

ECB Forum on Central Banking 2026

Panel 2

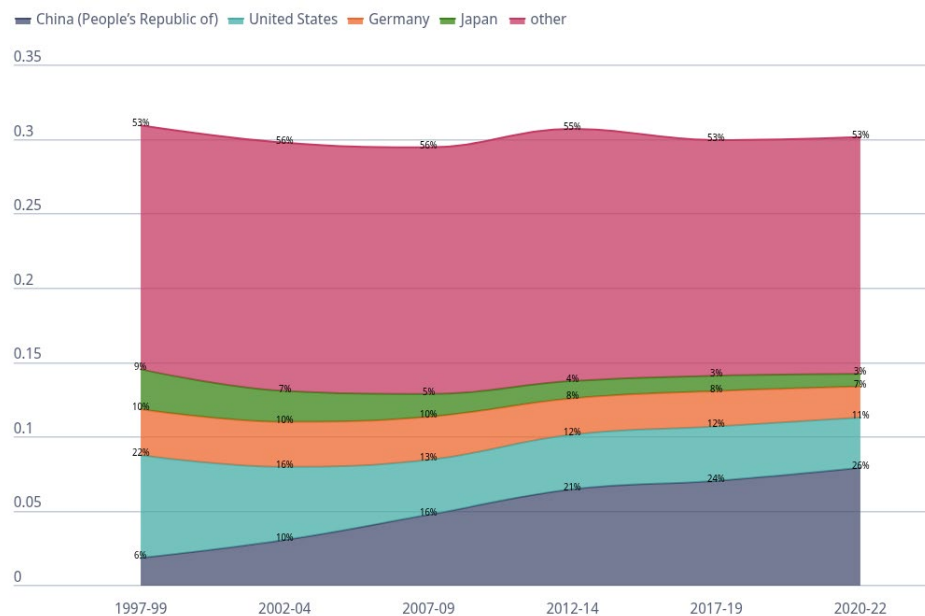
Europe's role in the new global trade landscape

Marion Jansen, Director OECD Trade and Agriculture

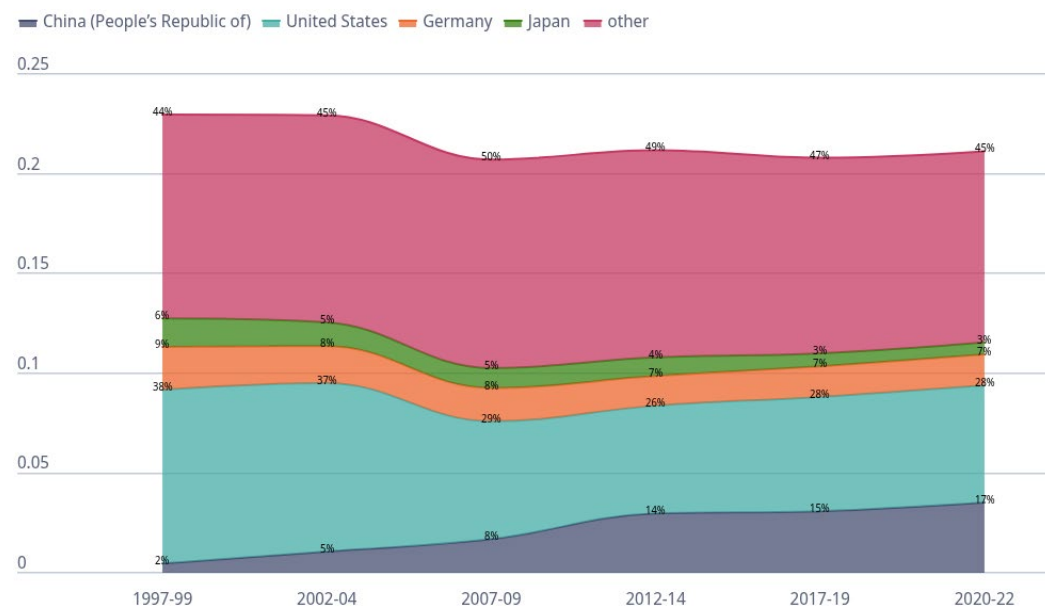
1 July 2026

China's contribution to countries' import and export concentration is growing

Average country-level import concentration (HHI indices, y-axis) and percentage contribution of major exporters (marked on graph)



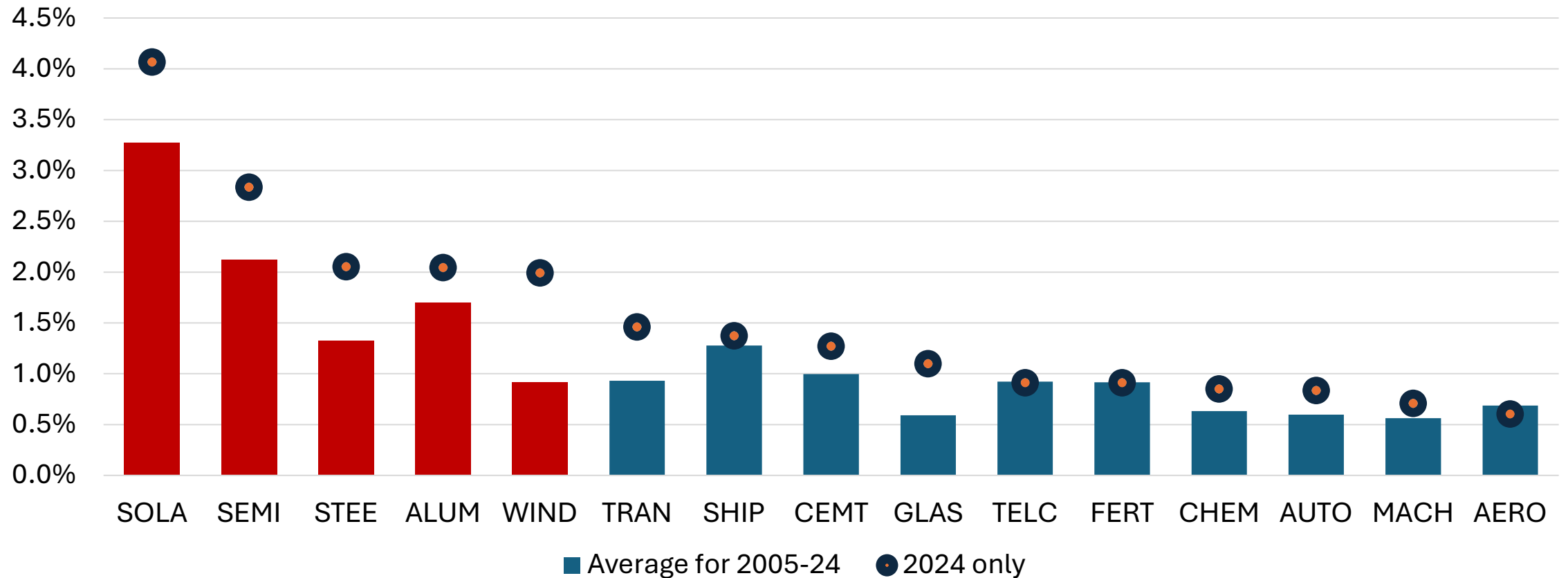
Average country-level export concentration (HHI indices, y-axis) and percentage contribution of major importers (marked on graph)



Note: these figures show the decomposition for selected exporters (left panel) and importers (right panel) of the values of the HHI indices for global imports and global exports, respectively. OECD calculations using the BACI database (Gaulier and Zignago, 2010).

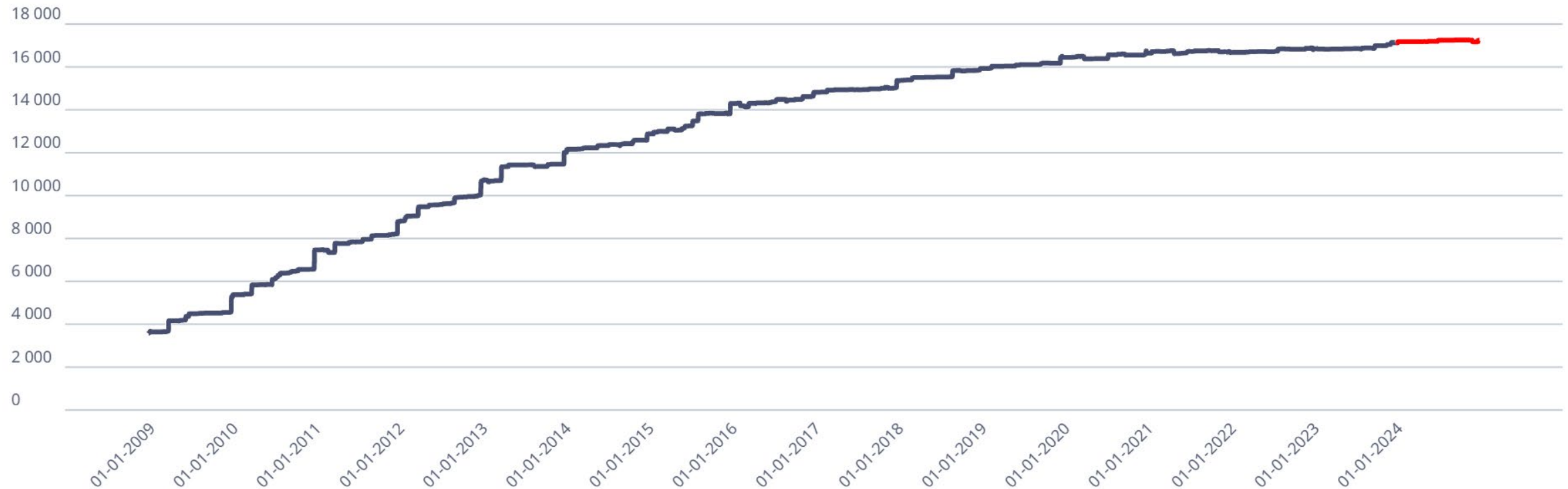
Renewable energy, semiconductors, heavy industries are most subsidised sectors

Industrial subsidies for 15 key industrial sectors (% of annual firm revenue)



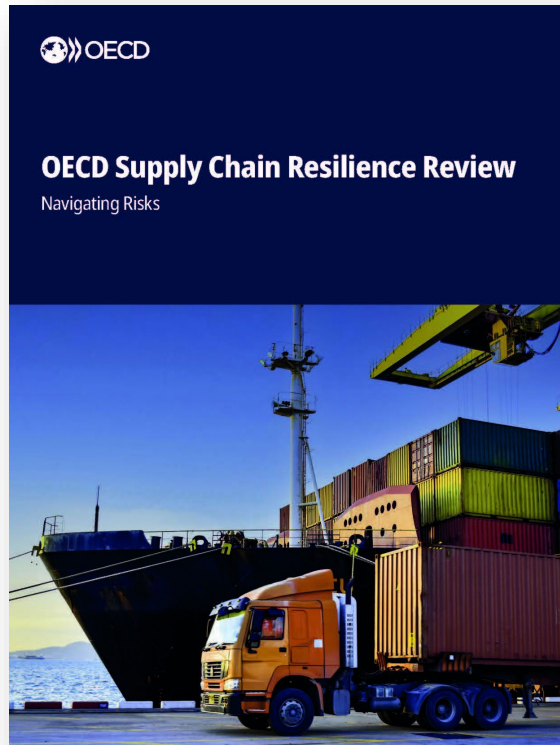
Export restrictions increased fivefold over 2009-2024

Number of exported raw materials subject to at least one export restriction measure



Note: This figure compiles all types of measures in place across all covered raw materials and all implementing countries. It takes into account the stock of measures in place at the beginning of the period, as well as new measures implemented since and discontinued measures.

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