

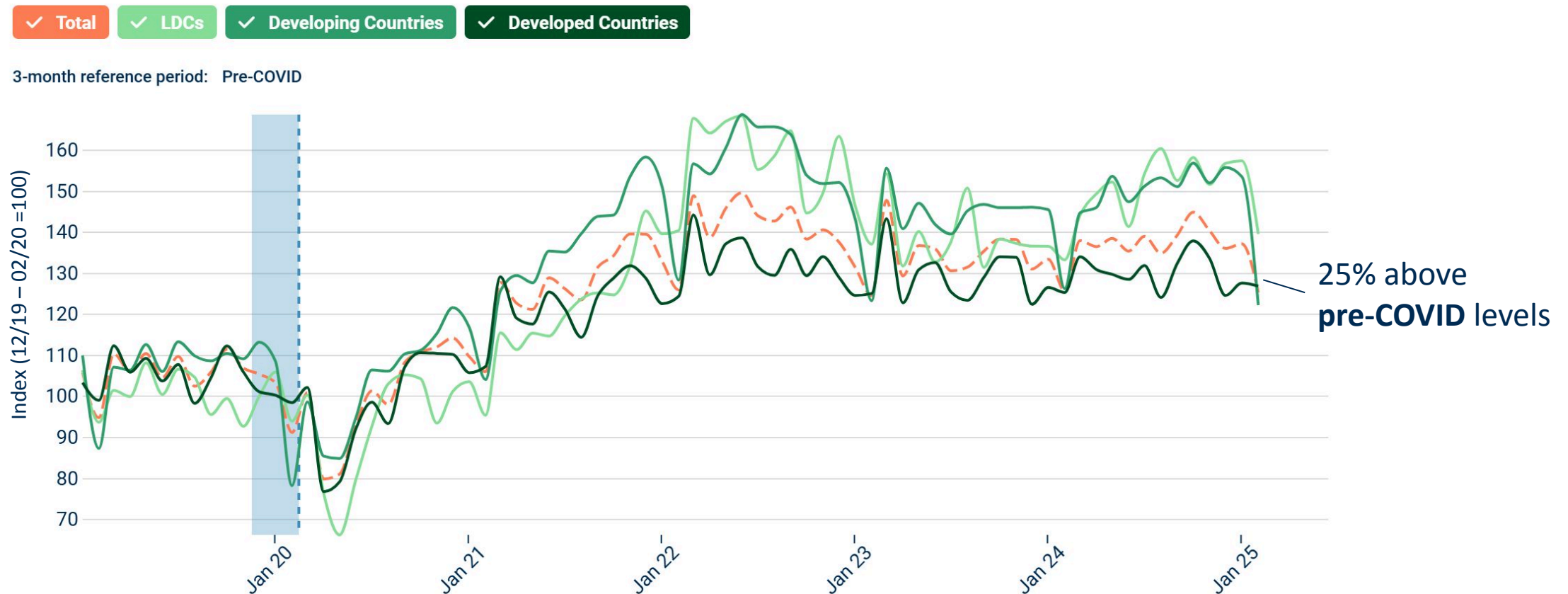
# Navigating trade uncertainty

18 June 2025

DCED Thematic Day on PSD in a changing global aid context: Navigating fragility, trade and reconstruction

# A rapidly changing trade landscape

## Evolution of exports, by development level

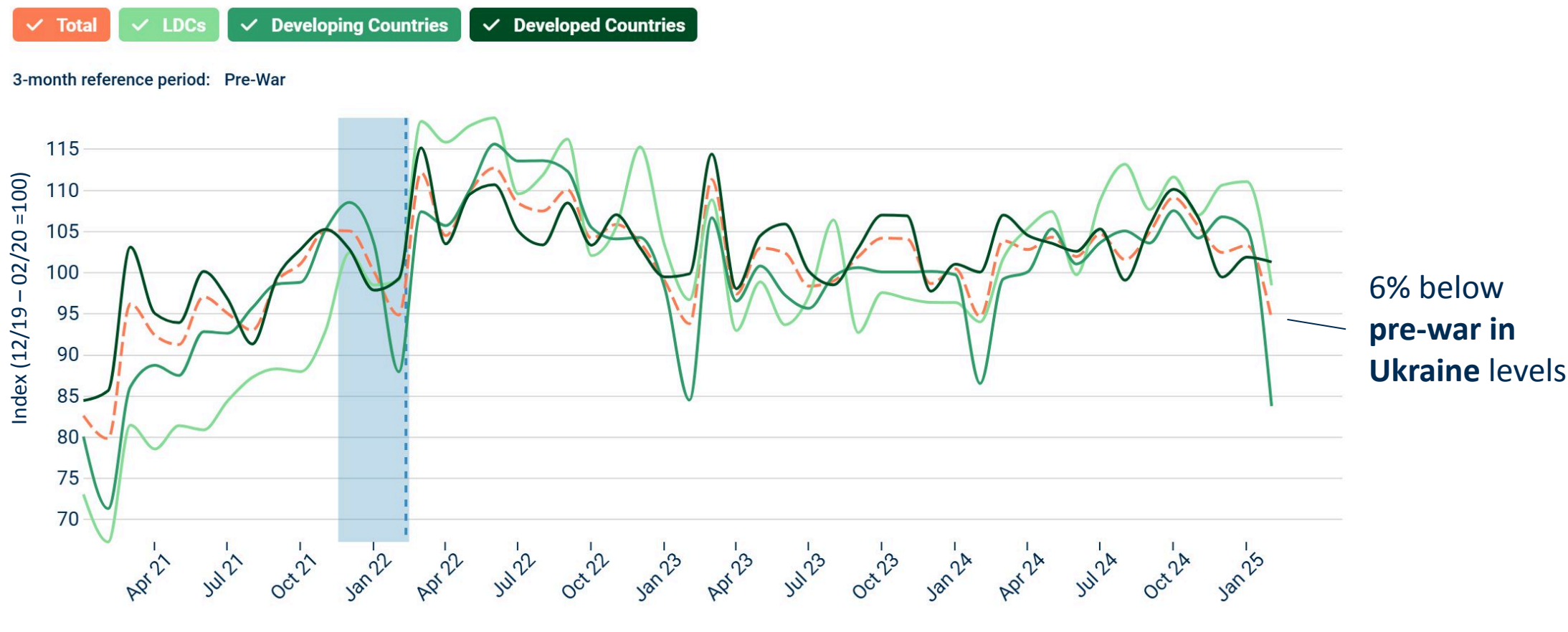


Source: ITC Trade Map ([www.trademap.org](http://www.trademap.org)) and national sources (2025)

Note: 100 refers to the shaded area, December 2019 to February 2020

# A rapidly changing trade landscape

## Evolution of exports, by development level



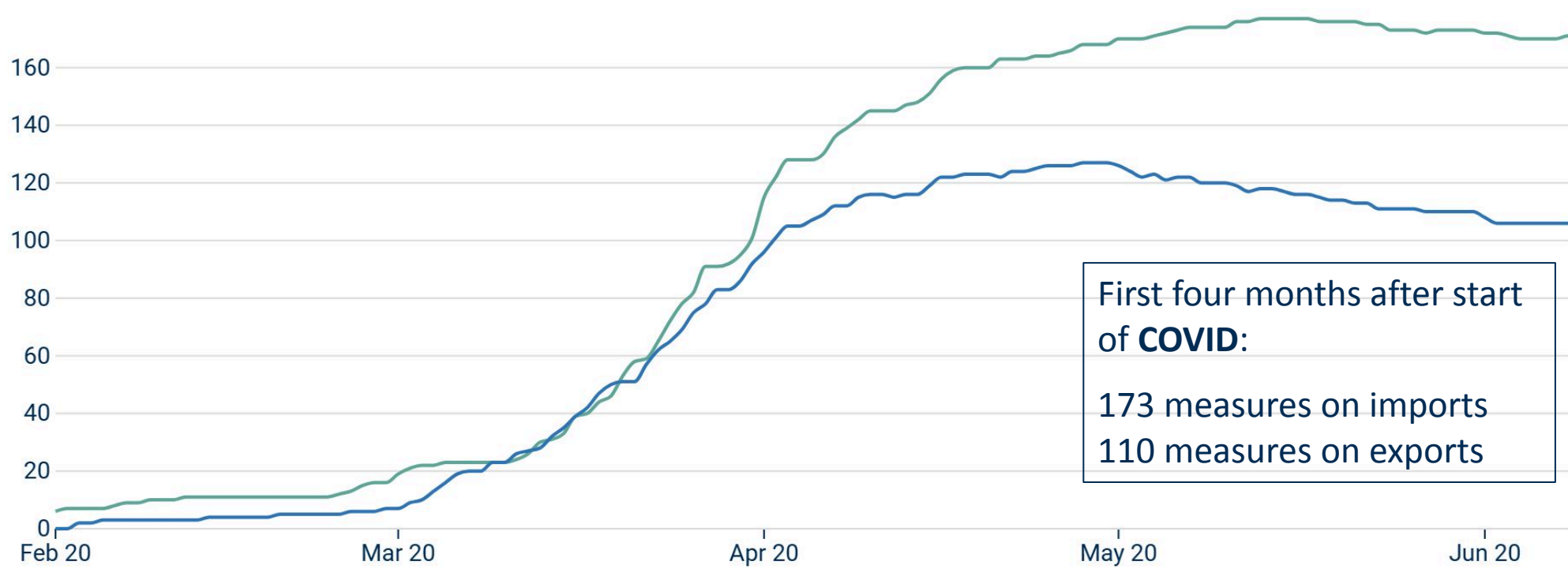
Source: ITC Trade Map ([www.trademap.org](http://www.trademap.org)) and national sources (2025)

Note: 100 refers to the shaded area, December 2021 to February 2022



# With a rising number of trade measures

✓ Measures on Exports    ✓ Measures on Imports

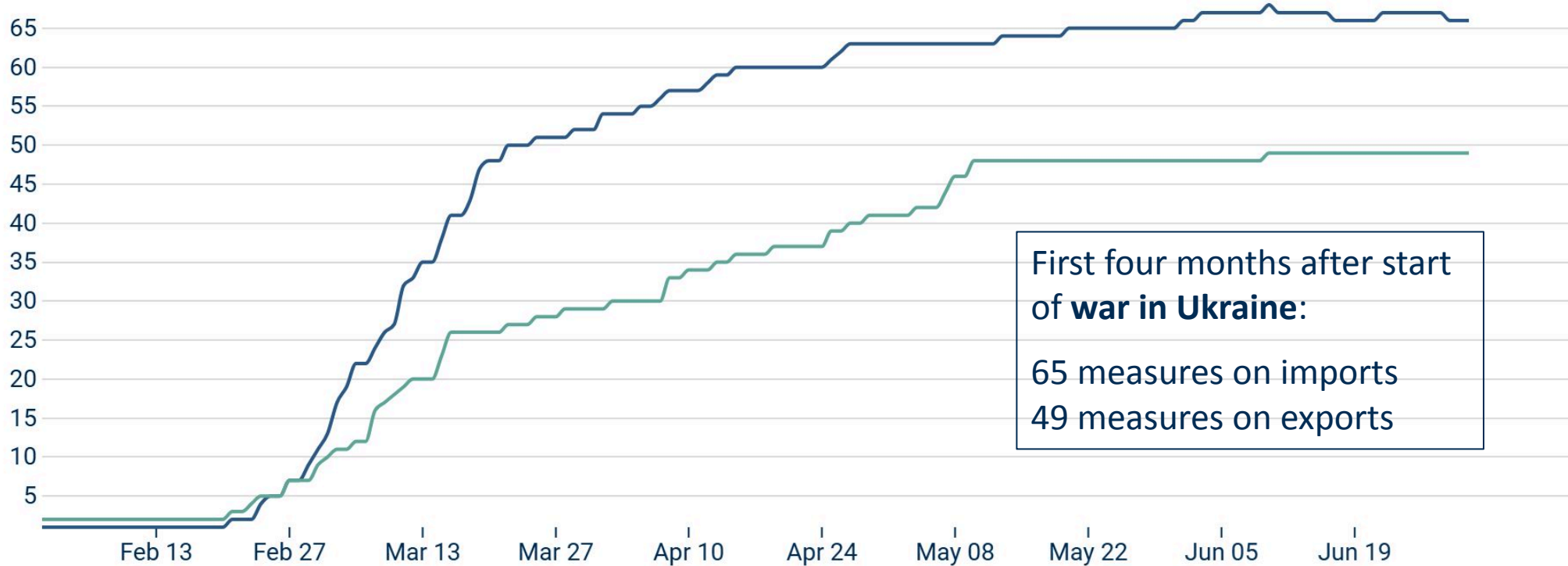


First four months after start of **COVID**:  
173 measures on imports  
110 measures on exports

# With a rising number of trade measures

✓ Measures on Exports

✓ Measures on Imports



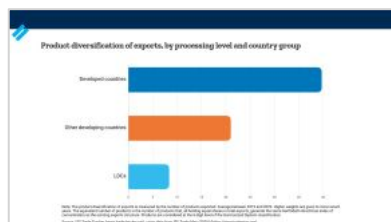


# Current events could weigh on global trade

- **128 new trade measures** since the new US government took office (US measures and countermeasures)
- Global trade in March 2025 was 6.6% above values from one year earlier □ effect of frontloaded orders in the US?
- ITC estimates **global trade potential to decline by -\$468 bn** by 2029, should current tariff measures remain in place. The WTO estimates a drop in world GDP growth of -0.6 pp in a scenario where tariffs between the US and China remain high.

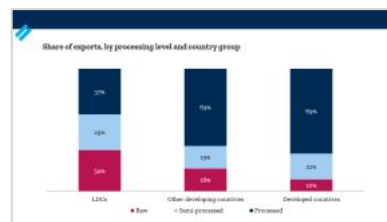
# How can the world's poorest respond to increased trade uncertainties?

## 1) Diversification



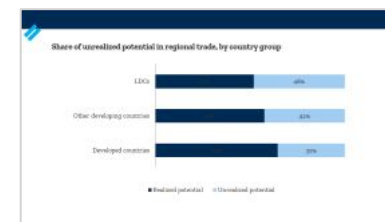
LDCs export **less** 'equivalent' **products** than other countries

## 2) Value addition



The **share of transformed** in total exports is **lower** than for other countries

## 3) Regional integration



LDCs find it more **difficult to unlock** their **regional trade potential** than other countries

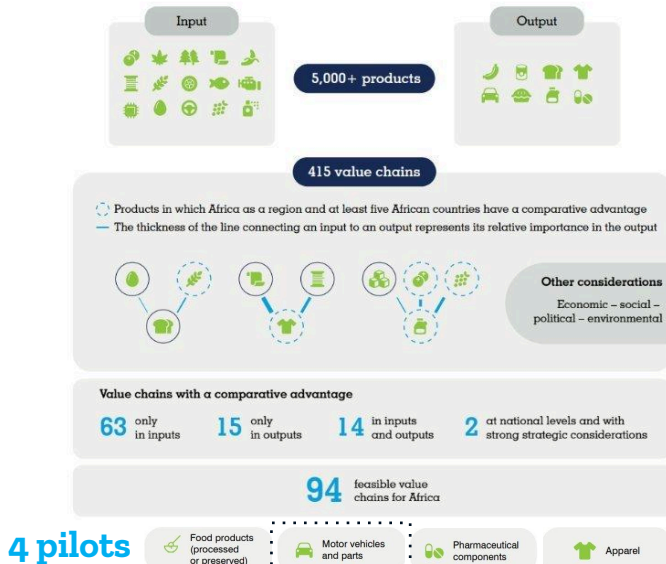


# Project example

## Developing an EV battery value chain in Africa

Phase 1: Implemented by December 2024

### 1 Value chain selection



Zoom-in to four different **chemistries of EV batteries**:

- Lithium-ion (three chemistries)
- Sodium-ion

### 2 Input-output analysis

Share of inputs available in Africa to meet export target (across all inputs): **62%**

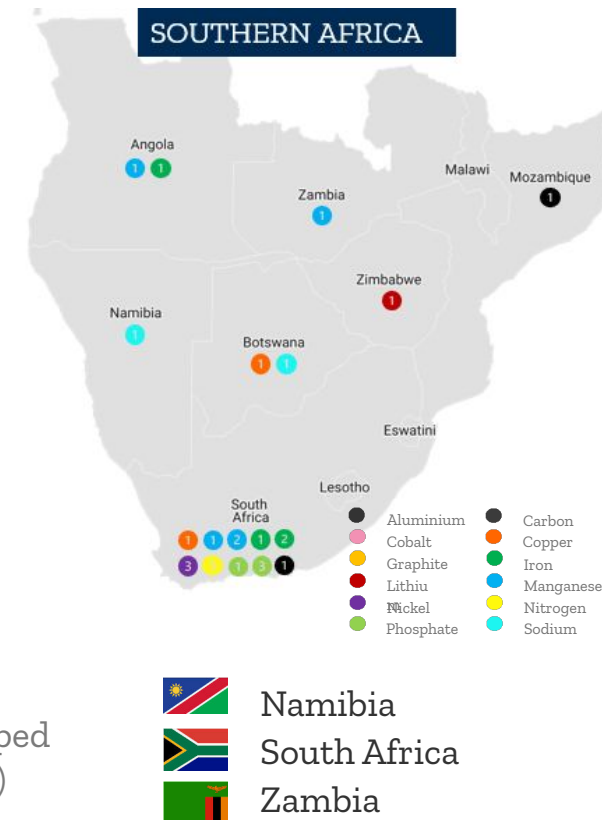
Value Chain: LMFP batteries	Input name	Technical coefficient	Minimum requirement (in million US\$)	Share of inputs available in Africa to meet the minimum requirement					
				Battery materials		Battery and refined materials		Battery, refined and raw materials	
	Copper	43.2%	6'496	<div><div></div></div>	0 %	<div><div></div></div>	4 %	<div><div></div></div>	80 %
	Graphite	31.6%	4'759	<div><div></div></div>	0 %	<div><div></div></div>	0 %	<div><div></div></div>	11 %
	Aluminium	18.5%	2'778	<div><div></div></div>	0 %	<div><div></div></div>	36 %	<div><div></div></div>	100 %
	Phosphate	2.4%	357	<div><div></div></div>	100 %	Min. req. met with 3rd stage inputs		<div><div></div></div>	
	Lithium	1.9%	285	<div><div></div></div>	0 %	<div><div></div></div>	0 %	<div><div></div></div>	59 %
	Manganese	1.8%	277	<div><div></div></div>	0 %	<div><div></div></div>	12 %	<div><div></div></div>	100 %
	Iron	0.6%	96	<div><div></div></div>	6 %	<div><div></div></div>	100 %	Min. req. met with 2nd and 3rd stage inputs	

**Investment into transformative capacity** to move from raw and refined to battery material production

**Investment into mining** (Africa holds 21% of the world's graphite reserves)

**Sourcing** from non-African suppliers with untapped export potential (China, Chile, Australia, Korea)

### 3 Mapping and validation of pilot countries



Namibia  
 South Africa  
 Zambia

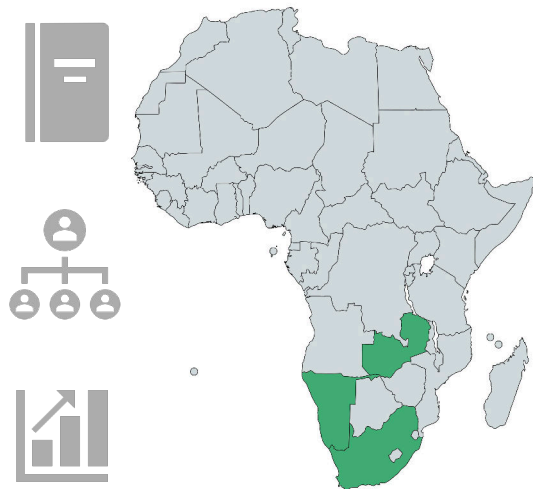


# Project example

## Developing an EV battery value chain in Africa

Phase 2: Under implementation since January 2025

- 1 Country-specific assessment of VC performance and regional connections
- 2 Consultations with industry experts, public and private stakeholders
- 3 Definition of the scope for regional VC roadmaps
- 4 Development of operational roadmaps for two Global Gateway projects



Business needs and challenges within the regional VC



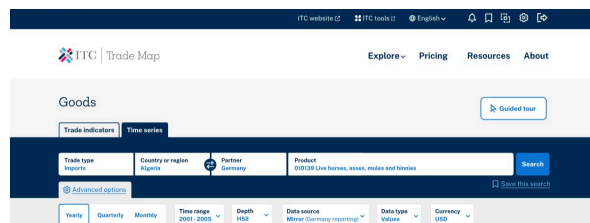
<p><b>1.1.1</b> Through the EVS Working Committee, the EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC.</p>	<p><b>1.1.2</b> Through the EVS Working Committee, the EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC.</p>
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Project	Activity	Priority	Start date	End date	Lead	Supporting	Estimated cost (USD)
1.1.1	Through the EVS Working Committee, the EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC.	1	2025-01-01	2025-12-31	SALEC	Ministry of Industry and Commerce, SADC	20,000
1.1.2	Through the EVS Working Committee, the EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC. The EVS industry needs to be strengthened to effectively deliver and provide the EVS industry in SADC.	1	2025-01-01	2025-12-31	SALEC	Ministry of Industry and Commerce, SADC	6,000
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# ITC market analysis tools help you navigate the rapidly evolving trade landscape

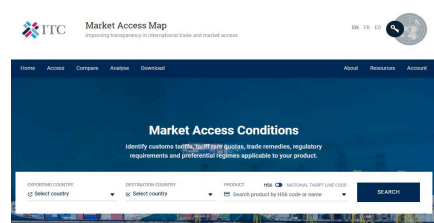
Access is free for all users in developing countries and the EU

Trade flows & company data  
(new design upcoming – December 2025)



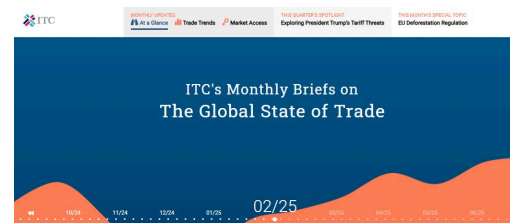
[trademap.org](https://trademap.org)

Market access conditions,  
including trade measures



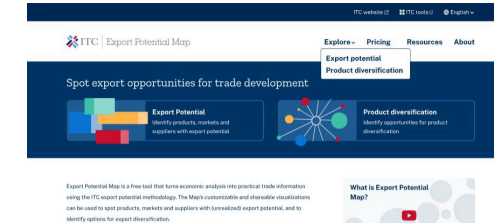
[macmap.org](https://macmap.org)

Trade briefs:  
analysis of recent measures



[tradebriefs.intracen.org](https://tradebriefs.intracen.org)

Export potential & diversification  
(new design upcoming – May 2025)



[exportpotential.intracen.org](https://exportpotential.intracen.org)

Visit the **Market Analysis Tools** portal for access to all tools, incl.:

- Rules of origin
- Investment
- Procurement

[marketanalysis.intracen.org](https://marketanalysis.intracen.org)





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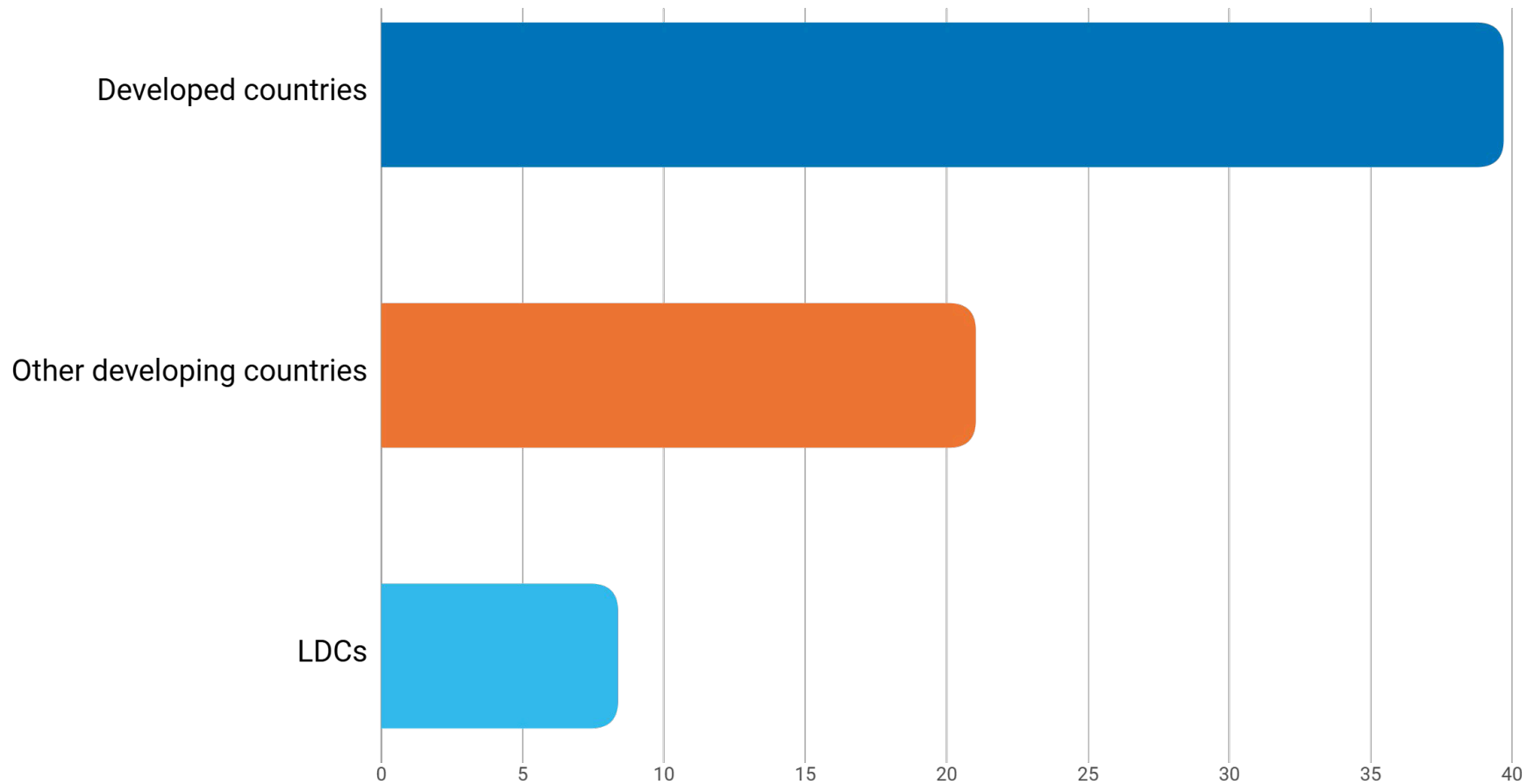
Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra



**Co-funded by  
the European Union**



## Product diversification of exports, by processing level and country group

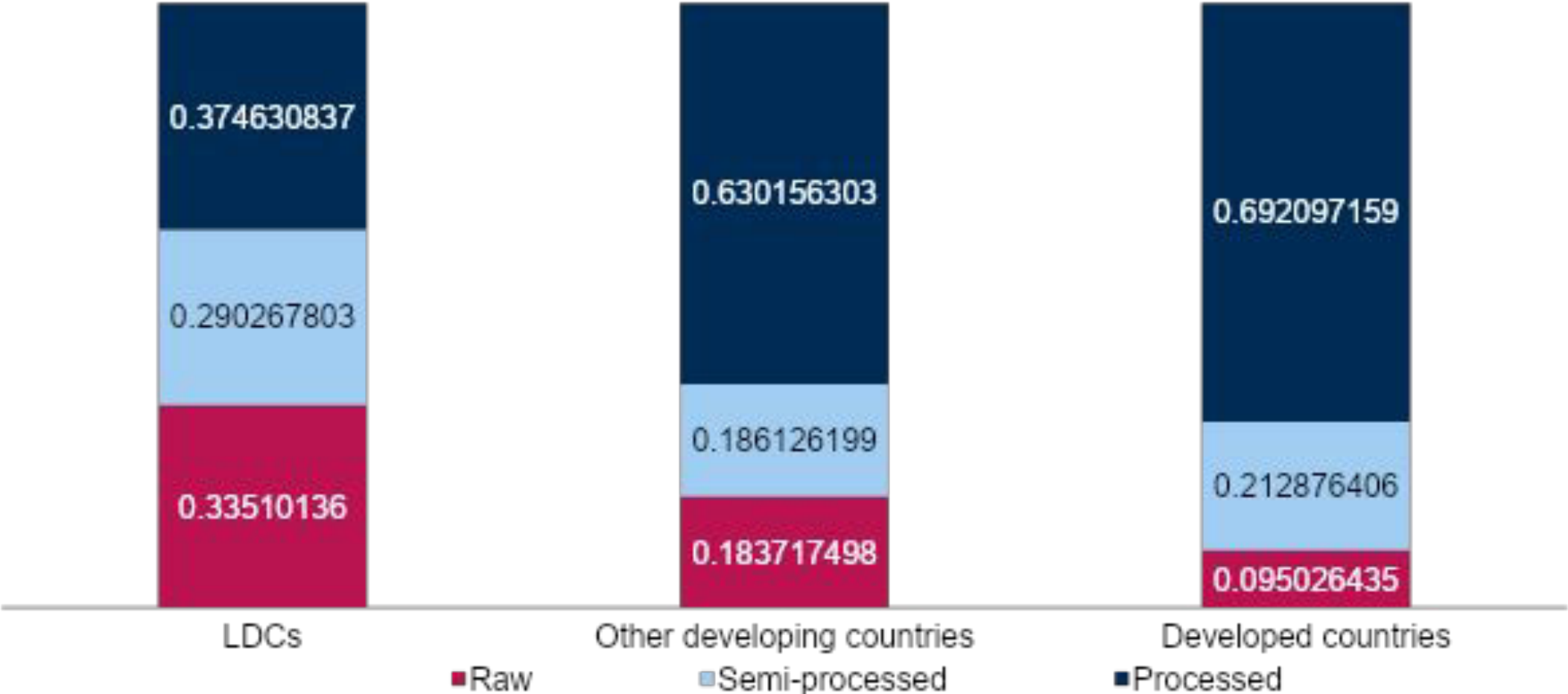


Note: The product diversification of exports is measured by the number of products exported. Average between 2019 and 2023. Higher weights are given to more recent years. The equivalent number of products is the number of products that, all holding equal shares in total exports, generate the same Herfindahl-Hirschman index of concentration as the existing exports structure. Products are considered at the 6-digit level of the Harmonized System classification.

Source: ITC Trade Tracker ([www.trade-tracker.org](http://www.trade-tracker.org)), using data from ITC Trade Map (2025) (<https://www.trademap.org>).



Share of exports, by processing level and country group





## Share of unrealized potential in regional trade, by country group

