

Navigating trade uncertainty

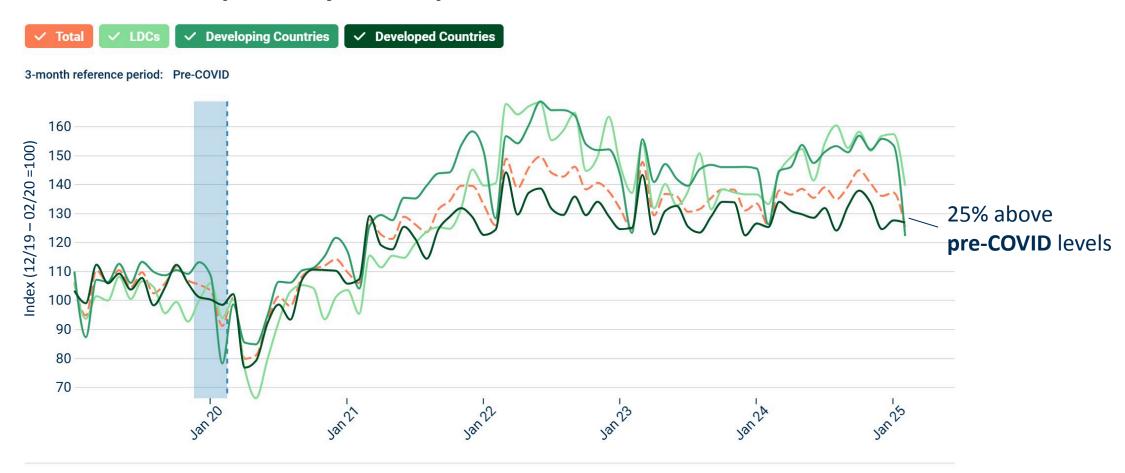
18 June 2025

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



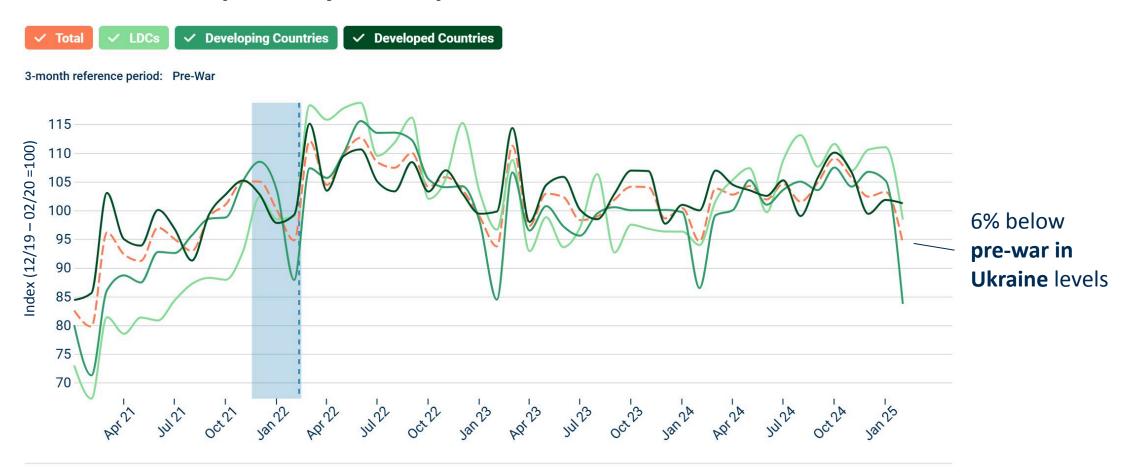
Source: ITC Trade Map (www.trademap.org) and national sources (2025)

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



A rapidly changing trade landscape

Evolution of exports, by development level



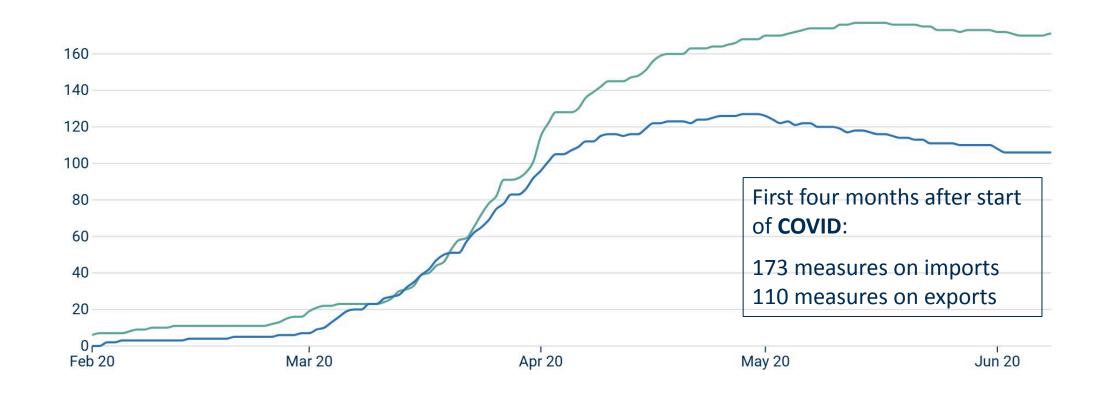
Source: ITC Trade Map (www.trademap.org) and national sources (2025)

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

With a rising number of trade measures

✓ Measures on Exports

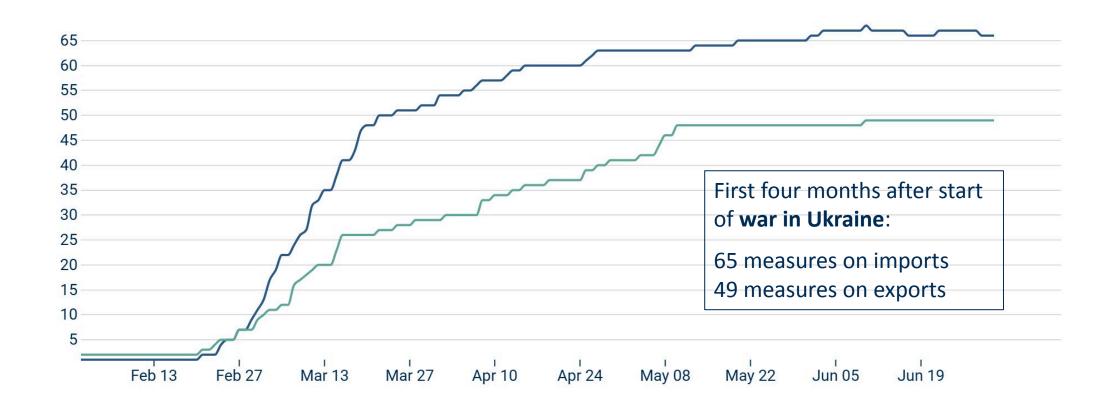
✓ Measures on Imports





With a rising number of trade measures

✓ Measures on Exports
✓ Measures on Imports





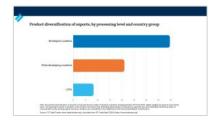
Current events could weigh on global trade

- 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.



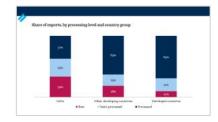
How can the world's poorest respond to increased trade uncertainties?

1) Diversification



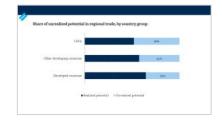
LDCs export **less** 'equivalent' **products** than other countries

2) Value addition



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

3) Regional integration



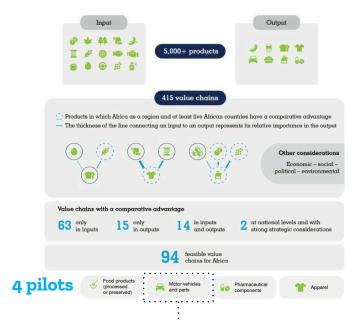
LDCs find it more
difficult to unlock their
regional trade potential
than other countries

Project example

Developing an EV battery value chain in Africa

Phase 1: Implemented by December 2024

1 Value chain selection

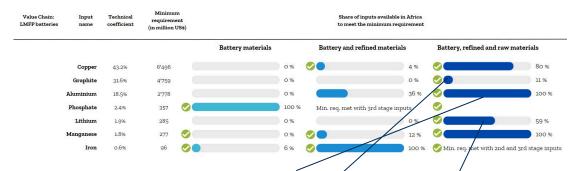


Zoom-in to four different **chemistries** of EV batteries:

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

2 Input-output analysis

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



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)





Mapping and validation of pilot countries





Project example

Developing an EV battery value chain in Africa

Phase 2: Under implementation since January 2025

Country-specific assessment of VC 2

performance and regional

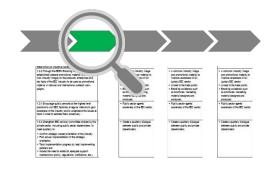
connections

Consultations with industry experts, public and private stakeholders



Business needs and challenges within the regional VC

Definition of the scope for regions 4 VC roadmaps Development of operational roadmaps for two Global Gateway projects



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	1.3: Build strong and regular printing public distingue (galling public mediudines mendud and to supportee of the EEC sucker).	1.3.1 Encourage public servorts at the highest level possible to visit EEC factories at regular internals to gain assumes of the industry and to understand the issues at hand in order to address them proactively.	*	01/07/0018	34,42,0000	Public sector agents' socceneds of the EEC sector.	Sn Lania Electron- ics Manufacturers and Exporters As- sociation	Ministry of Industry and Commerce Board of Investment (SO): Egont Development Board	6,000
		1.3.1 Designer Ett sekrary committee drawet by in- ministration inclining public sector debenders to meet susten) till 2. Confern statistic makes primeters of the industry. 8. Ris semanting immentation of the industry. 8. Ris semanting immentation for the challenge of whiteline. • This implementation progress by lead implementing partners and • Install the read to exhall in alrequall support mechanisms coloris, required in ministrations, est.	4	04/07/0248	34/42/0022	Create a quarterly discipue between public and private stateholders.	Eport Develop- reent Board	Ministry of Develop- ment Strategies and International Trade Opportment of Com- ments: Sin Lanks Electronics Manufac- tures and Exporters Association	6.000



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

Market access conditions, including trade measures



macmap.org

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

- Rules of origin
- Investment
- Procurement

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Trade briefs: analysis of recent measures



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Export potential & diversification

(new design upcoming – May 2025)



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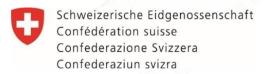
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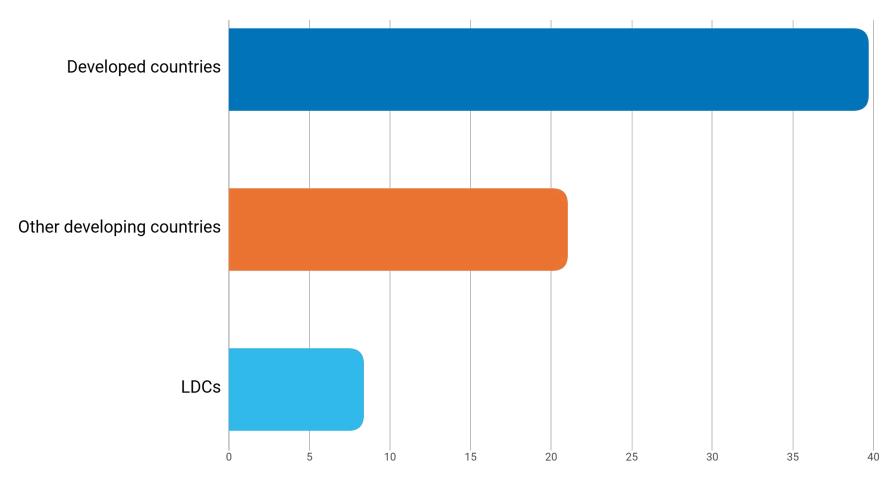








Product diversification of exports, by processing level and country group

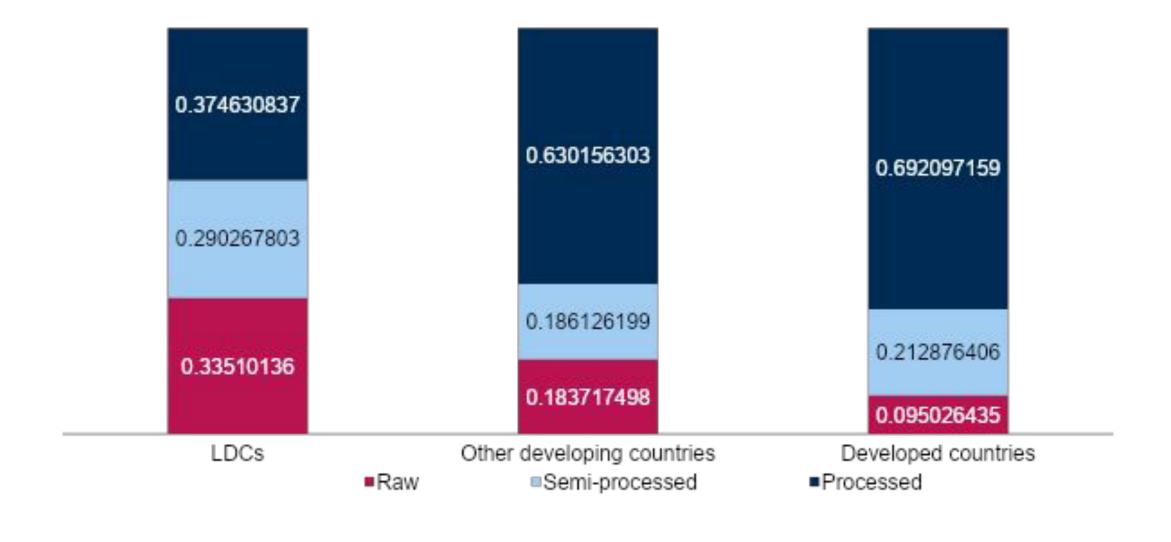


Note: The product diversification of exports is measured by the number of products exported. Average between 2019 and 2023. Higher weights are given to more recent years. The equivalent number of products is the number of products that, all holding equal shares in total exports, generate the same Herfindahl-Hirschman 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), using data from ITC Trade Map (2025) (https://www.trademap.org).

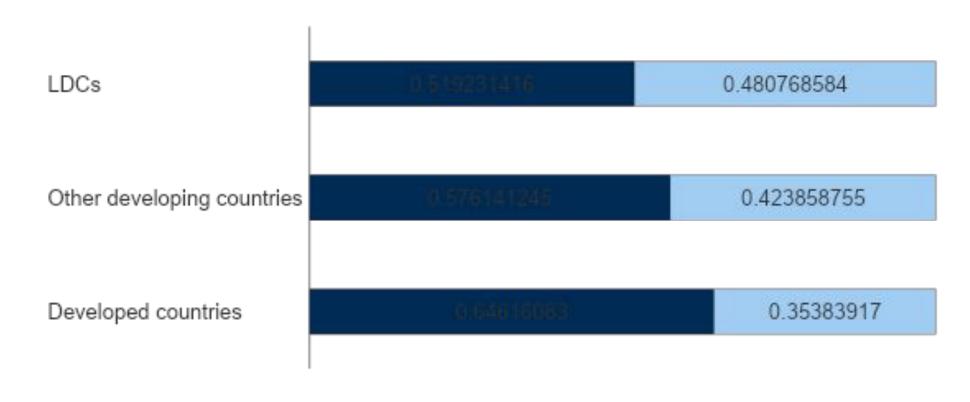


Share of exports, by processing level and country group





Share of unrealized potential in regional trade, by country group



■Realized potential ■Unrealized potential