Trade Buzz
Global Regulatory Radar

Quarterly Trade Intelligence Report

Q2 2026 | April–June

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

Zolltor AI

Letter from the CEO

Dear reader,

While volatile changes in tariff rates in major markets continue to roil trade relationships, non-tariff trade barriers remain a hidden friction of global commerce. Every quarter, WTO members publish hundreds of new and amended regulations through the ePing notification system, each a potential compliance event for exporters. Zolltor AI's Trade Buzz application exists to make this landscape legible. This report – our second quarterly intelligence briefing – covers April to June 2026 and compares the quarter to previous periods from a decade of ePing history.

The quarter was ordinary at the top and busy underneath. Notice volumes were comparable to previous Q2 levels but far fewer markets spent the year revising rules they had already written, product regulation kept spreading into new markets, and the shape of the warning exporters get changed. The key takeaways:

- Notification volume rose to 1,091, **up 8%** year over year, but sits **inside its normal seasonal range**. Volume decline from first quarter is a seasonal dip seen in eight of the past eleven years.
- The **volume increase is entirely sanitary**: SPS notifications rose 25% while TBT was flat (-1%), lifting the SPS share to **39.1%** from 33.8% in Q2 2025.
- **Amendment-driven hardening receded sharply.** 18 of 57 classifiable markets are Hardening (i.e., primarily revising existing regulations), against 28 of 55 a year ago.
- **Regulatory attention keeps spreading.** Medical equipment and food-contact materials each drew 14 markets over the past four quarters that had not regulated the category during the previous year.
- **More warning, given later.** 63.8% of enforcement-dated notifications arrived before their rule took effect, up from 43.0% in Q2 2025. But the median warning across these quarters fell from 196 days to 92 days.
- **Coverage remains the binding limit.** Only 29.4% of notifications carry an entry-into-force date at all. That figure sets the ceiling on how well this channel serves as an early warning system for exporters.

We built Trade Buzz because we believe exporters deserve better tools than manually tracking these thousands of government notices across multiple 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
August 2026

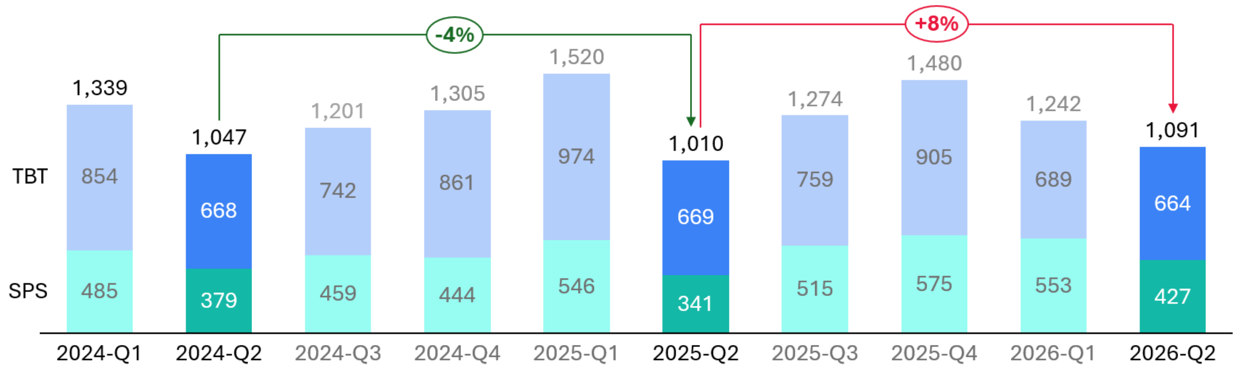
SECTION 1

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 sets the quarter against the decade of notification volumes behind it.

Q2 2026 saw 1,091 ePing notifications (excluding EAC joint filings)[1], an **increase of 8%** on Q2 2025. The rise is entirely sanitary: SPS notifications grew 25% year over year while TBT was flat at -1%. SPS accounted for 39.1% of the quarter, against 33.8% in the same period a year ago.

Quarterly notification volume



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

Volume fell 12% from Q1, which looks like a decline and is not. Measured against every second quarter in the decade-long series, 1,091 sits inside the normal band – 0.4 standard deviations below a decade Q2 average of 1,169. The quarter-on-quarter move is the same seasonal dip this series shows in eight of its eleven years. Read year over year, where the seasonality cancels, activity is up.

Q2 year-over-year comparison

METRIC	Q2 2024	Q2 2025	Q2 2026	2-YR CHANGE
Total notifications	1,047	1,010	1,091	+4%
SPS notifications	379	341	427	+13%
TBT notifications	668	669	664	-0.6%
SPS share	36.2%	33.8%	39.1%	+2.9pp
Active markets	71	70	69	-2

Note: Active markets = distinct markets issuing at least one notification in the quarter.

[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 Q2 2026 was 1,606 notices, 26% above Q2 2025 (1,270).

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.

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.

Markets by posture

Expanding	Hardening		Stable		Easing
13 (23%)	18 (32%)		18 (32%)		8 (14%)
European Union	Tanzania	Costa Rica	Chile	Peru	United States
Nicaragua	Uganda	India	Canada	Qatar	Brazil
Vietnam	Kenya	Colombia	Ukraine	Ecuador	Thailand
Australia	Rwanda	Türkiye	South Korea	United Kingdom	Israel
Mexico	Burundi	New Zealand	Kuwait	Yemen	Malawi
Panama	China	Malaysia	Taiwan	Russia	Indonesia
Philippines	Egypt	El Salvador	UAE	Botswana	Uruguay
Jordan	Japan	Switzerland	Oman	Albania	Kazakhstan
Jamaica	Saudi Arabia	Honduras	Bahrain	Paraguay	
Kyrgyzstan					
South Africa					
Nigeria					
Ghana					

Share of markets by posture (Q3-2025 to Q2-2026). Minimum 10 notifications in the trailing 12-month period

Hardening remains a large category but it has receded significantly: 32% of classifiable markets are Hardening vs. 52% a year earlier. That 20-point decline is the largest single movement anywhere in this report, indicating that fewer governments spent the year reopening rules they had already written. Stable absorbed most of the change (+17pp), with Expanding also up (+6pp).

A smaller share is not a smaller problem for the markets inside it: Thirteen markets are Hardening while running well above their own ten-year average annual volume. The East African Community accounts for five of them; the rest are spread across the map: Egypt, Saudi Arabia, India, China, Malaysia, and Türkiye among them. Churn has concentrated rather than disappeared, and an exporter selling into one of these markets faces the same re-certification risk as before.

Markets with increasing regulatory burden

The following markets saw the largest absolute increase in notification volume over the 12 months from Q3 2025 through Q2 2026.

COUNTRY	POSTURE	PAST YR	PRIOR YR	CHANGE	YOY	SPS%	TBT%
Tanzania	**Hardening**	727	498	+229	1.5X	24%	**76%**
Rwanda	**Hardening**	602	373	+229	1.6X	19%	**81%**
Burundi	**Hardening**	542	323	+219	1.7X	21%	**79%**
Nicaragua	**Expanding**	182	15	+167	12.1X	**97%**	3%
Kenya	**Hardening**	639	479	+160	1.3X	19%	**81%**
Uganda	**Hardening**	671	513	+158	1.3X	19%	**81%**
Panama	**Expanding**	61	0	+61	-	49%	51%
Egypt	**Hardening**	209	155	+54	1.3X	18%	**82%**
Vietnam	**Expanding**	101	60	+41	1.7X	14%	**86%**
Japan	**Hardening**	204	167	+37	1.2X	**72%**	28%

East Africa dominates the top of this table, but it is one programme, not five: Five of the ten markets above are East African Community members filing a shared body of regional standards; each member lodges the same standard as its own notification, so one regional decision appears as five national ones. The obligations are real, and an exporter must meet them in each market.

Outside that cluster, **Nicaragua** is the quarter's outlier: 182 notifications against 15 a year earlier, 97% of them sanitary – a national SPS programme built almost from nothing. **Vietnam** moved from Stable to Expanding on 101 notifications, 1.7X its prior year, driven by new rules rather than revisions.

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	423	519	-96	0.8X	19%	**81%**
Malawi	Easing	36	120	-84	0.3X	0%	**100%**
Indonesia	Easing	25	92	-67	0.3X	16%	**84%**
Brazil	Easing	253	301	-48	0.8X	49%	51%
Kazakhstan	Easing	19	54	-35	0.4X	**79%**	21%
Thailand	Easing	123	152	-29	0.8X	**59%**	41%
Israel	Easing	49	75	-26	0.7X	10%	**90%**
Costa Rica	Hardening	120	134	-14	0.9X	**66%**	34%
South Korea	Stable	95	107	-12	0.9X	30%	**70%**
Uruguay	Easing	22	32	-10	0.7X	**64%**	36%

The **United States** posted the largest absolute decline of any market, shedding 96 notifications to 423, and moved from Hardening to Easing (despite the continued volatility of its tariff policies). **Brazil**, **Indonesia** and **Malawi** also pulled back sharply.

Note that a market producing fewer regulatory events is not necessarily becoming easier to sell into; the stock of regulation already in force is unaffected by a quiet quarter.

SECTION 3

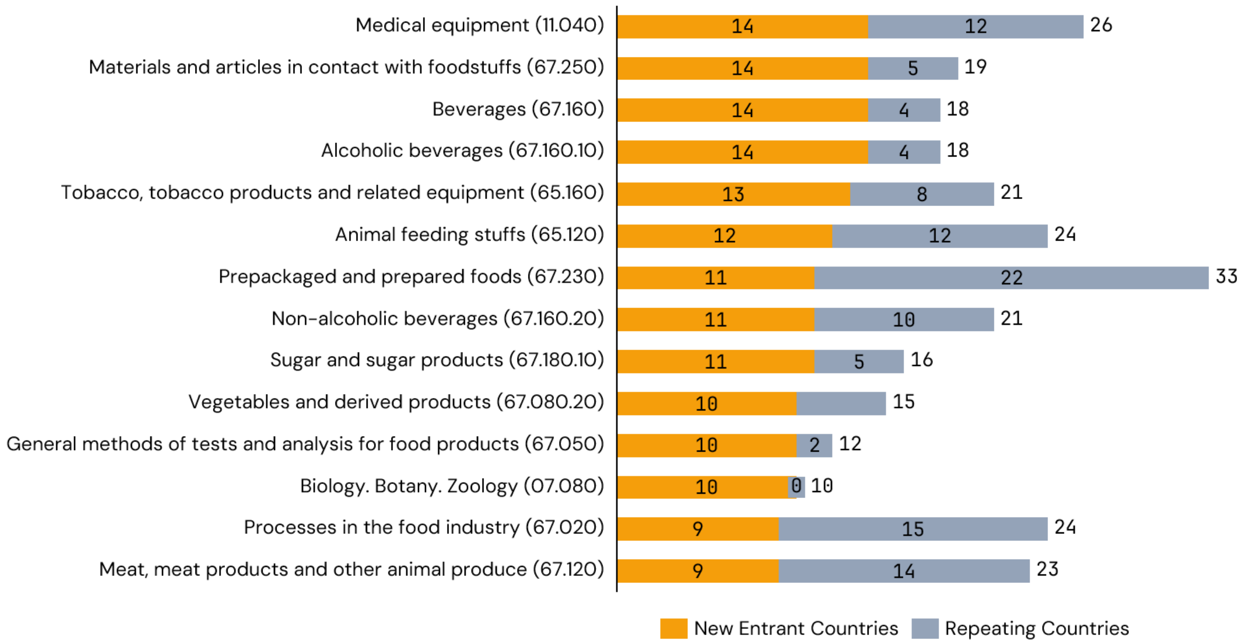
Are multiple countries converging on the same products?

Convergence occurs when multiple countries independently begin regulating the same product category. This section ranks ICS and HS 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 fourteen countries independently converge on the same category within a year – as medical equipment and food-contact materials both did over the past four quarters – the compliance workload multiplies across markets: fourteen separate filings, testing regimes and enforcement timelines, often with conflicting technical requirements.

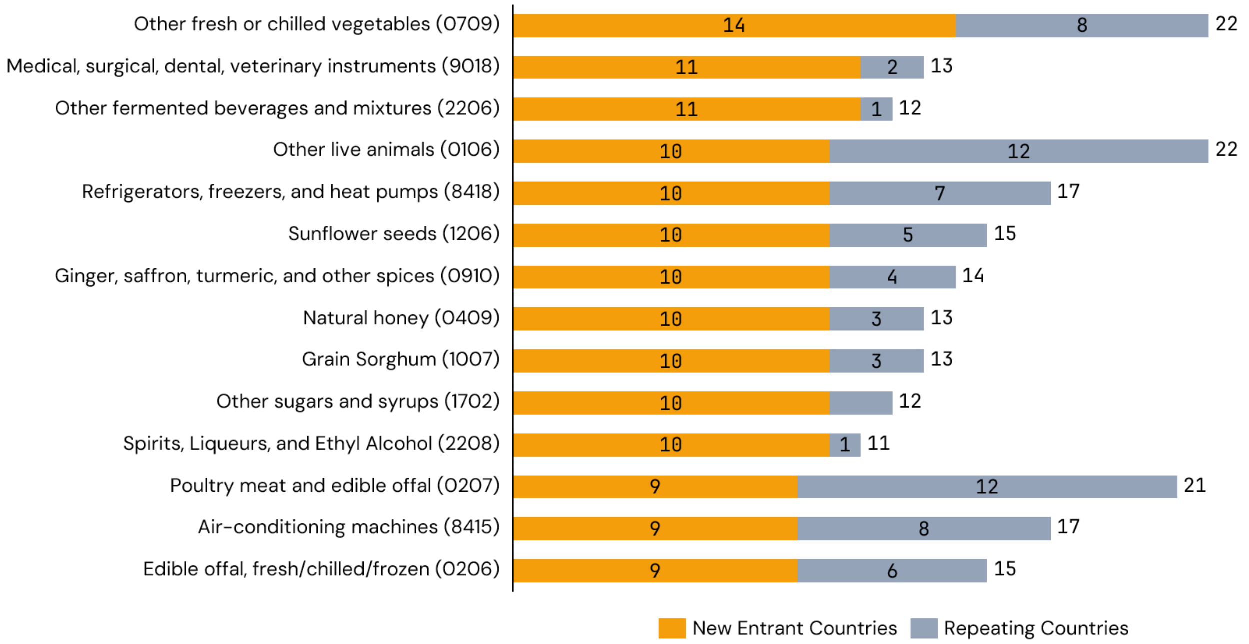
Categories are read two ways: (1) by **product**, grouping notifications by HS heading, the first four digits of codes used for customs classification; and (2) by **standard**, grouping them by ICS category, the classification assigned to the regulation itself. Most notifications carry one code type or the other, so the two rankings are alternative readings of the same quarter rather than two halves of it.

Number of countries issuing notices by regulatory standard (ICS)



New entrant = country that issued ≥1 notification in this ICS category during trailing 12 months (Q3-2025 to Q2-2026) but not in the prior 12 months. Includes joint EAC filings.

Number of countries issuing notices by product category (HS)



New entrant = country that issued ≥1 notification in this HS category during trailing 12 months (Q3-2025 to Q2-2026) but not in the prior 12 months. Includes joint EAC filings.

Medical equipment (ICS 11.040) leads the standards list, with 14 new-entrant markets to reach 26, and the product reading shows a similar movement in **surgical and dental instruments** (HS 9018). It is the only non-food category at the top of either ranking, and it did not appear there a quarter ago.

Food-contact materials has not slowed. The category we named last quarter as the clearest sign of a forming compliance wave drew a further 14 new-entrant markets and now counts 19. Its membership keeps turning over rather than settling: a category still recruiting markets four quarters on is a structural shift, not a cluster.

Beverages – a key convergence target in Q1 – again appears in three forms. Beverages generally, alcoholic beverages and non-alcoholic beverages all appear in the top ten, as they did a quarter ago. Beverage exporters face a sustained multi-format push spanning labelling, health warnings and ingredient disclosure across very different markets.

SECTION 4

Which sectors face the most regulatory pressure?

Convergence measures how widely a category has spread; **sector pressure** measures how much weight sits on it. Each sector is scored on three measured components:

1. The total number of individual **notices**
2. The number of distinct **markets** regulating it
3. **Notice Gap**, the share of the sector's base notifications that gave no usable lead time (i.e., the regulation was already in force when the notice was published, was effective the same day, or never carried an entry-into-force date)

Each component is ranked against other sectors across these three metrics, with the scores combined based on a 40/30/30 weighting into a stress score (1–100). The **Stress** column in the tables below places each sector among its peers over the past four quarters (Q3 2025–Q2 2026); the **Trend** column compares the sector’s recent metrics against its own ten-year history.

Sector stress by standard (ICS)

ICS	CATEGORY	STRESS	NOTICES	MARKETS	NOTICE GAP	TREND
67	Food Technology	93	1,103	64	91%	Escalating
13	Environment, Health Protection, Safety	89	434	34	95%	Cooling
65	Agriculture	85	321	49	83%	Steady
71	Chemical Technology	80	293	46	81%	Steady
97	Domestic and Commercial Equipment	77	206	41	80%	Cooling
11	Health Care Technology	73	192	40	75%	Steady
91	Construction Materials and Building	73	123	35	83%	Cooling
55	Packaging and Distribution	69	56	27	91%	Steady
23	Fluid Systems	68	84	28	83%	Cooling
59	Textile and Leather Technology	68	78	17	91%	Escalating

Sector stress by product (HS)

HS	CATEGORY	STRESS	NOTICES	MARKETS	NOTICE GAP	TREND
07	Vegetables	92	204	41	98%	Steady
04	Dairy, eggs, honey	90	309	44	94%	Escalating
02	Meat	89	273	38	95%	Cooling
08	Fruit & nuts	89	214	39	95%	Steady
12	Oil seeds	89	197	38	96%	Steady
10	Cereals	87	159	30	99%	Steady
09	Coffee, tea, spices	86	136	39	96%	Steady
23	Food residues & animal feed	84	156	26	97%	Escalating
22	Beverages & spirits	84	88	37	98%	Steady
01	Live animals	81	185	30	91%	Cooling

Food Technology carries more pressure than any other sector on either reading: 1,103 notifications across 64 markets puts it at the top of both volume and spread, and 91% of its base notifications gave no usable lead time. On the product reading the weight is distributed across agri-food chapters: vegetables, dairy, meat, oil seeds and cereals occupy the top places, every one of them with a Notice Gap above 90%.

Also scoring high on these metrics is **Environment, Health Protection, Safety.** It ranks second on Stress with 434 notifications across 34 markets, with 95% of notices giving no usable warning period.

Note that **high volume and *rising* pressure are not the same** thing. **Food Technology** (ICS 67), **Textile and Leather Technology** (ICS 59), and **Dairy, Eggs, and Honey** (HS 04) all stand at or near a decade high in their own history. Meanwhile, **Environment, Health Protection, Safety** (ICS 13), **Domestic and Commercial Equipment** (ICS 97), **Construction Materials and Building** (ICS 91), and Meat (HS 02) are all Cooling against their own record despite substantial absolute counts.

SECTION 5

How fast are regulations moving from proposal to enforcement?

A notification either reaches exporters before its rule takes effect, or it does not. Those are two separate questions, and a single average of them answers neither. This section reports the quality of advance notice from ePing documents across three related metrics:

Advance-Notice rate

The share of enforcement-dated notifications published before the rule took effect.

Depth of Notice

The median days of warning, counted only across the notifications that gave warning.

Effective Notice

Rate × depth, in days – the preparation a typical notification actually buys.

Addenda are excluded throughout this section: an addendum inherits the entry-into-force date of the rule it amends, so it is retrospective by construction and would distort every figure below. EAC joint filings are excluded on the same basis as Section 1.

Notice quality: Q2 comparison

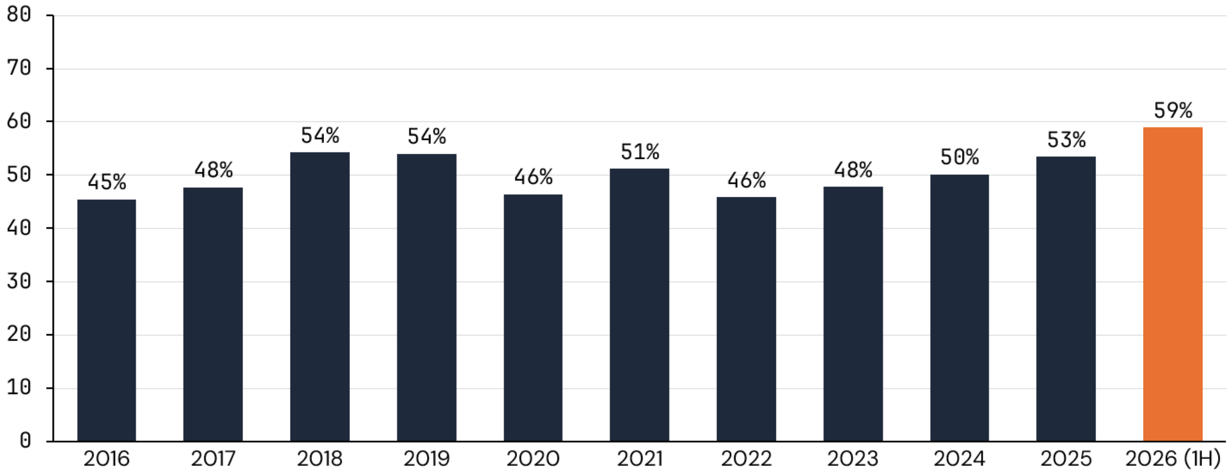
METRIC	Q2 2024	Q2 2025	Q2 2026
Advance-notice rate	51.4%	43.0%	63.8%
Depth of notice	273 days	196 days	92 days
Effective notice	140 days	84 days	58 days

More regulations warned, and warned for less time. 63.8% of dated notifications arrived before their rule took effect, up from 43.0% a year ago – a real improvement in whether exporters hear at all. Depth moved the other way, from 196 days to 92 days. Half of the warnings given fell between 39 days and 263 days. Multiplied together, a typical notification now buys 58 days of preparation, against 84 days a year ago. The channel reaches more people with less time.

Notice quality over the decade

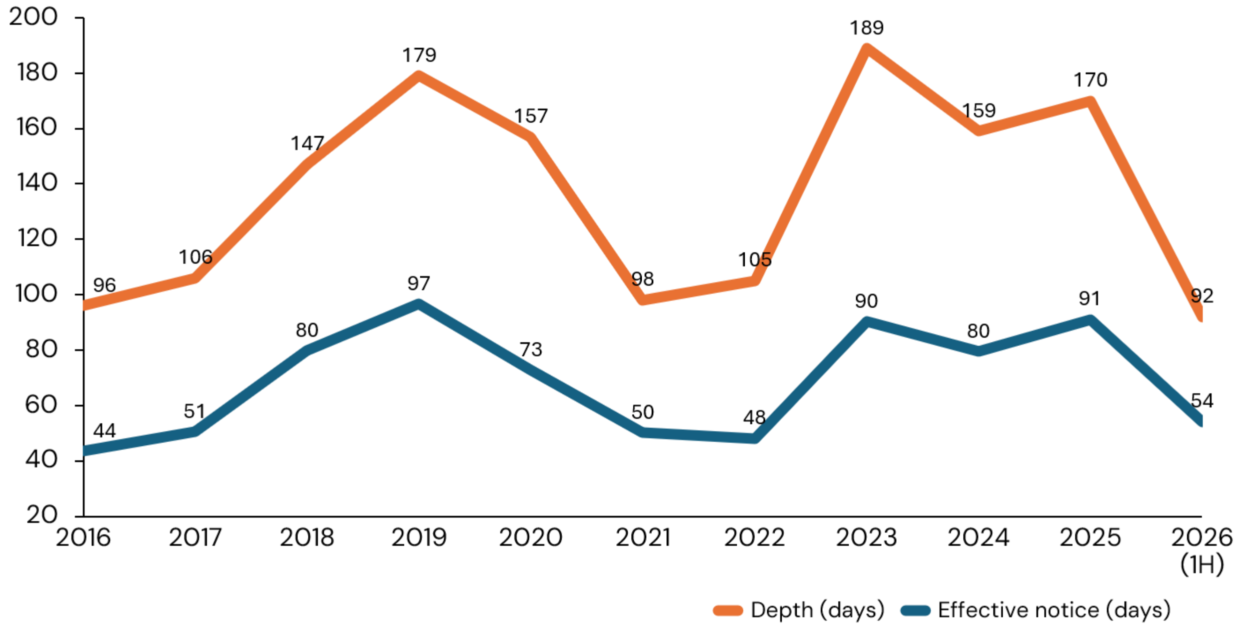
By broadening our view of these metrics across a full decade, we can see that these 2026 half-year numbers are indeed outliers.

Advance-Notice rate



Annual averages for share of enforcement-dated notifications that were published before the rule took effect.

Notice quality



Full year averages for notice quality metrics (2026 includes January-June only).

This decade view shows a system that redistributes warning rather than adding any. The share of measures announced before they take effect has sat near half in every year since 2016 while the depth of that warning has swung between 96 and 189 days with no direction to it.

The first half of 2026 departs from that pattern: more measures arrived ahead of their own enforcement than in any complete year, and they carried the shortest warning period in the series. For a compliance team, this dynamic moves the constraint from detection to reaction: the question now is less a matter of seeing a rule coming, but whether anything can be done in the weeks after it is announced.

SECTION 6

Which markets give exporters time to prepare?

Whether a country warns exporters about upcoming regulations at all, and how many days of warning it provides, are separate questions; and markets differ on both of these dimensions. The grid below places each major economy by how often it announces a rule before that rule bites, against the median warning it gives when it does give a future enforcement date. Markets in the bottom-left give exporters almost nothing on either dimension; markets in the top-right run structured, predictable regulatory pipelines.

Country timing ranges

Advance Notice Rate	Depth of Notice		
	<60 days	60-180 days	>180 days
>60%	Australia	European Union Philippines South Korea Vietnam Japan Jordan Türkiye	Taiwan China Israel
40-60%	–	Ukraine Canada	United Kingdom
<40%	United States	Colombia	Saudi Arabia Peru Chile Brazil

Advance notice rate = percentage of all notices with any enforcement date issued before that date
Depth of notice = median number of days prior to the enforcement date the dated notices were issued
Totals shown are for the past four quarters (Q3-2025 through Q2-2026); includes only markets that issued 10+ dated notices in this time period.

This 3x3 reveals four distinct regimes that are structurally different regulatory cultures and demand different monitoring strategies, different resource allocation, and different escalation timelines:

- **Pipeline systems** warn reliably and give months to act. For dated notifications in these markets, ePing functions well as an early-warning channel, although it remains only one part of a complete monitoring programme. Vietnam, Japan, Jordan, European Union, Philippines, South Korea, Türkiye, Czech Republic give two to six months of warning; Taiwan, China, Israel give more than six.
- **Fast-cycle systems** announce most changes in advance, but leave weeks rather than months before enforcement. Visibility is good; the constraint is reaction speed, so pre-

cleared compliance paths matter more here than earlier detection. Over the past four quarters, only Australia was in this category.

- **Shock systems** put most rules in force when notified. For these markets WTO notification is post-hoc disclosure: exporters learn about a regulation after it is law. Compliance cannot rest on this channel and requires direct monitoring of the domestic regulator. The United States, Colombia, Saudi Arabia, Peru, Chile, Brazil fell into this category. Other than the United States these markets do give warning, but they warn less often than other countries.
- **Hybrid systems** warn exporters about half the time. These markets are neither an early-warning channel nor a lost cause; their ePing notices are usable for planning but never sufficient as the only source. Ukraine, Canada, and the United Kingdom are in this category.

Several of these regimes are shortening: measured against their own ten-year histories, effective notice has fallen furthest in Philippines (256 days to 47 days), Vietnam (190 days to 71 days), European Union (221 days to 124 days), Ukraine (142 days to 105 days), and the United Kingdom (157 days to 130 days). A market that warned generously in the past is not guaranteed to keep doing so, which is an argument for watching the trend rather than trusting the label.

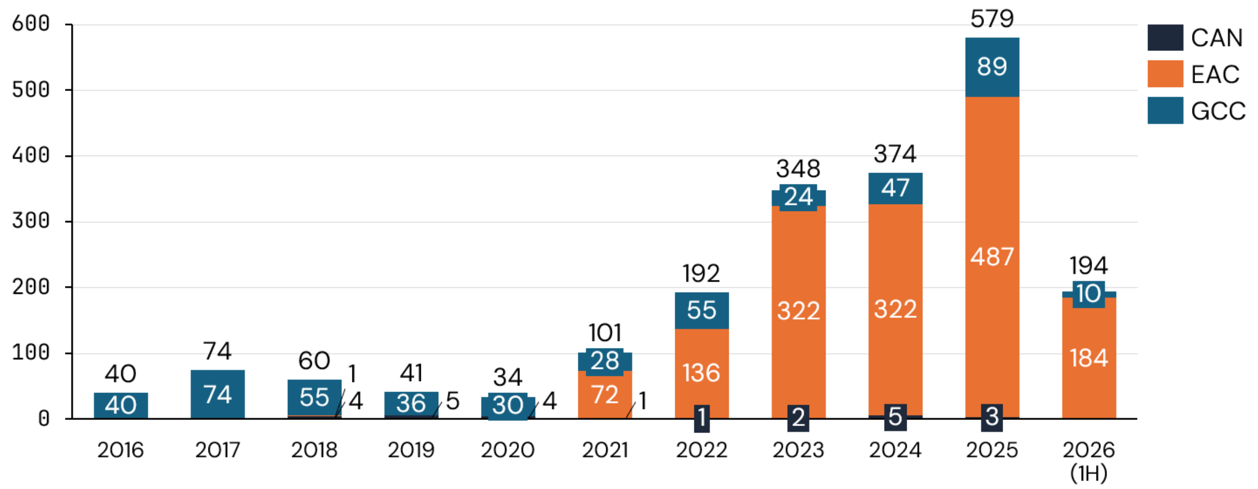
SECTION 7

How are regional blocs affecting global trade barriers?

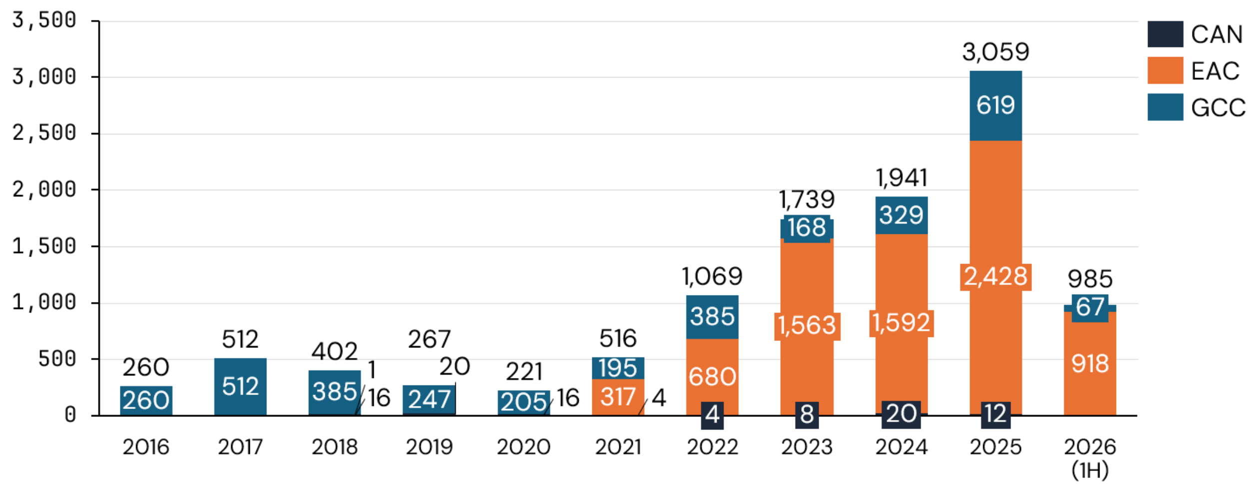
Most of this report counts individual export markets. However, some regulations are not written one market at a time: groups of countries may agree on common standards, with each member issuing a separate notification for what is essentially a single regulatory decision. Over the past five years this trend has grown enormously and has become the largest structural change in the notification stream.

Regional bloc filing (2016-2026)

Documents by bloc



Market obligations by bloc



Documents count distinct regulatory decisions; market obligations count the markets each one reaches. A five-member joint standard is one document and five obligations.

The world is not writing more regulations – it is applying the same number to more markets. In 2020 the notification stream carried 5,295 distinct regulatory documents and 5,482 market-level obligations; the two figures were almost the same, because almost every notification came from one market acting alone. By 2025 the number of distinct documents was 5,232, essentially unchanged, while market obligations had risen to 7,712, up 41%. The average document now reaches 1.47 markets, against 1.04 five years ago. Every bit of that gap is regional bloc filing.

The East African Community is the whole of the change. Across the five years to 2020 it lodged a single joint document; in 2025 it lodged 487 of them, reaching 2,428 market obligations – 31.5% of every obligation notified worldwide, from just five markets. The Gulf group has filed jointly since the start of the series and is the counter-example: 89 documents and 619 obligations in 2025, a long-standing arrangement that moves up and down without trending.

This is a change of method, not five new regulators. The five East African markets were already active notifiers before they harmonised – together they issued over a thousand notifications in 2020, filing individually. What changed from 2021 is that they began writing standards jointly and notifying them as a bloc. Their combined output has since roughly trebled, so the shift is both a reorganisation and real growth; the joint mechanism is what makes the growth land five times over.

Note that *every obligation counted here is real*. A market that adopts a regional standard genuinely requires compliance with it, and an exporter shipping to all five East African markets must satisfy all five. But the number of *independent regulatory programmes* is now materially smaller than the number of regulations. That is why the markets with the largest increases in Section 2 are dominated by a single filing programme, and why Sections 1 and 5 exclude joint East African filings from their calculations of global notice activity.

Methodology

Data source

All data sourced from the WTO ePing API (eping.wto.org). This report covers ePing notifications distributed between 1 January 2016 and 30 June 2026. Data accuracy is limited by the accuracy of information provided by WTO members.

Base notifications and amendments

A base notification opens a notification family; addenda, revisions and corrections attach to it and provide later information about the same measure. Amendment intensity, which drives the Hardening classification in Section 2, counts both. All date-based metrics in this report – advance-notice rate, depth of notice, enforcement-date coverage – use base notifications only.

Date extraction

Entry-into-force dates are extracted from API structured fields and ePing notification source documents. Qualitative values ("to be determined", "six months from adoption") are excluded. 29.4% of base notifications in Q2 2026 carry a usable entry-into-force date. Timing metrics are computed only from notifications where the date is available. Depth of notice is measured only across notifications that gave warning.

Limitations

Notification volume measures regulatory activity, not regulatory burden. A trade-facilitating measure and a new restriction are counted equally, and neither the stock of regulation already in force nor the severity of any individual measure is captured here. "Easing" describes lower notification activity and does not establish that a market became easier to export into. Enforcement-date coverage is the binding constraint on every timing figure in this report, and it moves year to year. Product-code coverage is uneven by instrument, which is why both code systems (ICS and HS) are reported. Codes and stated objectives are self-assigned by the notifying member and may contain inaccuracies.

EAC exclusion

East African Community joint filings are excluded from global trend analysis (Sections 1 and 5). The EAC's five members – Burundi, Kenya, Rwanda, Tanzania and Uganda – file identical standards five times, once per member, at volumes that generate a large share of all notices in a quarter. Including them in a global total creates spikes that obscure genuine trends. They are included in country and product-level analysis (Sections 2, 3, 4 and 6), where the markets and sectors they target carry real information for exporters: a market that adopts a regional standard genuinely requires compliance with it.

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 the four main analytical views behind this report: Acceleration (country-level posture and momentum), Convergence (multi-country product targeting), Sectors (product-level pressure analysis) and Trajectory (structural change, timing and churn). Country-level deep dives, sector drill-downs, WTO Specific Trade Concern tracking, and analysis of Friction (enforced and contested trade barriers) 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 imports or exports 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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