# The invisible protectionism of non-tariff measures

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International trade

*Non-tariff measures, protectionism, foreign trade*

*Tariffs are the visible face of protectionism, but not the only one. Import licences, bans, quotas, certificates and inspections shape Spanish firms' access to foreign markets every day, while barely making the headlines. These are non-tariff measures, less conspicuous than tariffs, harder to measure and often more costly.*

*This article explains what these measures are, how much weight they carry in world trade and how they affect Spanish products. According to Global Trade Alert (n.d.), between 2013 and 2025, 58% of the third-country non-tariff measures affecting Spain were restrictive, compared with 28% of tariff changes. Machinery, chemicals and metals are the sectors affected by the largest number of measures.*

*Three cases (Algeria, China and Saudi Arabia) show how these barriers can close a market, shift trade before they even take effect or, when removed, open up opportunities.*

For decades, **tariff liberalisation** was one of the most stable trends in international trade. Successive rounds of multilateral negotiations and the proliferation of trade agreements brought tariffs down to historically low levels, to the point that the tariff seemed an instrument in retreat. That perception changed in 2025. The **tariff increases** announced by the United States, which also hit European exports, and the responses of its trading partners have put trade policy back at the centre of the economic debate. World Trade Organization data reflect this shift: by mid-**2025**, import restrictions in force covered **19.4% of world imports**, up from 12.5% a year earlier, an increase driven mostly by new tariffs (World Trade Organization 2025).

However, the tariff is only the most visible dimension of **protectionism**. Alongside it operates a broader set of instruments, the so-called **non-tariff measures** (NTMs), which do not tax goods at the border but condition their access. Their use is part of a wider trend: since the 2008 financial crisis, government intervention in trade has spread across both advanced and emerging economies, with subsidies and trade restrictions as the main instruments. This trend has accelerated since 2020, driven by the pursuit of supply chain resilience, national security and **geopolitical tensions** (Evenett et al. 2025).

This article examines the role of NTMs as an instrument of trade protection and their impact on **Spanish exports**. After reviewing their definition and the reasons for their growing use, it describes how the NTMs affecting Spanish products evolved between 2013 and 2025, compared with tariffs. Finally, three cases illustrate their transmission mechanisms. In two of them, Algeria's 2022 ban and China's 2018 ban on waste imports, monthly foreign trade data are used to quantify how Spanish exports evolved before and after the measure. The article concludes with the implications for **Spanish foreign trade** and for the **logistics chain**.

## What non-tariff measures are

NTMs are policy measures other than tariffs that can affect international trade in goods, by changing quantities, prices or both. The international reference classification, developed by UNCTAD and known as the **MAST classification**, groups them into chapters identified by letters (UNCTAD 2019). Broadly speaking, two main families can be distinguished:

- **Technical measures**: sanitary and phytosanitary measures (chapter A), which protect human, animal and plant health; technical barriers to trade (chapter B), such as labelling rules or certifications; and pre-shipment inspections and other formalities (chapter C).
- **Non-technical measures**: those that directly limit the entry of goods or condition how they are imported, such as licences, quotas and bans (chapter E), price controls (chapter F) or restrictions on distribution channels (chapter H), among others.

A non-tariff measure is not necessarily a **trade barrier**. Many NTMs, especially technical ones, pursue legitimate objectives, such as ensuring food safety or preventing the entry of pests. The problem arises when a measure goes beyond what is necessary, is applied in a discriminatory way or is actually intended to protect domestic production. It also arises

when its administration generates disproportionate costs: unpredictable lead times, requirements that change without notice or duplicated documentation.

## Two thirds of trade is regulated

According to UNCTAD, roughly **two thirds of world trade** is subject to some kind of technical requirement. The most widespread are **technical barriers to trade**, such as labelling rules or certificates of conformity. **Sanitary and phytosanitary measures**, by contrast, are concentrated in agri-food products and affect around 20% of world trade. Measures applied at the border, such as inspections, quarantines or quotas, cover more than half of trade. These percentages cannot be added up, since the same product may be subject to several types of measures at once (UNCTAD 2025).

Beyond their coverage, however, what matters is their cost. According to the same source, the **compliance costs** of these measures are generally higher than those arising from tariffs. In developed countries, the cost associated with tariffs is below 2% of the value of trade, whereas NTMs can add much higher costs, particularly in the agri-food sector (UNCTAD 2025).

Evidence from **business surveys** points in the same direction. In a survey by the International Trade Centre and the European Commission of more than 8,000 exporters, over a third reported facing burdensome non-tariff measures. The most frequently cited problems were not so much the regulations themselves as the **procedures**: conformity assessment, proof of origin and the related formalities (International Trade Centre and European Commission 2016).

## Why protectionism is shifting towards non-tariff measures

This shift is largely explained by **political economy**. Tariffs are subject to **multilateral commitments**: most tariff lines of WTO members are bound, that is, subject to a maximum rate, and preferential trade agreements have cut tariffs to zero for a large share of trade. Raising a tariff above those limits means breaching commitments and risking retaliation or a dispute. NTMs, in contrast, offer much greater room for manoeuvre.

That room comes from three features. The first is their **opacity**: the effect of a licence or a certification requirement on the final price is not obvious, which makes it harder to detect and challenge than a tariff rate. The second is their **flexibility**: a licensing regime can be tightened simply by slowing down processing, without changing any regulation. The third is their **apparent legitimacy**: since they can invoke health, safety or environmental objectives, telling legitimate protection apart from protectionism requires case-by-case scrutiny.

The economic literature has quantified this shift by converting NTMs into their **tariff equivalent**. Between the late 1990s and the mid-2010s, while the world average tariff fell by more than half, the protection associated with NTMs more than doubled, offsetting tariff liberalisation (Milner, Niu and Gunessee 2018). An OECD study (Cadot, Gourdon and van Tongeren 2018) qualifies this result: not all NTMs reduce trade and, in some cases, as with certain sanitary measures, trade increases, possibly because the measure strengthens

confidence in the product. The effect of an NTM therefore depends on its design and implementation.

If, globally, protectionism tends to shift from tariffs towards these measures, the question is whether the same pattern can be seen in the barriers faced by Spanish products.

## The Spanish case: the same shift

Spanish exports reflect the same pattern. Between 2013 and 2025, most third-country tariff changes affecting Spanish products were reductions, while **NTMs** kept a **clearly restrictive bias**. This is shown by data from **Global Trade Alert (n.d.), hereafter GTA,** one of the reference databases for monitoring trade policy, which has documented government interventions since 2008 and classifies them according to their effect on trade.

For this count, the selection covers third-country measures affecting Spanish products that GTA rates as restrictive (red) or liberalising (green), excluding those with an uncertain effect. Only NTMs acting directly at the border, such as licences, bans or quotas, are considered (Table 1). Three groups of measures are left out: sanitary and technical measures, which fall outside GTA's coverage and are tracked through WTO notification systems; measures that operate like a tariff, such as tariff-rate quotas, which are grouped with tariffs; and **trade defence** measures (anti-dumping, anti-subsidy and safeguards), which are treated separately because they work as additional import duties.

*Table 1| Types of non-tariff measures considered*

| Type of measure | MAST chapter | Description |
|---|---|---|
| Import licences | E | Mandatory prior authorisation to import a product |
| Import bans | E | Total or partial ban on the entry of a product |
| Import quotas | E | Maximum limit on the quantity that can be imported |
| Port restrictions | C | Obligation to import only through certain ports or customs offices |
| Import monitoring | C | Prior registration or surveillance of imports |
| Minimum import prices | F | Price below which a product cannot be imported |
| Mandatory import channels | H | Obligation to import through certain agents or bodies |

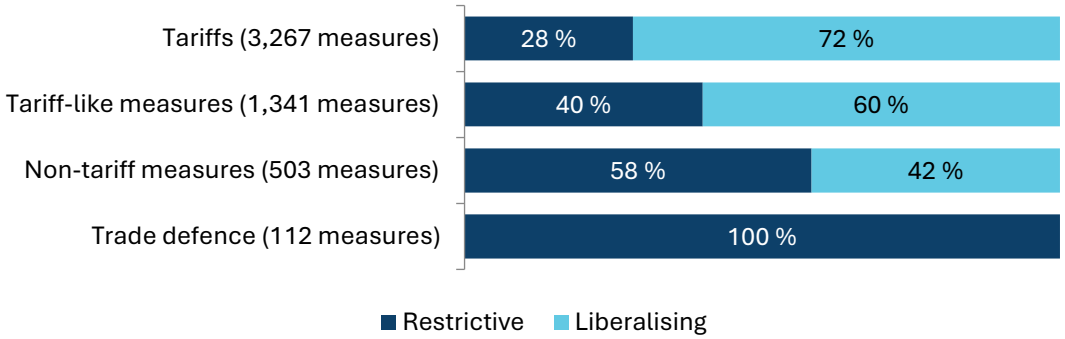
*Source: Own elaboration based on UNCTAD (2019) and Global Trade Alert (n.d.)*

On this basis, GTA records **503 NTMs** applied by 49 countries, an average of almost 40 a year, peaking at 69 in 2020, during the pandemic. 58% are restrictive, a share that reached two in three measures in 2025 (26 of 39), although data for that year are still provisional.

The contrast with **tariffs** is clear. Over the same period, 3,267 tariff changes affecting Spanish products were recorded, but only **28%** were **restrictive** (Graph 1). While third-country tariffs tended to fall, non-tariff measures became established as the **preferred channel of restriction**. Even in 2025, the year of **tariff escalation**, only 24% of tariff changes were

restrictive, although this figure is skewed by 260 routine concessions by Australia; excluding them, the share rises to half, led by Brazil and the United States.

*Graph 1| Direction of third-country measures affecting Spain, by type of instrument (2013–2025)*




*Source: Own elaboration based on Global Trade Alert (n.d.)*

It should be borne in mind that these figures count measures, not trade: a single tariff can outweigh dozens of licences. The additional 10% tariff announced by the United States in April 2025, for example, is a single measure that applied to virtually all its imports (Global Trade Alert n.d.). What the data reveal, therefore, is not so much the intensity of protection as its **form**: a sustained and selective use of non-tariff instruments.

That form has a leading instrument: **import licences**, which account for 317 measures, 63% of the total, well ahead of bans (97) and quotas (55). Their predominance illustrates the features described in the previous section. A licence does not set in advance how much can be imported; its effect depends on processing times, the transparency of the criteria and the administration's discretion. It thus combines restrictive power with low visibility.

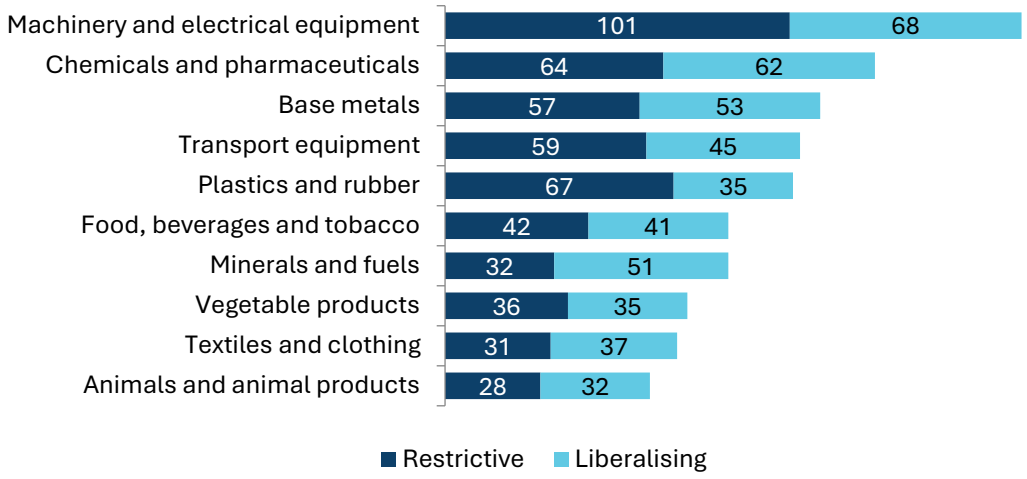
The measures also come from a small number of countries. Turkey (111), China (87), India (53), Argentina (47) and Indonesia (29) account for **65% of the total**. Their direction, however, differs: 82% of Turkish measures are restrictive, whereas in China and Argentina liberalising measures prevail, many of which relax earlier licensing regimes. Rather than a map of protectionism, the country count shows which governments use licences as a **routine tool** of **trade management**, tightening or relaxing them as circumstances require. The United States, the protagonist of the tariff escalation, ranks lower, as its protection is channelled mainly through tariffs.

## A broad and uneven sectoral impact

Non-tariff measures are not evenly spread across sectors. Their incidence is concentrated in **industrial and intermediate goods**: one in three measures affects machinery and electrical equipment, followed by chemicals and pharmaceuticals, metals, transport equipment and plastics (Graph 2). At product level, cars, telecommunications equipment and petroleum fuels stand out. In these sectors, many countries use licences as a routine trade management tool, and this is also where NTMs diverge most from tariffs: in machinery,

60% of non-tariff measures are restrictive, compared with 24% of tariff changes.

*Graph 2| Non-tariff measures affecting Spain, by sector (2013–2025)*




*Source: Own elaboration based on Global Trade Alert (n.d.)*

The **agri-food sector** occupies a more modest position in these data, with just over a quarter of the measures, but that figure does not reflect its true exposure. The barriers that weigh most heavily on food are **sanitary and phytosanitary** measures, which this count does not include. In fact, it is the sector the European Commission identifies as the most exposed, as discussed in the next section.

Some of Spain's most representative export products also appear frequently. Wine, ceramic tiles, pork, citrus fruit and olive oil are each affected by between 16 and 23 measures over the period. These are moderate figures, but relevant in highly export-oriented sectors, as the cases of ceramics in Saudi Arabia and recovered paper in China show later on.

The type of instrument also varies. In manufacturing, **licences** predominate, accounting for around three in four measures in machinery, chemicals and plastics. In transport equipment, by contrast, **bans** gain weight, mainly because of bans on imports of used vehicles in countries such as Thailand, Myanmar and Egypt. In almost all cases, moreover, the measures are highly targeted: half affect ten products or fewer. That precision is another feature of non-tariff protectionism: it operates product by product, which makes it harder to monitor.

## A diagnosis confirmed by the European Commission

European Commission data point in the same direction, with one advantage: its concept of non-tariff barrier is broader and also covers technical measures, services and investment. Its latest report identified **410 active barriers** at the end of 2024 in 67 countries, 23 of them new, while another 44 were fully or partially removed during the year. Russia, India, China and the United States top the list, and 63% of the barriers come from partners with which the EU has no preferential trade agreement (European Commission 2025).

More than four in ten barriers identified by the Commission are **technical measures**, with **sanitary** and **phytosanitary** measures as the largest group, and technical barriers alone affected some EUR 25 billion of European exports in 2024. At the same time, the Commission warns that, for some partners, **import restrictions** such as **non-automatic licences** have become a preferred industrial policy instrument, in line with the predominance of licences observed in the data for Spain (European Commission 2025).

This is also consistent with the previous section: the **most exposed sector** is **agri-food**, which accounted for 10 of the 23 new barriers in 2024 (European Commission 2025). For Spain, this is particularly relevant, as its agri-food and fisheries exports reached EUR 78,044 million in 2025, a fifth of the total (Ministerio de Agricultura, Pesca y Alimentación 2026). And it is in markets outside the EU, which take 38% of Spain's goods exports (Ministerio de Economía, Comercio y Empresa 2026), that these barriers weigh most, since rules are common within the single market.

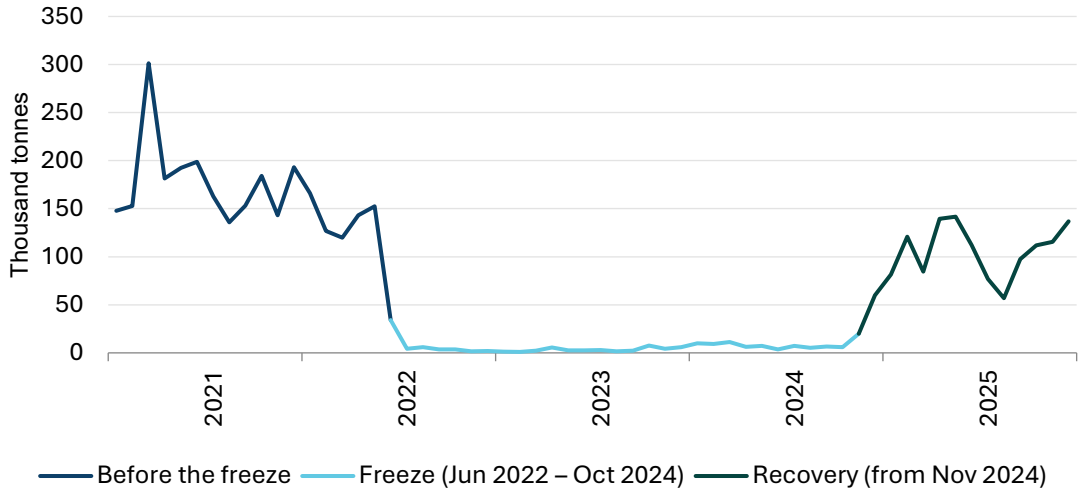
Aggregate figures, however, say little about how these barriers work in practice. Three recent cases shed light on this, each from a different angle: an informal barrier whose scope the counts do not capture, a measure announced months in advance and a barrier whose removal opened up a market.

## Three cases: closing, anticipating and opening markets

**Algeria: an informal barrier.** In June 2022, following the Spanish Government's change of position on Western Sahara, Algeria effectively froze trade with Spain. No decree was published and no measure was notified to the WTO: the freeze was implemented through **instructions to the banking system** (Cano 2024). GTA records it as an **import ban** on Spanish products, in force since 9 June 2022 (Global Trade Alert n.d.).

The **effect** was **immediate** (Graph 3). Between January 2021 and May 2022, Spain exported an average of some 168,000 tonnes a month to Algeria; between July 2022 and October 2024, the average fell to under 5,000, **97% less**. In value terms, exports dropped from EUR 1,888 million in 2021 to EUR 329 million in 2023, 83% less. The **recovery** was **uneven**: in value it began in 2024, when sales reached EUR 824 million, whereas in volume it did not start until the end of that year. In 2025, exports already exceeded their 2021 level in value, at EUR 2,125 million, 13% more, but in volume they recovered only 59%, pointing to a shift towards higher unit value products (Secretaría de Estado de Comercio n.d.).

*Graph 3| Spanish exports to Algeria, by month (thousand tonnes, 2021–2025)*



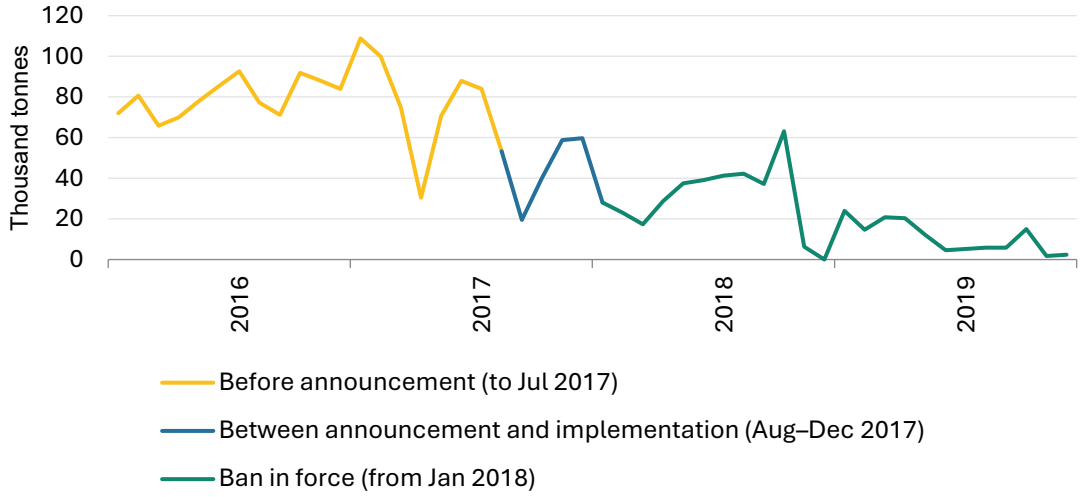

*Source: Own elaboration based on Secretaría de Estado de Comercio (n.d.)*

The case illustrates two limitations of the counts above. On the one hand, this measure counts as just one of the 503 recorded, despite bringing virtually all trade with a market to a halt. On the other, its informal nature makes it hard even to date its end: GTA considers the ban lifted in July 2023, but trade data show a gradual normalisation that was not complete until 2025.

**China and waste: the gap between announcement and implementation.** In July 2017, China notified the WTO of its intention to **ban imports** of 24 types of solid waste, including certain plastics and unsorted paper (Bodamer 2017). GTA records the measure as announced in August 2017 and implemented on 1 January 2018, that is, with more than four months' notice (Global Trade Alert n.d.). In the following years, China gradually extended the categories affected until, from 1 January 2021, it banned imports of **all solid waste** (Xinhua 2020). Exporters of recovered paper, plastics and scrap metal, for whom China was the world's main buyer, had to find alternative markets.

Foreign trade data show how Spanish exports of these products evolved (Grap 4). Between January and July 2017, before the announcement, the average monthly volume exported to China remained at levels similar to the same period of 2016. Between August and December, that is, between announcement and implementation, it was **44% lower** than in the same months of the previous year, which makes it unlikely that the fall reflects a seasonal pattern. In annual volume terms, exports in 2018, with the ban already in force, were 62% lower than in 2016, and in 2019, after the successive extensions, 86% lower (Secretaría de Estado de Comercio n.d.). The fall was **sharper for plastics** (−89% in 2018 compared with 2016) than for paper (−57%), which is consistent with the initial ban covering much of plastic waste but, for paper, only unsorted paper.

*Graph 4| Spanish exports to China of recovered paper and plastics (headings 4707 and 3915), by month (thousand tonnes, 2016–2019)*




*Source: Own elaboration based on Secretaría de Estado de Comercio (n.d.)*

The data therefore suggest that trade reacted before the measure came into force, but not through the **front-loading of shipments** that might have been expected. Faced with an announced closure, exporters may have an incentive to bring sales forward, a behaviour known as *front-loading* and documented for announced tariff changes (Khan and Khederlarian 2021). However, between August and December 2017, Spanish exports of these products to China fell. This pattern is consistent with uncertainty leading buyers to cut their orders ahead of the ban (Handley and Limão 2017; Handley, Limão and Graziano 2021), although aggregate data alone cannot establish that causal link. The **anticipation effect** of NTMs may thus work in both directions and deserves further study.

**Saudi Arabia and the United States: the value of removing barriers.** The other side of the coin is barriers that disappear. Saudi Arabia committed to capping the cost of the audits required of European manufacturers and to eliminating redundant tests and audits. Since then, European exports of ceramic tiles to the country rose from EUR 385 million in 2021 to EUR 502 million in 2024, in a sector in which Spain is among the leading European producers. In the case of the United States, the Commission estimates that the reopening of its market to EU sheep and goat meat will raise exports from 120 tonnes in 2025 to around 750 in 2027, with Spain as one of the main exporting countries (European Commission 2025). These are modest figures, and in the second case still a forecast, but they show that **removing a barrier** can deliver **quick** and **tangible results**.

## Time, an additional barrier

The Chinese case highlights a factor that often goes unnoticed: **time**. Between the announcement of a measure and its implementation there may be months or none at all, and in practice the margin tends to be short. In GTA data for Spain, **42%** of **NTMs** were implemented **on the same day they were announced**, three in four came into force within less

than a month and only 6% allowed more than three months for adjustment (Global Trade Alert n.d.). The Chinese case is therefore the exception rather than the rule.

This time dimension has direct consequences for the **logistics chain**. When there is notice, firms can bring shipments forward, obtain certifications or seek alternative destinations, albeit at the cost of concentrating transport demand into a few weeks. When there is none, the measure strikes by surprise: a sudden ban can leave goods in transit with no destination and forces routes and contracts to be reorganised at short notice. In both cases, uncertainty about whether and when a measure will be applied makes planning more expensive for exporters, freight forwarders and shipping lines.

Hence the importance of **transparency**. WTO agreements require new technical and sanitary regulations to be notified in advance precisely so that partners and businesses can adapt. At European level, the *Access2Markets* portal (European Commission n.d.) sets out the import requirements of each market, and the Commission provides a single entry point for businesses to report the barriers they encounter.

## Conclusions

The **tariff** offers an **incomplete picture** of the barriers facing Spanish exports. Over the past decade, while most third-country tariff changes were reductions, **NTMs** remained a predominantly restrictive instrument. Their profile is recognisable: **import licences** predominate, they come from a small number of countries and they mainly affect industrial and intermediate goods, although their impact on the agri-food sector is probably greater than the data suggest. This pattern is consistent with the evidence from UNCTAD (2025) and the European Commission (2025).

The cases discussed complete this picture. The Algerian case shows that a single informal barrier can bring trade with an entire market to a standstill; the Chinese case, that trade can react in the interval between the announcement and the implementation of a measure; and the Saudi and US cases, that removing a barrier can deliver results quickly. Added to this is the short notice with which these measures are usually applied: three in four come into force within less than a month. **Export difficulties** are measured not only in tariff points, but also in **weeks of waiting**, **refused licences** and **markets that close** without warning.

For the **maritime, port and logistics sector**, these measures have **direct implications**. Some act on the infrastructure itself, such as restrictions requiring imports through specific ports. Others alter the volume and direction of flows: a market that closes diverts cargo to other destinations, and an announcement can trigger peaks in transport demand. In addition, inspections, licences and certificates mean more paperwork and longer dwell times at logistics nodes. **Monitoring NTMs** is therefore also a **planning tool** for shipping lines, freight forwarders and terminals.

These conclusions should be qualified in light of the **limitations of the data used**. The count of measures does not reflect the **value of the trade affected**, as the Algerian case shows; it excludes sanitary and technical measures; and it can hardly capture **informal**

**barriers**, whose existence and duration are difficult to document. Overcoming these limitations requires estimating the effect of NTMs on trade flows by product and destination, distinguishing between the time of announcement and the time of implementation. In a context of **fragmentation of world trade**, understanding these mechanisms is key both for designing **trade policy** and for planning **logistics chains**.

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