Reviewing Agricultural Trade Policies to Promote Intra-OIC Agricultural Trade

Part 2

Serdar Sayan

13th Meeting of the COMCEC Agriculture Working Group

February 21, 2019

Ankara, Turkey
Outline

• Case Study Methodology
• Case Study Countries
• Main Lessons Learned from the Case Studies
• Conclusion and Policy Recommendations
Outline

• Case Study Methodology
• Case Study Countries
• Main Lessons Learned from the Case Studies
• Conclusion and Policy Recommendations
Case Study Methodology

• Country selection
  • Four OIC countries
  • Two non-OIC countries

• More detailed analysis of
  • Agricultural trade flows
  • Agricultural trade policies

for these six countries

• Field visits in three OIC case study countries
Selection

• Four OIC countries
  • **Turkey** (from the Asian group) \[FIELD VISIT\]
    • agricultural export hub within the OIC (COMCEC, 2018b)
  • **Morocco** (from the Arab group) \[FIELD VISIT\]
    • larger share of agriculture than in Turkey
  • **The Gambia** (from the African group) \[FIELD VISIT\]
    • dependence to «wood» & «fruits and nuts»
  • **Chad** (from the African group) \[DESK STUDY\]
    • food security issues and relatively more available data (WTO reports)

• Two non-OIC countries (among the best-practice cases)
  • **Thailand** (ASEAN) \[DESK STUDY\]
  • **Brazil** (MERCOSUR) \[DESK STUDY\]
Detailed Analysis

• **Agricultural Trade Flows**
  - Top trade partners in agricultural products
  - Top export destinations & top import origins in the OIC
  - Top export products/product groups & top import products/product groups

• **Agricultural Trade Policies**
  - Trade-weighted average applied tariffs for top products/product groups
  - NTM coverage ratio, NTM frequency ratio, and NTM affected product count in each country and sector
  - Trade agreements in force and the OIC members that export to the case study country under preferential tariffs
Field Visits

Main Purpose of the Field Visits: collect information that cannot be obtained through the analysis and review of published statistics

Key Informant Interview

• Semi-structured interview with 9 questions on
  • Agricultural trade policies
  • Food security, supply chains, and smallholder farmers
  • Trade relationships within the OIC and intra-OIC agricultural trade

• Conducted with
  • Directors and experts from the ministries and government agencies specializing in agriculture and trade
  • Private sector representatives
  • Specialists or managers working in the field of agricultural credits
  • Academics whose research focuses on agricultural trade.
Outline

• Case Study Methodology
• Case Study Countries
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• Conclusion and Policy Recommendations
Turkey

Shares of Agriculture, %, 2008 versus 2016

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP</th>
<th>Employment</th>
<th>Exports</th>
<th>Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>7.5</td>
<td>22.4</td>
<td>8.0</td>
<td>5.9</td>
</tr>
<tr>
<td>2016</td>
<td>6.2</td>
<td>19.5</td>
<td>11.0</td>
<td>7.2</td>
</tr>
</tbody>
</table>

Breakdown of Agricultural Trade, billion USD, 2016

- **Import**
  - Agri-food products; 10.6
  - Agri-raw materials; 2.6
  - Fish products; 0.2

- **Export**
  - Agri-food products; 15.9
  - Agri-raw materials; 0.3
  - Fish products; 0.9
Breakdown of Agricultural Exports & Top 5 Partners, 2016

<table>
<thead>
<tr>
<th>Top 5 Partners</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iraq</td>
<td>%17</td>
</tr>
<tr>
<td>Germany</td>
<td>%8</td>
</tr>
<tr>
<td>USA</td>
<td>%6</td>
</tr>
<tr>
<td>Italy</td>
<td>%4</td>
</tr>
<tr>
<td>Syria</td>
<td>%3</td>
</tr>
</tbody>
</table>

- NAFTA %7
- EU-28 %32
- OIC %42
- MERCOSUR %0
- ASEAN %2

Turkey
Breakdown of Agricultural Imports & Top 5 Partners, 2016

<table>
<thead>
<tr>
<th>Top 5 Partners</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>13%</td>
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<tr>
<td>USA</td>
<td>11%</td>
</tr>
<tr>
<td>Ukraine</td>
<td>6%</td>
</tr>
<tr>
<td>Brazil</td>
<td>5%</td>
</tr>
<tr>
<td>Germany</td>
<td>4%</td>
</tr>
</tbody>
</table>

- NAFTA %15
- EU-28 %25
- MERCOSUR
- OIC %16
- ASEAN %7
Turkey

Stakeholders’ perceptions and views
• Liberalized trade in terms of tariff protection
• Export subsidies in agriculture to boost production & exports
• Small & fragmented farms, inefficient value chains, & difficulties in access to finance as major problem areas
• Grant programs similar to those of the EU
• Too many cooperatives that target the entire sector as a source of inefficiency
• Ability to deliver a relatively large number of agri-food products as a logistic advantage
• Institutional differences among the OIC member countries as one of the challenges
Morocco

Shares of Agriculture, %, 2008 versus 2016

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP</th>
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</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>12.0</td>
<td>41.0</td>
<td>21.4</td>
<td>13.6</td>
</tr>
<tr>
<td>2016</td>
<td>12.0</td>
<td>37.7</td>
<td>20.6</td>
<td>12.2</td>
</tr>
</tbody>
</table>

Breakdown of Agricultural Trade, billion USD, 2016

- Export:
  - Agri-food products; 3.6
  - Fish products; 2.0
  - Agri-raw materials; 0.0

- Import:
  - Agri-food products; 4.6
  - Fish products; 0.2
  - Agri-raw materials; 0.3
Morocco

Breakdown of Agricultural Exports & Top 5 Partners, 2016

<table>
<thead>
<tr>
<th>Top 5 Partners</th>
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<tbody>
<tr>
<td>Spain</td>
<td>21%</td>
</tr>
<tr>
<td>France</td>
<td>16%</td>
</tr>
<tr>
<td>Russia</td>
<td>6%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>6%</td>
</tr>
<tr>
<td>Italy</td>
<td>5%</td>
</tr>
</tbody>
</table>

EU-28: 62%
NAFTA: 5%
MERCOSUR: 1%
ASEAN: 1%
OIC: 14%
Morocco

Breakdown of Agricultural Imports & Top 5 Partners, 2016

<table>
<thead>
<tr>
<th>Top 5 Partners</th>
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<tbody>
<tr>
<td>France</td>
<td>16%</td>
</tr>
<tr>
<td>USA</td>
<td>9%</td>
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<tr>
<td>Brazil</td>
<td>8%</td>
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<tr>
<td>Argentina</td>
<td>8%</td>
</tr>
<tr>
<td>Spain</td>
<td>7%</td>
</tr>
</tbody>
</table>

NAFTA %13
EU-28 %42
MERCOSUR %17
OIC %9
ASEAN %2
Morocco

Stakeholders’ perceptions and views

• Ensuring a minimum level of production and protecting farmers especially in arid areas are critical policy objectives

• Significant reductions in tariffs in the past few decades, followed by the 2013 tariff reform

• Adoption of the US and the EU standards in sanitary and hygiene

• The Green Morocco Plan (since 2008): multiple dimensions such as distributing lands, restructuring of farmers into cooperatives, and irrigation projects

• Lack of entrepreneurship in agriculture is a source of concern

• Existence of fragmented lands and continuing irrigation problems despite the successes

• Great potential as a major fish exporter to serve the OIC markets

• Strong agricultural trade prospects with North Africa and Sub-Saharan Africa
The Gambia

Shares of Agriculture, %, 2008 versus 2016

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<tr>
<td>2008</td>
<td>25.2</td>
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<td>51.0</td>
<td>28.1</td>
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<tr>
<td>2016</td>
<td>17.0</td>
<td>27.2</td>
<td>83.1</td>
<td>32.7</td>
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</tbody>
</table>

Breakdown of Agricultural Trade, billion USD, 2016

- Agri-food products, 352.6 billion USD
- Fish products, 4.2 billion USD
- Agri-raw materials, 1.3 billion USD

Agri-food products, 107.7 billion USD
Fish products, 8.6 billion USD
Agri-raw materials, 81.7 billion USD
The Gambia

Breakdown of Agricultural Exports & Top 5 Partners, 2016

<table>
<thead>
<tr>
<th>Top 5 Partners</th>
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</tr>
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<tbody>
<tr>
<td>China</td>
<td>41%</td>
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<tr>
<td>Guinea-Bissau</td>
<td>20%</td>
</tr>
<tr>
<td>India</td>
<td>20%</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>6%</td>
</tr>
<tr>
<td>Senegal</td>
<td>3%</td>
</tr>
</tbody>
</table>

NAFTA %0
EU-28 %8
MERCOSUR %0
ASEAN %6
OIC %24
The Gambia

Breakdown of Agricultural Imports & Top 5 Partners, 2016

Top 5 Partners | Share
--- | ---
Brazil | 22%
Malaysia | 11%
Indonesia | 8%
USA | 6%
Netherlands | 6%

NAFTA 6%
EU-28 20%
OIC 33%
MERCOSUR 24%
ASEAN 20%
The Gambia

Stakeholders’ perceptions and views

• Creating a more favorable environment for producers through productivity increases is a major policy objective

• The ultimate goal: a commercialized, efficient, and competitive agricultural sector for sustainable development

• Two major bottlenecks with respect to food security:
  • Low productivity- or no-production of staple foods such as rice
  • Farmers’ inability to access credit opportunities

• Several initiatives to support the supply chains (involvement of FAO, World Bank, etc.)

• Highly restricted spectrum of agricultural products to be exported (such as peanuts and cashews).

• Limited food processing facilities and lack of accredited laboratories as major problems that restrict agricultural exports
Chad

Shares of Agriculture, %, 2008 versus 2016

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</thead>
<tbody>
<tr>
<td>2008</td>
<td>54.6</td>
<td>87.2</td>
<td>0.8</td>
<td>20.9</td>
</tr>
<tr>
<td>2016</td>
<td>49.5</td>
<td>87.2</td>
<td>3.5</td>
<td>15.4</td>
</tr>
</tbody>
</table>

Breakdown of Agricultural Trade, billion USD, 2016

- **Import**: Agri-food products; 82.0
  - Fish products; 1.1
  - Agri-raw materials; 0.1

- **Export**: Agri-food products; 23.4
  - Fish products; 0.0
  - Agri-raw materials; 30.3
Chad

Breakdown of Agricultural Exports & Top 5 Partners, 2016

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<thead>
<tr>
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<tbody>
<tr>
<td>Turkey</td>
<td>42%</td>
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<tr>
<td>India</td>
<td>21%</td>
</tr>
<tr>
<td>Portugal</td>
<td>9%</td>
</tr>
<tr>
<td>Thailand</td>
<td>8%</td>
</tr>
<tr>
<td>Bahrain</td>
<td>5%</td>
</tr>
</tbody>
</table>

- NAFTA: 0%
- EU-28: 17%
- MERCOSUR: 0%
- OIC: 53%
- ASEAN: 12%
Chad

Breakdown of Agricultural Imports & Top 5 Partners, 2016

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<tr>
<td>France</td>
<td>24%</td>
</tr>
<tr>
<td>Belgium-Luxembourg</td>
<td>14%</td>
</tr>
<tr>
<td>Turkey</td>
<td>13%</td>
</tr>
<tr>
<td>Senegal</td>
<td>9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>7%</td>
</tr>
</tbody>
</table>

EU-28: 59%  
NAFTA: 2%  
ASEAN: 0%  
OIC: 31%  
MERCOSUR: 2%
Non-OIC Case: Thailand

Shares of Agriculture, %, 2008 versus 2016

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<tr>
<td>2008</td>
<td>10.1</td>
<td>42.5</td>
<td>17.1</td>
<td>6.1</td>
</tr>
<tr>
<td>2016</td>
<td>8.5</td>
<td>33.3</td>
<td>15.5</td>
<td>8.3</td>
</tr>
</tbody>
</table>

- Thailand is a founding member of ASEAN.
- In all of the broad agricultural product categories (agri-food, fish, agri raw), Thailand records large trade surpluses.
- Thailand recorded an agricultural trade surplus of 4.5 billion USD with the OIC partners in 2016.
- Thailand has FTAs with 48 countries worldwide, including 20 OIC member countries.
Non-OIC Case: Brazil

Shares of Agriculture, %, 2008 versus 2016

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<tr>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>4.6</td>
<td>17.5</td>
<td>27.9</td>
<td>5.0</td>
</tr>
<tr>
<td>2016</td>
<td>4.9</td>
<td>10.2</td>
<td>38.4</td>
<td>7.8</td>
</tr>
</tbody>
</table>

- Brazil is a founding member of MERCOSUR.
- In agri-food and agri-raw categories, Brazil records trade surpluses.
- Brazil recorded a sizable agricultural trade surplus with the OIC partners in 2016.
- Brazil has FTAs with 51 countries worldwide including 19 OIC member countries.
Outline

• Case Study Methodology
• Case Study Countries
• **Main Lessons Learned from the Case Studies**
• Conclusion and Policy Recommendations
Main Lessons Learned from the Case Studies

<table>
<thead>
<tr>
<th>Shares of Agriculture 2016</th>
<th>Turkey</th>
<th>Morocco</th>
<th>The Gambia</th>
<th>Chad</th>
<th>Thailand</th>
<th>Brazil</th>
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</thead>
<tbody>
<tr>
<td>GDP: 6.2%</td>
<td>GDP: 12.0%</td>
<td>GDP: 17.0%</td>
<td>GDP: 49.5%</td>
<td>GDP: 8.5%</td>
<td>GDP: 4.9%</td>
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</tr>
<tr>
<td>Emp: 19.5%</td>
<td>Emp: 37.7%</td>
<td>Emp: 27.2%</td>
<td>Emp: 87.2%</td>
<td>Emp: 33.3%</td>
<td>Emp: 10.2%</td>
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<tr>
<td>Export: 11.0%</td>
<td>Export: 20.6%</td>
<td>Export: 83.1%</td>
<td>Export: 3.5%</td>
<td>Export: 15.5%</td>
<td>Export: 38.4%</td>
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<tr>
<td>Import: 7.2%</td>
<td>Import: 12.2%</td>
<td>Import: 32.7%</td>
<td>Import: 15.4%</td>
<td>Import: 8.3%</td>
<td>Import: 7.8%</td>
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</tr>
<tr>
<td>Avg. non-OIC share in Top 5 Exports 2008-2016</td>
<td>63%</td>
<td>93%</td>
<td>62%</td>
<td>84%</td>
<td>78%</td>
<td>75%</td>
</tr>
<tr>
<td>Avg. non-OIC share in Top 5 Imports 2008-2016</td>
<td>83%</td>
<td>89%</td>
<td>45%</td>
<td>56%</td>
<td>89%</td>
<td>98%</td>
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Main Lessons Learned from the Case Studies

<table>
<thead>
<tr>
<th>Top 5 OIC destinations</th>
<th>Turkey</th>
<th>Morocco</th>
<th>The Gambia</th>
<th>Chad</th>
<th>Thailand</th>
<th>Brazil</th>
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<td>Iraq</td>
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<td>S. Arabia</td>
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<td>Cote d’Ivoire</td>
<td>Guinea-Bissau</td>
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<td>Iran</td>
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<td>Mauritania</td>
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<td>England</td>
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<td>Sudan</td>
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<td>Syria</td>
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<table>
<thead>
<tr>
<th>Top 5 OIC origins</th>
<th>Malaysia</th>
<th>Egypt</th>
<th>Malaysia</th>
<th>Cameroon</th>
<th>Indonesia</th>
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<tbody>
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<td>Malaysia</td>
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<td>UAE</td>
<td>Senegal</td>
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<td>Nigeria</td>
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<td>Turkey</td>
<td>UAE</td>
<td>Nigeria</td>
<td>Morocco</td>
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<table>
<thead>
<tr>
<th>PTAs with OIC countries</th>
<th>8</th>
<th>16</th>
<th>11</th>
<th>2</th>
<th>20</th>
<th>19</th>
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</thead>
</table>
Main Lessons Learned from the Case Studies

<table>
<thead>
<tr>
<th>Top 5 export products (divisions) to OIC</th>
<th>Turkey</th>
<th>Morocco</th>
<th>The Gambia</th>
<th>Chad</th>
<th>Thailand</th>
<th>Brazil</th>
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<td>CEREALS</td>
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<td>VEGETABLES &amp; FRUITS</td>
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<td>ANIMAL &amp; VEG. OILS</td>
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<td>SUGARS</td>
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<td>BEVERAGES &amp; TOBACCO</td>
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<td>VEGETABLES &amp; FRUITS</td>
<td>FEED. STUFF FOR ANIMALS</td>
<td>OIL SEEDS</td>
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<td>SUGARS</td>
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<td>ANIMAL &amp; VEG. OILS</td>
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<td>DAIRY PROD.</td>
<td>BEVERAGES &amp; TOBACCO</td>
<td>CRUDE RUBBER</td>
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<td>MEAT</td>
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<td>DAIRY PROD.</td>
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<td>HIDES &amp; SKINS</td>
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<td>CEREALS</td>
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<tr>
<td>Top 5 import products (divisions) to OIC</td>
<td>ANIMAL &amp; VEG. OILS</td>
<td>VEGETABLES &amp; FRUITS</td>
<td>ANIMAL &amp; VEG. OILS</td>
<td>BEVERAGES &amp; TOBACCO</td>
<td>FISH</td>
<td>ANIMAL &amp; VEG. OILS</td>
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<td>VEGETABLES &amp; FRUITS</td>
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<td></td>
<td>ANIMAL &amp; VEG. OILS</td>
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</tbody>
</table>
Main Lessons Learned from the Case Studies

Agricultural reforms and innovative designs

The case study analyses yield information on the design, implementation and impact of cases of agricultural reforms and other innovative market institutions.

• The Plan Vert or the Green Plan of Morocco: multi-faceted reform actions helped, with some success, the smallholders to integrate more strongly with global markets.

• Turkey’s farmer registration system and e-commerce infrastructure: examples of innovative market institutions for easing market access and information diffusion.

• The Agricultural and Natural Resources (ANR) Policy (2017-2026) of The Republic of the Gambia: a favorable environment for agricultural producers with an objective of maximizing poverty reduction.
Main Lessons Learned from the Case Studies

Desk Study Countries

• Chad (OIC)
  • High share of agriculture in GDP (almost equal to 50%)
  • Large agricultural trade deficit
  • Only 2 FTAs with OIC countries currently in force
  • Data reliability problems regarding agricultural trade policy measures
  • Decreased tariffs applied to the top imported products originating from the OIC countries

• Thailand and Brazil (non-OIC)
  • Low shares of agriculture in GDP (less than 10%)
  • Large agricultural trade surpluses
  • Large numbers of FTAs/PTAs with OIC countries
  • Generally facing high tariff rates imposed by the OIC countries
  • Decreased tariffs applied to the top imported products originating from the OIC countries
  • Brazil: Exemplary in terms of the match between its top 5 exports and promising products set identified here (4 out of 5)
Outline

• Case Study Methodology
• Case Study Countries
• Main Lessons Learned from the Case Studies
• Conclusion and Policy Recommendations
Summary of the Main Results from the Study

• High tariff protection in certain key product divisions such as «Sugars» and «Oil seeds»

• Low average tariffs coupled with low intra-OIC trade share in another key product division «Meat», indicating that NTMs may be limiting intra-OIC agricultural trade

• Low propensity of trade agreements within the OIC (or, symmetrically, high propensity of trade agreements with non-OIC countries)
Summary of the Main Results from the Study

• Significance of **smallholder farming practices** across the OIC, limited access to credit and technical knowledge, little or no interaction with global markets

• Common understanding among the stakeholders that **cooperation and coordination** among OIC member countries in the sphere of agricultural trade would be multilaterally beneficial

• Serious problems concerning **data availability and reliability** in the realm of agricultural trade flows and agricultural trade policy measures (including both the tariff rates and the NTMs)
SWOT: increasing intra-OIC agricultural trade

Strengths
• Shared borders by a large majority of member countries
• Cultural affinity
• Existing regional blocs such as ECOWAS, involving OIC and non-OIC partners together, or all-OIC arrangements such the Pan-Arab agreement
• Existing agricultural trade networks within the OIC with identified export and import hubs
• Existing legal structure regarding the Trade Preferential System within the OIC

Weaknesses
• Lack of experience in finding and entering new markets
• Intra-OIC competition in third party markets due to similarity of products
• Visa issues and other trade costs
Opportunities

• Increasing product variety
• Existence of products such as meat that are not subject to tariff protection
• Existence of potential trade achievable through tariff reductions and trade agreements
• Existence of COMCEC/COMCEC Agriculture/Trade Working Group(s) as a forum for regular contact

Threats

• Existence of trade agreements with non-OIC partners/membership in regional blocs etc. involving neighboring countries that are not OIC members
Conclusion and Policy Recommendations

Recommendation 1: Establishing Free Trade Areas

Tough route!

- **STEP 1**: Three FTAs for each regional group
- **STEP 2**: Merging the regional FTAs into a single OIC-wide FTA

Discriminately high tariffs applied by OIC members to fellow OIC partners often result from commitments of importing countries to third-parties.
Conclusion and Policy Recommendations

**Recommendation 2: Reducing tariff rates for key product divisions and products**

- Tariff cuts, particularly in key product divisions and products, would be highly beneficial.
- The key product divisions facing high tariff protection within the OIC are
  - Sugars, sugar preparations and honey,
  - Feeding stuff for animals,
  - Oil seeds and oleaginous fruits, &
  - Live animals.
Recommendation 3: Exploring possibilities for new bilateral trade arrangements in key product divisions and products

- Existing bilateral agreements cover only a small minority of potential exporter-importer matches in key product divisions and products.
  - 18% in Live Animals
  - 10% in Sugars, sugar preparations and honey
  - 6% in Oil seeds and oleaginous fruits
  - 5% in Feeding Stuff for Animals
  - 3% in Meat and meat preparations
- There exists a window of opportunity for the matched OIC members to establish new bilateral arrangements covering the key products.
Recommendation 4: Accelerating the processes for Halal certification

• Since «Meat and meat preparations» as a key product division is not subject to high tariff protection within the OIC, the process of establishing Halal certification across the OIC is a critical NTM-related policy to promote intra-OIC agricultural trade in meat products.

• The OIC members could accelerate the process of Halal certification by creating their national accreditation bodies and certification agencies (if not, some non-OIC countries may benefit from first-mover advantage by using their own Halal certifications).
Conclusion and Policy Recommendations

**Recommendation 5: Accelerating the implementation of the Trade Preferential System within the OIC**

- Trade agreements of the OIC members with non-OIC countries limit the scope of trade policy coherence within the OIC.

- Accelerating the implementation of the Trade Preferential System among the OIC Member States (TPS-OIC) is an important element that could be put on the policy agenda.
Recommendation 6: Promoting niche agricultural products

- Similarity in geography, climate conditions and factor endowments → competition among OIC members in certain products and markets around the globe

- (Policy) actions to increase intra-OIC trade:
  - ranging from product diversification and trademarking to marketing strategies and advertising campaigns.

- Promoting niche agricultural products of their fellow OIC partners under a reciprocal understanding of benefits
Conclusion and Policy Recommendations

Recommendation 7: Supporting commercial cooperation

- Differences in relative abundance of land and natural resources and of financial funds and credit → complementarities among OIC members → a window of opportunity in commercial cooperation

- Incentivizing commercial cooperation among the OIC member countries in the field of agricultural investment.

- Removal or reductions in the cost of obtaining business visas
Conclusion and Policy Recommendations

Recommendation 8: Supporting Non-commercial cooperation

• Differences in safety standards, market information systems, market institutions and human capital stocks → complementarities among OIC members → a window of opportunity in non-commercial cooperation

• Cooperation regarding technical expertise, skills, and safety standards

• Effective sharing of best-practice cases in agriculture and agricultural trade
Conclusion and Policy Recommendations

Recommendation 9: Building statistical capacity with regard to agricultural trade flows and policy measures

- New projects could be designed and conducted
  - to thoroughly identify the data availability and reliability problems in agricultural trade policy measures all across the OIC,
  - to develop institutional reform agendas that would help the OIC member countries alleviate the existing capability problems in the near future.

- A more specific policy action is to establish a new division on agricultural trade policy measures within SESRIC and benefit from this organ’s established capacities in data collecting and dissemination.
Recommendation 10: Directing research in agricultural trade policy analysis

• Joint works of Trade & Agriculture Working Groups of COMCEC that evaluate trade as a whole and treat agricultural trade as a subset of overall trade:
  • Calculating tariff equivalents of NTM measures for a sufficiently large set of agricultural products and OIC countries
  • Developing and analyzing general equilibrium models of trade policies and trade integration both within the OIC and between the OIC and non-OIC countries
Thank you for your attention.