APEC Business Advisory Council

REIWG I 2026

Non-Tariff Barriers affecting Food Trade: Overview of workstream and research project

Presentation by Stephanie Honey,
***on behalf of Sarah Ottrey*, ABAC New Zealand**

Jakarta, 8 February 2026



Where do we stand? 3 key data points

1 10% of the world's population faces **hunger,** and food insecurity is increasing

2 **Adverse climate impacts** are reshaping food production and worsening food insecurity

3 Food **markets are highly distorted** by tariffs and non-tariff barriers, in APEC and globally

⚠ NTBs have an impact on **food trade, food security** *and* **overall sustainability**



2026 Food Trade workstream

Part 1: Quantitative research project

- **Aim**: To assess the magnitude in dollar term equivalents of food NTBs in the APEC region
- **Output**: An accessible, published research report

➢ *Seeking ABAC funding (co-funded with New Zealand)*

Part 2: Case studies and real-world experiences

- Presentations in REIWG/SWG on case studies to highlight the interconnections between food trade and sustainability, to complement the quantitative research

Overall output

This workstream will give visibility to food trade barriers (nature and magnitude), and develop a set of recommendations to tackle them, complementing APEC work in this area



To tackle the NTB problem effectively, our analysis needs an update

- 2016 research report, '*Quantifying the costs of non-tariff measures in the Asia-Pacific region*' found that:
  - NTMs in the APEC region are three times as costly as tariffs, and are magnified through GVCs
  - Equivalent to USD$790 billion per year
  - Concentrated in dairy, rice, meat, horticulture

- This analysis contributed to ABAC's development of our 2016 Cross-Cutting Principles on NTBs
- APEC subsequently developed its own principles in 2018, inspired by ABAC
- In 2025, APEC developed *Best Practice Guidelines to Apply the Cross-Cutting Principles on NTMs*

2026 NTB Research project

- **Consultants**: John Ballingal and John Stephenson, Sense Partners
  - Highly experienced economists, and authors of the 2016 study and subsequent work for APEC on NTMs, including on essential goods in the pandemic
- **Research process**: Updating and expanding on the 2016 report, including by:
  - Updating the ad valorem equivalents of NTMs in the agri-food sector
  - Estimating costs by APEC economy at HS6 level (more detailed than 2016)
  - Examination of SPS, TBT, border control and quantitative restrictions
- **Timeframe**: For delivery by ABAC II
- **Project outcome**: A detailed research report, updating the 2016 research:
  - An assessment of the dollar-equivalent of agri-food NTMs in the APEC region
  - Presented by NTM category, to demonstrate which types of NTMs are most costly within APEC
- **Contributions to: Letter to MRT, FTAAP Statement** and inputs to the **Policy Partnership on Food Security**, consistent with our 2026 ABAC themes of “Openness” and “Connectivity”
- Co-funded with New Zealand

Recommendations

- Members to note the proposed workstream on food trade.
- Members to approve the request for ABAC research funding for a co-funded study on the cost of food NTMs in the APEC region.