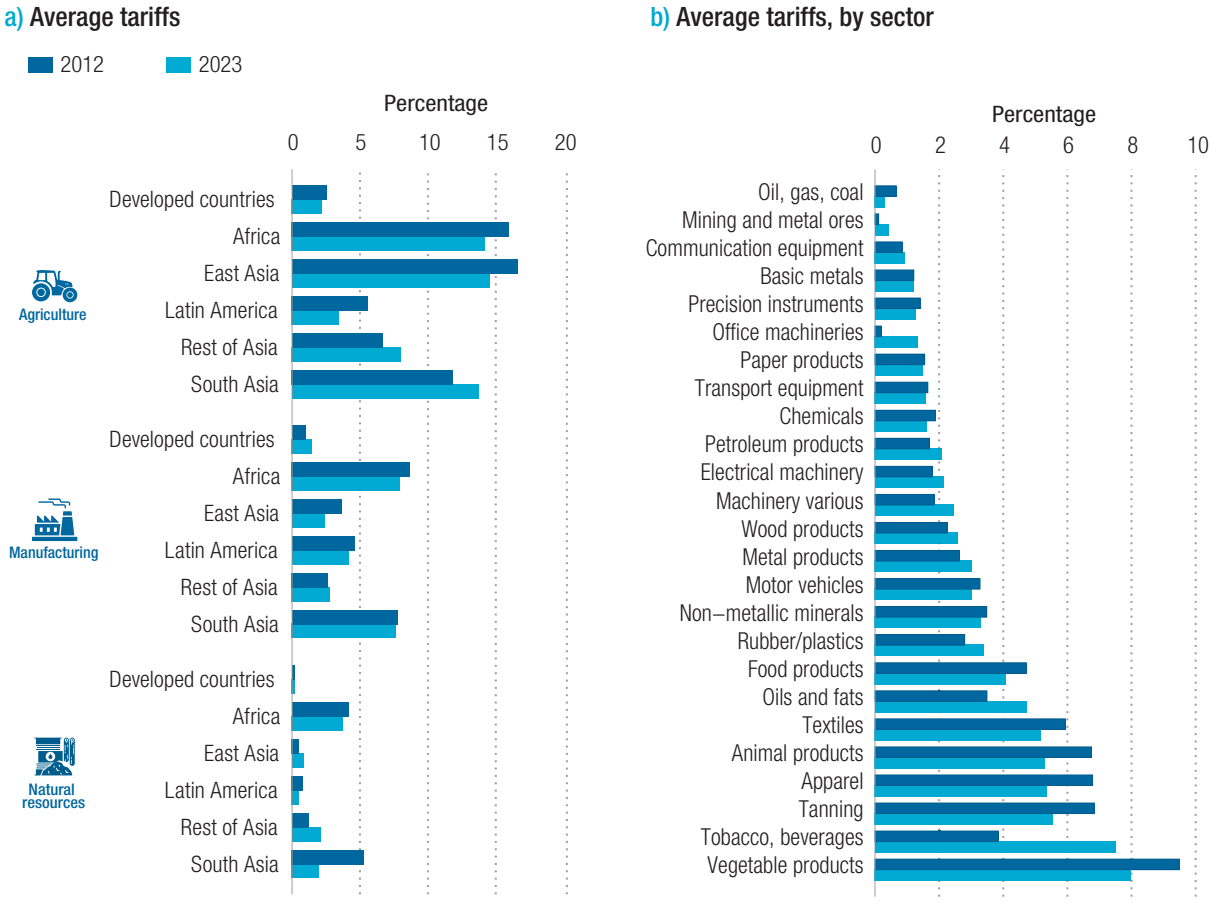


Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

International trade has been largely liberalized owing to both zero MFN tariffs and preferential duty-free access. The consequence is that about two-third of international trade is free of tariffs (Figure 3a). Still, tariffs applied to the remainder of international trade are often very high (Figure 3b). Importantly, there are differences between agriculture, manufacturing and natural resources. Agricultural trade is free from tariffs largely due to preferential access (as opposed to zero MFN tariffs). In this regard, preferential access and reciprocal concessions continue to play a key role for agricultural market access, as the remaining tariffs are high (averaging almost 20 per cent). Preferential access is also important for manufacturing products, for which the simple average tariff is at almost 10 per cent. On the other hand, preferential access is of limited importance in the case of natural resources, as trade in this category is largely tariff-free under MFN rates, and remaining tariffs are generally low (simple average about 6 per cent).

Low average tariffs mask large differences across economic categories and product sectors. In general, international trade in agriculture is taxed at a much higher rate than trade in manufacturing and natural resources. Tariffs also remain relatively high for manufacturing products, such as textiles and apparel, which are important for developing countries.

Figure 4
Trade weighted average tariffs, by region, broad category and sector

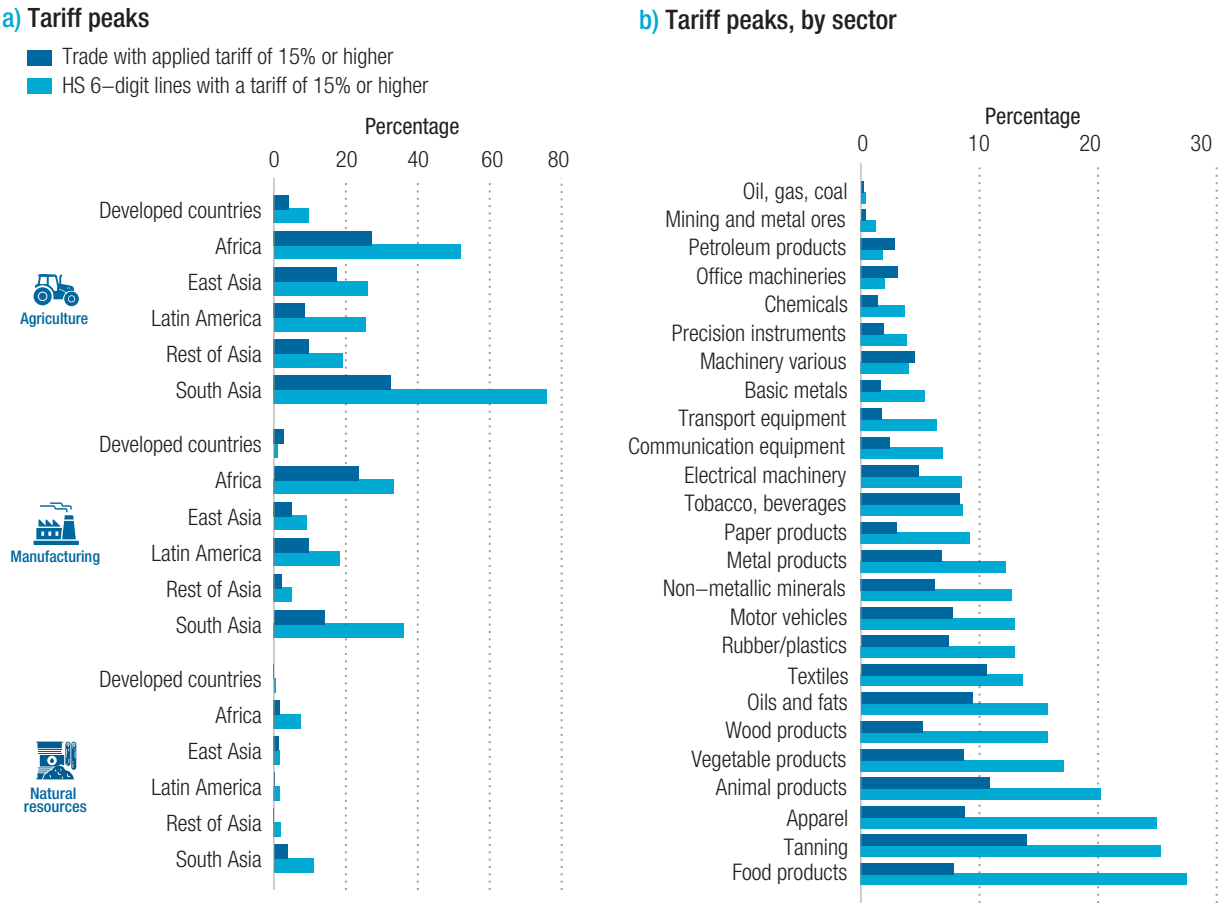


Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

Figures 4a and 4b depict the trade weighted average tariff for broad, as well as specific, categories of products. Tariff restrictions remain quite different across geographic regions and economic sectors. In general, international trade in agriculture is taxed at a much higher rate than trade in manufacturing and natural resources. Even within agriculture, tariffs vary greatly across geographic regions. African, South Asian and East Asian countries tend to apply relatively high tariffs in agriculture, while such tariffs are on average much lower in Latin American and developed countries. Manufacturing tariffs remain high only in the South Asian and in the Africa regions (about 8 per cent on average). Average tariffs vary greatly across product sectors, ranging from about 8 per cent for vegetable products and tobacco, beverages to almost zero for fuels and metal ores. Even considering all concessions and preferential schemes, international trade is subject to high tariffs not only in relation to agricultural products but also in the case of manufacturing products of importance for developing countries such as textiles and apparel (almost 6 per cent).

Amid generally low tariffs, there are a significant number of products where tariffs are relatively high. Tariff peaks are part of the tariff structures of many developing and developed countries. Tariff peaks tend to be concentrated in products of interest to low-income countries, such as agriculture as well as apparel, textiles and tanning.

Figure 5
Tariff peaks, by region, broad category and sector (2023)

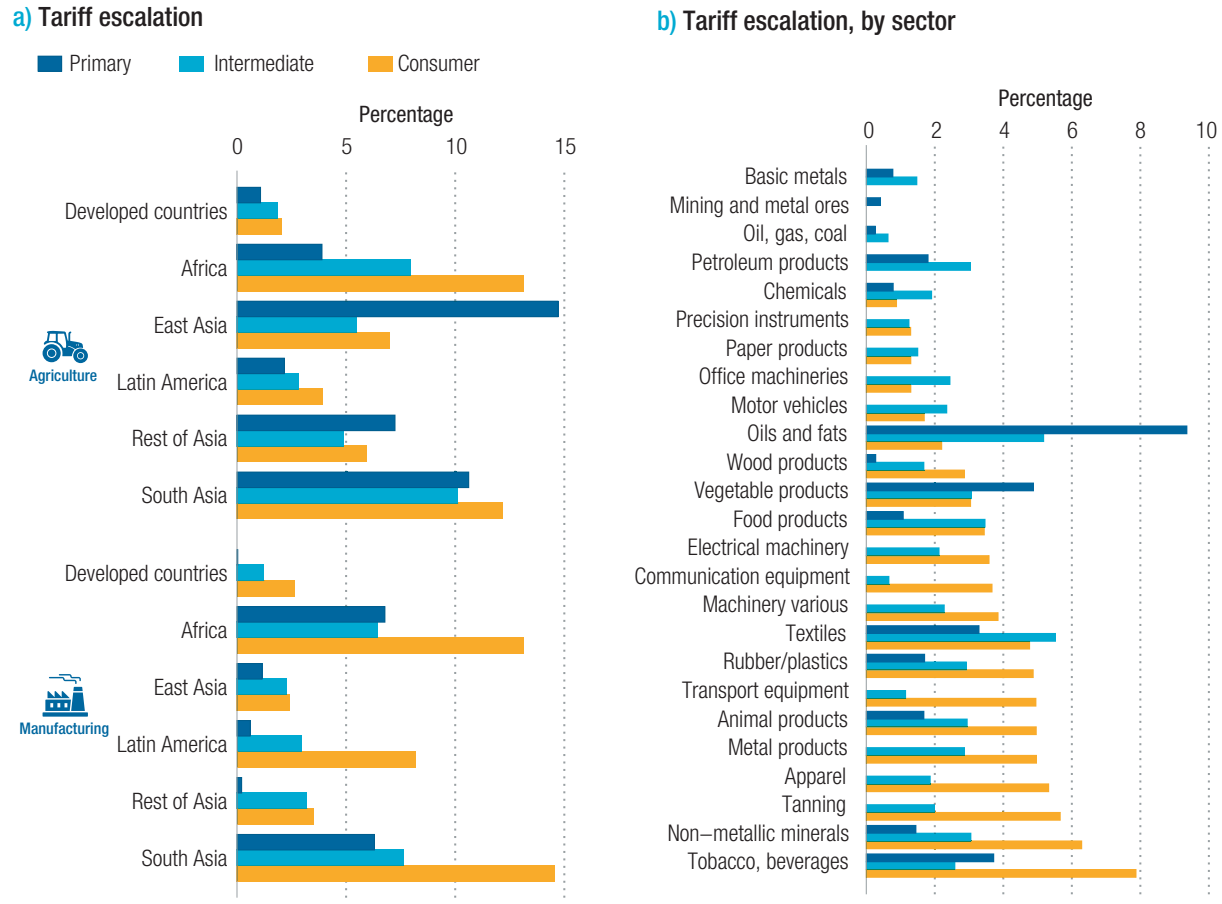


Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

In view of generally low tariffs, and even when all concessions such as unilateral and reciprocal preferential schemes are considered, there remain a significant number of products for which tariffs are relatively high. These high tariffs (at or above 15 per cent) are generally referred to as tariff peaks and are usually levied on sensitive products. Tariff peaks appear in the tariff structure of many developing countries, but with different patterns. For example, tariff peaks are a large part of the tariff structure of agricultural products of developing countries in South Asia and Africa (Figure 5a). Tariff peaks tend to be less prevalent in manufacturing, and less so in natural resources sectors. Tariff peaks tend to be concentrated in some of the products of interest to low-income countries, such as the agricultural sectors, but also apparel, textiles and tanning. For example, about 8 per cent of international trade in food products is subject to tariffs higher than 15 per cent, with almost 30 per cent of the HS 6-digit lines in this group higher than 15 per cent (Figure 5b). Similarly, about 8 per cent of international trade in apparel is subject to a tariff of 15 per cent or more, with 25 per cent of HS 6 digits lines higher than 15 per cent.

Tariff escalation remains a feature of the tariff regimes of both developed and developing countries. It is more pervasive in manufacturing products than in agriculture. Tariff escalation is prevalent in many sectors, including those of importance (e.g., apparel) to developing countries. Still for some sectors tariffs show a de-escalation or similar level of tariffs across processing stages (e.g. petroleum products, textiles, food products).

Figure 6
Tariff escalation by region, broad category and sector (2023)



Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

Tariff escalation – the practice of imposing higher tariffs on consumer (finished) products than on intermediates and raw materials – is present in the tariff structure of many countries. This practice favours processing industries closer to consumers, while discouraging the undertaking of processing activities in countries where raw materials originate. Most developing and developed countries adopt escalating tariff structures, but to varying degrees. Overall tariff escalation is more pervasive in manufacturing products than in agriculture (Figure 6a). Indeed, the tariff structure for the Asian regions is not escalating in the agricultural sector. Tariff escalation is prevalent in most sectors, including those of importance to developing countries: apparel, animal products, tanning and many light manufacturing sectors, some notable exceptions are petroleum products and textiles where inputs generally face a higher tariff relative to finished products (Figure 6b).

The pattern of trade restrictiveness varies greatly among regional trade flows. Intraregional trade is generally subject to lower TTRI than interregional trade. Many South–South regional trade flows are still burdened by relatively high tariffs. Tariff restrictiveness have change little during the last 10 years, with some notable exceptions driven by changes in the composition of trade flows.

Table 1
Tariff restrictiveness, matrix by region (percentage), 2023

	Exporting region					
Importing region	**Developed countries**	**Africa**	**Latin America**	**East Asia**	**South Asia**	**Rest of Asia**
Developed countries	1.1 -0.9	0.6 0.1	0.9 0.0	3.3 1.1	2.4 -0.5	1.1 0.5
Africa	7.5 -1.2	2.7 -0.3	9.9 1.0	11.2 -1.0	8.7 0.9	6.0 0.9
Latin America	2.7 -1.3	2.8 1.2	2.0 0.4	7.4 -1.2	10.6 2.5	4.2 0.3
East Asia	4.2 -1.3	2.2 0.3	10.4 7.8	1.3 -1.2	3.7 1.1	1.5 -0.1
South Asia	9.7 0.3	6.7 0.2	14.9 6.8	8.5 0.0	6.8 0.8	4.3 -3.1
Rest of Asia	3.1 0.5	1.4 -0.2	4.7 -1.0	4.1 -0.6	3.4 0.4	2.3 0.7

Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.
Note: Changes between 2012 and 2023 are shown in a smaller font.

Table 1 represents a matrix of the average levels of tariff restrictiveness on trade flows between regions in 2023. Differences in the rates exhibited in the table arise from different patterns of both market access and trade composition. The effect of regional trade agreements is reflected in the relatively lower degree of restrictiveness on intraregional compared with interregional trade. Many South–South trade flows are still burdened by relatively high tariffs. For example, trade between Latin America and South Asia face an average tariff of about 15 per cent. Tariffs have remained relatively constant in regard to trade between regions. Small changes are largely due to shifting composition of trade flows (as opposed to an increase in tariffs on particular product lines).

The system of tariff preferences affects international competitiveness by providing various countries with different market access conditions. Because trade agreements are often regional, the system of preferences tends to favour regional trade over interregional trade. Still, the magnitude of the effect of preferences differs widely across regions. African countries enjoy the highest preferential margins in trading with regional partners.

Table 2
Relative preferential margins, matrix by region (percentage), 2023

	Exporting region					
Importing region	**Developed countries**	**Africa**	**Latin America**	**East Asia**	**South Asia**	**Rest of Asia**
Developed countries	0.5 0.2	0.2 0.0	1.5 1.3	-1.9 -1.2	0.0 0.9	0.1 0.0
Africa	0.9 1.1	4.6 0.8	-2.2 -0.7	-2.8 -0.8	-2.1 -0.9	0.1 -0.5
Latin America	0.8 0.9	-0.5 -0.2	2.9 -0.3	-1.8 0.2	-2.2 -0.4	-1.0 0.2
East Asia	-0.3 0.1	-0.1 -0.2	-1.5 -0.7	0.7 0.3	-0.1 0.0	0.1 0.1
South Asia	-0.5 0.0	0.0 0.2	-1.8 0.0	-0.4 0.1	2.2 1.2	0.2 0.4
Rest of Asia	0.2 0.0	0.4 -1.1	-0.6 0.4	-0.8 0.4	0.5 0.9	0.7 -0.7

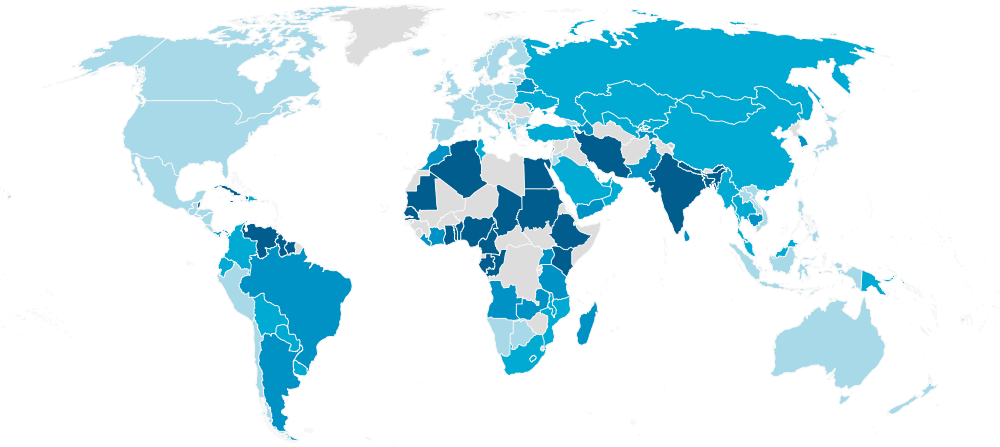
Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.
Note: Changes between 2012 and 2023 are shown in a smaller font.

Table 2 reports relative preferential margins (RPMs) calculated at the regional level for 2023 and their changes since 2012. RPMs provide a measure of the average preferential margin for a given country by taking into consideration any preference provided by its trading partners to foreign competitors. RPMs can be positive or negative, depending on the advantage or disadvantage a country has in terms of preferences with respect to other competing exporters. The RPM is exactly zero when there is no discrimination; it is largest for African countries, which enjoy about a 4.6 percentage point advantage on foreign competitors when trading within their region. The RPM is also large within Latin America (about 3 percentage points). On the other hand, the preferential systems provide only about half percentage points advantage to East Asian countries trading in their own region. With very few exceptions, interregional trade faces a negative RPM, suggesting that the preferential tariff structure negatively impacts non-regional exporters' competitiveness.

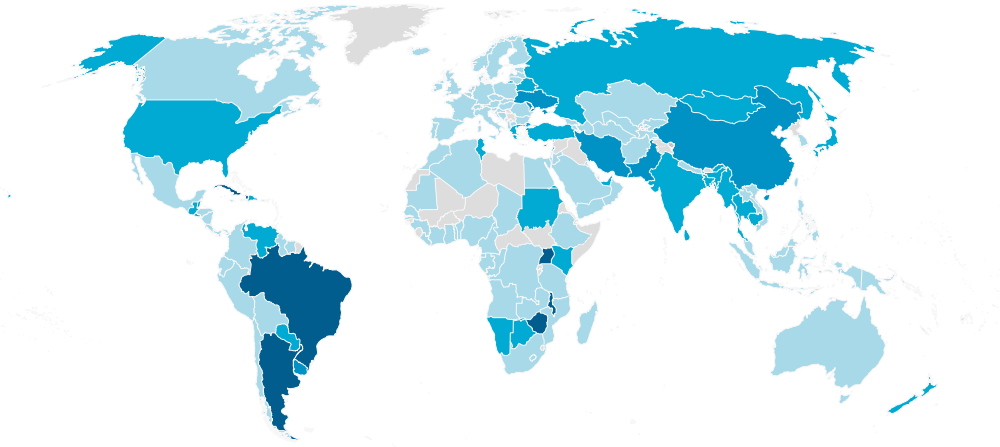
Import restrictiveness due to tariffs varies across developing economies, being generally higher for most Africa, South Asia, and Latin America countries, and low for most of East Asian economies. Many developing economies exports, especially of Latin America face relatively high tariffs.

Figure 7
Import restrictiveness

a. Import restrictiveness (2023)



b. Export restrictiveness (2023)



Very restrictive (more than 7.5%)
Restrictive 5% to 7.5%)
Average (2.5% to 5%)
Almost free (less than 2.5%)
No data

Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

Figure 7a illustrates the average level of tariff restrictions imposed on imports (as measured by the TTRI). The level of tariffs differs substantially across economies, and even within the same region. Figure 7b reports the overall level of tariff restrictions faced by exporters (as measured by the MA-TTRI). Latin American countries face high tariffs because a large share of their exports consists of agricultural products.

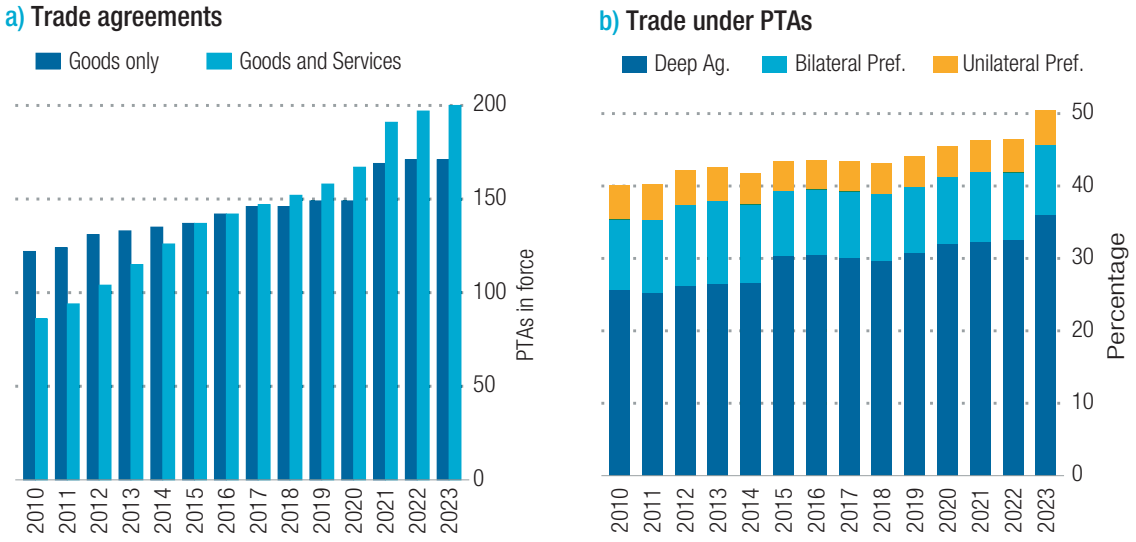
2

Trade agreements

2. Trade agreements

The international trading system is regulated by an increasing number of preferential trade agreements (PTAs). Most of the recent trade agreements address not only goods but also services, and deal with rules beyond reciprocal tariff concessions. The percentage of trade within PTAs has continued to increase. The significant increase of trade agreements in 2021 is largely due to new agreements signed by the United Kingdom as it left the European Union. The percentage of trade occurring under deep agreements has steadily increased, particularly in recent years. As of 2023, more than half of global trade took place between countries that had some form of trade agreement.

Figure 8
Trade agreements



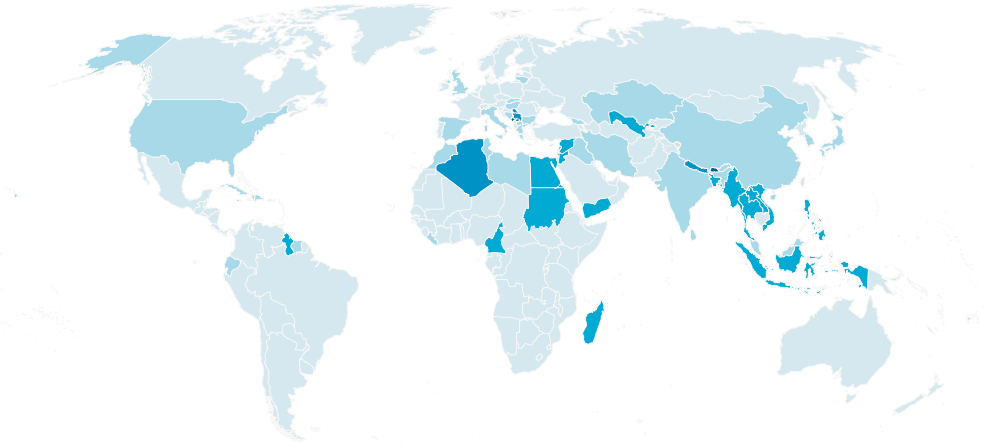
Source: UNCTAD secretariat calculations based on WTO RTAIS data and COMTRADE data.

Figure 8a illustrates the number of PTAs that have been in force in each year since 2010. The number of PTAs in force rise from about 210 in 2010 to about 370 in 2023. More than half of all trade agreements in force go beyond tariff concessions, to cover services and behind-the-border measures. After 2015 the upward trend has been largely driven by new trade agreements covering both goods and services. The significant rise in the number of trade agreements for 2021 is largely statistical, and due to the new agreements signed by the United Kingdom to substitute for its pre-existing agreements as a member of the European Union. In 2023 more than half of global trade took place between countries that had some form of trade agreements, or preferential access (Figure 8b). Overall, and without considering trade within the European Union, about one third of world trade takes place under deep trade agreements (i.e., those with trade rules going beyond traditional tariffs and existing WTO agreements, to cover deeper behind-the-border measures).

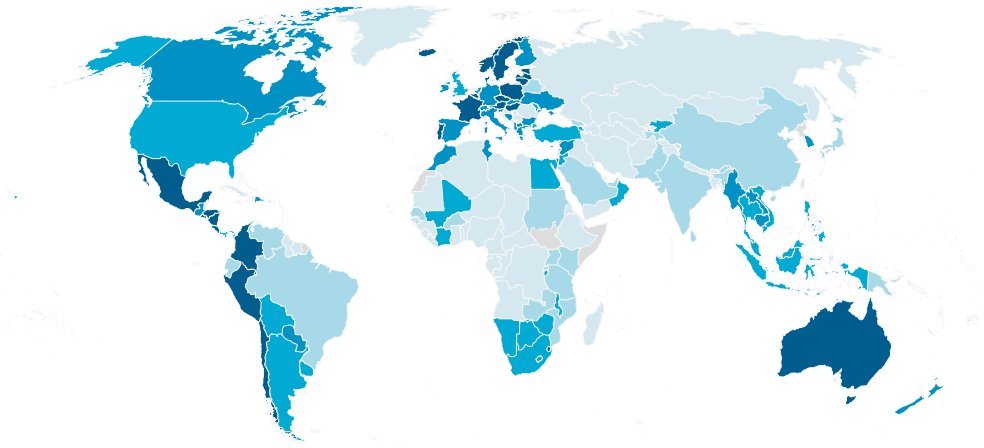
For the large majority economies, trade occurs under deeper agreements covering more than tariff preferences. Shallow agreements cover only a smaller per cent of trade, which is substantial only for a limited number of economies, largely in the East Asian region. Most of the trade of African countries occurs outside bilateral or multilateral trade agreements, but for the Southern African region.

Figure 9
Importance of preferential trade agreements

a. Importance of shallow PTAs, as measured by percentage of trade (2023)



b. Importance of deep PTAs, as measured by percentage of trade (2023)



Extremely important (more than 75%)
Very important (50% to 75%)
Important (25% to 50%)
Relatively important (10% to 25%)
Not important (less than 10%)
No data

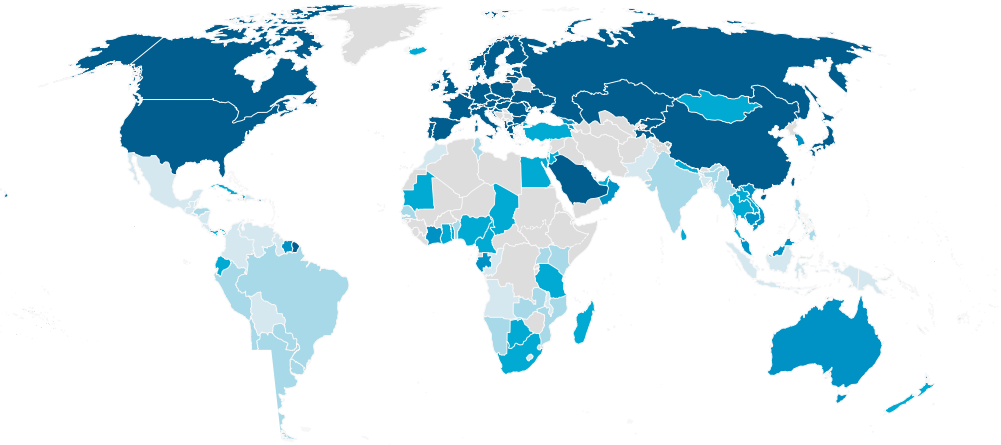
Source: UNCTAD secretariat calculations based on WTO RTAIS and COMTRADE data.

A large share of international trade of many developed economies occurs under some form of PTA, and in many cases under trade rules going beyond traditional reciprocal market access concessions. Figure 9a shows the percentage of trade occurring under shallow agreements (i.e., those relating mainly to tariff concessions). Figure 9b shows the percentage of trade occurring under deep agreements (i.e., those with trade rules going beyond traditional tariffs and existing WTO agreements, to cover deeper behind-the-border measures).

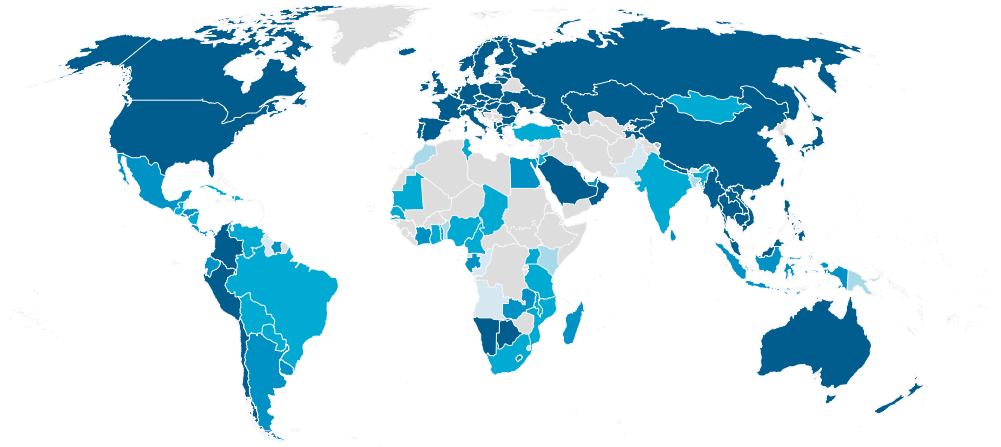
WTO bound tariff and bilateral trade agreements limit the policy space of economies in raising their tariffs. Developed economies tend to have very limited policy space in raising their tariffs, as most tariff lines are bound by WTO obligations. Once PTAs are accounted for, a substantial amount of trade is locked under preferential tariffs, which in turn means that the amount of "true" tariff water.

Figure 10
Policy space: Multilateral constraints

a. Tariff water 2023



b. True tariff water (2023)



Source: UNCTAD secretariat calculations based on COMTRADE data and UNCTAD TRAINS data.

Figure 10a portrays the average tariff water (trade weighed) calculated as the difference between WTO bound tariffs and applied MFN tariffs. Figure 10b portrays the average tariff water calculated as the difference between bound and applied tariffs, considering the implicit bindings imposed by both WTO and PTA commitments. The difference between the tariff that an economy applies at the border and the economy's commitments to other WTO members is referred to as "tariff water", or "binding overhang". In principle, tariff water provides the policy space for the economy to increase tariffs while remaining within WTO commitments.

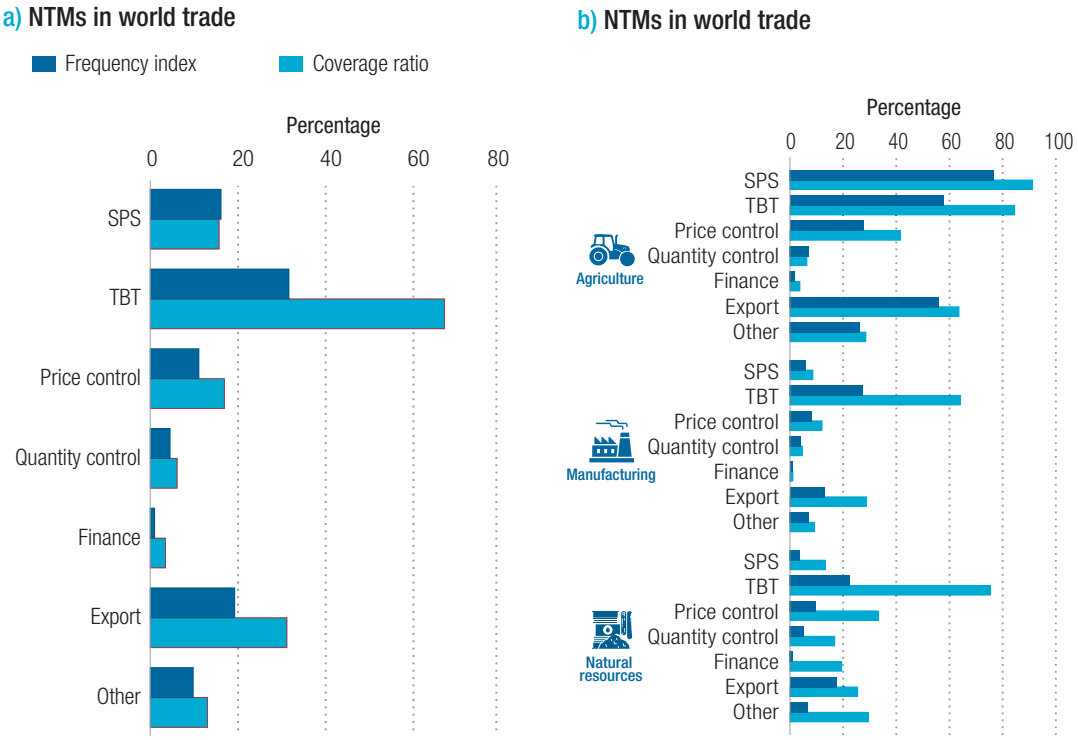
3

Non-tariff measures

3. Non-tariff measures

Non-tariff measures include a diverse array of policy measures serving different purposes. Among the various types of non-tariff measures, technical barriers are the most pervasive, as most international trade is regulated by some form of technical barrier. Quantity and price control measures cover a much smaller, but still significant, share of world trade. Export measures cover a significant part of world trade.

Figure 11
Prevalence of non-tariff measures, by type and broad category (2023)

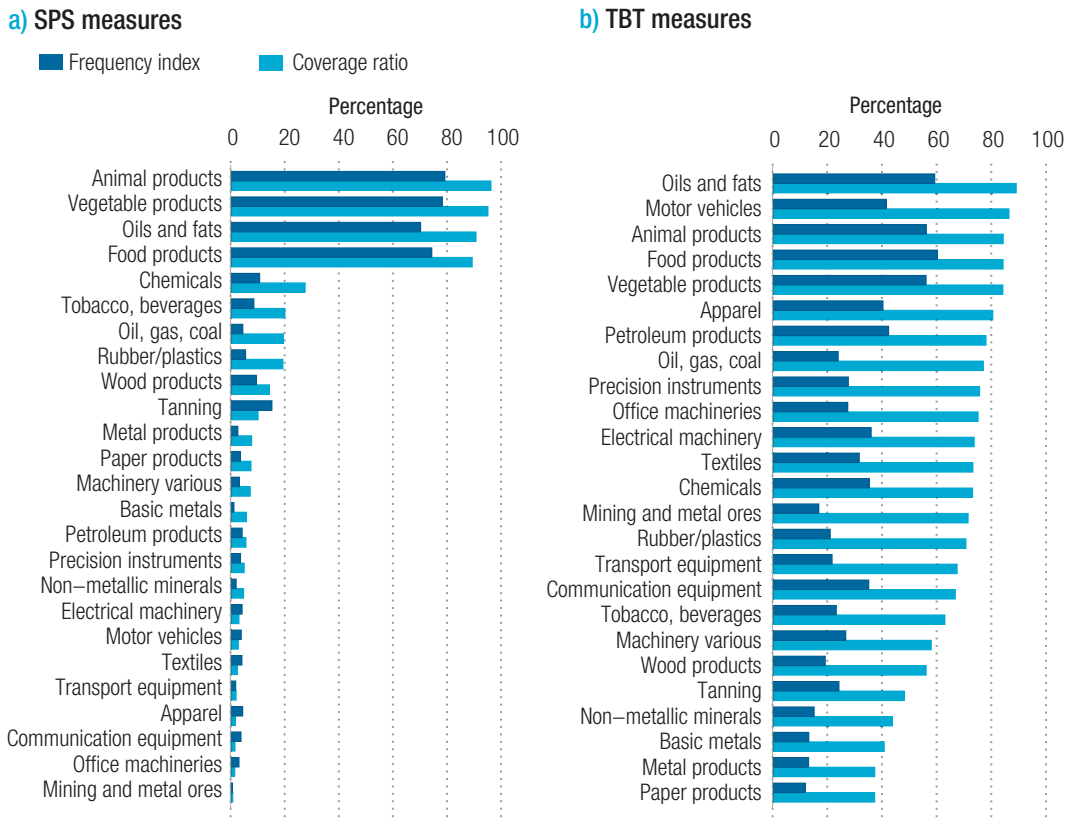


Source: UNCTAD secretariat calculations based on UNCTAD TRAINS data.

Figure 11a illustrates the distribution of NTMs across broad categories. For each category, both the frequency index (i.e., the percentage of HS 6-digit lines covered) and coverage ratio (i.e., the percentage of trade affected) are reported. International trade is highly regulated through the imposition of technical barriers to Trade (TBT) with more than 30 per cent of product lines and almost 70 per cent of world trade affected. Price control measures affect about 15 per cent of world trade. SPS affect almost 20 per cent of world trade. Export measures are also frequently applied to international trade, still their use is largely related to agriculture. Coverage of NTMs by broad category (Figure 11b), shows that agriculture is the most affected, with most of world agricultural trade subject to forms of SPS and TBT.

The prevalence of various technical non-tariff measures differs by economic sectors. Sectors related to agriculture tend to be regulated by SPS and export measures. TBT are used to regulate most economic sectors.

Figure 12
Non-tariff measures: SPS measures and TBT measures (2023)

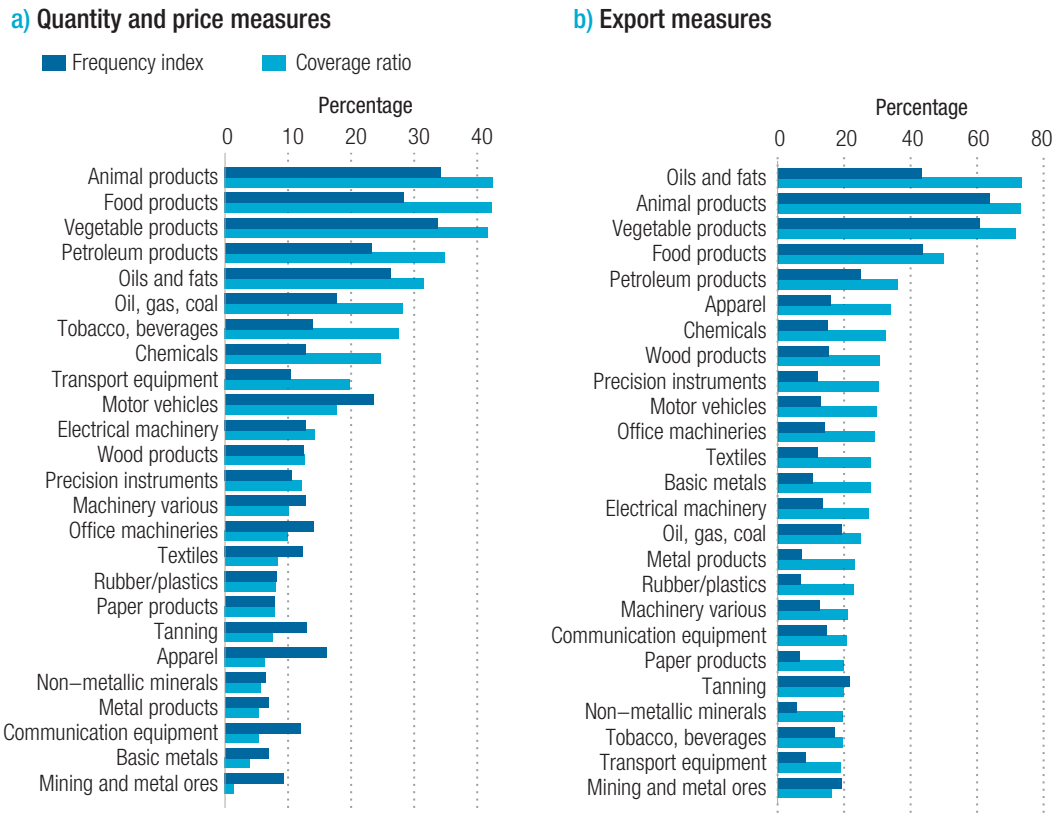


Source: UNCTAD secretariat calculations based on UNCTAD TRAINS data.

SPS measures are typically applied to agricultural products, and to other products that may have inherent health hazards due to contaminants (Figure 12a). TBT are widely used to regulate international trade in most sectors and concern the vast majority of world trade flows (Figure 12b).

Non-technical non-tariff measures such as quantity and price control measures continue to be used in many sectors, especially agricultural ones. Same sectoral patterns are found in relation to export measures.

Figure 13
Non-tariff measures: Quantity and price measures and export measures (2023)



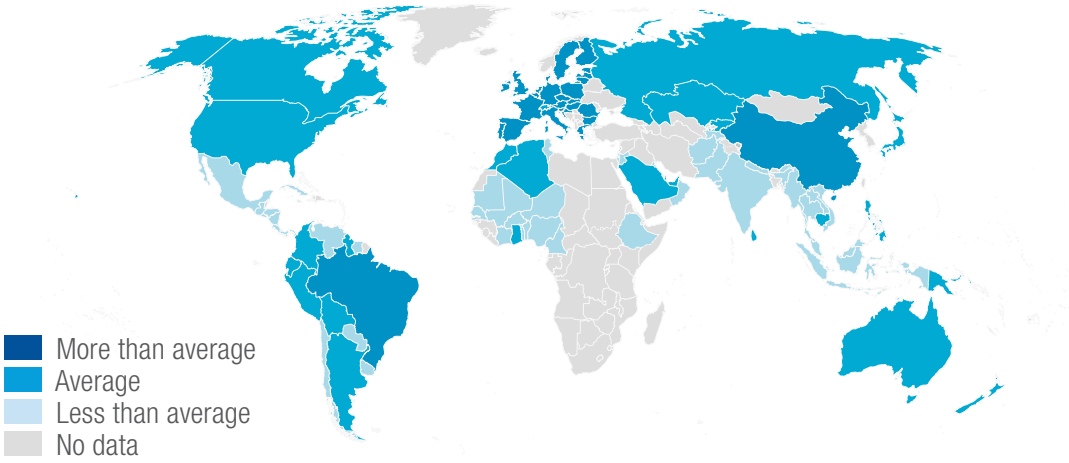
Source: UNCTAD secretariat calculations based on UNCTAD TRAINS data.

Quantity and price control measures are widely applied to many sectors. They cover a large share of world trade in regard to agricultural related products (Figure 13a). Finally, agricultural sectors as well as petroleum products and chemicals are generally affected by export measures (Figure 13b).

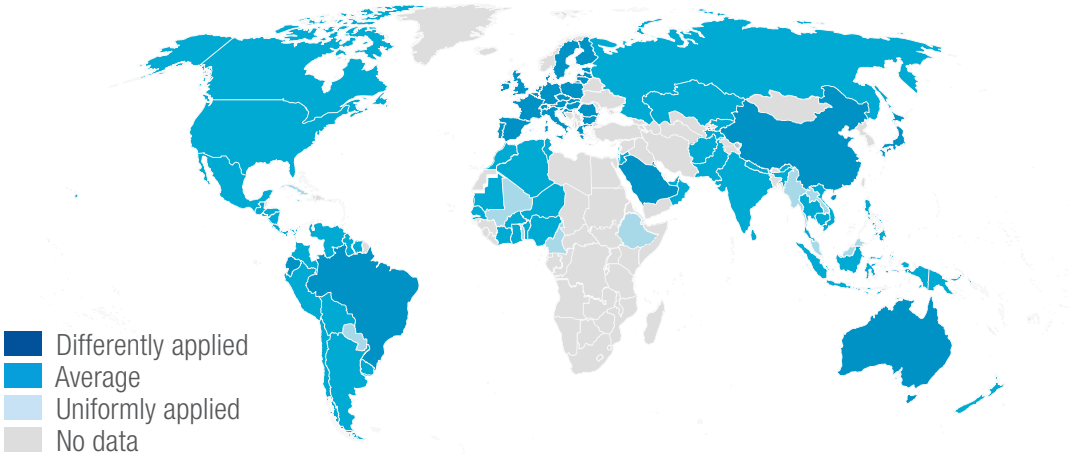
The use of technical measures tends to be more pervasive in the European Union, China, Brazil and Australia and less so in many low-income economies. Developed economies' use of technical non-tariff measures tends to be more targeted to specific products. This applies also to China and Brazil. Other developing economies tend to use technical non-tariff measures in a more homogenous manner.

Figure 14
Technical non-tariff measures, by economy

a. Technical non-tariff measures, relative intensity across economies (2023)



b. Technical non-tariff measures, intensity across products (2023)



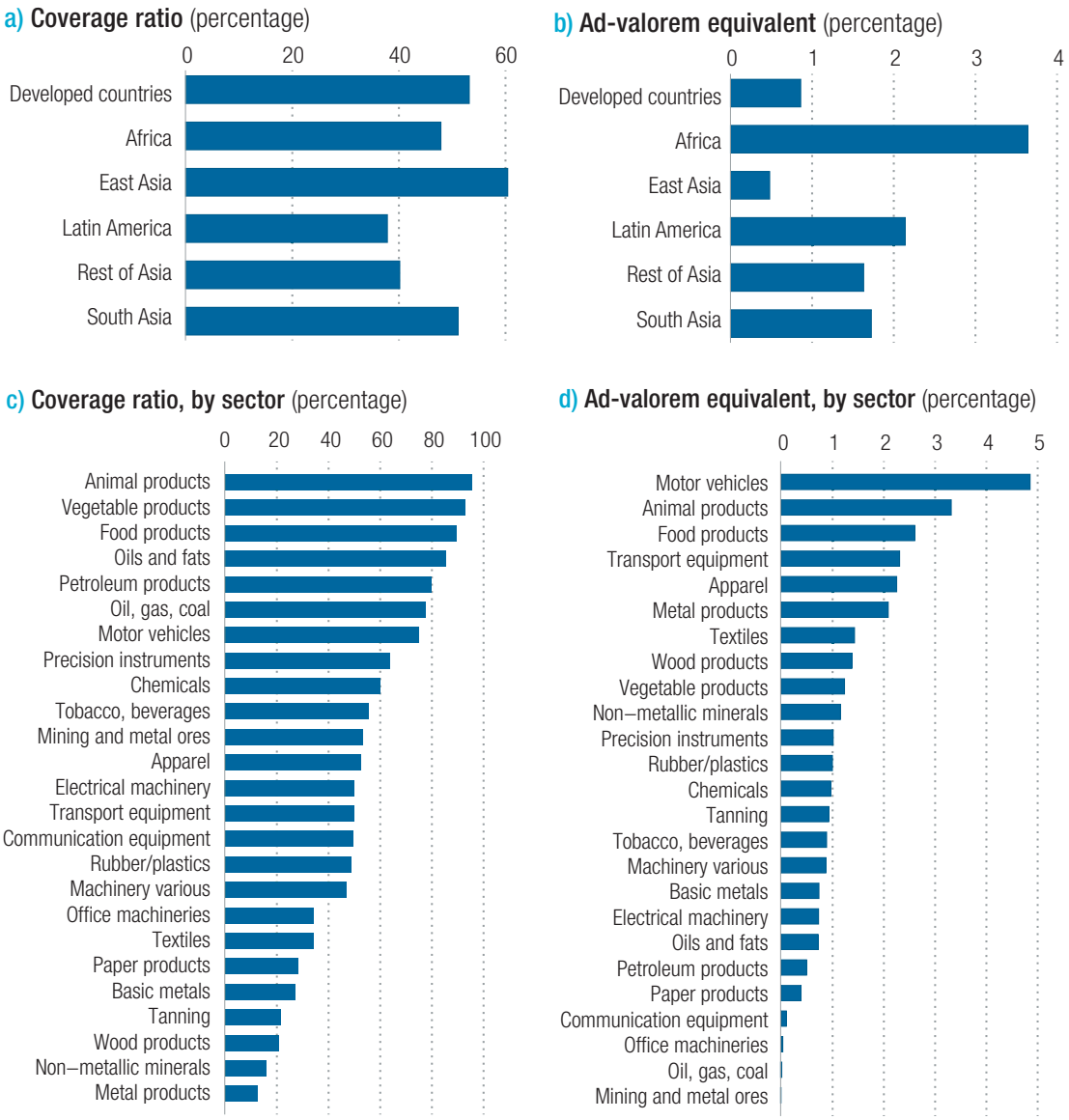
Source: UNCTAD secretariat calculations based on UNCTAD TRAINS data.

Figure 14a reports the difference between the number of non-technical measures applied by a given economy in each product and the average number of measures applied to that product. Then, economy averages are computed by weighing each product by its importance in world trade.

Figure 14b reports the standard deviation of product level differences within each economy. This illustrates whether non-technical measures tend to be uniformly applied across products or are applied with different intensity across products.

Border non-tariff measures, such as inspection and certification requirements, quarantines, quotas and other border formalities are widespread. They cover more than 50 per cent of world trade. High coverage does not imply high costs. The costs of such measures vary both across countries and across sectors. Costs tend to be higher in Africa and in Latin America. Across sectors, higher costs are estimated for the automotive industry and for agricultural sectors.

Figure 15
Border measures: coverage and ad-valorem equivalents (2023)



Source: UNCTAD secretariat calculations based on UNCTAD TRAINS data.

Border measures include documentation requirements such as certification, inspection, and quarantine, as well as quotas and any other measures that are expected to generate costs at entry. While the use of such measures is not very difference across regions (Figure 15a), the cost they generate is different (Figure 15b). They vary across sectors and are typically applied relatively more to agricultural products (Figure 15c). Their compliance costs (ad-valorem equivalents) vary across sectors (Figure 15d).

4

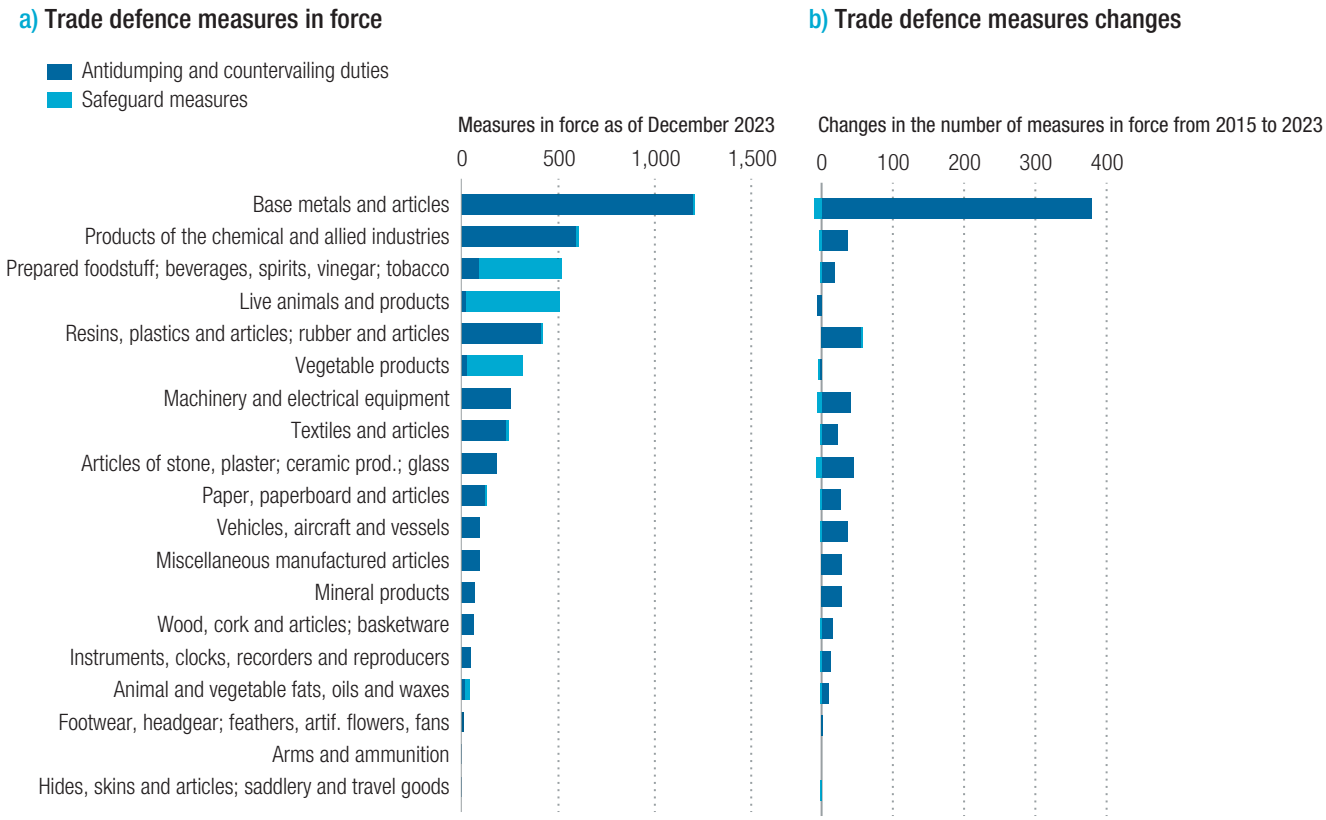
Trade defence measures


Budget

4. Trade defence measures

In 2023 there were more than 2200 antidumping measures and countervailing duties in force, and about 700 safeguards and special safeguards measures in place. Most of the antidumping measures were in base metals and chemicals. Safeguards measures are concentrated in the agri-food sectors, where they cover many HS lines. Since 2015 the number of antidumping measures has increased, while the safeguards have slightly declined.

Figure 16
Trade defence measures (2023)



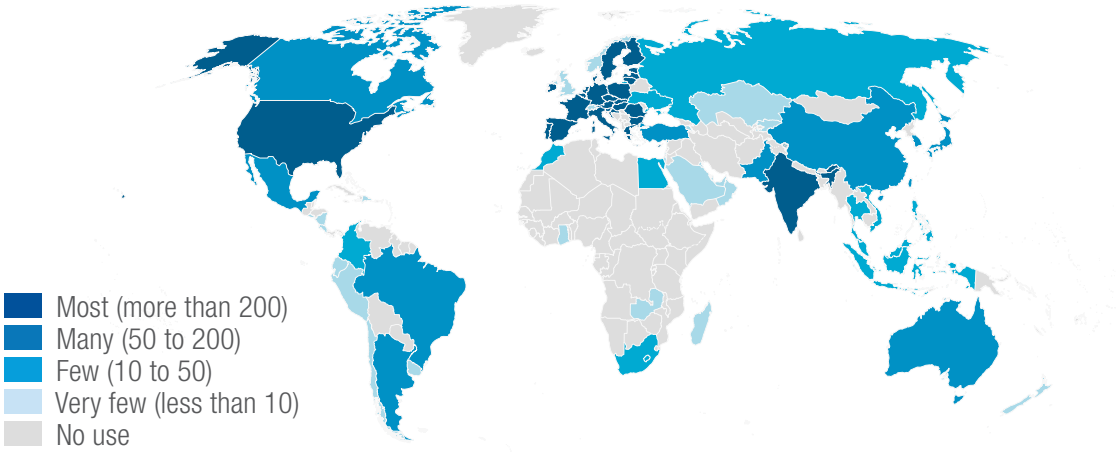
Source: UNCTAD secretariat calculations based on WTO I-TIP data.

Trade defence measures in the form of antidumping, countervailing duties, safeguards and special agricultural safeguards allow countries to actively respond to import-related concerns within an established WTO mechanism. A single trade defence measure can affect different sectors. In 2023 there were about 2200 trade defence measures, mostly in the form of antidumping measures. The use of safeguards measures is more limited (about 700 measures are in force, mostly special safeguards), but they tend to cover a large number of HS lines, especially in the agri-food sector. A very large share of measures relates to base metals (largely steel products), and chemicals and plastic products. The rest relates to other manufacturing products (Figure 16a). While measures should terminate within five years, trade defence measures often remain in effect longer. Since 2015 the number of measures in force has increased. Most of the new measures were related to products in base metals. The number of products covered by trade defence measures in other sectors increased to a smaller extent (Figure 16b).

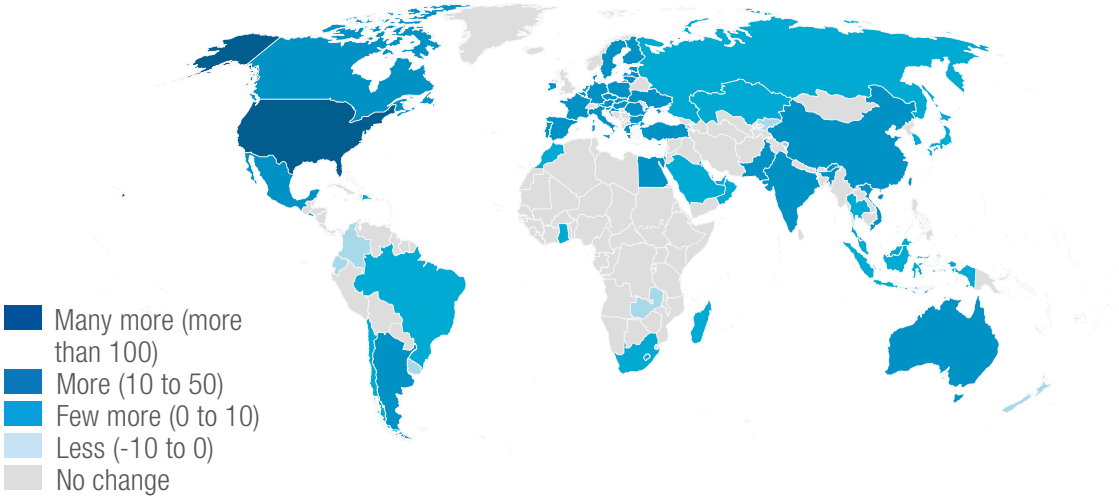
The use of trade defence mechanisms vary greatly across economies. As 2023 most of trade defence measures in force have been initiated by major economies. The economies with most measures in force were United States, India and the European Union. Since 2015, the United States was the economy for which the number of trade defence measures increased the most.

Figure 17
Trade defence measures, by economy

a. Trade defence measure in force, by initiating economy (2023)



b. Trade defence measures in force, by initiating economy (change between 2015 and 2023)



Source: UNCTAD secretariat calculations based on WTO I-TIP data.

The users of trade defence measures are many of the major economies, but also India (Figure 17a). The use of trade defence measure is largely absent in Africa. Since 2015, the measures in force decreased only for a very few economies (Figure 17b).

unctad.org

Printed at United Nations, Geneva
2508076 **(E)** – May 2025 – 260

UNCTAD/DITC/TAB/2025/1

United Nations publication
Sales No. E.25.II.D.16

ISBN 978-92-1-003508-8