



**Asia-Pacific  
Economic Cooperation**

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**2018/SOM2/CTI/WKSP/010**

**Addressing Non-Tariff Measures in ASEAN and  
Other Free Trade Agreements and Regional Trade  
Agreements - Perspectives from the Food Industry**

Submitted by: Food Industry Asia



**Capacity Building Workshop on  
Addressing Non-Tariff Measures in  
Free Trade Agreements and Regional  
Trade Agreements  
Port Moresby, Papua New Guinea  
17 May 2018**

# Addressing NTMs in ASEAN and other FTAs/RTAs

## Perspectives from the Food Industry

**17 May 2018**

**Port Moresby, Papua New Guinea**

# FIA'S POSITION IN THE FOOD INDUSTRY

GLOBAL ISSUES,  
LOCAL SOLUTIONS

- FIA works in collaboration with the **National Food and Agriculture Associations, Central & Local Government, FDAs, Academics, IGOs and NGOs across the region**



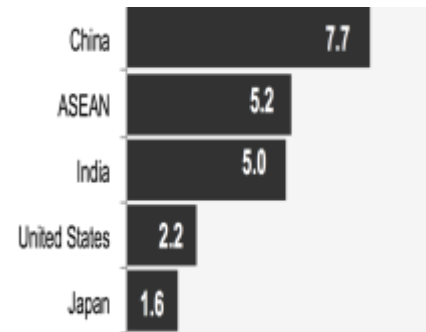


# **Addressing NTMs for the Food Sector in ASEAN**

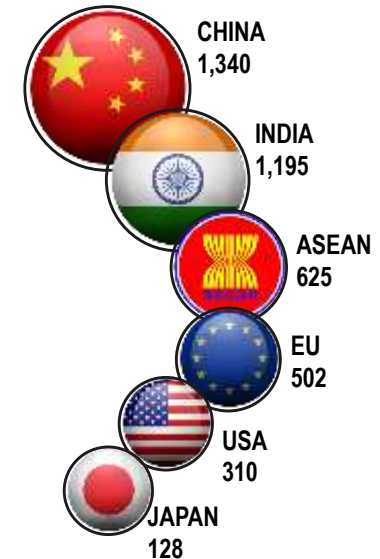
# ASEAN Regional Integration



## 2<sup>nd</sup> Fastest-growing economy



## 3<sup>rd</sup> Population



Source: ASEANStat, IMF, WB

A single market and production base

A highly competitive economic region

A region of equitable economic development

A region fully integrated into the global economy

# Steady Growth of F&B Trade in ASEAN

ASEAN trend in pre-packaged food export value and market share

Still huge potential for further growth in F&B Trade in ASEAN

How do these Impact ASEAN Trade?

ASEAN exports pre-packaged food sector	Unit / Scale	2013	2014	2015	2016
Intra-ASEAN	Value (USD Million)	13 664	14 346	14 183	14 757
	Share of total exports (%)	1.07	1.11	1.21	1.28
Extra-ASEAN	Value (USD Million)	31 858	33 969	32 108	33 154
	Share of total exports (%)	2.49	2.63	2.74	2.88

- Nevertheless, Member States' exports of pre-packaged food products within the region remain only a small part of ASEAN's total exports, reflecting the overall trend for trade in goods.
- the share of intra-ASEAN trade in goods in GDP remained relatively stable at 20.2%. By comparison, intra-EU trade stood at about 63% in 2015.

# Food Sector is Highly Regulated

Public NTMs in the Food Sector in ASEAN

	NTM Chapters							Total	% of Total
	Technical Measures			Non-Technical Measures					
	A	B	C	D	E	F	G-O		
Country	SPS	TBT	PSI	CTPM	QC	PC	Others	Total	Public NTMs
Malaysia	179	204	1		2	5		391	65.28
Singapore	89	142			1	11		243	52.48
Thailand	336	118			3	6		463	45.75
Philippines	67	42	6		10	13	3	141	22.09
Indonesia	57	38	11		3	2	1	112	22.44
Brunei	120	163			1	6		290	61.97
Cambodia	36	32			1	7		76	44.19
Lao PDR	22	5	2			10		39	18.66
Myanmar	12	5	1		1	1		20	14.60
Vietnam	88	18	1			2	6	115	42.75
<b>Total</b>	<b>1,006</b>	<b>767</b>	<b>22</b>		<b>22</b>	<b>63</b>	<b>10</b>	<b>1,890</b>	<b>42.75</b>

# Major TBTs for F&B Industry in ASEAN

- Information not easily accessible
- Regulations that are not in line with international standards e.g. Codex
- Frequent change of regulations
- Inconsistent implementation and interpretation by regulators/custom officers

## 1. Labelling (nutrition labelling)

## 2. Halal Standards & Certification

## 3. Import/Export Product Registration & Certification

## 5. Authorisation of Ingredients and Additives

## 6. Level of Contaminants and Testing Methods

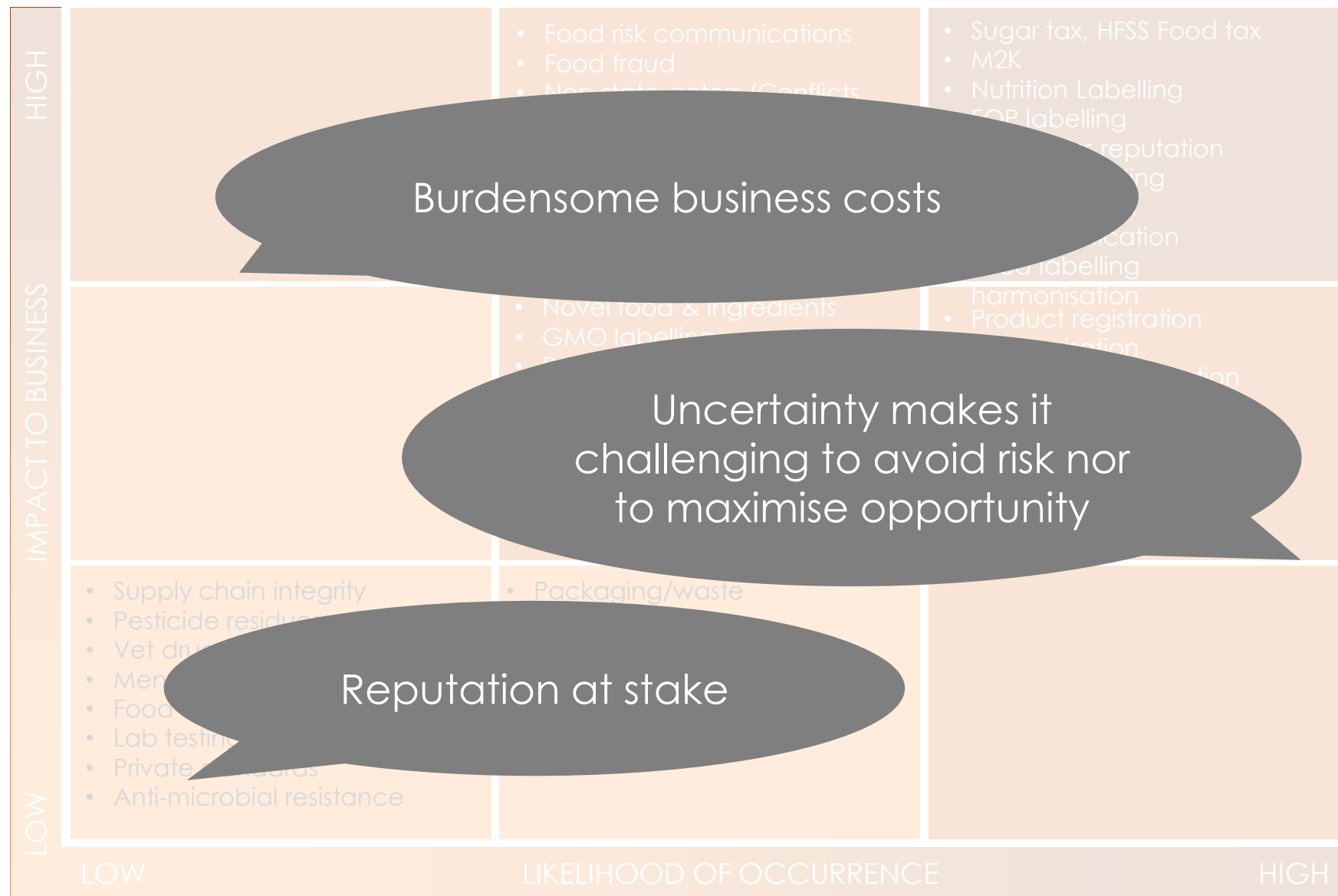


FIA industry survey, 2018

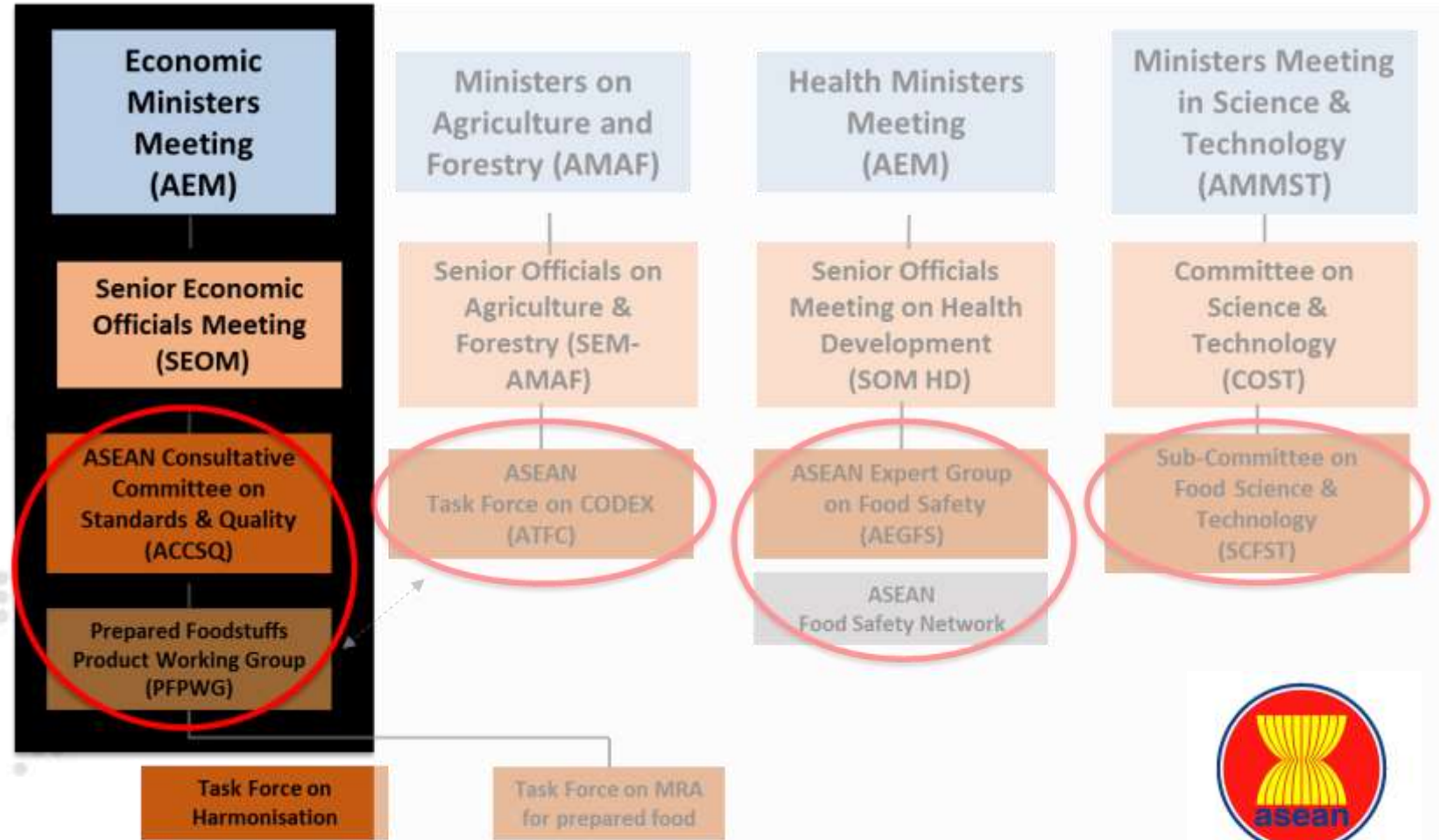


What Issues are Food & Beverage Industry faced with now?

How do these Impact the industry?



# ASEAN Structure – Sectoral Working Groups





# ASEAN Harmonisation for F&B Sector - Achievements So Far

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## Develop ASEAN Guidelines

ASEAN Food Safety Policy (2015)

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ASEAN Food Safety Regulatory Framework (AFSRF) (2016)

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## Adopt Codex Guidelines

ASEAN Principles and Guidelines for National Food Control Systems (2014)

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ASEAN General Principles of Food Hygiene (2014)

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ASEAN Guidelines for Import Control Systems (2014)

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ASEAN Principles for Food Import and Export Inspection and Certification (2014)

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ASEAN Principles and Criteria for the Establishment of Maximum Level for Contaminants and Toxins in Food and Feed (2016)

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ASEAN General Standards for the Labelling of Pre-packaged Food (2016)

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## ASEAN MRA

ASEAN MRA for Inspection and Certification on Food Hygiene for Prepared Foodstuff Products (not yet signed)

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# Capacity Building on Regional/National Standards Setting

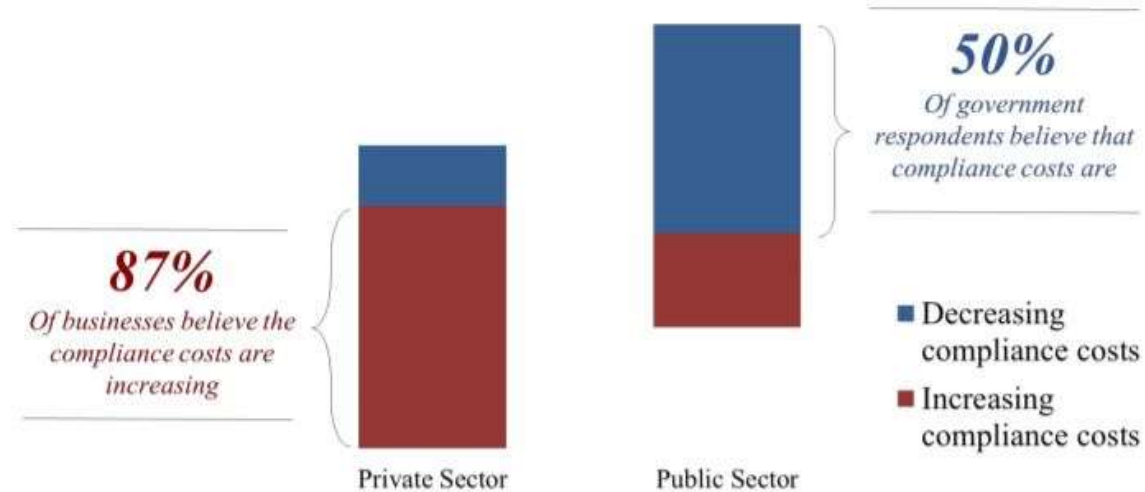


- Capacity building with Myanmar government to strengthen Codex activity and national standards-setting.

- Capacity building with ASEAN regulators and ASEAN Secretariat to strengthen Codex activities and regional collaboration in ASEAN.
- Focus on Developing Countries.

# **Addressing NTMs in ASEAN & other FTAs/RTAs: Challenges & Opportunities Ahead**

# Gap between the public & private sectors



- Among all NTBs, Technical Barriers to Trade (**TBT**) and Sanitary and Phyto-Sanitary (**SPS**) measures are found to be the most burdensome.
- The foremost recommendation is to improve **communication** between stakeholders, and use **consensus building** to drive public-private partnership to reduce uncertainty.

# Gap between the public & private sectors

**International/Regional  
harmonisation of regulation**

Capacity building and  
information exchange  
through public-private  
partnership

Open dialogues to address NTMs:  
identify priorities and ways  
forward

**Public Sector**

**Private Sector**

# THANK YOU

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