ICTSD Project on Special Products and a Special Safeguard Mechanism

South–South Trade in Special Products

By Christopher Stevens, Jane Kennan and Mareike Meyn
Overseas Development Institute

ICTSD
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International Environment House 2
7 Chemin de Balexert, 1219 Geneva, Switzerland
Tel: +41 22 917 8492 Fax: +41 22 917 8093
E-mail: ictsd@ictsd.ch Internet: www.ictsd.org

Chief Executive: Ricardo Meléndez-Ortiz
Programmes Director: Christophe Bellmann
Programme Team: Jonathan Hepburn, Constantine Bartel and Marie Chamay

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ICTSD welcomes feedback and comments on this document. These can be sent to Jonathan Hepburn at jhepburn@ictsd.ch.

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ABBREVIATIONS AND ACRONYMS

COMTRADE	United Nations Community Trade Statistics Database
ICTSD	International Centre for Trade and Sustainable Development
LDC	Least Developed Country
MFN	Most Favoured Nation
SP	Special Products
SSM	Special Safeguard Mechanism
TRAINS	TRade Analysis and INformation System, UNCTAD
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
WTO	World Trade Organization

FOREWORD

The world is producing more food than ever before. Yet, after decades of declining under-nourishment rates, the number of hungry people is on the increase again in several countries. Environmental degradation associated with intensive agricultural production – such as soil erosion, water pollution and biodiversity loss – remains at an unacceptable level. The major challenge today is, therefore, not so much to increase food production, but rather to ensure that agricultural production generates sufficient income for the poor, promotes equity and contributes to the sustainable use of natural resources.

The reform of the global agriculture trading system currently being negotiated in the context of the Doha Round – with the objective of establishing a “fair and market-oriented trading system” – will play a major role in this process. Over the last fifteen years, world agriculture trade has grown almost twice as fast as production. However, highly subsidised agricultural production and exports from member countries of the Organization of Economic Co-operation and Development (OECD) as well as the anti-competitive behaviour of trading firms are depressing world prices, thereby affecting development prospects in the South. Tariff peaks, tariff escalation and technical barriers to trade (such as sanitary and phyto-sanitary requirements) also limit market access and, thus, the potential gains from trade which developing countries are expecting.

While it is widely recognised that developing countries as a whole will benefit from freer agricultural trade, some fear that most of the new trading opportunities the Doha Round is set to bring would be captured by a few middle-income countries and large food exporters. Lower income countries would gain only little and might even lose from further liberalisation. Many still have large rural populations composed of small and resource-poor farmers with limited access to infrastructure and few employment alternatives. Thus, these countries are concerned that domestic rural populations employed in import-competing sectors might be negatively affected by further trade liberalisation, becoming increasingly vulnerable to market instability and import surges as tariff barriers are removed.

A large number of countries still depend on the export of a few commodities, the prices of which show high volatility and long-term decline. Commodity dependence, the expected erosion of preferences that some countries depend on for their export earnings, as well as increased food import prices due to the elimination of export subsidies, will make it difficult for these countries to guarantee their growing populations the food they need. In this context, safeguarding domestic food production capacity has become an essential component of food security strategies in an increasing number of countries.

These concerns were first raised at the World Trade Organization (WTO) in the context of the “Development Box” debate, in which developing countries tabled a set of proposals aiming at providing flexibility for countries to enhance domestic food production and adopt measures to protect the livelihoods of resource-poor farmers. These proposals included concrete measures to address dumping and import surges. Some were eventually reflected in the so-called 2004 July package. The provisions for special and differential treatment under Paragraphs 41 and 42 of the Framework Agreement are probably the most innovative from a sustainable development perspective. They specify that “developing country Members will have the flexibility to designate an appropriate number of products as Special Products, based on criteria of food security, livelihood security and rural development needs. These products will be eligible for more flexible treatment.” The Framework Agreement further states that a “Special Safeguard Mechanism (SSM) will be established for use by developing country Members.”

However, key aspects of these instruments – such as the selection and treatment of Special Products (SPs), or specific modalities for a new SSM, including product coverage, possible trigger mechanisms and remedies – were left for future negotiations. As a contribution to this highly controversial debate, the International Centre for Trade and Sustainable Development (ICTSD) Project on Special Products and a Special Safeguard Mechanism aims to generate knowledge and options to better articulate and advance the concepts of SP and SSM from a sustainable development perspective.

The present Issue Paper (No. 7), on “South-South trade in Special Products”, by Christopher Stevens, Jane Kennan and Mareike Meyn, is intended as a contribution to the discussion on the selection of Special Products and their treatment in the WTO. The paper aims to bring empirical evidence on South-South trade to bear on the controversial debate about the protection of SPs in the WTO Doha Round, by helping trade negotiators, policy makers and other stakeholders identify the extent to which the designation of products as SPs might affect other developing country exporters.

Ricardo Meléndez-Ortiz
Chief Executive, ICTSD

EXECUTIVE SUMMARY

This report helps to identify the extent to which the designation of products as Special Products might affect other developing country exporters. It aims to establish the *prima facie* evidence on the overlap between products that are important to developing countries as exports and those that are important to other developing countries as potential SPs. It provides information on the main developing country exporters and importers, the main products that are traded, and the main trends.

It uses this information to identify the importance for South-South trade of the products which appear most likely to be designated as SPs. Any notable barriers to trade in these products are also flagged. No "magic formulas" are discovered that would allow the legitimate interests of Southern exporters and importers to be reconciled through a simple rule or provision. However, the analysis does succeed in narrowing considerably the main areas of potential contention so that they may be resolvable through a limited number of bilateral negotiations.

Main Developing Country Exports and Exporters

Some 40 agricultural products[1] accounted for 0.5 percent or more of total developing country exports of goods covered by the WTO Agreement on Agriculture in 2005. These are the products on which the report is concentrated given, on the one hand, time and space constraints and, on the other, the extremely wide range of agricultural products traded by developing countries. It should be noted, however, that these 40 products accounted for less than 56 percent of total developing country exports of agricultural goods: there are therefore many other products that have not been covered by this study. A very much larger study would be required in order to bring them within its purview, but all the main goods are here.

These major developing country exports fall into eight broad product groups: meat, fresh vegetables, fresh/processed fruits, beverages, cereals and preparations, vegetable oils, sugar, tobacco and cotton. But South-South trade is important for only some of them. In only 27 cases is there at least one major developing country exporter that sends at least one-third of its exports to other developing countries.[2] The incidence of high developing country import market share is heavily focused on a relatively small number of country/product combinations. This leads to some optimism that bilateral negotiations could solve a significant proportion of potential problems concerning SPs and South-South trade.

The products that appear to be of particular concern in the Doha SP context are maize, rice, soya beans/oil/oilcake, palm oil (two items), sugar (two items), confectionery, fishmeal, tobacco/cigarettes and cotton. These are the products for which there is more than one major developing country exporter which, combined, accounted for more than 50 percent of total developing country exports in 2005.

Although much of the analysis has been done in relation to just one year (2005), a time series analysis has been made for the period 2001-2005. The picture is a very complex one, with substantial annual variations in many cases. But there are no clear-cut cases in which the 2005 figure provides a misleading impression because it is uniquely high or low compared with all the other four years.

Developing Country Importers

The characteristics of developing country importers are a key element of this analysis because the pattern of their trade may affect their attitude towards SPs. If an importer sources a high proportion of an agricultural good only from other developing countries, it could be possible to find a formulation that would satisfy all parties. In any case, the resolution of a coherent “Southern” position on SPs would largely involve developing countries. If, by contrast, a large proportion of imports is sourced from developed countries this may be more difficult. Given that a high proportion of the problematic commodities are items on which developed countries distort international production and trade, there may be a strong perceived need by developing country importers to apply SPs.

The study has identified the main developing country importers of all the key products identified.[3] There is a high degree of concentration of the important developing country importers. In half of the cases studied, three or fewer developing countries absorbed a significant share of a country’s exports to other developing countries. Again, this gives hope that bilateral negotiations might provide a basis for a common understanding on the use of SPs in these cases.

There is, moreover, a considerable overlap in the main developing country importers of different products. Of the 43 countries identified as a major importer of one or more of the key developing country exports, 25 were involved in three or fewer country/product combinations. The developing countries that were found to be most frequently importing key products were: Chile, China, Hong Kong, India, Indonesia, Iran, Malaysia, Pakistan, Philippines, Saudi Arabia, Singapore, South Africa, South Korea, Thailand and Turkey.

There is, however, no clear picture of whether these main importers source their imports mainly from developed or developing countries. In some cases, developing countries are overwhelmingly the most important source of imports for all the major importers. There are no cases where developing countries are minor sources for all the importers. However, there are many instances where there is a wide dispersion between some importers (where developing countries form a very small share of the total) and others (where they are the major source). These may be the most difficult cases to deal with since some importers may wish to protect themselves against imports from developed countries whilst others have no such need.

Overlap with Special Products

Because of the diversity of importer situations, it is important to see which of those goods that are important in South–South trade are likely to be designated as SPs. Since no list of nominated SPs yet exists, any comparison must be speculative. The report uses a list of possible SPs that were identified by ICTSD research as products most likely to be designated as SPs. Of the ten product groups listed as potential SPs, only six have featured in the analysis because they are both important developing country exports and a significant proportion are destined for other developing countries.

Obviously, some minor exports may be very important and problematic for some countries. However, given the picture of considerable diversity painted in this analysis of major products, it would seem sensible for Southern countries to seek first to reach an understanding on the majors. Should this be forthcoming, attention could then turn to the minor products not covered in this report.

The six potential SPs that are important in South–South trade fall into four groups. One group – beef and some vegetable oils – covers products for which almost all developing country imports are sourced in other developing countries. If any of these products are designated as SPs, only (or mainly) other developing countries would be affected. By the same token, some importers may decide that they do not need to designate these products as SPs, as any potential concerns about dumping should be negated by the absence of developed country imports.

The second group – other vegetable oils and rice – is similar to the first, but the preponderance of developing country imports sourced in other developing countries is not so marked. The issues are, therefore, not as clear-cut as they are for the first group.

The third group contains just one product – cuts of frozen chicken. In this case, the trade issues are highly country-specific and appear not to raise major problems.

It is the fourth group – maize, wheat and sugar/sugar products – that would appear to be the most problematic in terms of reaching consensus between developing country importers and exporters. Global trade in both products is highly distorted due to developed country subsidies, and there is a wide dispersion between major importers in terms of the sourcing of their imports.

Other WTO Remedies

The absolute level of the applied rate and its relationship with the bound rate influences the need for the use of SP measures. Only about half of the cases covered by the analysis show an applied tariff of 10 percent or more, suggesting that initial bilateral negotiations between Southern exporters and importers should concentrate on these.

Furthermore, in those cases where there is a large difference between bound and applied tariff rates - as is the case in over half of the cases covered - importers do not necessarily need to use SPs to protect their domestic production. Even after any Doha Most Favoured Nation (MFN) tariff reductions, they may retain sufficient flexibility to raise their applied rates up to their bound rate to provide protection against import surges.

The category of products that might be most difficult to deal with is the one where applied tariffs are very high and there is a wide margin between applied and bound tariffs. However, this category applies to only a few country/product cases. It is recommended that the countries concerned engage in bilateral discussions over whether or not the importers see a need to designate the products in question as SPs.

INTRODUCTION

Developing countries' trade in agricultural products keeps on growing dynamically. According to the United Nations Community Trade Statistics Database (COMTRADE) figures, agricultural exports from these countries increased by 77 percent in the period 1990–2003, from USD 83 billion to USD 147 billion. Developing countries have also become important importing countries of agricultural products. Thus, their agricultural exports to other developing countries are growing at higher rates than their exports to developed countries are. According to the WTO, the total share of South–South trade in agricultural exports increased from 32 to 46 percent in the period 1990–2003.

However, agriculture is not only relevant for developing countries' exports but also for their food security and livelihood. Many developing countries emphasise the need to protect themselves from subsidised agricultural imports and to address the relevance of agriculture as a major source of income and employment.

In order to address the socio–economic relevance of agriculture in developing countries, WTO Members agreed at the 2005 Hong Kong Ministerial meeting to grant developing countries the "flexibility to self-designate an appropriate number of tariff lines as Special Products guided by indicators based on the criteria of food security, livelihood security and rural development." However, what an appropriate number is, and whether suitable indicators valid for all countries exist, remain disputed among WTO Members.

While the G-33 group of developing countries that seek more substantial flexibilities on Special Products have submitted a proposal to make "at least 20 percent" of all tariff lines eligible for SP status, several agriculture-exporting developing countries have argued that the selection and treatment of SPs should not undermine the food- and livelihood security or rural development of their numerous poor and vulnerable farmers, whose welfare depends on improved market access for a few export products. For example, Thailand has proposed that when developing countries account for more than 50 percent of all exports of a given agricultural product, that product shall not be designated as an SP. Malaysia has made similar proposals.

In this respect, it is important to note that SPs are not a countervailing duty for developing countries to respond to dumping of agricultural imports. There is largely consensus among WTO Members that SPs will not be subject to tariff increases but may only exclude products from further tariff cuts. Developing country exporters' concerns that SPs will interrupt South–South trade are, therefore, largely unfounded. Most recent data show that in spite of existing trade barriers, South-South trade has been able to expand tremendously and is likely to continue to do so even in the absence of further liberalisation. However, SPs might be problematic for some countries and some products, e.g., when there is a big difference between bound and applied tariff rates and importing countries increase the applied rates. Furthermore, developing countries relying on exports of products which are likely to be designated as SP might have a hard time justifying domestically an absence of new market access opportunities.

This paper seeks to bring empirical evidence into the issue of South–South trade. Recognising that the policy framework surrounding SPs is highly disputed and that there are divergent interests between developing country exporters and developing country importers, this study brings empirical evidence on the products that are mainly involved in South–South trade and the countries that are the most frequent exporters and importers. It uses this information to identify the importance for South–South trade of the products that appear most likely to be designated as SPs and shows possible options for how both developing country exporters' and importers' concerns could be addressed.

Methodology

In an ideal world, this analysis would be based upon the commodity export data of every developing country, which would show all the main markets, including those in other developing countries. Such data would be provided for several years in order to deal with any marked annual variations and to flag underlying trends.

In reality, it is not feasible to do this and the methodology adopted has been selected as providing the best balance between precision, country coverage and timeliness. Data in the COMTRADE database provide figures for developing country exports, but the number of countries that are covered varies from year to year. For 2005, the year chosen for the primary analysis undertaken for this study, only 63 developing countries have so far reported their exports. Some regions (notably sub-Saharan Africa) and small states are particularly poorly represented in this group. Use of these data, therefore, would overlook many relevant trade flows.[4] The alternative used in this report is to base the analysis on what are called "mirror data". These are used to infer the most important developing country exports by looking at countries' imports. For 2005, 117 countries have reported import values. This still leaves many gaps – especially with respect to sub-Saharan Africa – but the data provide a reasonably complete picture of which countries are exporting which products. Goods that, for example, are traded only between two African countries, neither of which is a reporter to COMTRADE, would be overlooked completely; if either of those countries exported the product to a larger country that is a reporter, then the item would be picked up.

What the gaps in country coverage do mean, though, is that the list of developing country importers of products that are important developing country exports is understated. In addition to those markets that are covered by this report, there will be other (unquantifiable) imports from developing countries by those states that do not report to COMTRADE (or at least not in a timely fashion). In order to identify the relative importance of the various developing country agricultural exports, an aggregate for "developing countries" has had to be created.[5]

THE MAIN DEVELOPING COUNTRY EXPORTS AND EXPORTERS

Major Exports

Developing countries export a very wide range of agricultural goods, but in order to keep the study within manageable proportions it is necessary to focus on the most important. Table 1 lists all the items (at the Harmonised System (HS) 6-digit level of disaggregation) covered by the WTO Agreement on Agriculture, which accounted for 0.5 percent or more of total developing country exports in 2005. These 40 product groups accounted for just under 56 percent of total developing country exports of agricultural goods.

Table 1 is presented in declining order of the share of the item in total developing country agricultural exports, but to make the commodity composition of this group clearer the information is replicated in Table 2, but in ascending order of HS code. This allows similar items to be brought together.

Table 2 shows that the main developing country exports fall into eight broad product groups: meat, fresh vegetables, fresh/processed fruits, beverages, cereals and preparations, vegetable oils, sugar and tobacco.

This is a very broad range. Many of these products are imported to a significant extent by developing countries. Hence, there is prima facie evidence that the issue addressed by this study could be a highly relevant one, deserving significant attention in order to harmonise developing country interests.

Table 1. Main developing country exports in descending order of share

HS6	Description	Share of exports 2005 (%)
120100	Soya beans, whether or not broken	4.9
090111	Coffee (excl. roasted and decaffeinated)	4.7
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	4.3
080300	Bananas, incl. plantains, fresh or dried	3.9
151190	Palm oil and its fractions, whether or not refined	2.8
170111	Raw cane sugar (excl. added flavouring or colouring)	2.6
180100	Cocoa beans, whole or broken, raw or roasted	2.3
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	1.8
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	1.7
150710	Crude soya bean oil, whether or not degummed	1.6
520100	Cotton, neither carded nor combed	1.5
080610	Fresh grapes	1.5
151110	Crude palm oil	1.4
020230	Frozen, boneless meat of bovine animals	1.3
020714	Frozen cuts and edible offal of fowls of the species “gallus domesticus”	1.2
100590	Maize (excl. seed)	1.2
210690	Food preparations, n.e.s.	1.2
230120	Flours, meals and pellets of fish or crustaceans, molluscs, etc., unfit for human consumption	1.1
220300	Beer made from malt	1.0
060310	Fresh cut flowers and flower buds, for bouquets or for ornamental purposes	1.0
160232	Meat or offal of fowls of the species “gallus domesticus”, prepared or preserved	0.9
220421	Wine of fresh grapes, incl. fortified wines, in containers of <= 2 l	0.9
020130	Fresh or chilled bovine meat, boneless	0.8
090240	Black fermented tea and partly fermented tea in immediate packings of > 3 kg	0.7
070200	Tomatoes, fresh or chilled	0.7
180400	Cocoa butter, fat and oil	0.7
170199	Cane or beet sugar and chemically pure sucrose, in solid form	0.7
080810	Fresh apples	0.7
170490	Sugar confectionery not containing cocoa, incl. white chocolate	0.7
080430	Fresh or dried pineapples	0.6
100190	Wheat and meslin (excl. durum wheat)	0.6
080510	Fresh or dried oranges	0.6
020329	Frozen meat of swine	0.6
080132	Fresh or dried cashew nuts, shelled	0.6
200819	Nuts and other seeds, incl. mixtures, prepared or preserved	0.6
240220	Cigarettes, containing tobacco	0.6
190590	Bread, pastry, cakes, biscuits and other bakers' wares	0.6
200919	Orange juice, unfermented, whether or not containing added sugar or other sweetening matter	0.5
050400	Guts, bladders and stomachs of animals, fresh, chilled, frozen, salted, in brine, dried or smoked	0.5
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	0.5

Note:
(a) Items comprising 0.5 percent or more by value of total developing country exports of goods listed in the WTO Agreement on Agriculture.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006).

Table 2. Main developing country exports in ascending order of HS code

HS6	Description	Share of exports 2005 (%)
020130	Fresh or chilled bovine meat, boneless	0.8
020230	Frozen, boneless meat of bovine animals	1.3
020329	Frozen meat of swine	0.6
020714	Frozen cuts and edible offal of fowls of the species “gallus domesticus”	1.2
050400	Guts, bladders and stomachs of animals, fresh, chilled, frozen, salted, in brine, dried or smoked	0.5
060310	Fresh cut flowers and flower buds, for bouquets or for ornamental purposes	1.0
070200	Tomatoes, fresh or chilled	0.7
080132	Fresh or dried cashew nuts, shelled	0.6
080300	Bananas, incl. plantains, fresh or dried	3.9
080430	Fresh or dried pineapples	0.6
080510	Fresh or dried oranges	0.6
080610	Fresh grapes	1.5
080810	Fresh apples	0.7
090111	Coffee (excl. roasted and decaffeinated)	4.7
090240	Black fermented tea and partly fermented tea in immediate packings of > 3 kg	0.7
100190	Wheat and meslin (excl. durum wheat)	0.6
100590	Maize (excl. seed)	1.2
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	1.8
120100	Soya beans, whether or not broken	4.9
150710	Crude soya bean oil, whether or not degummed	1.6
151110	Crude palm oil	1.4
151190	Palm oil and its fractions, whether or not refined	2.8
160232	Meat or offal of fowls of the species “gallus domesticus”, prepared or preserved	0.9
170111	Raw cane sugar (excl. added flavouring or colouring)	2.6
170199	Cane or beet sugar and chemically pure sucrose, in solid form	0.7
170490	Sugar confectionery not containing cocoa, incl. white chocolate	0.7
180100	Cocoa beans, whole or broken, raw or roasted	2.3
180400	Cocoa butter, fat and oil	0.7
190590	Bread, pastry, cakes, biscuits and other bakers' wares	0.6
200819	Nuts and other seeds, incl. mixtures, prepared or preserved	0.6
200919	Orange juice, unfermented, whether or not containing added sugar or other sweetening matter	0.5
210690	Food preparations, n.e.s.	1.2
220300	Beer made from malt	1.0
220421	Wine of fresh grapes, incl. fortified wines, in containers of <= 2 l	0.9
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	0.5
230120	Flours, meals and pellets of fish or crustaceans, molluscs, etc., unfit for human consumption	1.1
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	4.3
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	1.7
240220	Cigarettes, containing tobacco	0.6
520100	Cotton, neither carded nor combed	1.5

Note:
(a) Items comprising 0.5 percent or more by value of total developing country exports of goods listed in the WTO Agreement on Agriculture.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006).

Products for Which South–South Trade is Important

The proportion of exports that are destined for other developing countries varies between exporter and product. An idea of the goods and countries for which South-South trade is most important is given in Table 3. It analyses the products listed in Tables 1 and 2 to find those for which developing countries are important markets. It lists for each of these the major exporters that direct more than one-third of their exports to other developing countries.

A first point to note about Table 3 is that developing countries are not important markets for some exports. Whilst 40 exports each account for at least 0.5 percent of developing countries' total exports, for only 27 of them is at least a third of exports sent to developing countries.

Table 3. Countries for which other developing countries are major markets

HS6	Description	Main developing country exporters[b]	Share by value (%)	
			Total exports	*Exports to developing countries*
020130	Fresh or chilled bovine meat, boneless	Paraguay	5	100
020230	Frozen, boneless meat of bovine animals	India	11	96
020329	Frozen meat of swine	China	11	92
020714	Frozen cuts and edible offal of fowls of the species "gallus domesticus"	Chile	5	55
080300	Bananas, incl. plantains, fresh or dried	Philippines	11	35
080510	Fresh or dried oranges	Egypt	21	50
080810	Fresh apples	China	20	56
090240	Black fermented tea and partly fermented tea in immediate packings of > 3 kg	Kenya	29	57
		Sri Lanka	18	40
100190	Wheat and meslin (excl. durum wheat)	*Haiti*	5	100
		Argentina	82	98
100590	Maize (excl. seed)	China	42	88
		Argentina	46	78
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	Vietnam	22	93
		Pakistan	10	88
		India	17	86
		Thailand	37	67
120100	Soya beans, whether or not broken	Argentina	27	97
		Paraguay	6	53
		Brazil	63	50
150710	Crude soya bean oil, whether or not degummed	Argentina	64	99
		Brazil	28	91
151110	Crude palm oil	Indonesia	53	70
		Malaysia	27	41
151190	Palm oil and its fractions, whether or not refined	Indonesia	31	75
		Malaysia	63	67
170111	Raw cane sugar (excl. added flavouring or colouring)	Guatemala	6	57
		Thailand	7	47
		Brazil	42	41
170199	Cane or beet sugar and chemically pure sucrose, in solid form	China	8	99
		Korea, Rep.	8	96
		Thailand	17	93
		United Arab Emirates	18	90
		Colombia	7	85
		Brazil	13	62
170490	Sugar confectionery not containing cocoa, incl. white chocolate	Colombia	9	67
		Brazil	8	50
		Argentina	5	44
		Thailand	5	38
		China	24	35
180100	Cocoa beans, whole or broken, raw or roasted	Indonesia	15	64
190590	Bread, pastry, cakes, biscuits and other bakers' wares	Malaysia	9	66
		China	24	38
210690	Food preparations, n.e.s.	Costa Rica	5	99
		Singapore	5	45
		Thailand	13	40
		China	15	35
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	South Africa[c]	5	41
230120	Flours, meals and pellets of fish or crustaceans, molluscs, etc., unfit for human consumption	Peru	64	61
		Chile	24	53
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	India	5	75
		Argentina	49	35

HS6	Description	Main developing country exporters[b]	Share by value (%)	
			Total exports	*Exports to developing countries*
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	Zimbabwe	8	68
		China	7	64
		Brazil	42	33
240220	Cigarettes, containing tobacco	United Arab Emirates	13	99
		Philippines	7	94
		Malaysia	12	91
		Indonesia	7	83
		China	18	78
		Turkey	5	71
520100	Cotton, neither carded nor combed	*Benin*	6	92
		India	9	88
		Burkina Faso	8	88
		Zimbabwe	5	75
		Brazil	14	72
		Syria[d]	6	71
		Egypt	9	71
		Mali	7	69

Note:
(a) Those directing more than one-third of their exports to other developing countries.
(b) Countries marked in *italics* are classified as Least Developed Countries (LDCs) by the UN.
(c) Self-selection as developed country to WTO.
(d) Not a WTO Member.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006).

The 13 products that appear to be unproblematic (or, at least, less problematic) because they are destined primarily for developed country markets are: animal guts, flowers, tomatoes, cashews and prepared nuts, pineapples, grapes, coffee, prepared chicken, cocoa butter, orange juice, beer and wine.

A second feature of Table 3 is that the incidence of high developing country import market share is focused on specific country/product combinations. If the countries listed in Table 3 are compared with those in Appendix Table 1 (which lists all the main developing country exporters of the key products), it can be seen that only a few developing countries direct a large proportion of their exports to other developing countries. Take the case of beef (covered in the top two rows of Table 3). Four countries account for five percent or more of developing country exports of fresh beef and a slightly different four for five percent or more of frozen beef exports, but only one of each set of four directs over one-third of its exports to other developing countries.

The incidence of high developing country import market share that is heavily focused on a relatively small number of country/product combinations leads to some optimism that bilateral negotiations could solve a significant proportion of potential problems concerning SPs and South-South trade. On the other hand, the widely diversified trade of some exporters might imply that there is less incentive to oppose the SP mechanism in a particular marketplace.

The products that appear to be of particular potential concern in the Doha SP context are maize, rice, soya beans/oil/oilcake, palm oil (two items), sugar (two items), confectionery, fishmeal, tobacco/cigarettes and cotton (plus wheat, but, as explained below, this may be an anomaly). These are the products for which more than one exporter is listed in Table 3 and those listed accounted for more than 50 percent of total developing country exports in 2005. In addition, for beef (two items), pig meat, chicken, oranges, apples and cocoa beans, only one exporter is listed in Table 3 but over half of its exports were sent to other developing countries, so that some "country-specific" solutions may be required under Doha.

Export Trends

These tables provide a snapshot for 2005 of the products and exporters for which South–South trade is most important. Clearly, the picture is a very complex one and it is infeasible within a very short study, therefore, to provide comprehensive time series on every important flow. On the other hand, some impression must be given of the extent to which the 2005 figures provide an accurate picture of established, year-to-year flows.

Table 4 takes the country/product combinations listed in Table 3 and shows in each case the share of exports directed to other developing countries in every year 2001–2005. There are substantial annual variations in many cases, but, except for Haiti's exports of wheat, there are no clear cases in which the 2005 figure provides a misleading impression because it is uniquely high or low compared with all of the other four years or because there appears to be a clear upward or downward trend. Hence, the identification of key products and countries for the year 2005 appears to provide a valid basis for the next step in this overview of trade flows, save that wheat moves from the category of being an issue for two or more countries to that of being of concern to just one.

Table 4. Export trends

HS6	Description	Main developing country exporters [a]	Share of exports going to other developing countries (%)				
			2005	2004	2003	2002	2001
020130	Fresh or chilled bovine meat, boneless	Paraguay	100	100	99	98	96
020230	Frozen, boneless meat of bovine animals	India	96	97	98	97	98
020329	Frozen meat of swine	China	92	77	66	58	92
020714	Frozen cuts and edible offal of fowls of the species "gallus domesticus"	Chile	55	57	35	80	65
080300	Bananas, incl. plantains, fresh or dried	Philippines	35	32	36	32	36
080510	Fresh or dried oranges	Egypt	50	42	59	65	77
080810	Fresh apples	China	56	56	69	74	74
090240	Black fermented tea and partly fermented tea in immediate packings of > 3 kg	Kenya	57	53	53	21	20
		Sri Lanka	40	43	41	44	46
100190	Wheat and meslin (excl. durum wheat)	*Haiti* [d]	100	-	-	-	-
		Argentina	98	98	100	99	99
100590	Maize (excl. seed)	China	88	68	89	95	90
		Argentina	78	75	64	71	72
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	Vietnam	93	71	83	89	76
		Pakistan	88	83	88	90	95
		India	86	91	88	87	87
		Thailand	67	71	71	70	70
120100	Soya beans, whether or not broken	Argentina	97	95	91	77	86
		Paraguay	53	54	61	81	63
		Brazil	50	43	41	33	27
150710	Crude soya bean oil, whether or not degummed	Argentina	99	97	99	95	97
		Brazil	91	95	100	99	99
151110	Crude palm oil	Indonesia	70	74	80	70	65
		Malaysia	41	52	69	77	69
151190	Palm oil and its fractions, whether or not refined	Indonesia	75	84	83	71	71
		Malaysia	67	72	73	63	61
170111	Raw cane sugar (excl. added flavouring or colouring)	Guatemala	57	55	34	52	52
		Thailand	47	55	40	48	58
		Brazil	41	41	22	35	25
170199	Cane or beet sugar and chemically pure sucrose, in solid form	China	99	90	92	96	95
		Korea, Rep.	96	96	99	95	98
		Thailand	93	90	92	90	100
		United Arab Emirates	90	92	87	99	94
		Colombia	85	87	98	97	99
		Brazil	62	84	84	82	92

HS6	Description	Main developing country exporters [a]	Share of exports going to other developing countries (%)				
			2005	2004	2003	2002	2001
170490	Sugar confectionery not containing cocoa, incl. white chocolate	Colombia	67	68	74	77	80
		Brazil	50	49	44	41	55
		Argentina	44	42	37	33	57
		Thailand	38	37	34	31	25
		China	35	36	39	43	45
180100	Cocoa beans, whole or broken, raw or roasted	Indonesia	64	65	65	54	42
190590	Bread, pastry, cakes, biscuits and other bakers' wares	Malaysia	66	65	70	78	76
		China	38	40	44	46	44
210690	Food preparations, n.e.s.	Costa Rica	99	98	93	95	99
		Singapore	45	41	55	53	47
		Thailand	40	27	42	39	38
		China	35	40	44	49	51
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	South Africa [b]	41	45	47	65	53
230120	Flours, meals and pellets of fish or crustaceans, molluscs, etc., unfit for human consumption	Peru	61	57	44	52	45
		Chile	53	42	40	41	34
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	India	75	87	86	90	83
		Argentina	35	32	32	29	27
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	Zimbabwe	68	54	44	37	30
		China	64	55	49	47	66
		Brazil	33	24	23	17	23
240220	Cigarettes, containing tobacco	United Arab Emirates	99	99	99	99	99
		Philippines	94	95	95	30	43
		Malaysia	91	88	82	79	89
		Indonesia	83	91	93	85	79
		China	78	71	77	69	74
		Turkey	71	60	63	10	24
520100	Cotton, neither carded nor combed	*Benin*	92	93	88	86	89
		India	88	87	85	20	11
		Burkina Faso	88	86	82	67	56
		Zimbabwe	75	79	65	55	37
		Brazil	72	68	70	57	64
		Syria [c]	71	63	64	49	47
		Egypt	71	58	57	51	45
		Mali	69	75	72	55	51

Notes:
(a) Countries marked in *italics* are classified as LDCs by the UN.
(b) Self-selection as developed country to WTO.
(c) Not a WTO member.
(d) No country reported imports of this item from Haiti in any of the years 2001-2004.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006/January 2007).

DEVELOPING COUNTRY IMPORTERS

The "next step" is to look at which developing countries are importing the key agricultural goods from other developing countries. If an understanding is to be reached between developing countries on SPs for products that are important in South–South trade, account will also have to be taken of their needs and concerns.

If an importer sources a high proportion of an agricultural good only from developing countries, it could be possible to find a formulation that would satisfy all parties. In contrast, if a large proportion of imports are sourced from developed countries, it may be more difficult. It is likely to be impractical to apply different policies to those imports that are obtained from other developing countries and the perceived need for an SP may be enhanced by the fact that the imports from the major, developed country, source are subsidised.

The Main Importers

Table 5 identifies the main developing country importers so that a more detailed analysis can be undertaken below of the relative importance for them of developed and developing country import sources. It takes the country/product combinations covered in Tables 3 and 4 and identifies all developing country destinations accounting for five percent or more of the named exporter's total exports of the item to developing countries. The items identified as being particularly relevant in the discussion of Table 3 are shaded.

Table 5 shows that, in half of the cases, three or fewer developing countries account for five percent or more of a country's exports to other developing countries. This gives hope that bilateral negotiations might provide a common understanding on the use of SPs in these cases.

Table 5. Principal developing country importers

HS6	Description	Main developing country exporters in 2005 [b]	Main developing country importers in 2005 [b]
020130	Fresh or chilled bovine meat, boneless	Paraguay	Chile, Brazil
020230	Frozen, boneless meat of bovine animals	India	Malaysia, Philippines, Saudi Arabia
020329	Frozen meat of swine	China	Hong Kong, Singapore
020714	Frozen cuts and edible offal of fowls of the species "gallus domesticus"	Chile	Mexico, Hong Kong
080300	Bananas, incl. plantains, fresh or dried	Philippines	Korea Rep., China, Saudi Arabia
080510	Fresh or dried oranges	Egypt	Saudi Arabia
080810	Fresh apples	China	Indonesia, Thailand, Singapore, Philippines, Hong Kong, Malaysia, Saudi Arabia
090240	Black fermented tea and partly fermented tea in immediate packings of > 3 kg	Kenya Sri Lanka	Pakistan, *Sudan* [d], *Yemen* [d] Iran, Saudi Arabia, Jordan, Chile, Hong Kong, Pakistan
100190	Wheat and meslin (excl. durum wheat)	Argentina	Brazil, Indonesia, South Africa [c]
100590	Maize (excl. seed)	China Argentina	Korea Rep., Malaysia Saudi Arabia, Peru, Chile, Morocco, Malaysia
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	Vietnam Pakistan India Thailand	Philippines, Malaysia, Cameroon, Iran Iran [d], Saudi Arabia, Oman, Mozambique, Qatar, Cameroon, Mauritius Saudi Arabia, South Africa [c] China, South Africa, Hong Kong, Malaysia, Singapore, *Benin*, Cameroon, Iran [d]

HS6	Description	Main developing country exporters in 2005 [b]	Main developing country importers in 2005 [b]
120100	Soya beans, whether or not broken	Argentina Paraguay Brazil	China, Thailand Argentina, Brazil, Morocco, Turkey China, Thailand, Iran [d]
150710	Crude soya bean oil, whether or not degummed	Argentina Brazil	China, India, Peru, Korea Rep. Iran [d], India, China, Morocco
151110	Crude palm oil	Indonesia Malaysia	India, Malaysia, *Tanzania* India, Saudi Arabia, *Yemen* [d], Pakistan, China
151190	Palm oil and its fractions, whether or not refined	Indonesia Malaysia	China, Pakistan, India, Turkey China, Pakistan, Turkey
170111	Raw cane sugar (excl. added flavouring or colouring)	Guatemala Thailand Brazil	Korea Rep., China, Venezuela, Malaysia Indonesia, China, Korea Rep., Malaysia Saudi Arabia, Morocco, Pakistan, India, Malaysia, Iran [d], *Yemen* [d]
170199	Cane or beet sugar and chemically pure sucrose, in solid form	China Korea, Rep. Thailand United Arab Emirates Colombia Brazil	Pakistan, Indonesia, Singapore, Hong Kong China, Hong Kong, Indonesia, Philippines Indonesia, Singapore Pakistan, Jordan, Saudi Arabia, Oman, Indonesia Peru, Chile, Ecuador, Trinidad/Tobago Pakistan, Colombia, *Yemen* [d], Sri Lanka, *Gambia*, Jordan, Chile
170490	Sugar confectionery not containing cocoa, incl. white chocolate	Colombia Brazil Argentina Thailand China	Venezuela, Ecuador, South Africa [c], Chile, Peru South Africa [c], Argentina Chile, Guatemala, Honduras, Uruguay, Ecuador, Bolivia, Mexico, Venezuela Philippines, Indonesia, Malaysia, Hong Kong, China, Singapore Hong Kong, Indonesia, Korea Rep., Singapore, Mexico
180100	Cocoa beans, whole or broken, raw or roasted	Indonesia	Malaysia, Brazil, Singapore, China
190590	Bread, pastry, cakes, biscuits and other bakers' wares	Malaysia China	Singapore, Hong Kong, Saudi Arabia Hong Kong, Korea Rep.
210690	Food preparations, n.e.s.	Costa Rica [e] Singapore Thailand China	Honduras, Guatemala, Panama, Nicaragua Malaysia, Hong Kong, Thailand, Korea Rep., Philippines, Indonesia Philippines, Malaysia, Turkey, Hong Kong, Indonesia Hong Kong, Singapore, Korea Rep., Malaysia, Thailand
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	South Africa [c]	Philippines, China, Singapore, *Tanzania*
230120	Flours, meals and pellets of fish or crustaceans, molluscs, etc., unfit for human consumption	Peru Chile	China China, Korea Rep., Indonesia
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	India Argentina	Indonesia, Pakistan, Thailand, China, Korea Rep., Sri Lanka, Philippines Philippines, Indonesia, Malaysia, Thailand, South Africa, Korea Rep.
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	Zimbabwe China Brazil	China, South Africa [c], Turkey Indonesia, Philippines, Hong Kong, Singapore China, Philippines, Turkey, Indonesia

HS6	Description	Main developing country exporters in 2005[b]	Main developing country importers in 2005[b]
240220	Cigarettes, containing tobacco	United Arab Emirates	Iran[d], Oman
		Philippines	Thailand, Singapore
		Malaysia	Hong Kong, Singapore
		Indonesia	Singapore, Malaysia
		China	Hong Kong, Singapore, Malaysia
		Turkey	Iran[d]
520100	Cotton, neither carded nor combed	*Benin*	China, Thailand, Indonesia
		India	China, Pakistan, Thailand
		Burkina Faso	China, Thailand
		Zimbabwe	Thailand, South Africa[c], China, *Zambia*, Korea Rep., Indonesia
		Brazil	Pakistan, China, Indonesia, Korea Rep., Thailand, Argentina
		Syria[d]	Turkey, China, Indonesia, Thailand, Pakistan
		Egypt	India, Pakistan, China, Turkey, Thailand
		Mali	China, Thailand, Pakistan, Indonesia

Notes:
(a) All developing countries receiving five percent or more of the exporter's total exports of the item to developing countries.
(b) Countries marked in *italics* are classified as LDCs by the UN.
(c) Self-selection as developed country to WTO.
(d) Not a WTO Member.
(e) According to the data, a major source of Costa Rica's imports of this item was Costa Rica! This is assumed to be an error, and the country is therefore not included here or in subsequent tables as a major importer.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006/January 2007).

Of the 50 shaded rows in Table 5, 22 have three or fewer major importers. In the cases of fishmeal and cigarettes there are no exporting states that have more than three major developing country markets. For all the others, at least one exporter has a larger number of major developing country import markets. Sugar, cotton, rice, plus soya and palm products have the greatest diversity of suppliers and importers and, hence, in principle the largest number of interests to be accommodated.

There is some considerable overlap in the main developing country importers of different products. To make this clear, Table 6 lists all of the developing country importers identified in Table 5 and indicates the number of products of which they were major importers. Of the 43 countries in Table 6, 13 countries accounted for five percent or more of exports in only one country/product combination, and a further 11 for just two or three combinations. Again, this lends credence to the idea that bilateral negotiation could remove some dangers of a conflict of interest between developing countries over the use of SPs.

There are 15 countries that are major importers of seven or more country/product combinations. Several of these are middle-income countries, and others very large countries with quite sophisticated control systems well able to protect domestic interests. They are China, Indonesia, Malaysia, Hong Kong, Singapore, Thailand, Pakistan, South Korea, Philippines, Saudi Arabia, Iran, South Africa, Turkey, Chile and India.

Given the characteristics of the 15 most frequent importing developing countries of seven or more country/product combinations, it may be possible to reach a consensus among WTO Members in the South not to designate imports from developing countries as SPs.

Importer Characteristics

As noted above, much will depend upon whether developing countries are a major or minor source of these countries' imports. We have examined the composition of the countries' imports of the products in question for 2005. Full details of this analysis are presented in Appendix Table 2 and a

Importer [a]	# items [b]
China	28
Indonesia	21
Malaysia	18
Hong Kong	17
Singapore	16
Thailand	16
Pakistan	15
Korea Rep.	14
Philippines	12
Saudi Arabia	12
Iran [d]	9
South Africa [c]	8
Turkey	8
Chile	7
India	7
Brazil	4
Morocco	4
Peru	4
Yemen [d]	4
Argentina	3
Cameroon	3
Ecuador	3
Jordan	3
Mexico	3
Oman	3
Sri Lanka	3
Venezuela	3
Guatemala	2
Honduras	2
Tanzania	2
Benin	1
Bolivia	1
Colombia	1
Gambia	1
Mauritius	1
Mozambique	1
Nicaragua	1
Panama	1
Qatar	1
Sudan [d]	1
Trinidad/Tobago	1
Uruguay	1
Zambia	1

Notes:
(a) Countries marked in *italics* are classified as LDCs by the UN.
(b) For example, the product/exporter combinations in Table 5.
(c) Self-selection as developed country to WTO.
(d) Not a WTO Member.

summary is provided in Table 7. This shows for all countries that are major importers for two or more products the share of developing countries (in aggregate) in their imports of each of the reviewed goods.

The picture is a mixed one. In some cases, developing countries are overwhelmingly the most important source of imports for all the major importers. For seven of the 27 goods none of the importers sourced less than 89 percent of its imports from other developing countries and, in some instances, it was 100 percent. It may be possible to forge an intra-South consensus in these cases. At the other end of the scale would be cases where developing countries are only a minor source of any country's imports – but there are none of these. However, there are cases where developing countries form a very small share of one (or several) countries' imports and there are others for the same product where they are the main source. These are probably the most difficult cases to deal with: some developing importers may wish to protect themselves against imports from developed countries whilst others have no such need.

Overlap with Special Products

Because of this diversity of importer situations, it is important to see which of these goods are likely to be designated as SPs and, hence, for which it is important to ensure that South-South trade is not disrupted as a result. No list of nominated SPs yet exists, so any comparison between important developing country exports and the goods that other developing countries wish to designate as SPs must be speculative. However, based on the results of 11 country studies carried out by ICTSD in Geneva, 10 products were identified that are most likely to become designated as SPs.[6]

Table 7. Share of developing countries in major developing country importers' imports (percent)

Product		Major developing country importers[a]																											
		China	Hong Kong	Malaysia	Saudi Arabia	Singapore	Indonesia	Korea Rep.	Philippines	Pakistan	Iran[c]	South Africa[b]	Thailand	Chile	India	Turkey	Brazil	Morocco	Peru	*Yemen*[c]	Argentina	Oman	Sri Lanka	Ecuador	Guatemala	Honduras	Jordan	Mexico	*Tanzania*	Venezuela
	Total	**15**	**11**	**11**	**11**	**11**	**10**	**10**	**9**	**7**	**6**	**6**	**6**	**5**	**5**	**5**	**4**	**4**	**4**	**4**	**3**	**3**	**3**	**2**	**2**	**2**	**2**	**2**	**2**	**2**
Fresh beef	**2**													100			100													
Frozen beef	**3**			89	94				94																					
Frozen pig meat	**2**		89			66																								
Frozen chicken	**2**		63																									35		
Bananas	**3**	100			100			100																						
Oranges	**1**				99																									
Apples	**7**		32	68	65	65	68		92				77																	
Tea	**8**		96		100					100	99			100						98							100			
Wheat	**4**						12					38					99						40							
Maize	**6**			99	87			74						100				50	84											
Rice	**14**	100	94	100	86	95			96		76	99										99								
Soya beans	**7**	59									66		71			45	100	60			99									
Soya bean oil	**6**	100						94			81				100			59	95											
Palm oil, crude	**7**	54		100	100					100					100					98									100	
Palm oil & fractions	**4**	100								100					100	100														
Raw cane sugar	**11**	81		48	83		70	38		96	78				95			100		93										100
Sugar in solid form	**17**	83	77		92	45	75		91	84				100					100	95		83	19	100			81			
Sugar confectionery	**18**	53	51	90		54	89	39	91			86		89					96		87			95	90	90		34		93
Cocoa beans	**4**	100		100		97											100													
Bakers' wares	**4**		55		57	75		57																						
Food preparations	**12**		54	30		44	37	11	61				20			5									81	85				
Ethyl alcohol	**4**	73				57			83																				96	
Fishmeal	**3**	90					50	74																						
Soya bean oilcake	**9**	93		98			91	99	64	100		100	97										100							
Tobacco	**7**	95	70			98	73		83			83				70														
Cigarettes	**6**		51	66		61					58		86									59								
Cotton	**10**	32					36	16		48		100	45		54	13					100									

Notes:
(a) Countries marked in *italics* are classified as LDCs by the UN.
(b) Self-selection as developed country to WTO.
(c) Not a WTO Member.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006/January 2007).

Table 8 takes these products and summarises the characteristics of South-South trade identified in the analysis above. Of the ten products for which SPs may be important, only six have featured in the analysis.

Table 8. Overlap between potential SPs and major South–South traded goods

Possible SP	Major developing country export [a]	Major South-South export [b]
Rice	Yes	Yes
Maize	Yes	Yes
Wheat	Yes	Yes
Sugar	Yes	Yes
Chicken	Yes	Yes
Beef	Yes	Yes
Vegetable oils	Yes (palm/soya oils)	Yes
Milk and dairy	No [c]	–
Onions	No [c]	–
Potatoes	No [c]	–
Tomatoes	Yes	No [d]

Note:
(a) For example, included in Tables 1 and 2.
(b) For example, included in Table 3.
(c) No item in this product group met the initial criterion used to define "major exports" in this study, viz. items that accounted for at least 0.5 percent of the value of world imports of agricultural goods from developing countries in 2005.
(d) Only four percent of developing country exports in 2005 were destined for other developing countries.

Table 9. Developing country importer characteristics for SPs

HS6	Description	Major developing country importers	Share of developing countries in major developing country importers' imports (%)		
			Min.	*Max.*	*Mean*
020130	Fresh beef	**2**	100	100	100
020230	Frozen beef	**3**	89	94	92
020714	Frozen chicken cuts	**2**	35	63	49
100190	Wheat and meslin	**4**	12	99	47
100590	Maize	**6**	50	100	82
100630	Rice	**14**	74	100	93
150710	Soya bean oil, crude	**6**	59	100	88
151110	Palm oil, crude	**7**	54	100	93
151190	Palm oil & fractions	**4**	100	100	100
170111	Raw cane sugar	**11**	38	100	80
170199	Sugar in solid form	**17**	19	100	80
17049	Sugar	**18**	34	96	79

Source: Derived from the figures in Table 7.

Rice, maize, sugar, chicken, wheat, beef, and some sorts of vegetable oils (palm and soya oils) are potential SPs that are both major developing country exports and important South-South traded products.

Three products (milk and dairy, onions and potatoes) did not qualify as major developing country exports on the selection criterion used in this study.

Tomatoes again are a significant developing country export, but 96 percent were destined for developed country markets in 2005. Hence, it seems unlikely that SPs by developing countries will disrupt exports.

Table 9 takes the six product groups that are probable SPs and major developing country exports for which developing countries are also important markets and summarises information drawn from Table 7. There appear to be four groups of SPs:

1. In three cases, developing countries supply all or most of the imports of the major developing country importers. They are fresh beef, frozen beef and one category of palm oil.

2. In a further three cases (the other vegetable oils and rice), the mean share of imports by all the main importers sourced in developing countries is over 90 percent (88 percent for soya oil).

3. The third category consists of just one item: cuts of frozen chicken. This is a good imported by just two developing countries for which special geographical factors appear to determine the pattern of trade.[7]

4. Finally, for maize, wheat and sugar/sugar products, there is a wide dispersion between importers in the share sourced from developing countries. This may mean that there exist clear differences of interest between states, which could complicate the task of reaching an intra-South agreement.

Therefore, if countries were to designate as SPs any products from the first group (fresh beef, frozen beef and one category of palm oil), this would necessarily affect only (or mainly) other developing countries. By the same token, some countries may decide that they do not need to designate these specific products as SPs, as any potential concerns about dumping should be mitigated by the absence of developed country imports. For the second group (the other vegetable oils and rice), the situation is very similar although the preponderance of developing countries as major import sources is not as marked as for the first group.

The third product (frozen chicken cuts) is a cause célèbre in terms of the effects of consumer patterns in the North on the price of exports to the South. However, due to the country specifics of this one item, it is not considered to be a problematic case.

The products in the fourth group (maize, wheat and sugar/sugar products) are sourced in both developing and developed countries and are particularly subject to substantial distortions in world production and trade. In both product groups, major industrialised country markets are heavily protected and, in the case of wheat and sugar, this protection has resulted in the creation of surpluses, some of which are dumped on the world market at subsidised prices. These factors have undoubtedly contributed to the desire of some countries to seek more flexible tariff treatment for some products. The products in the fourth group are, therefore, considered to be the most problematic in terms of reaching consensus between developing country importers and exporters.

OTHER WTO REMEDIES

The need for use of SP measures – at least in respect of imports – will be influenced by the other remedies that importers have available to safeguard important national production. If applied tariffs are already low on the goods that are important for South–South trade, it implies that governments do not consider that their domestic producers need protection on these items. In addition, if the gap between applied and bound rates is wide then there may still be scope to protect against price shocks by raising the applied rate, even if the latter are reduced under Doha.

The absolute level of the applied rate and its relationship with the bound rate is therefore a critical piece of information in identifying potential less contentious cases (so that attention can be focused on the more problematic ones). Table 10 provides this information, giving an overview of the main exporters and importers of potential SPs and stating the bound and applied tariffs in major developing country import markets. In most rows of Table 10 the applied tariff cited is the MFN rate. However, in those cases where the TRade Analysis and INformation System (TRAINS) indicates that a preferential tariff applies between the exporter and importer in question, it is this preferential rate that has been given.[8] Three particularly interesting cases can be identified from Table 10, plus a relatively small number of other items. Case A and B appear to be least contentious. Case C, which is very small, may be especially contentious.

Case A: Low Applied Tariffs

In almost half of the cases covered by Table 10, the applied tariff for the bilateral trade in question is below 10 percent (for which revenue generation may be the main goal). In almost one-third of cases it is zero percent. This suggests that initial bilateral negotiations between Southern exporters and importers can concentrate on those items on which a significant tariff is applied. These would appear to be the items that importers are most concerned to control and are, therefore, those for which SPs might offer an attraction.

Case B: Wide Margin Between Bound And Applied Rates

For the vast majority of products, importing countries apply a tariff that is below the tariff bound in the WTO and in some cases this gap is very wide. In the cases of Brazil's bovine meat imports from Paraguay, Mauritius's rice imports from Pakistan or Tanzania's palm oil imports from Indonesia, for example, the applied tariffs are currently set at zero percent while the bound rate is up to 120 percent. In over half of the cases covered by Table 10 the bound tariff is at least twice as high as the applied tariff.

In those cases where there is a large difference between bound and applied tariff rates, importers do not necessarily need to use SPs to protect their domestic production. Even after any Doha MFN tariff reductions, they may retain sufficient flexibility to raise their applied rates up to their bound rate to provide protection against import surges. It would certainly seem sensible for those Southern countries exporting to such countries to engage in bilateral discussions over whether or not the importers see a need to designate the products in question as SPs.

Case C: Absolutely High Rates of Applied and Bound Rates

The third category of products, which might be the most difficult one to deal with, covers products where applied tariffs are very high *and* show a wide margin between applied and bound tariffs. The most prominent example is Malaysia's and Indonesia's palm oil exports to India, which currently face an applied tariff of 100 percent that can be increased to a bound rate of 300 percent. Other country/product combinations that are potentially affected are Pakistan's, Thailand's and Vietnam's rice exports to Cameroon, and Brazil's sugar exports to India, Morocco, Pakistan, Venezuela and Colombia. However, only 11 country/product combinations of all 125 country/product combinations covered in Table 10 show tariffs of 20 percent or higher and a bound tariff rate that is at least one-third higher than the applied tariff rate. This small number of cases adds evidence to the idea that the concerned countries might be able to negotiate product-specific solutions on a bilateral basis.

Table 10. Major traders of potential SPs and tariff regimes applied

HS6	Description	Developing country exporter	Developing country importer[a]	Share of (%):			Value of exporter's exports to importer ($000)	Share of total exports of item (%)	Tariff		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*			*Bound (%)*	*Applied[b] (% unless stated otherwise)*	*Regime[b]*
020130	Fresh or chilled bovine meat, boneless	Paraguay	Brazil	52	100	52	30,521	36	55	0	Mercosur FTA
			Chile	16	100	16	51,772	61	25	1.5	Mercosur–Chile ECA[e]
020230	Frozen, boneless meat of bovine animals	India	Malaysia	92	89	82	139,495	52	15	0	MFN
			Philippines	70	94	66	72,903	27	35	10	MFN
			Saudi Arabia	39	94	36	18,996	7	6	0	MFN
020714	Frozen cuts and edible offal of fowls of the species "gallus domesticus"	Chile	Hong Kong	4	63	3	10,619	17	0	0	MFN
			Mexico	100	35	35	49,647	79	37.5	0	Chile–Mexico FTA
100190	wheat and meslin (excl. durum wheat)	Argentina	Brazil	93%	99%	93%	711,876	71%	55	0	MFN or Mercosur FTA[c]
			Indonesia	77%	12%	9%	73,502	7%	27	0 or 5	MFN
			South Africa[d]	100%	38%	38%	66,489	7%	72	2	MFN
100590	Maize (excl. seed)	Argentina	Chile	100	100	100	138,276	16	25	0.6	Mercosur–Chile ECA[e]
			Malaysia	52	99	51	68,658	8	5	0	MFN
			Morocco	100	50	50	115,087	14	122	18	MFN
			Peru	99	84	84	142,435	17	30 or 68	12	MFN
			Saudi Arabia	98	87	85	159,952	19	5 or 7	0	MFN
		China	Korea Rep.	91	74	68	819,787	97	328 or 630	338 or 630	MFN
			Malaysia	38	99	38	50,620	6	5	0	MFN
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	India	Saudi Arabia	84	86	72	377,780	73	5	0	MFN
			South Africa[c]	32	99	32	70,060	13	0	0	MFN
		Pakistan	Cameroon	14	94	13	17,528	6	80	20	MFN
			Iran[d]	32	76	24	89,166	31	n/a	4 or 100	MFN
			Mauritius	59	99	59	17,266	6	37	0	MFN
			Mozambique	24	95	22	24,186	8	100	7.5	MFN
			Oman	66	99	65	43,075	15	5	0	MFN
			Qatar	73	97	70	21,381	7	12	0	MFN
			Saudi Arabia	10	86	9	46,455	16	5	0	MFN

HS6	Description	Developing country exporter	Developing country importer[a]	Share of (%): Exporter in importer's imports from developing countries	Share of (%): Developing countries in importer's imports from world	Share of (%): Exporter in importer's imports from world	Value of exporter's exports to importer ($000)	Share of total exports of item (%)	Tariff: Bound (%)	Tariff: Applied[b] (% unless stated otherwise)	Tariff: Regime[b]
		Thailand	*Benin*	78	74	58	57,717	7	60	10	MFN
			Cameroon	44	94	41	56,410	6	80	20	MFN
			China	96	100	96	179,652	20	65	1-65	MFN
			Hong Kong	95	94	90	133,878	15	0	0	MFN
			Iran[d]	19	76	14	52,126	6	n/a	4 or 100	MFN
			Malaysia	51	100	51	89,825	10	40	40	MFN
			Singapore	68	95	65	70,348	8	10	0	MFN
			South Africa[c]	67	99	66	144,921	16	0	0	MFN
		Vietnam	Cameroon	33	94	31	42,057	6	80	20	MFN
			Iran[c]	15	76	11	41,798	6	n/a	4 or 100	MFN
			Malaysia	40	100	40	69,930	10	40	40	MFN
			Philippines	96	96	92	505,761	70	--	50	MFN
150710	Crude soya bean oil, whether or not degummed	Argentina	China	84	100	84	732,503	38	9	9 or 19.9	MFN
			India	72	100	72	619,654	32	45	45	MFN
			Korea Rep.	88	94	84	114,346	6	5.4	5.4	MFN
			Peru	99	95	94	117,437	6	30	0.8	Argentina–Peru FTA
		Brazil	China	16	100	16	138,445	18	9	9 or 19.9	MFN
			India	22	100	22	191,783	25	45	45	MFN
			Iran[c]	99	81	80	318,207	42	n/a	4	MFN
			Morocco	69	59	41	61,900	8	34 or 215	3	MFN
151110	Crude palm oil	Indonesia	India	85	100	85	699,808	69	300	100	MFN
			Malaysia	99	100	99	150,932	15	10	0	MFN
			Tanzania	92	100	92	56,503	6	120	0	MFN
		Malaysia	China	85	54	46	18,818	6	9	9 or 19.9	MFN
			India	15	100	15	122,944	41	300	100	MFN
			Pakistan	59	100	59	34,982	12	100	Rs 9500/MT	MFN
			Saudi Arabia	98	100	98	57,550	19	15	5	MFN
			Yemen[c]	68	98	67	35,185	12	n/a	5	Customs duty[f]
151190	Palm oil and its fractions, whether or not refined	Indonesia	China	31	100	31	540,908	42	8 or 9	9 or 19.9	MFN
			India	79	100	79	166,234	13	300	100	MFN
			Pakistan	43	100	43	300,279	24	100	Rs 9050 or 10800/MT	MFN

HS6	Description	Developing country exporter	Developing country importer[a]	Share of (%):			Value of exporter's exports to importer ($000)	Share of total exports of item (%)	Tariff		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*			*Bound (%)*	*Applied[b] (% unless stated otherwise)*	*Regime[b]*
			Turkey	37	100	37	76,318	6	19.5 or 46.8	0, 12 or 31.2	MFN
		Malaysia	China	69	100	69	1,196,460	53	8 or 9	9 or 19.9	MFN
			Pakistan	55	100	55	384,945	17	100	Rs 9050 or 10800/MT	MFN
			Turkey	63	100	62	127,654	6	19.5 or 46.8	0, 12 or 31.2	MFN
170111	Raw cane sugar (excl. added flavouring or colouring)	Brazil	India	86	95	82	119,281	14	150	100	MFN
			Iran[c]	79	78	62	74,762	9	n/a	4 or 70	MFN
			Malaysia	76	48	36	107,428	12	--	0	MFN
			Morocco	100	100	100	146,592	17	168	35	MFN
			Pakistan	94	96	90	142,335	16	150	10	MFN
			Saudi Arabia	96	83	80	176,504	20	11	0	MFN
			Yemen [c]	62	93	58	64,318	7	n/a	5	Customs duty[f]
		Guatemala	China	25	81	21	66,771	38	50	15 or 50	MFN
			Korea Rep.	54	38	20	79,015	45	18	3	MFN
			Malaysia	7	48	3	9,454	5	--	0	MFN
			Venezuela	47	100	47	17,907	10	105	20	MFN
		Thailand	China	15	81	12	39,334	22	50	15 or 50	MFN
			Indonesia	62	70	43	102,277	57	95	Rp 550/kg	MFN
			Korea Rep.	17	38	6	25,215	14	18	3	MFN
			Malaysia	9	48	4	12,020	7	--	0	MFN
170199	Cane or beet sugar and chemically pure sucrose, in solid form	Brazil	Chile	10	100	10	6,267	6	98	6	MFN
			Colombia	79	100	79	14,326	14	117	20	MFN
			Gambia	98	45	45	7,028	7	110	n/a	No data available
			Jordan	11	81	9	6,883	7	5 or 20	5 or 30	MFN
			Pakistan	13	84	11	30,861	30	150	10	MFN
			Sri Lanka	34	19	7	9,129	9	50	28 or Rs 4.50/kg	MFN
			Yemen[c]	74	95	70	10,595	10	n/a	5	Customs duty[f]

HS6	Description	Developing country exporter	Developing country importer [a]	Share of (%): Exporter in importer's imports from developing countries	Share of (%): Developing countries in importer's imports from world	Share of (%): Exporter in importer's imports from world	Value of exporter's exports to importer ($000)	Share of total exports of item (%)	Tariff: Bound (%)	Tariff: Applied [b] (% unless stated otherwise)	Tariff: Regime [b]
		China	Hong Kong	16	77	12	6,773	6	0	0	MFN
			Indonesia	5	75	4	11,069	10	95	Rp 700/kg	MFN
			Pakistan	33	84	28	79,573	75	150	10	MFN
			Singapore	15	45	7	6,862	6	10	0	MFN
		Colombia	Chile	45	100	45	28,014	34	98	6	MFN
			Ecuador	99	100	99	10,121	12	45	13.2	Colombia–Ecuador FTA
			Peru	53	100	53	33,787	41	30 or 68	12 or 20	MFN
			Trinidad/Tobago	50	96	48	6,104	7	100	25 or 40	MFN
		Korea, Rep.	China	95	83	79	47,113	48	50	15 or 50	MFN
			Hong Kong	82	77	63	34,777	35	0	0	MFN
			Indonesia	4	75	3	8,565	9	95	Rp 700/kg	MFN
			Philippines	35	91	32	5,025	5	50 or 80	1, 50 or 65	MFN
		Thailand	Indonesia	78	75	59	182,444	88	95	Rp 700/kg	MFN
			Singapore	25	45	11	11,666	6	10	0	MFN
		United Arab Emirates	Indonesia	6	75	4	13,150	6	95	Rp 700/kg	MFN
			Jordan	38	81	31	24,279	11	5 or 20	0	UAE–Jordan FTA
			Oman	96	83	79	19,951	9	5	0	MFN
			Pakistan	50	84	42	121,370	55	150	10	MFN
			Saudi Arabia	98	92	90	22,217	10	10, 15 or 20	0	MFN
170490	Sugar confectionery not containing cocoa, incl. white chocolate	Argentina	Bolivia	32	93	30	1,782	6	40	2	Mercosur–Bolivia FTA
			Chile	49	89	44	7,730	26	25	0	Mercosur–Chile ECA [e]
			Ecuador	11	95	10	1,796	6	20	20	MFN
			Guatemala	20	90	18	3,031	10	40	15	MFN
			Honduras	29	90	27	2,658	9	30	15	MFN
			Mexico	9	34	3	1,613	5	--	16	Argentina-Mexico FTA
			Uruguay	50	95	48	2,438	8	35	0	Mercosur FTA
			Venezuela	3	93	3	1,574	5	25	20	MFN
		Brazil	Argentina	76	87	66	5,364	11	35	0	Mercosur FTA
			South Africa [d]	68	86	59	26,665	53	37	37	MFN
		China	Hong Kong	70	51	36	48,548	44	0	0	MFN
			Indonesia	66	89	59	15,312	14	40	5	MFN
			Korea Rep.	64	39	25	10,374	9	19.7	8	MFN
			Mexico	35	34	12	6,550	6	--	20	MFN
			Singapore	38	54	21	8,435	8	10	0	MFN

HS6	Description	Developing country exporter	Developing country importer [a]	Share of (%):			Value of exporter's exports to importer ($000)	Share of total exports of item (%)	Tariff		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*			*Bound (%)*	*Applied [b] (% unless stated otherwise)*	*Regime [b]*
		Colombia	Chile	29	89	26	4,548	6	25	0	Colombia–Chile ECA [e]
			Ecuador	61	95	58	10,353	13	20	20	MFN
			Peru	57	96	55	4,544	6	30	20	MFN
			South Africa [d]	14	86	12	5,471	7	37	37	MFN
			Venezuela	85	93	79	42,026	55	25	20	MFN
		Thailand	China	21	53	11	2,484	10	10	10	MFN
			Hong Kong	4	51	2	2,548	10	0	0	MFN
			Indonesia	21	89	19	4,948	19	40	5	MFN
			Malaysia	22	90	20	4,084	16	30	15	MFN
			Philippines	38	91	34	6,320	24	45	5	ASEAN FTA
			Singapore	9	54	5	1,989	8	10	0	MFN

Notes:

(a) Durum wheat (HS 100110) comprised only 0.2% of the value of developing country exports of agricultural items to the World in 2005. It thus fell below the 0.5% threshold for products included in the original study, and data on main developing country exporters/importers were not therefore collected.

(b) Countries marked in *italics* are classified as LDCs by the UN.

(c) The regime and tariff shown are those applying to (or assumed to apply to) imports of the relevant item from the exporter in question. Only preferential rates which are included in the importers' tariff schedules in UNCTAD's TRAINS database are shown; if other preferences exist, they have not been taken into consideration here.

(d) Code 10019010 has a zero MFN rate, and 10019090 a zero rate under the Mercosur FTA.

(e) Not a WTO Member.

(f) Self-selection as developed country to WTO.

(g) ECA: Economic Complementation Agreement.

(h) The tariff regime in Yemen applies uniform customs duties according to the value of the goods.

Sources: Derived from data obtained from UN COMTRADE database (downloaded December 2006); WTO CTS database; UNCTAD TRAINS database.

SUMMARY OF FINDINGS

The analysis in this report has thrown up a number of *potential* lines for developing a Southern consensus with respect to SPs, but it has not identified any "magic bullets" in the sense of discrete measures that would have fairly general applicability. The overwhelming impression given is one of diversity. Certain approaches *might* be suitable for specific product/country relationships, but it is clear that there are differences of interest between some developing country importers and others and, similarly, between some exporters and others.

Possibly the most helpful message from the report is that, despite this diversity, there are some marked areas of focus. There are six products potentially identified as SPs that are subject to substantial South–South trade, which are heavily concentrated in a few large middle–income developing countries. Because of this limited number of products and countries there may be scope for bilateral negotiations to address the concerns of developing country exporters with respect to SPs. A consensus on SPs by major developing country traders might then pave the way to broader South–South consensus on SPs.

At the same time, however, negotiations on SPs are constrained by the diversity of developing countries' interests which makes it impossible to conclude that only X number of countries need to be involved in discussions on Y number of products. In most cases, there are sufficient countries with a "minor interest" which cannot be excluded from discussions. Moreover, there is no clear regional pattern in trade for many of the items that have been flagged as potentially important. Most problematic are products where both developing countries and developed countries are important import sources. Agreements on SPs may be difficult since some developing countries will seek protection from trade distorting subsidies often associated with developed countries' agricultural exports.

Nevertheless, should the will exist to forge a consensus on SPs, it would be reasonable to focus negotiations on the 15 developing countries that are widespread importers from other developing countries and the small number of countries which direct specific potential SPs to Southern markets. Since a significant number of the most widespread developing country importers are middle–income countries, it might be possible to reach agreement that they would not designate as SPs products of particular interest to other developing countries.

The tariff analysis adds evidence to the thesis that such a consensus might be possible. Since, in almost half of the cases, the applied tariff for the bilateral trade in question is below 10 percent, the protection of these products through SPs is unlikely. Also in those manifold cases where there is a large difference between bound and applied tariff rates, importers do not necessarily need to use SPs to protect their domestic production but could simply raise their tariffs closer to the bound level. Exporting countries would be well advised to minimise the risk over whether or not importing countries see a need to designate as SPs the products in which they are interested, by engaging in bilateral discussions with their developing country trading partners. Bilateral negotiations are also advised for the rarely found but most problematic cases where applied tariffs are very high and there is a wide margin between applied and bound tariffs.

APPENDIX TABLES

Appendix Table 1. Main developing country exporters of most important developing country agricultural exports, 2005

HS6	Description	Main developing country exporters	Share of developing country exports (%)	Destination of exports (%)	
				Other developing countries	*Non-developing countries*
020130	Fresh or chilled bovine meat, boneless	Brazil	37	27	73
		Argentina	35	29	71
		Uruguay	10	11	89
		Paraguay	5	100	0
		All others	12	23	77
020230	Frozen, boneless meat of bovine animals	Brazil	42	18	82
		Uruguay	20	3	97
		Argentina	15	12	88
		India	11	96	4
		All others	12	24	76
020329	Frozen meat of swine	Brazil	48	28	72
		Chile	29	25	75
		China	11	92	8
		Mexico	10	5	95
		All others	1	29	71
020714	Frozen cuts and edible offal of fowls of the species "gallus domesticus"	Brazil	87	27	73
		Chile	5	55	45
		All others	8	67	33
050400	Guts, bladders and stomachs of animals, fresh, chilled, frozen, salted, in brine, dried or smoked	China	54	6	94
		Brazil	10	8	92
		Iran [b]	5	0	100
		All others	30	9	91
060310	Fresh cut flowers and flower buds, for bouquets or for ornamental purposes	Colombia	39	1	99
		Ecuador	19	3	97
		Kenya	18	0	100
		All others	24	9	91
070200	Tomatoes, fresh or chilled	Mexico	63	0	100
		Morocco	19	0	100
		Turkey	9	2	98
		All others	8	45	55
080132	Fresh or dried cashew nuts, shelled	India	49	4	96
		Vietnam	32	6	94
		Brazil	15	5	95
		All others	4	25	75
080300	Bananas, incl. plantains, fresh or dried	Ecuador	30	7	93
		Colombia	17	0	100
		Costa Rica	15	1	99
		Philippines	11	35	65
		Panama	5	1	99
		Guatemala	5	0	100
		All others	17	15	85
080430	Fresh or dried pineapples	Costa Rica	57	0	100
		Philippines	10	30	70
		Cote d'Ivoire	9	0	100

HS6	Description	Main developing country exporters	Share of developing country exports (%)	Destination of exports (%)	
				Other developing countries	*Non-developing countries*
		Ghana	6	0	100
		All others	18	7	93
080510	Fresh or dried oranges	South Africa [a]	35	18	82
		Egypt	21	50	50
		Morocco	12	0	100
		Turkey	7	0	100
		Argentina	6	2	98
		All others	19	37	63
080610	Fresh grapes	Chile	49	12	88
		South Africa [a]	18	5	95
		Mexico	13	0	100
		Brazil	5	1	99
		All others	16	11	89
080810	Fresh apples	Chile	37	32	68
		China	20	56	44
		South Africa [a]	16	14	86
		Argentina	16	15	85
		Brazil	7	1	99
		All others	4	74	26
090110	Coffee (excl. roasted and decaffeinated)	Brazil	28	4	96
		Colombia	17	2	98
		Vietnam	9	15	85
		Indonesia	6	14	86
		Guatemala	6	1	99
		All others	33	6	94
090240	Black fermented tea and partly fermented tea in immediate packings of > 3 kg	Kenya	29	57	43
		Sri Lanka	18	40	60
		India	16	25	75
		China	8	13	87
		Indonesia	7	27	73
		All others	21	46	54
100190	Wheat and meslin (excl. durum wheat)	Argentina	82	98	2
		Haiti	5	100	0
		All others	14	97	3
100590	Maize (excl. seed)	Argentina	46	78	22
		China	42	88	12
		All others	12	80	20
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	Thailand	37	67	33
		Vietnam	22	93	7
		India	17	86	14
		Pakistan	10	88	12
		All others	14	76	24
120100	Soya beans, whether or not broken	Brazil	63	50	50
		Argentina	27	97	3
		Paraguay	6	53	47
		All others	4	45	55
150710	Crude soya bean oil, whether or not degummed	Argentina	64	99	1
		Brazil	28	91	9
		All others	8	94	6
151110	Crude palm oil	Indonesia	53	70	30
		Malaysia	27	41	59

HS6	Description	Main developing country exporters	Share of developing country exports (%)	Destination of exports (%)	
				Other developing countries	*Non-developing countries*
		Papua New Guinea All others	5 15	0 64	100 36
151190	Palm oil and its fractions, whether or not refined	Malaysia Indonesia All others	63 31 6	67 75 81	33 25 19
160232	Meat or offal of fowls of the species “gallus domesticus”, prepared or preserved	Thailand China Brazil All others	48 37 13 2	4 6 3 38	96 94 97 62
170111	Raw cane sugar (excl. added flavouring or colouring)	Brazil Thailand Mauritius Guatemala All others	42 7 7 6 38	41 47 0 57 23	59 53 100 43 77
170199	Cane or beet sugar and chemically pure sucrose, in solid form	United Arab Emirates Thailand Brazil China Korea, Rep. Colombia Mexico All others	18 17 13 8 8 7 5 24	90 93 62 99 96 85 0 76	10 7 38 1 4 15 100 24
170490	Sugar confectionery not containing cocoa, incl. white chocolate	China Mexico Colombia Brazil Thailand Argentina All others	24 24 9 8 5 5 25	35 5 67 50 38 44 56	65 95 33 50 62 56 44
180100	Cocoa beans, whole or broken, raw or roasted	Cote d'Ivoire Ghana Indonesia Nigeria Cameroon All others	40 20 15 9 5 12	8 19 64 4 13 21	92 81 36 96 87 79
180400	Cocoa butter, fat and oil	Malaysia Cote d'Ivoire Indonesia Brazil Singapore All others	24 20 14 12 6 24	9 1 2 24 12 3	91 99 98 76 88 97
190590	Bread, pastry, cakes, biscuits and other bakers' wares	China Mexico Malaysia Thailand All others	24 14 9 7 45	38 2 66 11 47	62 98 34 89 53
200819	Nuts and other seeds, incl. mixtures, prepared or preserved	Turkey China All others	71 12 17	2 24 19	98 76 81
200919	Orange juice, unfermented, whether or not containing added sugar or other sweetening matter	Brazil All others	94 6	1 56	99 44
21069	Food preparations, n.e.s.	China	15	35	65

HS6	Description	Main developing country exporters	Share of developing country exports (%)	Destination of exports (%)	
				Other developing countries	*Non-developing countries*
		Thailand	13	40	60
		Mexico	9	32	68
		Korea, Rep.	7	26	74
		Singapore	5	45	55
		Costa Rica	5	99	1
		All others	45	66	34
220300	Beer made from malt	Mexico	82	2	98
		All others	18	45	55
220421	Wine of fresh grapes, incl. fortified wines, in containers of <= 2 l	Chile	51	13	87
		South Africa [a]	30	2	98
		Argentina	16	17	83
		All others	3	18	82
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	Brazil	48	26	74
		Jamaica	7	0	100
		Costa Rica	7	0	100
		China	6	29	71
		El Salvador	5	1	99
		South Africa [a]	5	41	59
		All others	21	24	76
230120	Flours, meals and pellets of fish or crustaceans, molluscs, etc., unfit for human consumption	Peru	64	61	39
		Chile	24	53	47
		All others	12	49	51
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	Argentina	49	35	65
		Brazil	38	23	77
		India	5	75	25
		All others	8	77	23
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	Brazil	42	33	67
		Malawi	11	12	88
		Zimbabwe	8	68	32
		China	7	64	36
		Argentina	6	13	87
		India	5	15	85
		All others	22	24	76
240220	Cigarettes, containing tobacco	China	18	78	22
		United Arab Emirates	13	99	1
		Malaysia	12	91	9
		Korea, Rep.	10	32	68
		Philippines	7	94	6
		Indonesia	7	83	17
		Turkey	5	71	29
		All others	28	71	29
520100	Cotton, neither carded nor combed	Brazil	14	72	28
		India	9	88	12
		Egypt	9	71	29
		Burkina Faso	8	88	12
		Mali	7	69	31
		Syria [b]	6	71	29
		Benin	6	92	8
		Zimbabwe	5	75	25
		All others	37	78	22

Note:
Countries marked in *italics* are classified as LDCs by the UN.
(a) Self-selection as developed country to WTO.
(b) Not a WTO Member.
Source: Derived from data obtained from UN COMTRADE database (downloaded December 2006).

Appendix Table 2. Major developing country exporters' share of major developing country importers' markets, 2005

HS6	Description	Developing country exporter[a]	Developing country importer[b]	Share of (%):		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*
020130	Fresh or chilled bovine meat, boneless	Paraguay	Brazil	52	100	52
		Paraguay	Chile	16	100	16
020230	Frozen, boneless meat of bovine animals	India	Malaysia	92	89	82
		India	Philippines	70	94	66
		India	Saudi Arabia	39	94	36
020329	Frozen meat of swine	China	Hong Kong	61	89	55
		China	Singapore	32	66	21
020714	Frozen cuts and edible offal of fowls of the species "gallus domesticus"	Chile	Hong Kong	4	63	3
		Chile	Mexico	100	35	35
080300	Bananas, incl. plantains, fresh or dried	Philippines	China	90	100	90
		Philippines	Korea Rep.	100	100	100
		Philippines	Saudi Arabia	47	100	47
080510	Fresh or dried oranges	Egypt	Saudi Arabia	75	99	75
080810	Fresh apples	China	Hong Kong	51	32	16
		China	Indonesia	95	68	64
		China	Malaysia	62	68	42
		China	Philippines	99	92	91
		China	Saudi Arabia	16	65	11
		China	Singapore	72	65	47
		China	Thailand	94	77	72
090240	Black fermented tea and partly fermented tea in immediate packings of > 3kg	Kenya	Pakistan	72	100	72
		Kenya	Sudan	97	100	96
		Kenya	*Yemen*[c]	90	98	89
		Sri Lanka	Chile	64	100	64
		Sri Lanka	Hong Kong	55	96	52
		Sri Lanka	Iran[c]	39	99	39
		Sri Lanka	Jordan	76	100	76
		Sri Lanka	Pakistan	3	100	3
		Sri Lanka	Saudi Arabia	30	100	30
100190	Wheat and meslin (excl. durum wheat)	Argentina	Brazil	93	99	93
		Argentina	Indonesia	77	12	9
		Argentina	South Africa[b]	100	38	38
		Haiti	Sri Lanka	97	40	38
100590	Maize (excl. seed)	Argentina	Chile	100	100	100
		Argentina	Malaysia	52	99	51
		Argentina	Morocco	100	50	50
		Argentina	Peru	99	84	84
		Argentina	Saudi Arabia	98	87	85
		China	Korea Rep.	91	74	68
		China	Malaysia	38	99	38
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	India	Saudi Arabia	84	86	72
		India	South Africa[b]	32	99	32
		Pakistan	Cameroon	14	94	13
		Pakistan	Iran[c]	32	76	24
		Pakistan	Mauritius	59	99	59
		Pakistan	*Mozambique*	24	95	22

HS6	Description	Developing country exporter[a]	Developing country importer[b]	Share of (%):		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*
		Pakistan	Oman	66	99	65
		Pakistan	Qatar	73	97	70
		Pakistan	Saudi Arabia	10	86	9
		Thailand	*Benin*	78	74	58
		Thailand	Cameroon	44	94	41
		Thailand	China	96	100	96
		Thailand	Hong Kong	95	94	90
		Thailand	Iran[c]	19	76	14
		Thailand	Malaysia	51	100	51
		Thailand	Singapore	68	95	65
		Thailand	South Africa[b]	67	99	66
		Vietnam	Cameroon	33	94	31
		Vietnam	Iran[c]	15	76	11
		Vietnam	Malaysia	40	100	40
		Vietnam	Philippines	96	96	92
120100	Soya beans, whether or not broken	Argentina	China	47	59	28
		Argentina	Thailand	43	71	31
		Brazil	China	52	59	31
		Brazil	Iran[c]	99	66	65
		Brazil	Thailand	54	71	39
		Paraguay	Argentina	97	99	96
		Paraguay	Brazil	100	100	100
		Paraguay	Morocco	35	60	21
		Paraguay	Turkey	14	45	7
150710	Crude soya bean oil, whether or not degummed	Argentina	China	84	100	84
		Argentina	India	72	100	72
		Argentina	Korea Rep.	88	94	84
		Argentina	Peru	99	95	94
		Brazil	China	16	100	16
		Brazil	India	22	100	22
		Brazil	Iran[c]	99	81	80
		Brazil	Morocco	69	59	41
151110	Crude palm oil	Indonesia	India	85	100	85
		Indonesia	Malaysia	99	100	99
		Indonesia	Tanzania	92	100	92
		Malaysia	China	85	54	46
		Malaysia	India	15	100	15
		Malaysia	Pakistan	59	100	59
		Malaysia	Saudi Arabia	98	100	98
		Malaysia	*Yemen*[c]	68	98	67
151190	Palm oil and its fractions, whether or not refined	Indonesia	China	31	100	31
		Indonesia	India	79	100	79
		Indonesia	Pakistan	43	100	43
		Indonesia	Turkey	37	100	37
		Malaysia	China	69	100	69
		Malaysia	Pakistan	55	100	55
		Malaysia	Turkey	63	100	62
170111	Raw cane sugar (excl. added flavouring or colouring)	Brazil	India	86	95	82
		Brazil	Iran[c]	79	78	62
		Brazil	Malaysia	76	48	36
		Brazil	Morocco	100	100	100
		Brazil	Pakistan	94	96	90

HS6	Description	Developing country exporter[a]	Developing country importer[b]	Share of (%):		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*
		Brazil	Saudi Arabia	96	83	80
		Brazil	*Yemen*[c]	62	93	58
		Guatemala	China	25	81	21
		Guatemala	Korea Rep.	54	38	20
		Guatemala	Malaysia	7	48	3
		Guatemala	Venezuela	47	100	47
		Thailand	China	15	81	12
		Thailand	Indonesia	62	70	43
		Thailand	Korea Rep.	17	38	6
		Thailand	Malaysia	9	48	4
170199	Cane or beet sugar and chemically pure sucrose, in solid form	Brazil	Chile	10	100	10
		Brazil	Colombia	79	100	79
		Brazil	*Gambia*	98	45	45
		Brazil	Jordan	11	81	9
		Brazil	Pakistan	13	84	11
		Brazil	Sri Lanka	34	19	7
		Brazil	*Yemen*[c]	74	95	70
		China	Hong Kong	16	77	12
		China	Indonesia	5	75	4
		China	Pakistan	33	84	28
		China	Singapore	15	45	7
		Colombia	Chile	45	100	45
		Colombia	Ecuador	99	100	99
		Colombia	Peru	53	100	53
		Colombia	Trinidad/Tobago	50	96	48
		Korea, Rep.	China	95	83	79
		Korea, Rep.	Hong Kong	82	77	63
		Korea, Rep.	Indonesia	4	75	3
		Korea, Rep.	Philippines	35	91	32
		Thailand	Indonesia	78	75	59
		Thailand	Singapore	25	45	11
		United Arab Emirates	Indonesia	6	75	4
		United Arab Emirates	Jordan	38	81	31
		United Arab Emirates	Oman	96	83	79
		United Arab Emirates	Pakistan	50	84	42
		United Arab Emirates	Saudi Arabia	98	92	90
170490	Sugar confectionery not containing cocoa, incl. white chocolate	Argentina	Bolivia	32	93	30
		Argentina	Chile	49	89	44
		Argentina	Ecuador	11	95	10
		Argentina	Guatemala	20	90	18
		Argentina	Honduras	29	90	27
		Argentina	Mexico	9	34	3
		Argentina	Uruguay	50	95	48
		Argentina	Venezuela	3	93	3
		Brazil	Argentina	76	87	66
		Brazil	South Africa[b]	68	86	59
		China	Hong Kong	70	51	36
		China	Indonesia	66	89	59
		China	Korea Rep.	64	39	25
		China	Mexico	35	34	12

HS6	Description	Developing country exporter[a]	Developing country importer[b]	Share of (%):		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*
		China	Singapore	38	54	21
		Colombia	Chile	29	89	26
		Colombia	Ecuador	61	95	58
		Colombia	Peru	57	96	55
		Colombia	South Africa[b]	14	86	12
		Colombia	Venezuela	85	93	79
		Thailand	China	21	53	11
		Thailand	Hong Kong	4	51	2
		Thailand	Indonesia	21	89	19
		Thailand	Malaysia	22	90	20
		Thailand	Philippines	38	91	34
		Thailand	Singapore	9	54	5
180100	Cocoa beans, whole or broken, raw or roasted	Indonesia	Brazil	79	100	79
		Indonesia	China	36	100	36
		Indonesia	Malaysia	66	100	66
		Indonesia	Singapore	59	97	58
190590	Bread, pastry, cakes, biscuits and other bakers' wares	China	Hong Kong	79	55	43
		China	Korea Rep.	61	57	35
		Malaysia	Hong Kong	8	55	4
		Malaysia	Saudi Arabia	10	57	6
		Malaysia	Singapore	79	75	59
210690	Food preparations, n.e.s.	China	Hong Kong	66	54	36
		China	Korea Rep.	44	11	5
		China	Malaysia	16	30	5
		China	Singapore	17	44	8
		China	Thailand	27	20	5
		Costa Rica	Guatemala	61	81	50
		Costa Rica	Honduras	82	85	70
		Costa Rica	Nicaragua	79	87	69
		Costa Rica	Panama	63	51	32
		Singapore	Hong Kong	10	54	6
		Singapore	Indonesia	9	37	3
		Singapore	Korea Rep.	20	11	2
		Singapore	Malaysia	34	30	10
		Singapore	Philippines	4	61	3
		Singapore	Thailand	26	20	5
		Thailand	Hong Kong	8	54	5
		Thailand	Indonesia	14	37	5
		Thailand	Malaysia	35	30	10
		Thailand	Philippines	52	61	32
		Thailand	Turkey	92	5	5
220710	Undenatured ethyl alcohol, of actual alcoholic strength of >= 80%	South Africa[b]	China	72	73	52
		South Africa[b]	Philippines	49	83	40
		South Africa[b]	Singapore	24	57	13
		South Africa[b]	*Tanzania*	76	96	73
230120	Flours, meals and pellets of fish or crustaceans, molluscs etc., unfit for human consumption	Chile	China	20	90	18
		Chile	Indonesia	59	50	30
		Chile	Korea Rep.	88	74	65
		Peru	China	73	90	66
230400	Oilcake and other solid residues resulting from the extraction of soya bean oil	Argentina	Indonesia	47	91	42
		Argentina	Korea Rep.	28	99	28
		Argentina	Malaysia	91	98	89

HS6	Description	Developing country exporter[a]	Developing country importer[b]	Share of (%): Exporter in importer's imports from developing countries	Developing countries in importer's imports from world	Exporter in importer's imports from world
		Argentina	Philippines	92	64	59
		Argentina	South Africa[b]	100	100	100
		Argentina	Thailand	37	97	36
		India	China	92	93	86
		India	Indonesia	25	91	23
		India	Korea Rep.	10	99	10
		India	Pakistan	100	100	100
		India	Philippines	8	64	5
		India	Sri Lanka	97	100	97
		India	Thailand	10	97	9
240120	Tobacco, partly or wholly stemmed/stripped, otherwise unmanufactured	Brazil	China	58	95	55
		Brazil	Indonesia	32	73	23
		Brazil	Philippines	47	83	39
		Brazil	Turkey	51	70	36
		China	Hong Kong	79	70	55
		China	Indonesia	44	73	32
		China	Philippines	20	83	17
		China	Singapore	38	98	37
		Zimbabwe	China	41	95	39
		Zimbabwe	South Africa[b]	29	83	24
		Zimbabwe	Turkey	8	70	6
240220	Cigarettes, containing tobacco	China	Hong Kong	38	51	19
		China	Malaysia	41	66	27%
		China	Singapore	30	61	18%
		Indonesia	Malaysia	19	66	13%
		Indonesia	Singapore	29	61	17%
		Malaysia	Hong Kong	49	51	25%
		Malaysia	Singapore	12	61	7%
		Philippines	Singapore	3	61	2%
		Philippines	Thailand	81	86	70%
		Turkey	Iran[c]	24	58	14%
		UAE	Iran[c]	66	58	38%
		UAE	Oman	92	59	54%
520100	Cotton, neither carded nor combed	*Benin*	China	13	32	4
		Benin	Indonesia	4	36	1
		Benin	Thailand	4	45	2
		Brazil	Argentina	96	100	96
		Brazil	China	7	32	2
		Brazil	Indonesia	24	36	9
		Brazil	Korea Rep.	49	16	8
		Brazil	Pakistan	32	48	15
		Brazil	Thailand	8	45	4
		Burkina Faso	China	16	32	5
		Burkina Faso	Thailand	9	45	4
		Egypt	China	2	32	1
		Egypt	India	66	54	35
		Egypt	Pakistan	22	48	11
		Egypt	Thailand	5	45	2
		Egypt	Turkey	14	13	2
		India	China	15	32	5
		India	Pakistan	10	48	5
		India	Thailand	7	45	3
		Mali	China	8	32	2
		Mali	Indonesia	3	36	1

HS6	Description	Developing country exporter[a]	Developing country importer[b]	Share of (%):		
				Exporter in importer's imports from developing countries	*Developing countries in importer's imports from world*	*Exporter in importer's imports from world*
		Mali	Pakistan	3	48	1
		Mali	Thailand	10	45	4
		Syria[c]	China	2	32	1
		Syria[c]	Indonesia	6	36	2
		Syria[c]	Pakistan	3	48	2
		Syria[c]	Thailand	3	45	1
		Syria[c]	Turkey	57	13	8
		Zimbabwe	China	2	32	0
		Zimbabwe	Indonesia	3	36	1
		Zimbabwe	Korea Rep.	11	16	2
		Zimbabwe	South Africa[b]	40	100	40
		Zimbabwe	Thailand	15	45	7
		Zimbabwe	*Zambia*	93	100	93

Note:
Countries marked in *italics* are classified as LDCs by the UN.
(a) Self-selection as developed country to WTO.
(b) Not a WTO member.
Source: derived from data obtained from UN COMTRADE database (downloaded January 2006).

ENDNOTES

1 At the Harmonised System (HS) 6-digit level.

2 Major exporters are defined as those supplying five percent or more of total reported world imports of the product in question from developing countries.

3 Major importers are defined as developing countries that account for five percent or more of the total exports from the principal developing country exporters to developing country destinations.

4 For example, an analysis of developing country exports of fresh flowers would omit Kenyan exports because this country has not yet reported its trade to COMTRADE. It follows that any list of "important exports" derived only from this data source will contain items important to some but overlook entirely those that are exported by others.

5 There is no general accepted definition of "developing country". In the WTO, countries select themselves as being "developed" or "developing". Since this self-selection might be politically driven and can be changed at any time, the report defined the countries listed in the Human Development Report 2006 as developing countries minus Cyprus and plus Niue and Cook Islands. One implication is that the group of countries listed in the Human Development Report 2006 does not include the States of the former Soviet Union or Albania which are considered to be economies in transition.

6 As can be seen from Table 7, 15 other products (pig meat, bananas, oranges, apples, tea, wheat, soya beans, cocoa beans, bread/cake, food preparations, ethyl alcohol, fishmeal, soya oilcake, tobacco/cigarettes, and cotton) were identified as being major developing country exports and important South-South traded goods. However, in the first set of country studies conducted by ICTSD, these products were not identified as potential SPs on the basis of their relationship with the criteria of food security, livelihood security and rural development.

7 One is Hong Kong, with 63 percent of imports sourced in developing countries (mainly Brazil) and the other is Mexico with 65 percent sourced in developed countries (all from the United States). Since Brazil is a major exporter (and hence, presumably, aware of the need to balance Southern export and import needs in the use of SPs) and the United States is a developed country WTO Member, SPs may not be problematic for Southern trade.

8 Given the incomplete recording of preferential tariff rates in TRAINS, it is possible that there are other cases in which a preferential applied rate is applicable to trade between the exporter and importer in question but the table gives only the MFN rate. Conversely, there may also be cases where an apparent preferential rate does not apply in practice, possibly because of rules of origin or because TRAINS is inaccurate.

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Linking Trade, Climate and Sustainable Energy.
Selected Issue Briefs, 2006.

These and other ICTSD resources are available at http://www.ictsd.org/pubs/series.htm.

ICTSD's Programme on Agricultural Trade and Sustainable Development aims to promote food security, equity and environmental sustainability in agricultural trade. Publications include:

- The ACP experience of preference erosion in the banana and sugar sectors: Possible policy responses to assist in adjusting to trade changes.
  Issue Paper No. 7 by Paul Goodison, 2007.

- Special Products and the Special Safeguard Mechanism: Strategic Options for Developing Countries.
  Issue Paper No. 6 by ICTSD, 2005.

- Lessons from the Experience with Special Products and Safeguard Mechanisms in Bilateral Trade Agreements.
  Issue Paper No. 5 by Carlos Pomareda, forthcoming.

- Methodology for the Identification of Special Products (SP) and Products for Eligibility Under Special Safeguard Mechanism (SSM) by Developing Countries.
  Issue Paper No. 4 by Luisa Bernal, 2005.

- Special Products: Options for Negotiating Modalities.
  Issue Paper No. 3 by Anwarul Hoda, 2005.

- Tariff Reduction, Special Products and Special Safeguards: An Analysis of the Agricultural Tariff Structures of G-33 Countries.
  Issue Paper No. 2 by Mario Jales, 2005.

- The New SSM: A Price Floor Mechanism for Developing Countries.
  Issue Paper No. 1 by Alberto Valdés and William Foster, 2005.

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ABOUT ICTSD

Founded in 1996, the International Centre for Trade and Sustainable Development (ICTSD) is an independent non-profit and non-governmental organization based in Geneva. By empowering stakeholders in trade policy through information, networking, dialogue, well-targeted research and capacity building, the centre aims to influence the international trade system such that it advances the goal of sustainable development.

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