



Introduction

Trade of fish and fisheries products, including fish meal products, are influenced by both traditional trade policies, like tariffs, and non-tariff measures (NTMs). NTMs comprise several categories of measures such as sanitary and phytosanitary (SPS), technical barriers to trade (TBT) as well as non-technical measures. UNCTAD (2013) provides an international classification of NTMs; see Table 1 below.

NTMs are governmental measures that determine the conditions under which trade takes place. They have become increasingly important as governments reacted to consumers' concerns about catching and production practises. Consumers are for example concerned about the application of feed and drugs that have been found as residues in fish and related products or the environmental effect of intensive aquaculture production or fishing (FAO, 2014). In some cases, NTMs have also been used as protectionist measures disguised by health, safety or other public purposes.

The goal of our analysis is to identify which NTMs are used for which fishery products by trade partners. In this poster, we present first results from the EU perspective. Although not being presented for specific species, the results are interesting for those trading fish and fisheries products since they provide insights about how much markets are regulated by NTMs.

Method

We calculate the indicators, as listed below, by using the available NTM data information in a systematic way. The indicators are constructed according to the three dimensions of NTMs: measure, product and partner countries. The indicators point out the prevalence of different categories of NTMs as well as the potential trade affected.

Data

The NTM data comes from the NTM map, using the TRAINS database (Guimbar, 2015; Gourdon, 2014). The data constitutes an inventory of whether a measure according to the international classification of NTMs is part of a country's body of rules and regulations and thus described in official legislative texts of the respective countries. Referring to the date of implementation of the regulation, we consider the entire stock of NTMs in place in 2014. This means that measures that are temporarily used for a certain time in the past are excluded in our snapshot of 2014. The NTM data is collected for 44 countries; some important countries for fish trade, e.g. Norway and Japan, are not covered.

The trade data is the standard UNCTAD Comtrade database for 2014. We use the SITC classification, which we aggregate to groups of different categories of fish, according to the degree of preparation.

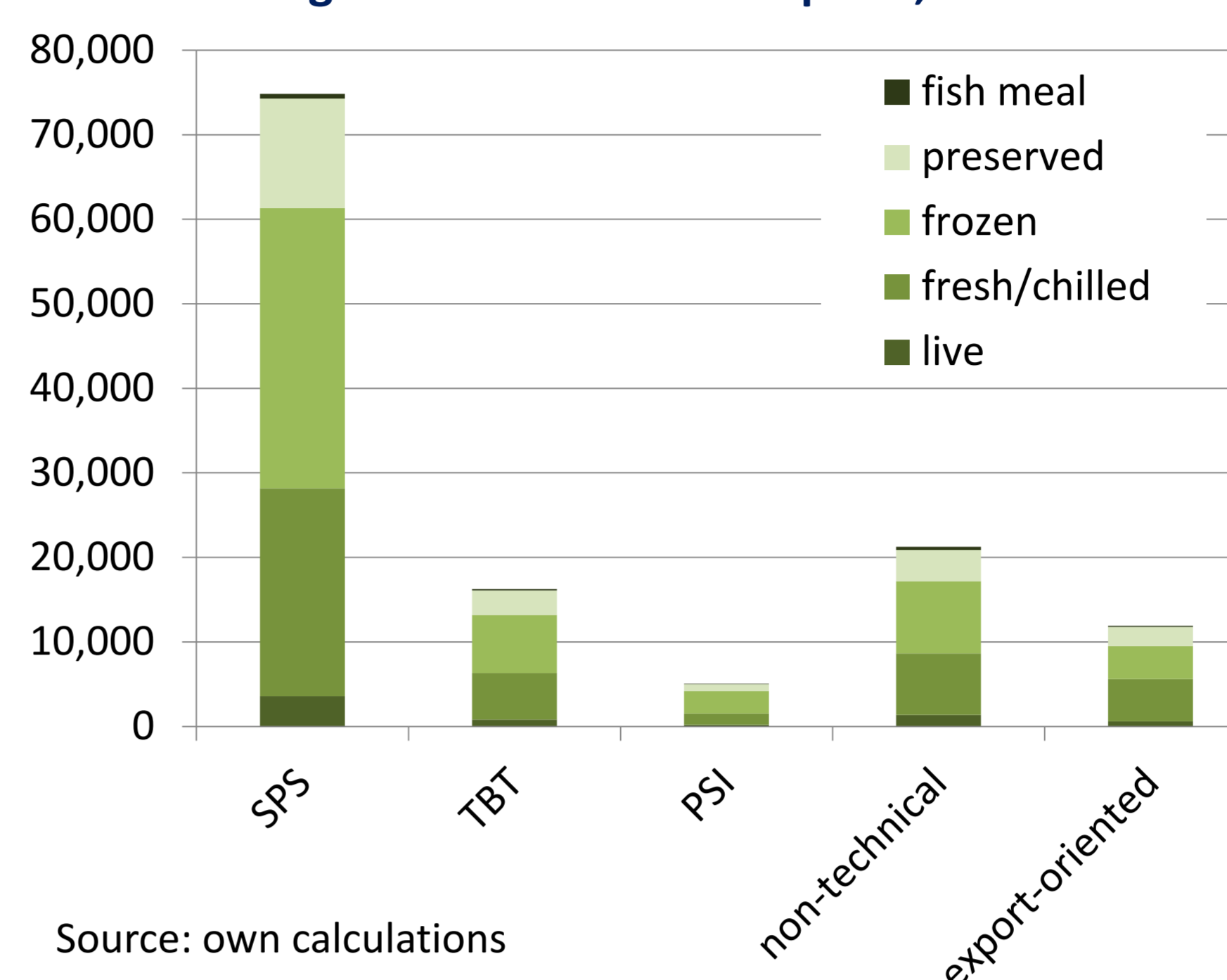
Table 1: International classification of NTMs

Technical NTMs	Chapter A Chapter B Chapter C	Sanitary and Phytosanitary (SPS) measures Technical Barriers to Trade (TBT) measures Pre-shipment inspection (PSI) and other formalities
Non-technical NTMs	Chapter D Chapter E Chapter F Chapter G Chapter H Chapter I Chapter J Chapter K Chapter L Chapter M Chapter N Chapter O	Contingent Trade-protective measures Non-automatic licensing, quotas, quantity control Price control: charges, taxes and other para-tariffs Finance measures Anti-competitive measures Trade-related investment measures Distribution restrictions, sales/services Restrictions on post-sales services Subsidies (excluding export subsidies) Government procurement restrictions Intellectually property rights Rules of origin
Export-related	Chapter P	Measures on exports

Source: UNCTAD (2013)

Results

Figure 1: NTMs on EU exports, 2014

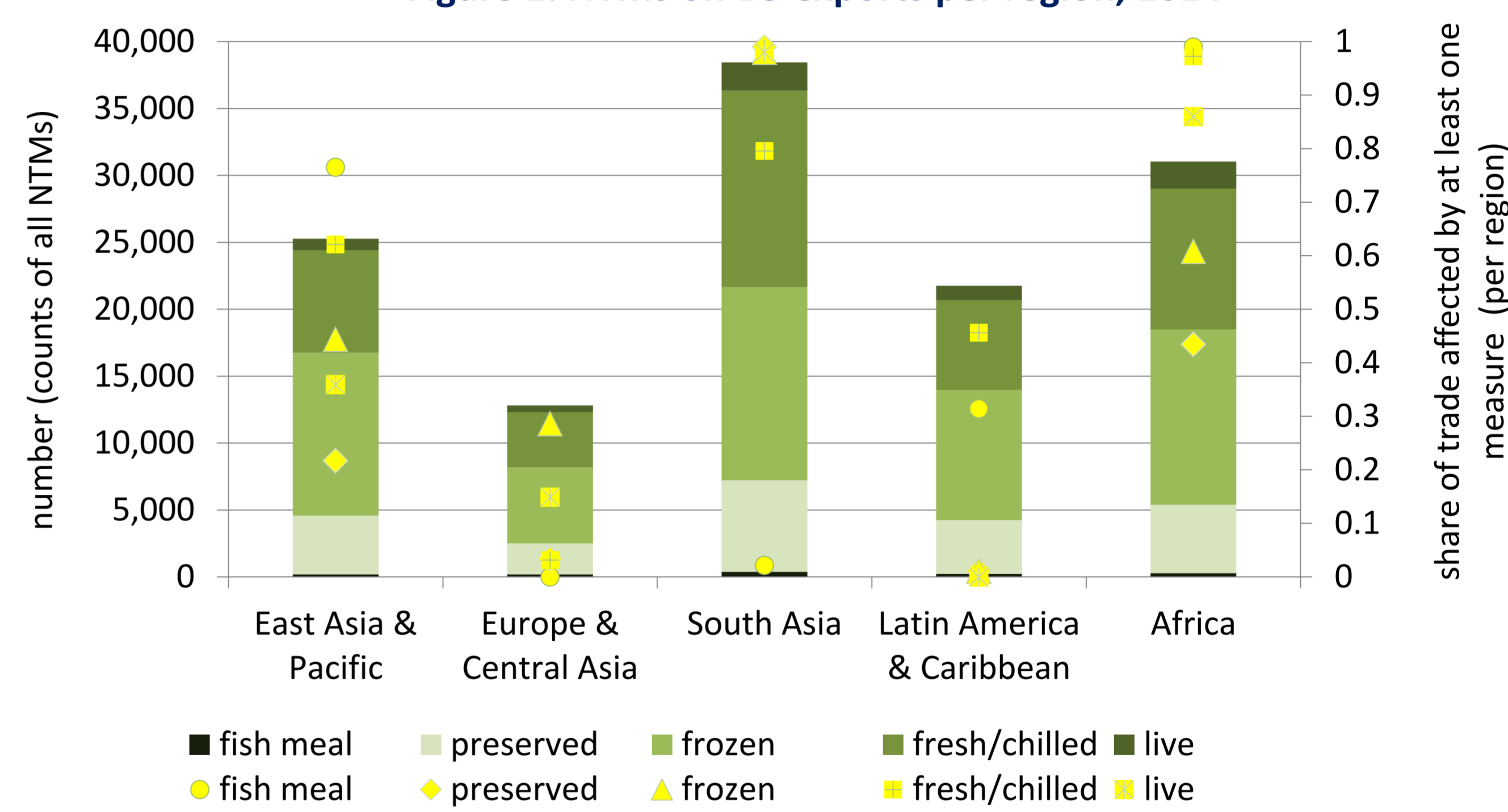


Source: own calculations

Figure 1 presents the number of NTMs on EU exports of fisheries products (perspective of EU exporters), mainly SPS but also quantitative restrictions and especially for frozen and fresh or chilled products. Note that the counts of NTMs per product and country are simply added, which explains the very large number. For imports into the EU, the number of NTMs is less, mainly SPS and TBT.

Per region of export destination, the total counts of NTMs are presented in Figure 2. The share of EU exports subject to NTMs are high especially for South Asia and Africa; for Europe/Central Asia EU exports seem to be affected less.

Figure 2: NTMs on EU exports per region, 2014



Source: own calculations

Conclusions

For fish/fisheries, NTMs are important "behind the border" measures determining EU export opportunities and market access. EU exports are subject to many NTMs, as the considerable number of NTM counts indicate. Most NTM counts are reported for SPS measures. EU exports to South Asia and Africa seem to be most affected, with less NTMs for the region of Europe and Central Asia. Overall, most NTMs are reported for fresh and frozen products, which makes these products more regulated than others.

The analysis presented constitutes the first step of looking into the issues of NTMs for EU fish/fisheries. Next to quantifying the actual trade effect of NTMs for EU fish/fisheries, we plan to obtain first hand expert information about which NTMs matter and their effect in the EU sector.

- **SPS measures:** prohibitions of substances, maximum residue levels (MRLs), animal /plant health measures for preventing the dissemination of diseases/pests;
- **TBT measures:** labelling, technical specifications and quality requirements as well as environmental standards. For both SPS and TBT, conformity assessment, testing and inspection as well as certification are included.
- **PSI measures** include pre-listing of firms to be eligible for exporting or importing.

Note: The potential obstacles for importers or exporters due to NTMs are not reported in the NTM TRAINS database, which collects neither information on the possible difficulties to implement measure or to comply with them nor complaints like a complaint register. The stringency of measures is also not evaluated.

References

FAO (2014): The state of the world fisheries and aquaculture. Opportunities and challenges. Rome; Gourdon, J. (2014): CEPII NTM-MAP: A Tool for Assessing the Economic Impact of Non-Tariff Measures; CEPII Working Paper 2014-24; Guimbar, H. (2015): Information on the update of NTM-Map. CEPII note; UNCTAD (2013): Classification of NTMs. February 2012 Version, Geneva;

Poster presented at the Conference "Economic advice in fisheries management", February 4-5th, 2016 in Malta. Special thanks to Barbara van der Hout and Diti Oudendag for their support in the data management.

This poster was prepared within Work Package W1 of the SUCCESS project. EU Research and Innovation Programme Horizon 2020, Project acronym: SUCCESS, Project full title: "Strategic Use of Competitiveness towards Consolidating the Economic Sustainability of the European Seafood sector", Grant agreement no: 635188.