

An aerial photograph of a city, likely Rome, showing a dense urban landscape with red-tiled roofs and various buildings. A large, semi-transparent blue trapezoidal shape is overlaid on the right side of the image, containing the title text.

# ETAS IN GLOBAL MARKETS: A DATA- BASED ANALYSIS

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# OUTLINE



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The ETAs in the global markets

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The economic relevance of PAC 4, PAC 9, PAC 13, PAC 33, and PAC 35

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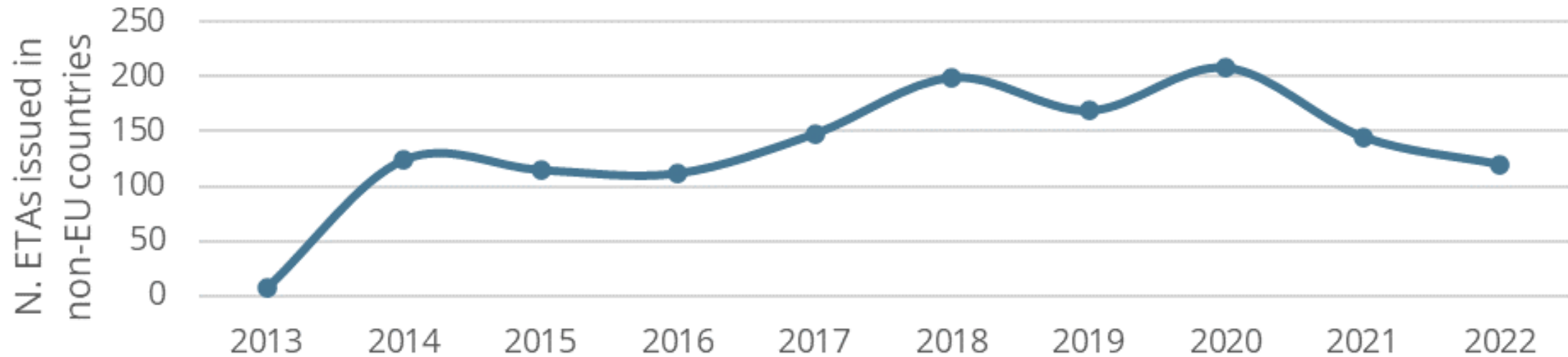
Key and emerging players for PAC 4, PAC 9, PAC 13, PAC 33, and PAC 35

**04**

Main takeaways

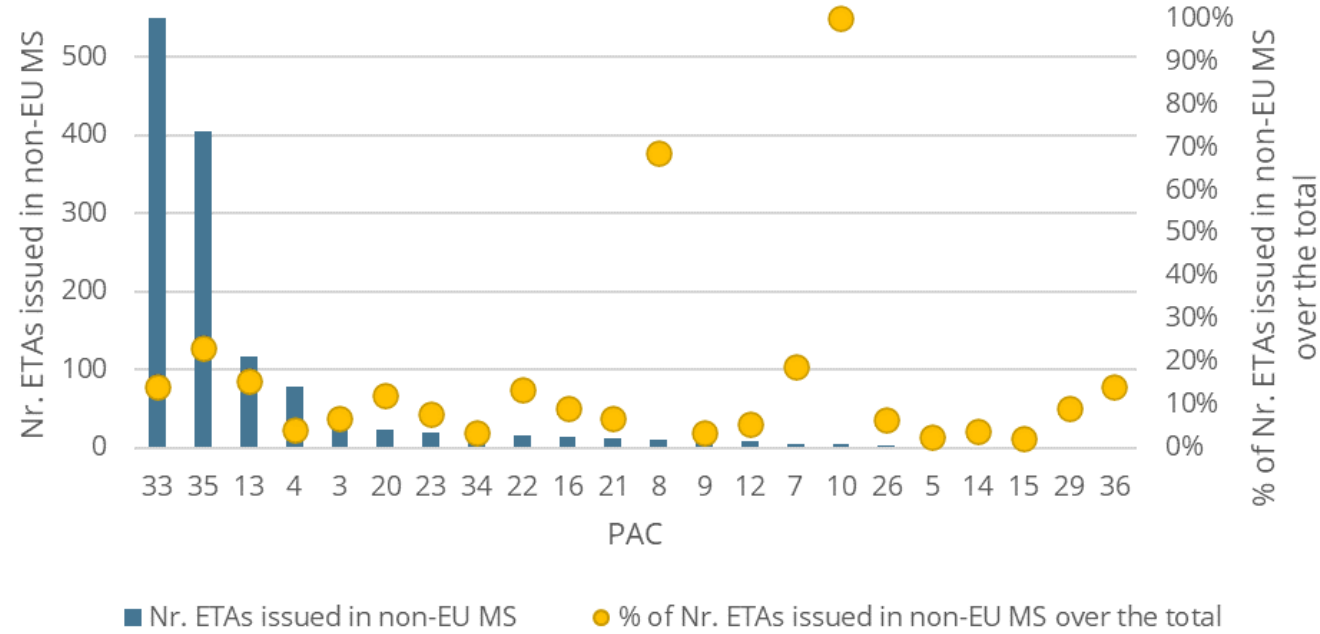
# The ETAs in the global markets: overview

- An increasing number of manufacturers around the world are showing interest in the EOTA route by requesting ETAs
- 1,347 ETAs issued in non-EU countries between 2013 and 2022, representing 12% of the total number of ETAs issued at the global level (11,116)



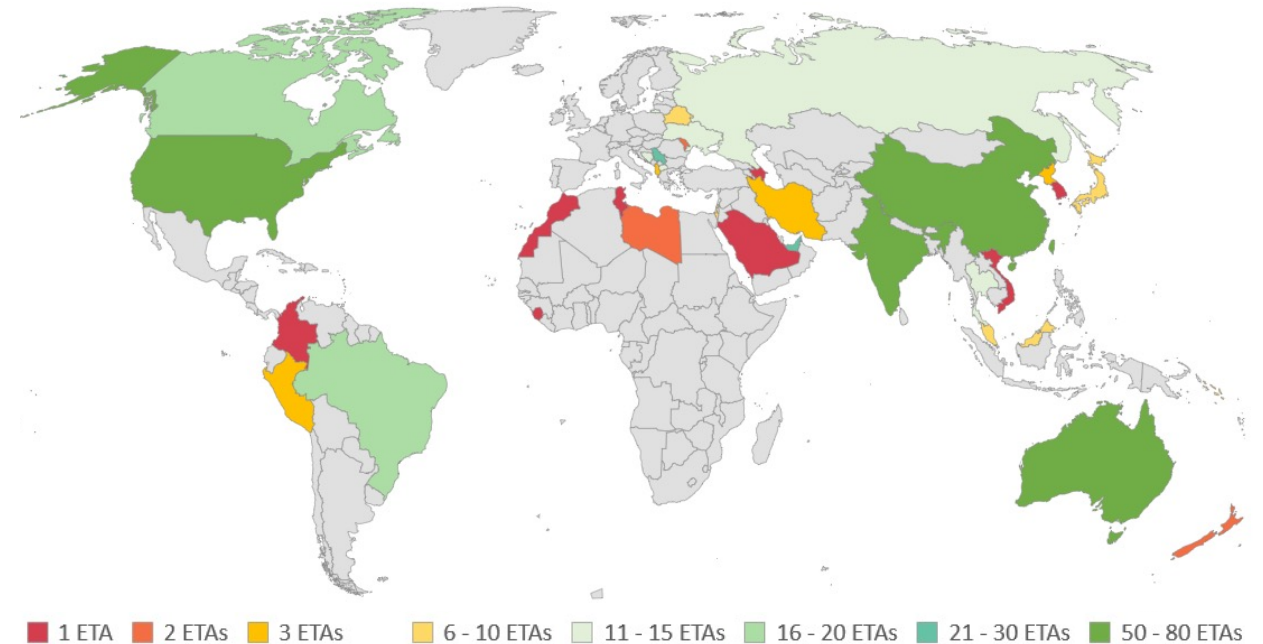
# The ETAs in the global markets by product area

- The number as well as the relevance of ETAs issued in non-EU countries widely varies across product areas
  - Most non-EU ETAs covered products under Fixings (PAC 33) and Fire stopping (PAC 35)
  - The share of ETAs covering Fixed firefighting equipment (PAC 10) and Geotextile, geo-membranes, and related products (PAC 8) is larger outside the EU than among EU27 Member States (MS)



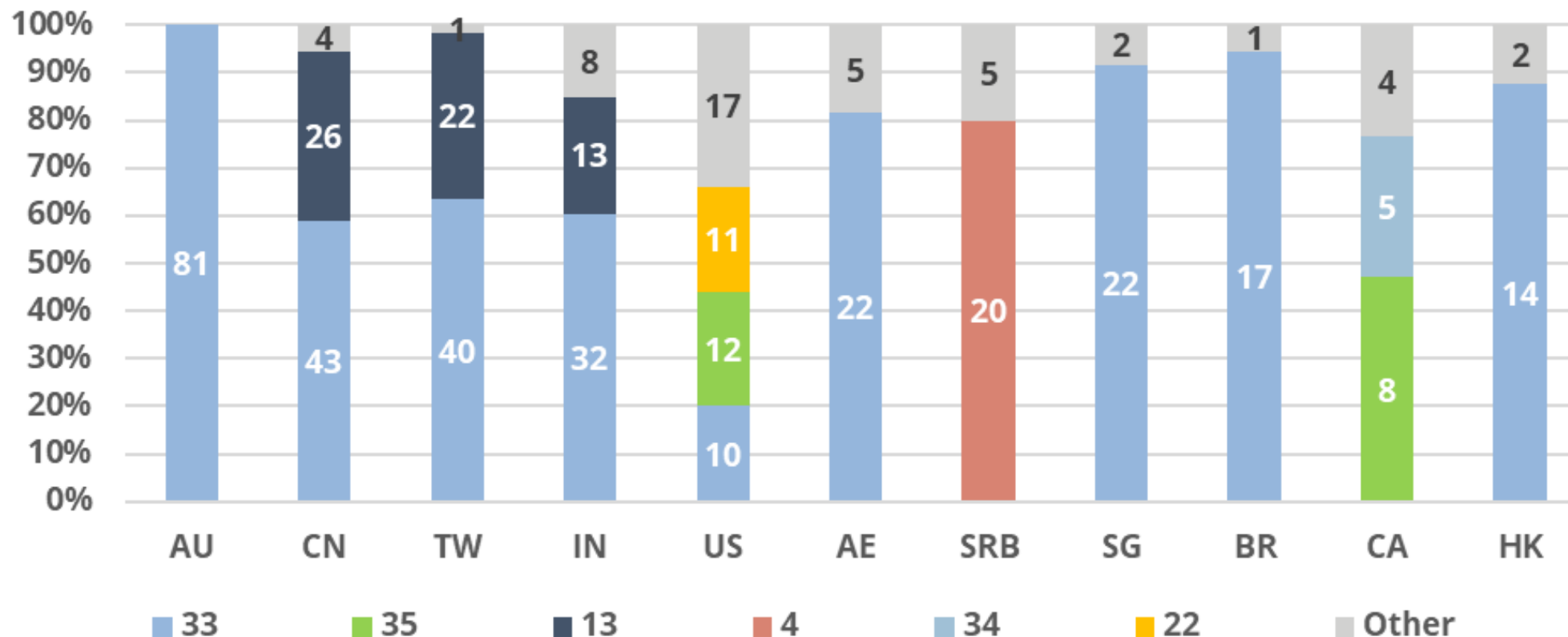
# The ETAs in the global markets by country

- A significant number of ETAs has been issued in Australia (81 ETAs), China (73 ETAs), Taiwan (63 ETAs), India (53 ETAs), and the United States (51).
- Most countries have steadily increased the number of ETAs requested per year between 2013 and 2022, especially in China and Brazil



# The ETAs in the global markets by country and products area

- ETAs covering PAC 33 have been widely requested in most non-EU countries, with only few exceptions in Canada, Serbia, and the United States



# Production and trade patterns in selected product areas (PAC 4, PAC 9, PAC 13, PAC 33, PAC 35)

- Between 2010 and 2019, the global production increased by 76%, at an average annual growth rate of 6.9%
  - +100% in the value of production manufactured in non-EU countries
- The share of production manufactured in non-EU countries has increased from 76% in 2010 to 86% in 2019
  - 70.5% of the global production in the selected product areas was manufactured in the Asian and Pacific regions in 2019
- EU cross-border trade has steadily increased between 2000 and 2022 internally (intra-EU trade) and with extra-EU countries
  - Intra-EU trade constitutes the largest share of commercial flows

# The relationship between ETAs and global markets

- ETAs are by and large requested in countries characterised by larger product market sizes and stronger trade relationships with EU MS
  - The more a country plays a key role in the market or trades with European Member States, the more likely manufacturers from this country are to request an ETA
- Some countries instead look at the ETA route as a best practice example, leading to a higher number of ETA requests



# The main players in selected product areas (PAC 4, PAC 9, PAC 13, PAC 33, PAC 35)

	PAC 4	PAC 9	PAC 13	PAC 33	PAC 35
<b>Production</b>	China, US	China, US	China, US	China, US, India	China, US
<b>N. enterprises</b>	Thailand, China	Mexico, China	China, UK	Mexico, US, China	China, US
<b>Extra-EU export</b>	US, China	UK, US	UK, Japan, China	US, China, UK	US, UK, China
<b>Extra-EU import</b>	China, Russia	China, UK	China, Russia, Ukraine	China, Taiwan, US	China, UK, US

# Emerging players in selected product areas

- Egypt shows increasing growth rates in the total production of PAC 4, PAC 9, and PAC 13, and in the number of companies active under all PACs is increasing more and more
- Other key emerging countries in terms of production growth are Philippines (PAC 9, PAC 35), Iran (PAC 33), and Kyrgyzstan (PAC 9)
- In Nepal and Peru, the number of active companies respectively for PAC 9 and PAC 13, and PAC 33 is significantly increasing
- Morocco, Saudi Arabia, South Korea, and Vietnam show increasing growth rates in their trade relationships with the European Member States.

# Main takeaways

- Extra-EU countries are increasing their market share in terms of total output
- The increasing number of ETAs issued in non-EU countries suggests that ETAs are becoming more and more relevant for manufacturers outside of the European Union
- The observed differences across product areas and countries suggest that if the ETA route is to be strengthened outside the EU, it is advisable to diversify the internationalisation strategy by country and product area
- The ETA route could be promoted in the main EU trade partners, especially if the relevant countries do not have a national certification system. This strategy could benefit both European Member States and non-EU countries

THANK  
YOU

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