Quarterly Trade Intelligence Report

Q1 2026 | January–March

Strategic intelligence on non-tariff trade barriers
Based on WTO member notification data

Zolltor AI

Letter from the CEO

Dear reader,

Although a dramatic rise in tariffs has been the top story of global trade over the past year, non-tariff trade barriers remain the hidden architecture of global commerce. Every quarter, WTO members publish hundreds of new and amended regulations through the ePing notification system – each one a potential compliance event for exporters. Zolltor AI's Trade Buzz application exists to make this landscape legible. This report, our first quarterly intelligence briefing, distils two years of WTO ePing notices into the patterns and signals that matter for European exporters navigating regulatory complexity.

The data tells an overall story: the global trade system is moving from ***predictable***, ***rules-based***, ***early-notice*** regulation to a more ***fragmented***, ***reactive***, ***late-notice***, and ***amendment-heavy*** regulation. The key takeaways:

- Overall notice volumes were down in Q1 2026 compared to the previous quarter (and vs. Q1-2025), but **regulation is not shrinking** – it is shifting into sanitary and biosecurity domains.
- This is **not limited to new regulations** – amendment-driven "hardening" of existing regulation is playing an increasing role.
- Compliance risk is **decentralizing to mid-tier markets** that are expanding their non-tariff barriers more quickly than major markets.
- **New regulatory domains are forming rapidly**, with product categories such as food testing that received minimal regulatory focus in 2024 attracting 10+ countries simultaneously in the past 12 months.
- **WTO notifications are a lagging indicator** – many large export markets publish notifications after rules are already adopted and enforced.
- **Lead times** for complying with new regulations are structurally short and highly skewed by export market.

We built Trade Buzz because we believe exporters deserve better tools than manually tracking thousands of government notices across dozens of languages to get to insights like these. This report is one expression of that mission. For real-time monitoring, country deep-dives, and sector-level analysis, we invite you to explore the Trade Buzz dashboard at https://buzz.zolltor.ai.

We welcome your feedback and questions.

Scott McPherson
CEO, Zolltor AI
April 2026

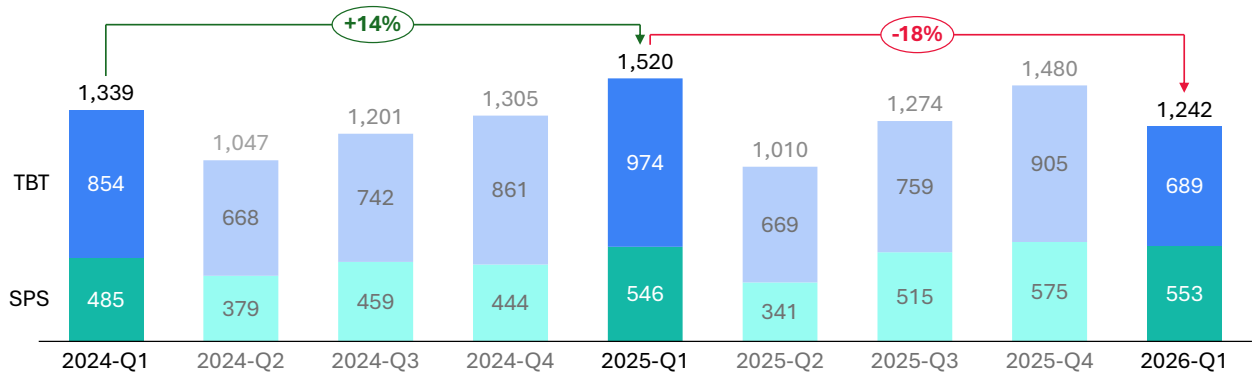
SECTION 1

Is the world getting harder or easier to export into?

WTO member notification volume is the broadest measure of regulatory activity. More notifications mean more potential compliance events for exporters. This section provides a high-level view of the past two years of notification volumes.

Q1 2026 saw 1,242 ePing notifications (excluding EAC joint filings)[1], a decrease of 18% from Q1 2025 (and 7% below Q1 2024). Almost the entire decline is attributable to TBT (technical barriers to trade) notifications, which fell 29% while SPS (sanitary & phytosanitary) notifications barely moved. The result is a **compositional shift** – SPS share rose from 36% to 45% of total volume, the highest share in the two-year dataset.

Quarterly notification volume



Source: WTO ePing API. Excludes EAC joint filings. See methodology for rationale.

The QoQ pattern reveals a consistent seasonal rhythm: Q2 drops sharply, then recovers through Q3 and Q4. Q1 2026's drop from Q4 breaks this pattern. Combined with the YoY decline, this suggests a possible deceleration in global regulatory output, not a seasonal artefact.

Q1 year-over-year comparison

METRIC	Q1 2024	Q1 2025	Q1 2026	2-YR CHANGE
Total notifications	1,339	1,520	1,242	-7%
SPS notifications	485	546	553	+14%
TBT notifications	854	974	689	-19%
SPS share	36.2%	35.9%	44.5%	+8.3pp
Active markets	76	72	75	-1

[1] See the methodology section at the back of this report for information on why high-volume joint East African Community (EAC) notifications are excluded from the analysis in Sections 1 and 5. Including EAC joint notifications, the total for Q1 2026 was 1,645 notices, a 14% YoY decline from Q1 2025 (1,910).

SECTION 2

Where is the regulatory burden shifting?

Individual markets move between regulatory postures over time. This section classifies each market based on its trailing 12-month activity vs. the prior year, using these categories:

Expanding

Volume growing (≥15% YoY and ≥5 absolute increase), driven primarily by new base regulations.

The regulatory frontier is advancing.

Hardening

Amendment-dominant activity (amendments ≥50% of total, or amendment growth outpacing base regulation growth by ≥20 percentage points).

Existing rules are being actively revised.

Stable

Volume flat, composition balanced or new-regulation-dominant.

The regulatory environment is predictable.

Easing

Volume declining (≥15% YoY and ≥5 absolute decrease).

The market is producing fewer regulatory events.

Markets by posture

Expanding	Hardening		Stable	Easing	
11 (19%)	17 (29%)		12 (20%)	19 (32%)	
Nicaragua	Kenya	Ukraine	Moldova	United States	Ecuador
Panama	Tanzania	Saudi Arabia	Paraguay	Brazil	Kuwait
Botswana	Burundi	Malaysia	Mexico	Egypt	New Zealand
Jordan	Rwanda	Costa Rica	Switzerland	Indonesia	Turkey
Taiwan	Uganda	Honduras	Armenia	Canada	Uruguay
Kyrgyzstan	India	El Salvador	Philippines	Thailand	Bahrain
Cape Verde	Japan	South Africa	Chile	Kazakhstan	Qatar
Czech Republic	China	Australia	Vietnam	Argentina	United Arab
Nigeria	Colombia		United Kingdom	South Korea	Emirates
Malawi			Oman	Israel	Morocco
Russia			Peru		
			European Union		

Share of markets by posture (Q2-2025 to Q1-2026). Minimum 10 notifications in the trailing 12-month period

One third of classifiable markets are Easing, while only one in five is Expanding. The majority of the regulatory landscape – 52% of markets – is either Stable or Easing, meaning **the global compliance burden is decelerating for most exporters**. The Hardening share deserves particular attention: these markets aren't adding volume but are actively revising existing rules, which means current approvals and certifications may need to be revisited even where headline notification counts look calm.

The distinction between Expanding and Hardening matters operationally: new regulations can be designed for in advance, but amendments to existing rules can invalidate certifications, formulations, and labelling that exporters have already invested in. Re-certification is often more costly than first-time compliance because it requires reworking products and processes already in production. The seven Hardening markets in the top-10 growth table below represent not just

more regulation but more regulatory churn, where the rules of the game change for exporters who believed they were already compliant.

Markets with increasing regulatory burden

The following markets saw the largest absolute increase in notification volume over the 12 months from Q2 2025 through Q1 2026.

COUNTRY	POSTURE	PAST YR	PRIOR YR	CHANGE	YOY	SPS%	TBT%
Kenya	Hardening	652	420	+232	1.6x	18%	82%
Tanzania	Hardening	687	465	+222	1.5x	26%	74%
Burundi	Hardening	491	321	+170	1.5x	22%	78%
Rwanda	Hardening	539	371	+168	1.5x	20%	80%
Nicaragua	Expanding	164	9	+155	18.2x	100%	
Uganda	Hardening	604	517	+87	1.2x	21%	79%
Panama	Expanding	59	12	+47	4.9x	49%	51%
India	Hardening	107	60	+47	1.8x	24%	76%
Japan	Hardening	203	160	+43	1.3x	69%	31%
Botswana	Expanding	33	0	+33	–	100%	

The standout story is the cluster of **Hardening** markets of the East African Community (Kenya, Tanzania, Burundi, Rwanda, Uganda) as well as Japan and India. Here existing rules are being actively revised, not just new rules being written. Japan and India are growing more modestly but likewise have amendment-dominant profiles. **Nicaragua's** 18x surge is a different story: a new SPS programme appeared almost from nothing.

Markets with decreasing regulatory burden

The following markets saw the largest absolute decrease in notification volume over the trailing 12 months.

COUNTRY	POSTURE	PAST YR	PRIOR YR	CHANGE	YOY	SPS%	TBT%
United States	Easing	406	529	-123	0.8x	19%	81%
Brazil	Easing	252	334	-82	0.8x	51%	49%
Egypt	Easing	173	213	-40	0.8x	17%	83%
Indonesia	Easing	36	74	-38	0.5x		89%
Canada	Easing	117	147	-30	0.8x	55%	45%
Thailand	Easing	124	153	-29	0.8x	45%	55%
Kazakhstan	Easing	19	47	-28	0.4x	89%	
Argentina	Easing	11	38	-27	0.3x	36%	64%
South Korea	Easing	92	113	-21	0.8x	25%	75%
Israel	Easing	60	78	-18	0.8x		97%

The **United States** saw the largest absolute decline of any market, shedding 123 notifications. The US remains heavily amendment-dominant (67% amendments), meaning even its reduced output is mostly revisions to existing rules. **Brazil** and **Canada** also pulled back significantly. For European exporters, this signals a temporary easing of compliance pressure in three of the world's largest non-EU markets. However, the US still generated 406 notifications, the most of any country (and its shifting policies remain a source of chaos for the global trading community).

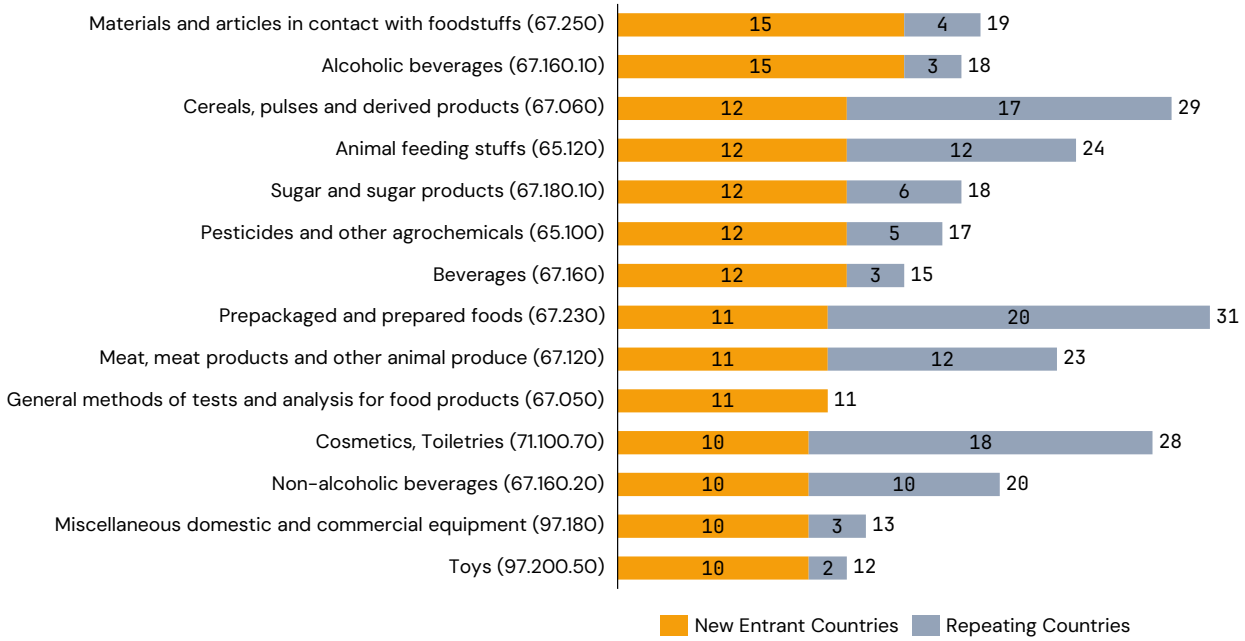
SECTION 3

Are multiple countries converging on the same products?

Convergence occurs when multiple countries independently begin regulating the same product category. This section ranks ICS product categories by the count of new-entrant countries – markets that issued regulatory notices for a product category over the past year but had not done so in the prior 12-month period.

Convergence carries a specific cost structure that distinguishes it from single-market regulatory growth. When one country introduces a new requirement, an exporter faces a single compliance event. When 15 countries independently converge on the same product category within a year – as food-contact materials did over the past four quarters – the **compliance cost scales multiplicatively**: 15 separate filings, 15 separate testing regimes, and 15 separate enforcement timelines, often with conflicting technical requirements. The convergence rankings in this section are therefore not just a measure of geographic spread but a leading indicator of where compliance budgets will face the sharpest pressure in the coming quarters.

Number of countries issuing notices by product category



New entrant = country that issued ≥1 notification in this ICS category during trailing 12 months (Q2-2025 to Q1-2026) but not in the prior 12 months. Includes joint EAC filings.

Food-contact materials tops the convergence ranking with 15 new-entrant countries joining just 4 continuing ones. This category was addressed by only a handful of major markets in the prior year but has become a global regulatory front for mid-sized countries. This is one of the clearest signals in the dataset that a new compliance wave is forming.

Three of the top 14 categories are beverages: alcoholic beverages, beverages general, and non-alcoholic beverages all saw at least 10 new markets issuing regulatory notices. Beverage exporters face a coordinated, multi-format regulatory push spanning labelling, health warnings, and ingredient disclosure across diverse markets.

The highest-volume category isn't the fastest-spreading one. Cereals has the most total countries issuing notices (29) but ranks third on new entrants. In contrast, food-testing methods has 11 new entrants and zero continuing countries – an almost entirely new regulatory category.

Non-food categories are emerging. Toys and miscellaneous domestic equipment each attracted 10 new-entrant countries against very small continuing bases (2 and 3 respectively), signalling early-stage convergence waves outside the food and agriculture domain.

The agrochemical cluster is broadening. Fertilizers, pesticides, and animal feed all appear in the list with 12 new entrants each, reflecting governments treating the entire agricultural input chain – not just finished food products – as a regulatory priority.

SECTION 4

Which sectors face the most regulatory pressure?

Sector pressure combines notification volume, geographic spread, enforcement timeline, and retrospective rates (the percentage of notices released after enforcement has begun). Unlike convergence – which is focused only on geographic spread – this section measures intensity. The table below shows the top 20 ICS product categories by notification count in the trailing 12 months.

Sector pressure indicators

ICS	CATEGORY	NOTICES	COUNTRIES	URGENT	YOY Δ
67.060	**Cereals, pulses, derived products**	309	29	0	-1
71.100.70	**Cosmetics, toiletries**	213	28	1	+105
65.080	**Fertilizers**	189	11	0	+158
67.120.30	**Fish and fishery products**	187	19	0	-14
67.040	**Food products in general**	172	39	1	-117
67.100.10	**Milk and dairy products**	143	10	0	+112
13.020	**Environmental protection**	138	9	1	-69
65.120	**Animal feeding stuffs**	125	24	0	-41
67.080.20	**Vegetables, derived products**	118	14	0	-77
67.080	**Fruits and vegetables**	116	23	0	+5
65.020.20	**Plant growing**	106	11	0	+10
71.100	**Products of chemical industry**	105	16	0	-58
67.220.20	**Food additives**	102	17	0	+8
67.160.10	**Alcoholic beverages**	99	18	1	+62
71.100.40	**Surface active agents**	94	10	0	+34
11.120	**Pharmaceuticals**	90	21	7	-23
67.120.10	**Meat and meat products**	89	14	0	+18
67.230	**Prepackaged and prepared foods**	77	31	0	-39
65.160	**Tobacco products**	74	21	1	+10
07.080	**Biology, botany, zoology**	71	9	0	+71

Cosmetics nearly doubled from 108 to 213 notifications across 28 countries. The regulatory objectives are overwhelmingly TBT: human health protection, consumer labelling, and deceptive practices prevention.

Fertilizers exploded from 31 to 189 notifications, a 6x increase concentrated in just 11 countries. The combination of TBT labelling requirements and SPS biosecurity concerns (animal health, plant protection, food safety all appear in the regulatory objectives) reflects governments treating fertilizers as both a consumer product and a biosecurity vector.

Milk and dairy followed the same pattern: 31 to 143, a 4.6x increase in just 10 countries. Like fertilizers, this is a concentrated surge – a small number of markets rapidly building new regulatory frameworks.

Pharmaceuticals carry the highest urgency count at 7 urgent notifications – more than all other top-20 sectors combined. With the broadest country spread among non-food categories (21 markets), this is the sector where regulatory pressure is most likely to require immediate action.

Biology/botany is entirely new: 71 notifications across 9 countries where there were zero in the prior period. This is a new regulatory front that didn't exist a year ago.

Compliance timelines by sector

Enforcement date coverage varies dramatically across sectors. Only 6 of the top 20 categories have sufficient data (≥15 notifications with known enforcement dates) to assess compliance timelines. The remaining 14 product categories have fewer than 10% of notifications disclosing enforcement dates, making sector-level timing analysis unreliable.

ICS	CATEGORY	NOTICES	EIF #	COVERAGE	MEDIAN EIF	RETRO %
71.100.70	**Cosmetics, toiletries**	213	71	33%	0 days	75%
11.120	**Pharmaceuticals**	90	38	42%	18 days	24%
71.100	**Products of chemical industry**	105	35	33%	56 days	26%
13.020	**Environmental protection**	138	35	25%	28 days	37%
67.040	**Food products in general**	172	34	20%	0 days	62%
67.060	**Cereals, pulses, derived**	309	20	6.5%	74 days	35%
67.230	**Prepackaged foods**	77	18	23%	0 days	61%

EIF # = notifications with known enforcement dates. Coverage = EIF # as share of total notices. Median EIF = median days from publication to enforcement. Retro % = share already in force at time of publication.

Cosmetics is an especially challenging sector for compliance surprises. With the highest EIF coverage in the table (n=71) and a 75% retrospective rate, three-quarters of cosmetics regulations with known enforcement dates were already in force when notified. The median usable lead time is zero days.

Pharmaceuticals offer the best-documented timeline pressure. The highest coverage rate (42%) and a 24% retrospective rate mean most pharma regulations do provide advance notice – but the median lead time is just 18 days. Combined with 7 urgent notifications, pharma exporters face tight but visible compliance windows.

Food products general and **prepackaged foods** both show zero median lead time with retrospective rates above 60%. These broad food categories – which often overlap with more specific ICS codes – are structurally retrospective: the typical food regulation is already in force when exporters learn about it.

SECTION 5

How fast are regulations moving from proposal to enforcement?

Three timing metrics capture the exporter's response timeline:

Comment window

Measures how long exporters have to influence a proposed regulation.

Adoption lag

Measures how quickly a regulation becomes law after notification.

Implementation window

Measures how long exporters have to comply after notification.

Together these metrics reveal whether the global regulatory machine is compressing or expanding the time exporters have to react.

Critically, where enforcement or adoption dates precede publication, the lead time is zero – the exporter has no usable notice via WTO channels. The medians and means below reflect this zero-minimum treatment.

Timing metrics: Q1 comparison

	MEDIAN			MEAN		
METRIC	Q1 2024	Q1 2025	Q1 2026	Q1 2024	Q1 2025	Q1 2026
Comment window	60	60	60	57.0	57.6	57.4
Adoption lag	0	0	0	36.6	35.5	39.2
Implementation window	0	29	23	90.5	111.1	103.6

Days per metric. Negative values (enforcement/adoption before publication) clamped to zero.

The comment window is a structural constant at 60 days – the WTO standard period. No variation across quarters or years. The mean of ~57 days confirms minimal deviation.

The median adoption lag is zero in every quarter, meaning more than half of all regulations with known adoption dates were already adopted when the WTO was notified. The mean of 36-39 days reflects a right tail of well-structured regulatory pipelines, but the typical regulation arrives pre-adopted.

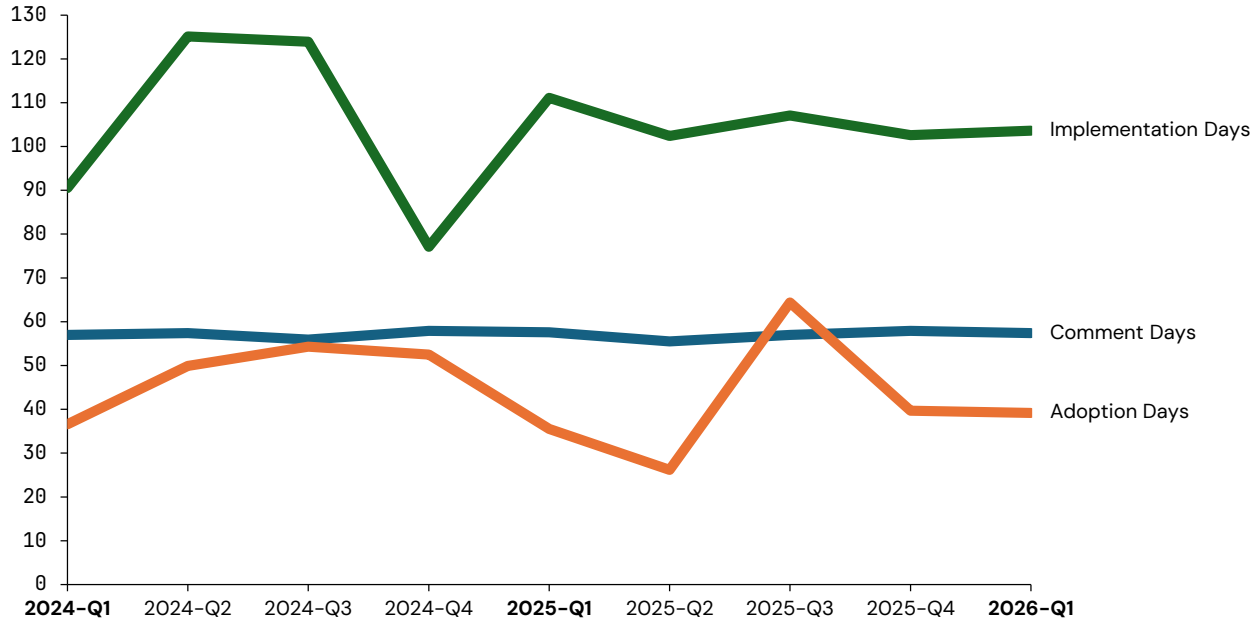
The implementation window tells a cautiously improving story. The median moved from 0 days in Q1 2024 to 29 in Q1 2025, settling at 23 in Q1 2026. The system has shifted from "majority retrospective" to "majority forward-looking, but barely." The mean is higher and stable at 104 days, pulled up by a minority of regulations with generous enforcement lead times.

This Q1-2026 implementation window gap between the mean (104 days) and the median (23 days) has a practical consequence for compliance planning: any system built around average lead times will systematically underestimate the urgency of most individual regulations. The mean is inflated by a minority of well-structured regulatory pipelines – particularly in markets like China and Vietnam – that provide months of notice. The typical regulation, however, gives

roughly three weeks. Compliance teams should plan around medians and worst cases, not averages.

Timing trends (all quarters)

Looking at the average timing metrics by quarter over the past two years captures how the usable lead time exporters actually get (when dates are disclosed) has changed:



Mean number of days per notice metric by quarter issued. Based on 6,995 notices with comment period, 2,801 notices with adoption date, and 3,028 notices with implementation date.

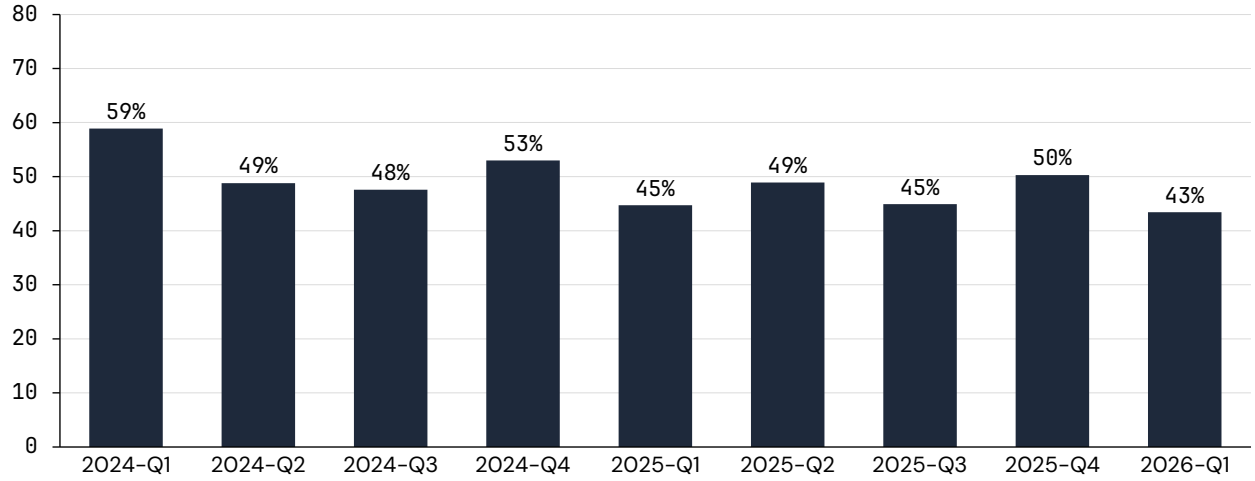
Comment windows are a structural constant at ~57 days – virtually no variation across nine quarters, confirming this is a WTO-driven default rather than a country-level decision.

Implementation lead time settled around 100-110 days after spiking to 125 in early 2024. While this suggests exporters can expect a 3-4 month compliance window on average, the median of 23 days (see above) reminds us that most individual regulations give far less.

Adoption lag is the least predictable metric, oscillating between 26 and 64 days with no trend. Exporters cannot reliably forecast when a notified regulation will become law.

Retrospective enforcement rate

The retrospective rate measures the share of enforcement-dated notifications already in force at publication, providing exporters with no advanced notice.



Share of all notices with an enforcement date that were already in force when the notice was issued.

The retrospective rate has improved greatly from Q1 2024 to Q1 2026: a 15-percentage point decline over two years. But “improving” still means 128 regulations in Q1 2026 alone were retroactive. For exporters, this remains a coin flip: for every regulation where an enforcement date is known, there is roughly a 43% chance it was already in force when published.

SECTION 6

Which markets give exporters time to prepare?

Adoption lag and **implementation lead time** vary enormously by country. The following chart maps 24 major economies by how much usable notice they provide through WTO channels – from adoption (when a regulation becomes law) to enforcement (when compliance is required). Markets in the bottom-left give exporters near-zero notice on both dimensions; markets in the top-right provide structured, predictable regulatory pipelines.

Country timing ranges

Implementation Lead Time \ Adoption Lag	0-5 days	6-60 days	>60 days
>60 days	European Union Egypt India	China Vietnam Philippines Malaysia	Switzerland South Korea
6-60 days	Indonesia	Australia	Japan
0-5 days	United States United Kingdom Canada Thailand Israel Kenya Brazil Ukraine	–	Saudi Arabia Türkiye

Median days for each metric across all notices issued by the country in the past 12 months (Q2-2025 through Q1-2026).

This 3x3 reveals three distinct regulatory regimes, each requiring a different compliance approach:

Shock systems provide near-zero notice on both adoption and enforcement. The United States, United Kingdom, Canada, Brazil, Thailand, Israel, Kenya, and Ukraine all cluster in the bottom-left of the chart. For these markets, WTO notification is post-hoc disclosure – exporters learn about regulations after they are already law. Compliance in shock-system markets cannot rely primarily on WTO channels and requires direct monitoring of domestic regulatory agencies.

Pipeline systems provide structured, predictable lead times. China offers the longest implementation runway of any major economy (448 days median), with a 48-day median adoption period. Vietnam, the Philippines, Malaysia, Switzerland, and South Korea also give exporters months to prepare. In these markets, the ePing system works roughly as intended – as an early warning mechanism.

Hybrid systems combine long visibility with compressed action windows. Japan provides extended adoption lag (62 days) but only 25 days from adoption to enforcement – exporters see the regulation coming but face a tight window once it is finalised. Saudi Arabia and Türkiye present the inverse: regulations sit in draft for months, then take effect almost immediately upon adoption. The EU itself is a hybrid – fast adoption but slower enforcement, giving exporters limited time to influence the regulation but adequate time to comply.

These are not points on a spectrum. They are structurally different regulatory cultures that demand different monitoring strategies, different resource allocation, and different escalation timelines.

Methodology

Data source

All data sourced from the WTO ePing API (eping.wto.org). This report covers ePing notifications distributed between 1 January 2024 and 31 March 2026. Data accuracy is limited by the accuracy of information provided by WTO members.

Date extraction

Enforcement dates (entry into force) and adoption dates are extracted from API structured fields and ePing notification source documents. Qualitative values ("to be determined," "6 months from adoption") are excluded. Coverage: approximately 17% of notifications have enforcement dates, 37% have adoption dates, and 73% have comment deadlines. Timing metrics are computed only from notifications where the relevant date is available. Where enforcement or adoption dates precede publication, the usable lead time is treated as zero days.

Limitations

Enforcement date coverage (17%) biases timing metrics toward addenda, emergency measures, and countries with structured regulatory pipelines. Notification volume measures regulatory activity, not regulatory burden – a trade-facilitating measure and a new restriction are counted equally. ICS code coverage varies by instrument type: 95% of TBT notifications include ICS codes versus 42% of SPS notifications, meaning SPS measures are underrepresented in ICS-based convergence and sector analysis. ICS classifications are self-assigned by the notifying WTO member and may contain inaccuracies. Month-only dates in source documents are parsed as the 2nd of the month, introducing ±30-day imprecision for a small subset of dates.

EAC exclusion

East African Community (EAC) joint filings are excluded from global trend analysis (Sections 1 and 5). The EAC's five members (Burundi, Kenya, Rwanda, Tanzania, Uganda) file identical standards five times – once per member – at high volumes, generating 20-47% of all notices in each quarter. Including EAC data in overall counts creates false volume spikes that obscure genuine global trends. EAC filings are included in country and product-level analysis (Sections 2, 3, 4, and 6) where these notices and the sectors they target carry real information for exporters.

About Trade Buzz and Zolltor AI

Trade Buzz

Trade Buzz is a global regulatory radar that monitors non-tariff trade barriers in real time. It tracks WTO ePing notifications – the formal mechanism through which WTO members announce new or changed SPS and TBT measures – and transforms raw regulatory data into strategic intelligence for trade compliance teams.

The Trade Buzz dashboard provides four analytical views: Acceleration (country-level posture and momentum), Convergence (multi-country product targeting), Sectors (ICS-level pressure analysis), and Trajectory (structural change, timing, and churn). Country-level deep dives, sector drill-downs, and WTO Specific Trade Concern tracking are available through the interactive dashboard at https://buzz.zolltor.ai.

Zolltor AI

Zolltor AI builds intelligence tools for international trade. Our mission is to make the global regulatory landscape transparent and navigable for companies of all sizes. We believe that tracking changes to tariffs and trade policies that impact every company that trades across borders should not require a team of specialists reading thousands of government notices in dozens of languages – it should be powered by data, structured by technology, and delivered as actionable insight to business leaders.

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