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# NON-TARIFF DIMENSION OF NEOPROTECTIONISM IN WORLD TRADE IN AGRI-FOOD PRODUCTS

Key words: international trade, trade policy, neoprotectionism, agri-food products, non-tariff measures to trade

ABSTRACT. The aim of this paper was to determine the scope of non-tariff measures used in the world agri-food trade in 2020. This study used data of the United Nations Conference on Trade and Development (UNCTAD) and the Global Trade Alert (GTA) data. Applying the methodology developed by the UNCTAD and the World Trade Organization (WTO) three indexes were established to describe the use of non-tariff measures (NTMs) to trade, i.e., the Frequency Index, the Coverage Ratio and the Prevalence Ratio. The number of trade preferences and trade restrictions used by the largest exporters and importers of agri-food products was also measured. The analysis showed that the scope of use of non-tariff protection measures in world trade in agri-food products is much greater compared to other branches of the economy. In countries implementing a highly protectionist trade policy, such as Brazil, China, India, Indonesia, Canada, the USA and Vietnam, non-tariff instruments were used in relation to all tariff lines and the entire value of import. To the greatest extent, non-tariff protection measures were adopted in the trade of non-processed plant origin products, including cereals, oilseeds and oleaginous fruit, fruit and vegetables, as well as dairy products. Countries most commonly implementing trade restrictions against their partners and, at the same time, at greatest risk of retaliatory actions on their part included EU countries, the USA and China.

## INTRODUCTION

Despite the general acceptance and support for the concept of free trade manifested at the forum of the World Trade Organization (WTO), many countries, particularly those more economically developed, use protectionist instruments. Such a dichotomy in the implemented trade policy, in which free trade is promoted with the simultaneous establishment of protectionist instruments in the state's economic policy, was stressed

e.g., by Wanda Dugiel [2009]. The tendency to protect one's own market against increased competition from imports is particularly evident in the agricultural sector. Protectionist symptoms are greater during economic crises (even in countries, which used to support free trade), while, at present, they constitute a reaction to the negative effects of globalization and trade liberalization [Bagwell, Staiger 2003, Bussière et al. 2011, Enderwick 2011, Grottel 2016, Kłosowicz-Toborek 2018, Baena Rojas, Londoño Pineda 2020, Vitale 2020, Perez-Sebastian et al. 2021].

Trade protectionism in the 21st century is most frequently termed neoprotectionism and its genesis is commonly associated with the 2008 financial crisis. It differs from the traditional, 19th century protectionism, in which access to the market was defended mainly using high tariffs, by the fact that here non-tariff trade barriers are being implemented [Salvatore 1993], which do not directly indicate the intention to protect domestic producers or branches of the national economy. This type of protectionism is hidden and it is applied selectively towards sensitive branches of production or selected trade partners [Rynarzewski 2005, Ghibuțiu 2013, Riedel 2014]. Present-day protectionism is more subtle and takes the form of hidden subsidizing, the implementation of technical or administrative barriers discriminating against competition and, at the same time, outside the control of the WTO, which is hard to detect and challenge.

An example of selectivity of neoprotectionism, both geographically and sectoral, may be provided by a greater than average protection of producers and the agricultural market, executed using an extensive range of non-tariff instruments with a markedly lower transparency of action compared to tariffs[1]. On the one hand, trade neoprotectionism in the agricultural sector stems from the concept of the strategic trade policy[2], while, on the other hand, it is strongly related with the concept of food sovereignty. This concept is most frequently understood as the right of individual countries to implement agricultural and food policies adapted to the needs of the local population, but, at the same time, it has no negative effect on the populations of other countries. Such a policy does not focus on the accessibility of food itself, but rather on methods to secure it to satisfy the needs of the local population. In other words, the concept of food sovereignty – in contrast to food security – does not only rely on a technical point of view and solutions implemented to improve food access and availability but involves a political point of view and emphasises the role of agriculture as a strategic economic sector. The concept of food sovereignty emphasises the role of family farming, organic production methods, the fair division of means of production and the prevention of exclusion. Granting high priority to local food production and consumption, the concept of food sovereignty promotes such a trade

[1] The problem of the ambiguous effect on trade non-tariff barriers is discussed e.g., by Zhaohui Niu et al. [2018].

[2] This concept assumes that there are certain strategic areas of activity, which will bring considerable social benefits [Zielińska-Głębocka 1998].

policy, which contributes to a reduction of undernourishment, while, at the same time, promoting the attainment of sustainable development [Sobiecki 2007, Kraciuk 2013, Krysztofiak et al. 2020].

When analyzing premises of contemporary protectionism, it may be observed that arguments for protection are formulated from the point of view of individual economies while neglecting the international context [Drelich-Skulska, Domiter 2018]. In the trade policy of the 21st century, we may indicate a trend towards economic patriotism, manifested in ethnocentrism and the realization of programs promoting the consumption of goods offered by domestic producers. However, it needs to be remembered that the implementation of any trade policy instrument poses a risk of retaliatory actions on the part of countries, in relation to which these instruments are being applied, and if the imposed sanctions are motivated politically regardless of the targeted country, retaliatory actions are global in character and may be implemented by most international trade agents [Grottel 2016]. Neoprotectionism, as a response to unfair trade practices, was presented by David Peterson [1987]. Moreover, present-day protectionism motivated by economic nationalism is often a permanent element of the state's trade policy, whereas the classics of economic nationalism (e.g., Friedrich List and Alexander Hamilton) opted for the educational (temporary) character of protection, encouraging its application only in specific situations [Harlen 1999, Riedel 2014]. The high level of protection for the internal market of the European Union may constitute confirmation of neoprotectionist stability over time.

Non-tariff barriers in trade are commonly used neoprotectionist instruments. Premises for the adoption of non-tariff instruments for trade policy in the agricultural sector may be divided into economic, political and social. One of the most significant economic arguments supporting such an approach is connected with the specific character of labor as a factor of production and the lesser potential to improve labor efficiency in farms compared to producers in the non-agricultural sectors of the economy. This, in turn, results in limited possibilities to increase income from agricultural production and is manifested in income disparity, hindering production growth [Rembisz 2010]. The use of non-tariff barriers in agricultural trade is also promoted by disruptions of agricultural markets understood not only as income disparity in relation to other sectors of the economy, but also as inequalities in labor efficiency and income within agriculture itself in terms of the agricultural area and regional structure [Horbowiec 2016]. The area of individual farms may either facilitate or prevent economies of scale and, thus, contributes to variation in production profitability in terms of farm area classes. Additionally, the location of farms – related with more or less advantageous natural conditions and specific market accessibility – results in the spatial diversification of production profitability. As a consequence, we may observe a decrease in real social income below the optimal level. The role of the state and, at the same time, a justification for intervention is eliminating sources of such market disruptions and – in case this proves impossible – neutralizing their effects [Wojtas 2015]. Uncertainty and

instability of agricultural income, to a considerable extent, stems from the specific character of both agricultural production and the agricultural market. In this respect, we need to not only consider the dependence of production on natural conditions, but also the elasticity of demand and supply, the length of the production cycle or the technological standard of production. For this reason, the factor indicating the need or necessity of both tariff and non-tariff protection is connected with the increasing profitability of agricultural production by reducing the import of competitive products from abroad [Horbowiec 2016].

Political implications for the adoption of non-tariff instruments in the case of trade policy in the agricultural sector may include e.g. the activity of farmer groups (such as groups of agricultural producers, agricultural cooperatives or labor unions) promoting the interests of domestic producers and opting for the protectionist policy to protect the domestic market against competition from imports [Zawojska 2006]. This argument stems from the logic of collective action (the theory of groups) proposed by Mancur Olson [1965, 2012], which explains why small social groups (such as e.g., farmers), with an apparently lesser potential but homogeneous interests, prove to be more effective in achieving their objectives compared to large groups with diverse interests and experience greater problems coordinating their actions. Mancur Olson [1985] showed that, although groups of agricultural producers differ in terms of size and the convergence of member interests, they all strive to gain the greatest possible surplus (benefit) from protection at the expense of consumers and taxpayers, who are hardly ever motivated to self-organize in order to counter the drive of agricultural producers to gain a producer surplus. It may be assumed that such an approach explains the successes of agricultural producer groups lobbying for protection measures in highly developed countries and the ineffectiveness of producer organizations in developing countries [Olson 1986, Anderson 1995]. At the same time, it needs to be stressed that despite the convergence of motivations to adopt intervention measures (increasing farm profitability and protecting domestic producers), differences may be found in the protection and types of protection instruments used in countries differing in economic development. Apart from the protection of the country's economy, both in terms of guaranteeing producer income and protecting the health of plants and animals as well as all consumers, the adoption of non-tariff instruments, as a means of persuasion and pressure on partner countries, is also politically motivated. An example of such a protection policy may be provided e.g., by the embargo imposed by Russia in 2014 on the import of certain agri-food products coming from the EU, including e.g., fruit and vegetables, meat, milk and dairy products.

Social causes for non-tariff protection are closely related with economic arguments and attempts to eliminate the disparity in agricultural income by limiting foreign competition and, thus, stimulating demand for domestic products and assuring decent prices for domestic producers. It may be stressed that such argumentation is consistent with the basic objectives of the EU Common Agricultural Policy. Nevertheless, it counters the

original premises for protectionism presented by more economically developed countries as aiming to eliminate changes in income levels.

When analyzing protectionist instruments in present-day agricultural trade, tariffs are observed to be hitting historic lows, while commonly applied neoprotectionist instruments including non-tariff barriers to trade is justified by the necessity to eliminate market imperfections and protect the health of domestic consumers [Grundke, Moser 2019]. As stated by Robert Baldwin: "The lowering of tariffs has, in effect, been like draining a swamp. The lower water level has revealed all the snags and stumps of non-tariff barriers that still have to be cleared away" [1970, p. 237, 2000, p. 2]. On the one hand, some countries strive towards the harmonization of technical measures to attain further benefits from trade, at least in bilateral relations. On the other hand, concerns over excessive, discriminatory and hidden protectionism have led to the close monitoring of non-tariff barriers worldwide. Thus, the following questions arise: What is the scope of utilization of non-tariff instruments in the world agri-food trade? Is it greater than in the other sectors of the economy? Are these barriers used with comparative intensity in all branches of the food industry and by all trade participants?

The importance and effects of non-tariff barriers implemented in the agri-food trade have been extensively investigated, however, most studies conducted to date have concerned selected categories of non-tariff instruments and only some countries adopting them. For instance, Maria Cipollina and Luca Salvatici [2008] analyzed trade policies implemented at the border, while Yuan Li and John Beghin [2012] focused on the effects of technical measures on trade in agri-food products. Alan Matthews et al. [2017], referred to the trade measures of the EU, while Chang Liu et al. [2019], as well as Fabio Gaetano Santeramo and Emilia Lamonaca [2019a] quantified the impact of non-tariff measures on the African agri-food trade. In turn, Mmatlou Kalaba et al. [2016], presented the case of the Southern African Development Community (SADC), while Agnieszka Sapa [2015] tried to assess the use of non-tariff instruments in the agri-food import of 10 developing countries with the highest shares in the world agriculture's value added. This paper presents a more comprehensive point of view and aims at determining the scope of non-tariff measures used in world agri-food trade in 2020.

## RESEARCH MATERIAL AND METHODOLOGY

This study used recently available and internationally comparable data of the United Nations Conference on Trade and Development (UNCTAD) for the year 2020 and the Global Trade Alert (GTA) data corresponding in terms of the timeframe. In order to provide answers to the raised research question and estimate the scope of utilization of non-tariff measures (NTMs) in world agri-food trade (comprising sections 1-24 according to the

Harmonized System – HS), the methodology developed by the UNCTAD and the WTO was applied and three indexes were established, i.e., [Disdier, Fugazza 2019]:

– Frequency Index, which provides the share of products affected by one or more NTMs;
– Coverage Ratio, which reports the share of imports affected by one or more NTMs in total imports;
– Prevalence Ratio, which captures the average number of NTMs affecting an imported product.

Next, the number of interventions used in trade in selected agri-food products in 2020 was analyzed in terms of interventions liberalizing trade (trade preferences) and interventions harmful to trade (trade restrictions). Analyses covered a total of 46 countries (18 single countries and the UE as a group of 28 member countries) being the largest world exporters and importers of agri-food products, which, in 2020, were responsible for 81% and 78%, respectively, of global export and import for this group of products.

## RESEARCH RESULTS

Table 1 presents the values of indexes characterizing the use of non-tariff measures in countries being the largest exporters and importers of agri-food products depending on individual sectors. Based on the obtained results, it may be stated that a highly protectionist trade policy was implemented by Canada, Argentina, China, Vietnam and the EU. In these countries, non-tariff measures were imposed for min. 90% tariff items and the import value, whereas the number of instruments applied in relation to a single tariff item ranged from 4 to 7. An elevated use of non-tariff measures was observed in trade in agri-food products. In this case, non-tariff measures were applied in relation to min. 95% and, in some cases, even 98-100% of the above-mentioned products and import value. An extremely protectionist trade policy in the agri-food sector was implemented in Brazil, China, India, Indonesia, Canada, the USA and Vietnam, applying over a dozen instruments each for imports of individual products. A slightly lesser scope of agricultural market protection was observed in Switzerland, Thailand, the EU, Argentina and Australia. Due to the indispensable character of import, the importance of non-tariff protection in the trade of mineral products was relatively limited, although, also in this case, there were instances of imposing non-tariff measures on 100% of imported tariff items and the entire value of imports (Canada, the USA). In turn, the scope of application of non-tariff measures varied in the trade of industrial products. While in the import of industrial products to Canada, Argentina, the EU, Vietnam and China a non-tariff character of protection was strongly manifested, in the import to Thailand, Mexico and Switzerland the use of such instruments was relatively low. The average number of trade barriers applied in the import of individual products was also lower compared to total trade.

Table 1. Non-tariff measures usage in countries being the largest exporters and importers of agri-food products in the world by sector* (state on 11 November 2020)

| Country | Total | | | Agriculture (HS 1-24) | | | Natural resources (HS 25-27) | | | Manufacturing (HS 28-97) | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | A | B | C | A | B | C | A | B | C | A | B | C |
| Saudi Arabia | 68 | 72 | 6.1 | 99 | 95 | 16.7 | 33 | 13 | 0.0 | 65 | 70 | 5.0 |
| Argentina | 94 | 93 | 4.6 | 99 | 100 | 8.5 | 25 | 78 | 0.6 | 94 | 95 | 4.4 |
| Australia | 67 | 70 | 3.5 | 98 | 98 | 16.1 | 67 | 46 | 1.6 | 63 | 72 | 2.1 |
| Brazil | 75 | 84 | 6.3 | 100 | 100 | 18.7 | 57 | 85 | 2.9 | 73 | 82 | 5.6 |
| China | 90 | 92 | 6.8 | 100 | 100 | 22.8 | 90 | 98 | 4.7 | 89 | 90 | 5.4 |
| India | 47 | 69 | 4.9 | 100 | 100 | 23.0 | 59 | 80 | 5.2 | 44 | 62 | 3.9 |
| Indonesia | 61 | 70 | 3.0 | 100 | 100 | 11.7 | 25 | 91 | 0.6 | 59 | 60 | 2.4 |
| Japan | 61 | 76 | 3.3 | 97 | 99 | 7.4 | 42 | 88 | 3.2 | 57 | 67 | 2.8 |
| Canada | 100 | 98 | 4.2 | 100 | 100 | 9.6 | 100 | 100 | 2.0 | 100 | 97 | 3.3 |
| Malaysia | 48 | 63 | 2.4 | 99 | 95 | 10.3 | 29 | 80 | 1.3 | 41 | 56 | 1.2 |
| Mexico | 38 | 45 | 1.0 | 99 | 95 | 6.1 | 33 | 94 | 1.2 | 36 | 37 | 0.8 |
| Russia | 76 | 85 | 4.2 | 98 | 99 | 11.8 | 67 | 71 | 2.0 | 73 | 83 | 3.3 |
| Singapore | 47 | 60 | 2.6 | 96 | 99 | 9.1 | 25 | 36 | 1.2 | 40 | 65 | 1.6 |
| Switzerland | 52 | 50 | 4.9 | 99 | 100 | 24.0 | 18 | 79 | 0.7 | 46 | 46 | 2.1 |
| Thailand | 28 | 38 | 2.1 | 99 | 99 | 14.9 | 84 | 30 | 2.7 | 20 | 34 | 0.8 |
| Turkey | 62 | 60 | 1.2 | 94 | 97 | 2.3 | 35 | 90 | 0.9 | 61 | 55 | 1.2 |
| EU | 92 | 89 | 6.3 | 98 | 98 | 15.5 | 64 | 86 | 4.0 | 92 | 89 | 5.0 |
| USA | 77 | 83 | 4.1 | 100 | 100 | 16.1 | 100 | 100 | 2.4 | 74 | 80 | 2.6 |
| Vietnam | 89 | 92 | 5.0 | 100 | 100 | 17.6 | 57 | 94 | 4.3 | 89 | 91 | 3.8 |

* Sectors are defined by the Harmonized System (HS) at 2-digit;
A – Frequency Index; B – Coverage Ratio; C – Prevalence Ratio

Source: own elaboration and [UNCTAD 2021a]

A markedly higher level of protectionism in agricultural trade in relation to that in other sectors of production, to a considerable extent, results from specific characteristics of agricultural production and trade, among them e.g., the strategic character of products for the assurance of food security, insufficient capital assets per employee, a dispersed organizational structure, lower productivity of production factors, slow dynamics of production growth, the biological character of production and dependence on natural conditions, as well as price and income elasticity of food demand [Heidhues 1979, Adamowicz 1988, Sapa 2014]. Moreover, the primary causes for traditional protectionism in agriculture include e.g., the necessity to ensure domestic food security, the rationalization

of agricultural production methods, support for the modernization of the processing industry, the protection of plant, animal and human health, the protection of domestic farms against foreign competition and the reduction of international food purchase prices [Heidhues 1979, Houck 1986, Sumner 1995, Koo, Kennedy 2005, Pawlak 2011].

While up to the 1930's intervention measures in foreign trade were introduced only occasionally to prevent food shortages or protect the income of producers against price decreases in the case of surplus production destabilizing the market, in the later period, state intervention in trade became an integral part of agricultural policy and broadly understood interventionism in agriculture. Since then, protectionist instruments have supported the agricultural production sector; they are used permanently, but selectively and flexibly. Additionally, apart from the economic premises for the implementation of protection measures, a certain role is also played by political and social factors. Among others, these factors are related with the varied importance and treatment of the agricultural sector in developing and developed countries, reducing the disparity in the economic situation of agricultural and non-agricultural populations, exerting pressure on trade partner countries as well as actions taken by farmer groups [Zawojska 2006, Horbowiec 2016]. In turn, specific goals of the contemporary foreign trade policy for agricultural products include [Klawe 1981, Adamowicz 1988, Skawińska 1991, Horbowiec 2016]:

– assurance of domestic food security;
– assurance of priority for the sale of domestic agricultural products on the domestic market;
– assurance of an equilibrium in the domestic market, balancing the demand and supply for individual products as well as guaranteeing a stable level of agricultural product prices;
– improvement of labor efficiency and the stabilization of income levels for the farming population;
– modification of the trade balance and the balance of payments in accordance with the principles assumed in the general economic policy;
– assurance of fulfillment of international obligations.

Based on the data given in Table 2, it may be stated that, in 2020, in trade for all groups of agri-food products, the number of restrictions imposed against trade partners was greater than the number of granted preferences. This was particularly evident in the trade in dairy products, sugar crops, fruit, bakery products, tobacco products, live animals, wine, oilseeds and oleaginous fruit, fish and vegetables. Interventions were more common in the trade of plant origin products compared to animal origin products. The greatest number of instruments, both facilitating and limiting trade, were applied in the trade in cereals, vegetables, fruit and oil crops. Among animal origin products dairy products were the group of products burdened with an extensive scope of used trade restrictions. The number of non-tariff barriers applied in 2020 in the world dairy trade was over 2-fold greater than

Table 2. The implementation of state interventions in world trade in selected agri-food products in 2020

| Product group | Number of new interventions | | Implementing countries | | Affected countries | |
|---|---|---|---|---|---|---|
| | A | B | A | B | A | B |
| Cereals | 46 | 112 | Brazil, Chile, EU | Brazil, Turkey, EU | USA, Canada Argentina, | USA, Russia, Brazil |
| Vegetables | 31 | 102 | India, Brazil, Kazakhstan | Brazil, USA, China | EU, China, Canada | EU, India, China |
| Fruits and nuts | 18 | 84 | Mexico, India, Brazil | EU, Brazil, China | EU, USA, Argentina | India, USA, Egypt |
| Oilseeds and oleaginous fruits | 25 | 95 | Turkey, Argentina, Brazil | EU, China, Brazil | USA, EU, China | USA, EU, Russia |
| Sugar crops | 6 | 64 | Mexico, Brazil, China | EU, Brazil, Australia | EU, Japan, Mexico | EU, USA, China |
| Live animals | 12 | 52 | Mexico, Venezuela, Brazil | Brazil, China, Turkey | EU, Mexico, India | USA, EU, Australia |
| Fish live, fresh or chilled for human consumption | 16 | 55 | Meksyk, Rosja, Brazylia | EU, Mexico, Australia | Japan, EU, Canada | Vietnam, India, Russia |
| Meat and meat products | 23 | 47 | China, Russia, Argentina | China, EU, Argentina | Brazil, USA, EU | EU, USA, Brazil |
| Prepared or preserved fish | 22 | 41 | USA, China, Sri Lanka | China, Canada, Argentina, | Vietnam, China, Thailand | Brazil, Vietnam, USA |
| Prepared or preserved vegetables | 22 | 41 | India, USA, Russia | China, USA, EU | EU, Canada, Singapore | EU, USA, India |
| Prepared or preserved fruits and nuts | 30 | 56 | India, Russia, China | China, Turkey, EU | EU, Thailand, Malaysia | USA, Australia, EU |
| Vegetable oils | 30 | 51 | Sri Lanka, Argentina, Malaysia | India, EU, China | Malaysia, India, Turkey | USA, EU, Malaysia |

Table 2. Cont.

| Product group | Number of new interventions | | Implementing countries | | Affected countries | |
|---|---|---|---|---|---|---|
| | A | B | A | B | A | B |
| Dairy products* | 18 | 238 | China, India, Pakistan | China, EU, USA | EU, Turkey, Malaysia | EU, USA, Switzerland |
| Bakery products | 7 | 32 | India, Indonesia, Kazakhstan | USA, China, EU | Turkey, EU, Canada | EU, Turkey, Malaysia |
| Sugar and molasses | 24 | 56 | Chile, Pakistan, Indonesia | USA, Chile, Egypt | EU, Brazil, Guatemala | Brazil, EU, Argentina |
| Cocoa, chocolate and sugar confectionery | 11 | 29 | USA, Argentina, China | China, Argentina, EU | Thailand, Uruguay, EU | Switzerland, Japan, EU |
| Spirits | 40 | 44 | China, Argentina, Brazil | EU, Argentina, China | USA, Malaysia, EU | USA, EU, Australia |
| Wines | 7 | 28 | Australia, China, Indonesia | China, EU, Russia | EU, Japan, Turkey | USA, Australia, Chile |
| Tobacco products | 4 | 18 | Indonesia, Russia, Vietnam | EU, Indonesia, Uruguay | Cambodia, Zimbabwe, Singapore | China, USA, India |

* Excluding processed liquid milk, cream and whey;
A – instruments liberalizing trade; B – instruments harmful to trade

Source: own elaboration based on [GTA 2021]

in the trade in cereals, ranking first in the use of trade restrictions among plant origin products, and over 13-fold greater than the number of instruments liberalizing trade in this group of products. It may be observed that non-processed agricultural products were more frequently subjected to interventions compared to food products, while relatively the least frequently trade policy measures were used to influence trade in staple products, such as e.g., bakery products and stimulants (alcoholic beverages and tobacco products).

Restrictions in agri-food trade were implemented most frequently by Brazil, EU countries and China, while measures of the non-discriminatory liberalization of trade were used by a larger number of countries. Apart from the above-mentioned countries, they were also commonly used by Turkey, India, Indonesia, Mexico and Russia (Table 2).

Granted preferences were used to the largest extent by the USA, the EU, China, Japan, Mexico, Turkey, Malesia and Thailand. The first three of the above, in 2020, having jointly an almost 50% share in the world export of agri-food products [UNCTAD 2021b], as well as India and Russia were also frequently exposed to restrictions in trade.

It results from the above that the agriculture and food industry are much more impeded by non-tariff measures than other sectors. This is in line with the previous studies by Yuan Li and John Beghin [2012], Agnieszka Sapa [2015] or Anne-Célia Disdier and Marco Fugazza [2019]. The importance of non-tariff measures was also discussed by Fabio Gaetano Santeramo and Emilia Lamonaca [2019a, 2019b], who found that an increasing use of this type of trade interventions locks out African exporters. The heterogeneous effects of non-tariff measures on both developed and developing African agri-food exporters was investigated e.g., by Chang Liu et al. [2019]. It results from the presented study that the scope of non-tariff instruments used varies across the analyzed commodities and countries. For SADC this was already proven by Mmatlou Kalaba et al. [2016], while for developing countries this was pointed out by Agnieszka Sapa [2015]. The level and pattern for the use of non-tariff barriers to trade in the EU and US agri-food trade was also described by Karolina Pawlak [2021].

## SUMMARY

Neoprotectionism differs from traditional, 19th century protectionism because of the extensive use of non-tariff instruments in the trade policy, which do not directly indicate the intention to protect domestic producers or sectors. This protectionism is hidden and is used selectively towards sensitive branches of production or selected trade partners. The scope of use of non-tariff protection measures in the world trade of agri-food products is much greater compared to other sectors of the economy, while, at the same time, it varies across the analyzed commodities and countries.

In 2020 in countries implementing a highly protectionist trade policy, such as Brazil, China, India, Indonesia, Canada, the USA and Vietnam, non-tariff instruments were used in relation to all tariff lines and the entire value of import, while in imports of individual products over a dozen up to over 20 instruments were applied. To the greatest extent, non-tariff protection measures were adopted in the trade of non-processed plant origin products, including cereals, oilseeds and oleaginous fruit, fruit and vegetables, as well as dairy products. Staple products (e.g., bakery products) and stimulants (alcoholic beverages and tobacco products) were relatively rarely subjected to intervention measures. Countries most commonly implementing trade restrictions against their partners and, at the same time, at greatest risk of retaliatory actions on their part included EU countries, the USA and China, in 2020 having jointly an almost 50% share in the world export of agri-food products.

Considering the popularity and relatively high number of barriers per one tariff line, the adoption of non-tariff instruments in international agri-food trade raises serious concerns, particularly among developing countries. Thus, established quality and safety standards binding in export to markets of more economically developed countries frequently exceed the limits imposed by international standards and, even if by themselves are not necessarily protectionist in character, they may exclude small producers from developing countries from the target market (due to excessively high adaptation costs) [Disdier, Fugazza 2019]. In this case the hidden and selective character – both in terms of its subjects and objects – of present-day non-tariff protectionism is clearly manifested and this is what the agri-food trade is affected by to a much greater extent than other sectors of the economy.

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# POZATARYFOWY WYMIAR NEOPROTEKCJONIZMU W ŚWIATOWYM HANDLU PRODUKTAMI ROLNO-SPOŻYWCZYMI

Słowa kluczowe: handel międzynarodowy, polityka handlowa, neoprotekcjonizm, produkty rolno-spożywcze, pozataryfowe instrumenty polityki handlowej

ABSTRAKT

Celem artykułu jest określenie zakresu wykorzystania barier pozataryfowych w światowym handlu produktami rolno-spożywczymi w 2020 roku. W badaniach wykorzystano dane Konferencji Narodów Zjednoczonych ds. Handlu i Rozwoju (UNCTAD) oraz Global Trade Alert. Posługując się metodyką opracowaną przez UNCTAD i WTO, wyznaczono trzy wskaźniki opisujące wykorzystanie barier pozataryfowych w handlu, tj. indeks częstości, indeks pokrycia i wskaźnik powszechności. Zmierzono także liczbę preferencji handlowych i restrykcji handlowych zastosowanych przez największych światowych eksporterów i importerów produktów rolno-spożywczych. Na podstawie zrealizowanych badań można stwierdzić, że zakres wykorzystania środków protekcji pozataryfowej w światowym handlu produktami rolno-spożywczymi jest dużo większy niż w innych branżach. W krajach prowadzących wysoce protekcjonistyczną politykę handlową, takich jak Brazylia, Chiny, Indie, Indonezja, Kanada, USA i Wietnam, środki pozataryfowe stosowano w odniesieniu do wszystkich linii taryfowych i całej wartości importu. W największym zakresie instrumenty protekcji pozataryfowej były stosowane w handlu nieprzetworzonymi produktami pochodzenia roślinnego, takimi jak zboża, nasiona i owoce oleistych, owoce i warzywa, oraz produktami mleczarskimi. Wśród krajów najczęściej wprowadzających restrykcje handlowe wobec swoich partnerów, a zarazem najbardziej narażonych na działania odwetowe z ich strony, znalazły się trzy kraje: UE, USA i Chiny.

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