



Global Trade Alert

GTA Monthly Roundup: April 2026

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GTA Monthly Roundup: April 2026

A summary of trade and industrial policy activity worldwide

The Global Trade Alert team documented 777 trade and industrial policy developments during April 2026. Five trends emerge:

- 1. The US and China clashed over “teapot” refineries.** The US issued an alert to financial institutions on sanctions risks linked to Chinese independent “teapot” refineries, several of which appear on the US Specially Designated Nationals List. China responded with a blocking order prohibiting compliance with these sanctions, rejecting them as improper extraterritorial overreach.
- 2. Domestic subsidies emerged as the dominant response to the Strait of Hormuz crisis.** Australia, Brazil, the European Union (at the Commission and national level), Malaysia, India, and the Philippines rolled out fuel-cost relief, SME liquidity guarantees, and industry-specific support. The packages span direct grants, tax credits, loans and guarantees, fuel-price subsidies, with several individual schemes exceeding USD 1 billion.
- 3. Export and import restrictions tightened around energy, fertiliser, and strategic inputs.** China, India, Türkiye, and Russia all imposed or adjusted export controls on fuel and chemical products. Several also recalibrated import duties on fertiliser inputs.
- 4. Trade defence activity intensified, particularly against Chinese imports.** Authorities in Australia, Brazil, Canada, Mexico, South Korea, the Southern African Customs Union, and the United States opened new investigations. These covered antidumping, countervailing, and safeguard cases across steel, chemical, and wood products, among others. China was the most frequently named respondent, when applicable.
- 5. Major economies expanded their structural policy toolkits.** The United States activated multiple Title III Defense Production Act authorisations spanning energy and grid infrastructure. China adopted two framework regulations granting authorities powers to restrict exports, imports, FDI, government procurement, and data transfers as countermeasures.

The GTA Monthly Roundup provides a rapid overview of changes in import barriers, export curbs, subsidies, and related industrial policy measures. It is organised by geography, beginning with the United States, China and the European Union. The final section briefly summarises developments in further regions covered by the GTA. Links to official sources are included in the references.

Jump to the section that interests you most:

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United States

The United States continued reshaping its Section 232 tariff regime, expanded the use of the Defense Production Act to support energy infrastructure, and concluded a tariff-relief agreement with a major pharmaceutical company. The GTA team documented 167 new interventions during the last four weeks.

Export Restrictions

The US Department of Energy [authorised Southern LNG Company to export an additional 28.3 billion cubic feet per year \(Bcf/yr\) of LNG](#) to non-FTA countries. The measure brings the Elba Island Terminal's total authorised non-FTA export volume to 158.3 Bcf/yr. In this context, Assistant Secretary of the Hydrocarbons and Geothermal Energy Office Kyle Haustveit noted: "At a time when global energy supply routes face disruption, the United States remains a reliable energy partner to our allies and trading partners".

Import Restrictions

The US Administration [overhauled Section 232 tariffs on aluminium, steel, and copper](#), changing how duties are calculated and differentiating rates by product and country. Duties now apply to the full customs value, not just the metal content. [Core metal articles remain at 50%](#), but rates vary from there. [Some downstream derivatives drop to 25%, others are eliminated](#). [Metal-intensive industrial and grid equipment gets a temporary 15% floor](#). [Motorcycle parts](#) for US manufacturing were also exempted. Country-level treatment diverges, too. The UK secured [a 15% rate on downstream derivatives](#) meeting origin thresholds. [Non-normal-trade-relations countries](#) –Belarus, Russia, the DPRK, and Cuba– face a flat 25%. Russia is subject to an additional regime: [core steel and copper at 50%, downstream derivatives at 25%](#).

Washington also imposed a tiered tariff regime on patented pharmaceuticals and active ingredients, effective 29 September 2026. The [default rate is 100%](#) on imports without a preferential arrangement. Country-specific rates are lower: [15% for the EU, Japan, South Korea, and Switzerland/Liechtenstein](#), and [10% for the UK](#). Firms with [an approved onshoring plan pay 20%](#), escalating to 100% by April 2030. Those combining onshoring with [an MFN pricing agreement pay 0%](#) until January 2029. [Regeneron](#) became the last firm to secure an exemption under this framework. The proclamation also [exempts listed pharma inputs from the parallel Section 122 surcharge](#).

The Federal Communications Commission (FCC) temporarily exempted specific foreign-produced goods from two recent import restrictions. [Specified routers](#) were exempted from the March 2026 restriction until October 2027. [A specified uncrewed aircraft system](#) was exempted from the December 2025 restriction until the end of 2026. Both exemptions followed Conditional Approvals from the Department of War.

The International Trade Administration initiated parallel trade defence proceedings on imports of certain oil country tubular goods. These include an [antidumping investigation covering imports from Austria, Chinese Taipei, and the United Arab Emirates](#), and a [countervailing investigation targeting Austrian imports](#). Both notices were published in late April and follow petitions from US producers. In addition, Washington imposed [definitive antidumping and countervailing duties on Chinese float glass imports](#). The definitive antidumping rates on China range are up to 181.5% (down from provisional ones of up to 311.8%), while countervailing rates were set up to 113.3% (reduced from provisional levels of up to 891.6%).

Subsidies

The Administration activated multiple authorisations under Title III of the Defense Production Act, designating several sectors as essential to national defence. The designations make these sectors eligible for direct purchases, purchase commitments, and subsidy payments. Covered sectors span energy and infrastructure: [grid infrastructure and supply chain inputs](#); [natural gas and LNG infrastructure](#); [petroleum production, refining, and logistics](#); [coal supply chains and baseload power generation](#); and [large-scale energy infrastructure development, manufacturing, and deployment](#). All received authorisations for state aid, in-kind support and procurement incentives.

Federal agencies also directed financing toward energy and medical technologies. The Department of Energy issued a [conditional loan commitment of up to USD 263 million to SHINE Chrysalis LLC](#) for a medical isotope production facility in Wisconsin. Separately, ARPA-E announced [USD 135 million to support fusion technology development and commercialisation](#) over 18 months.

Washington also confirmed a Most-Favoured-Nation [drug pricing agreement with Regeneron](#). As a result, the biotechnology firm committed to [investing USD 27 billion in US research, development, and manufacturing by 2029](#), more than doubling its biologics manufacturing capacity.

Utah [awarded Creekstone Energy LLC a USD 172 million post-performance tax reduction](#) to develop a hyperscale AI energy and data infrastructure campus. The company intends to invest USD 17 billion over 20 years and create 106 jobs.

Other Measures: Sanctions and Procurement

The Office of Foreign Assets Control (OFAC) both tightened and loosened sanctions on petroleum trade during the period. It targeted entities and [vessels](#) across [the UAE, India, the Marshall Islands, and the Netherlands](#) for illicit Iranian and Russian petroleum trade. [Financial entities in Iran, Hong Kong, and the UK](#) were also targeted for facilitating oil transactions. OFAC also issued an [alert on sanctions risks linked to China-based "teapot" oil refineries](#), signalling readiness to deploy secondary sanctions against supporting financial institutions. Yet it simultaneously issued [General License 134B, authorising transactions for Russian-origin crude](#) loaded before mid-April. [A parallel authorisation](#) covered vessels carrying such cargo.

The FCC complemented its import exemptions on routers and UAS with procurement-side measures. It [granted public procurement access](#) and [equipment authorisation exemptions](#) for the same [foreign-produced routers](#) and [UAS](#). Both followed Conditional Approvals from the Department of War, determining that the identified devices do not pose unacceptable risks to US national security.

China

During April 2026, China advanced two major regulatory frameworks expanding its toolkit of trade and investment countermeasures, while continuing to roll out subnational industrial policy support. The GTA team documented 56 new interventions.

Export Restrictions

In early April, the State Council adopted two framework regulations expanding China's defensive trade toolkit. [Order 2026/834 on industrial and supply chain security](#) allows China to prohibit or restrict exports of goods and technologies in response to supply chain security threats. It also enables Beijing to levy [special fees on exports](#) when foreign states take discriminatory measures against Chinese industrial chains. [Order 2026/835 on countering improper foreign extraterritorial jurisdiction](#) empowers authorities to prohibit or restrict export activities for entities on a malicious entities list.

The Ministry of Commerce (MOFCOM) [added seven EU entities to China's Export Control List](#), citing their alleged participation in arms sales to Taiwan. The targeted firms span the defence and aerospace sectors across Belgium, Germany, and the Czech Republic.

Moreover, China tightened and loosened export controls on different commodities during the period. The government reportedly instructed domestic producers to [halt exports of sulfuric acid](#) from copper and zinc smelting by-products. The ban takes effect in May 2026 and may run until the end of the year. Conversely, Beijing [allocated a one-off batch of export quota of 500'000 tonnes for refined petroleum](#) products, partially reversing the suspension of diesel and gasoline exports imposed in [early March](#).

Import Restrictions

The two framework regulations also contain import-side provisions. [Order 2026/834](#) enables authorities to prohibit or restrict imports and levy [special fees](#) as countermeasures to supply chain threats. [Order 2026/835](#) grants parallel authority to restrict imports from entities on the malicious entities list.

The State Council Customs Tariff Commission [will implement zero-tariff treatment for imports from 20 African non-LDC countries](#), effective 1 May 2026 through April 2028. The measure covers 7,863 tariff lines across 19 countries, including South Africa, Nigeria, Egypt, and Kenya, with prior rates of up to 65% reduced to zero. [Mauritius received a separate concession](#) covering 334 tariff lines, with prior duties of up to 30% also eliminated.

Subsidies

The State Council issued two sets of guidelines expanding state aid commitments. The [energy conservation and carbon reduction guidelines](#) provide direct support toward energy-saving equipment and green transformation of traditional industries, including steel, petrochemicals, and building materials. The [service sector guidelines](#) target state aid for high-end production and life services, aiming to scale the sector to ca. USD 15 trillion by 2030.

Earlier, several ministries adopted the [Work Plan for the 2026 Service Consumption Quality and Benefit Action](#). The action plan calls for state aid to upgrade service consumption infrastructure and to develop livelihood-related sectors. Targeted sectors include catering, accommodation, elderly care, childcare, culture, entertainment, tourism, sports, and health.

At the subnational level, three provinces adopted state aid packages with distinct approaches. Heilongjiang targeted the [intelligent robot industry](#) specifically. Grants reach up to [USD 7.2 million per project](#) for industrialising core robotics technologies, with smaller grants for R&D, innovation centres, and upgrading and digitising manufacturing. Anhui focused on manufacturing competitiveness. Among others, it offered up to USD 1.5 million per cluster for [advanced manufacturing clusters](#) and [national manufacturing innovation centres](#). Sichuan took

a broader approach. Its package spans [emerging and future industries](#) like robotics and quantum technology, but also [retail chains, construction, and pork processing](#). It also provides support for [industrial project completion](#) and [second-hand car dealers](#).

Other Measures: Countermeasures, FDI Restrictions and Procurement Access

MOFCOM responded to the US teapot refinery sanctions by [prohibiting any entity from recognising, enforcing, or complying with them](#). The prohibition covers five Chinese petrochemical firms, including several independent refineries. Beijing grounded the measure in its 2021 Rules on Counteracting Unjustified Extra-territorial Application of Foreign Legislation.

The two new framework regulations also expanded China's countermeasures beyond trade. Order 2026/834 allows authorities to restrict [foreign direct investment, transactions with Chinese organisations](#), and [access to government procurement](#). Order 2026/835 grants similar powers over [FDI](#) and [procurement access](#), while also covering [data and personal information transfers](#).

Beyond these frameworks, the NDRC Office of the Foreign Investment Security Review Working Mechanism [prohibited the foreign acquisition of the Chinese AI startup Manus](#). Reportedly, the acquiring entity was Meta Platforms Inc, with the transaction reportedly valued at approximately USD 2 billion. The decision was issued under the Measures for the Security Review of Foreign Investment in force since 2020.

In a conciliatory move, MOFCOM issued Order 2026/1 [removing two Lithuanian financial institutions from its countermeasures list](#). The two had been listed in August 2025 after the EU sanctioned two Chinese financial institutions for alleged ties to Russia. The delisting followed the EU's withdrawal of those sanctions on 23 April 2026.

European Union

The EU intensified its sanctions regime against Russia. Member states rolled out support measures to cushion the economic impact of the Middle East crisis. The GTA team documented 152 new interventions by the EU and its member states.

Export Restrictions

As part of its [20th sanctions package against Russia](#), the EU expanded [export bans](#) on goods contributing to Russian industrial and military capacities. It [added 60 entities](#) to the dual-use export ban list, spanning Russia, China, Türkiye, the UAE, Hong Kong, and Thailand. The package also [prohibited technical assistance, brokering, and financing](#) for ice-breaker and LNG tanker vessels linked to Russia, and [forbade port access to 46 vessels](#) contributing to Russia's warfare against Ukraine. It simultaneously [re-allowed port access for 11 previously listed vessels](#). The Commission estimates new restrictions are worth over EUR 365 million.

The EU also activated its [sanctions anti-circumvention tool against Kyrgyzstan](#) for the first time. The measure prohibits exports of machining centres and voice/data transmission equipment to the Kyrgyz Republic.

Import Restrictions

Within the same sanctions package, the EU [banned imports of various metals, chemicals, and minerals from Russia](#), worth over EUR 530 million. It also [prohibited imports of natural gas condensate from Russian LNG plants](#).

The package simultaneously eased certain import restrictions. The EU [introduced a quota on Russian ammonia](#) of 688,000 metric tonnes per year, replacing a full ban. It also [exempted Liechtenstein](#) from the import ban on petroleum products containing Russian crude.

In terms of trade defence, Brussels imposed [provisional antidumping duties on terephthalic acid imports from Mexico and South Korea](#). Mexico faces a flat rate of 25.7%, while South Korean exporters are subject to company-specific rates ranging from 6.2% to 13.7%.

Subsidies

The European Commission unveiled its [AccelerateEU strategy](#) to accelerate the bloc's transition to clean and affordable energy. The strategy mobilises USD 117 billion through the Industrial Decarbonisation Bank. It combines an Investment Booster financed by 400 million EU ETS allowances with a state aid temporary framework, geothermal de-risking schemes, and standardised financing for clean heating.

Under the Clean Industrial Deal state aid framework, the Commission approved several national schemes. Germany received approval for a [USD 4.5 billion electricity price relief scheme](#) benefiting energy-intensive companies at risk of relocation. Beneficiaries must reinvest at least 50% into modernising assets. Bulgaria received a similar [USD 393 million scheme](#) for energy-intensive industries at risk of carbon leakage. The Commission also approved Czechia's [USD 4.3 billion scheme](#) supporting sustainable biomethane production through 15-year contracts for difference.

Several member states rolled out support packages in response to the Middle East crisis. The Netherlands announced a USD 1.1 billion package combining [SME energy-saving assistance and agricultural support](#) with [tax credits, including motor vehicle tax relief](#). Portugal allocated [USD 521 million over three months](#) to compensate for fuel price increases across transport, agriculture, and fisheries. Ireland announced [USD 140.5 million for the haulage and coach sector](#), alongside [USD 117.9 million for farmers and fishers](#) to cope with rising fuel costs.

The European Investment Bank directed financing toward energy transition and industrial modernisation. The EIB signed a [USD 580.2 million loan with Eni](#) for converting an Italian refinery into a biofuel facility. It also provided a [USD 294.1 million guarantee to expand electricity grids](#) and announced [USD 146.5 million in loans](#) for energy infrastructure in Germany and Austria. Additionally, under the European Investment Fund, it launched an [InvestEU guarantee of up to USD 117.4 million](#) supporting SME investments in automation, robotics, and AI-based digital solutions.

At the national level, member states directed subsidies toward diverse policy goals. The Netherlands launched a [USD 721.9 million grant scheme](#) for voluntary dairy herd reduction to cut ammonia and greenhouse gas emissions. Italy approved a [USD 246 million grant to CamGraPhIC](#) for graphene-based photonic optical transceivers. Croatia announced [USD 325.3 million for digital and green transition investments](#), complemented by [USD 155.7 million for the defence sector](#). Germany launched [Growth Fund II](#) with USD 366.5 million in combined federal and [KfW Capital](#) investment for technology start-ups. Germany's export credit agency also

disclosed [guarantees](#) backing industrial equipment [exports to the United States](#), valued between EUR 101 and 200 million.

Other Measures: Sanctions Against Russia and FDI Restrictions

The 20th sanctions package [added 77 companies to the frozen funds list](#), spanning multiple jurisdictions and sectors. The majority were [Russian firms](#) across military manufacturing, oil and gas, and finance. But the list reached well beyond Russia, targeting [UAE petroleum traders](#), [Chinese semiconductor and drone firms](#), [Belarusian military equipment producers](#), [Uzbek suppliers to Russian gunpowder manufacturers](#), and a [Kyrgyz cryptocurrency platform](#), among others.

The package also tightened banking and crypto transactions, as well as introduced service restrictions. Brussels imposed prohibitions on [20 new Russian banks](#) and targeted [financial institutions in Kyrgyzstan and Laos](#) alongside [one Azerbaijani bank](#). It [forbade transactions with the RUBx and Digital Rouble crypto-assets](#), extending the prohibition to all Russian-based crypto-asset service providers. Brussels also [prohibited transactions with ports in Russia and Indonesia](#) used for crude oil transport and [banned LNG terminal services](#) to Russian-linked entities. Conversely, the EU [delisted five financial institutions from China and Tajikistan](#).

At the national level, Italy [restricted the Chinese state-owned CNRC's influence over Pirelli](#) under its Golden Power framework. CNRC holds a 34.1% stake in Pirelli through its subsidiary Marco Polo International Italy. Under the new restrictions, CNRC is limited to nominating three of 15 board directors and barred from directing or coordinating the company. Pirelli must also refuse Chinese-linked entities access to sensitive R&D, proprietary technology, and Cyber Tyre data.

Other Regions

The GTA documented 402 developments announced by jurisdictions outside the US, China, and the European Union in the last four weeks. Significant developments include:

Argentina approved two mining projects as beneficiaries of the Incentive Regime for Large Investments (RIGI in Spanish). These are [Minera del Altiplano's Expansion Phase 1B lithium carbonate](#) project and [Minera Andina del Sol's expansion of the Veladero gold mine](#). Both projects received tax benefits, import duty exemptions and internal tax exemptions on undisclosed imported products.

Australia launched the [USD 687.2 million Economic Resilience Program](#), providing zero-interest loans to businesses operating in fuel, fertiliser, and other critical supply chains. The measure aims to mitigate the impact of global oil market disruptions. Transactions are subject to [the Australian Industry Participation policy](#). As for trade defence, Canberra initiated an [antidumping investigation on Chinese imports of titanium dioxide](#) and [an antidumping investigation on imports of zinc-coated steel from South Korea and Vietnam](#).

Brazil announced a package of measures to mitigate the impact of rising fuel prices stemming from the Middle East conflict. This includes [USD 1.1 billion in support for domestically produced diesel](#) and [USD 738.5 million for road diesel imports](#). For the aviation sector, the government set up [a USD 1.4 billion restructuring credit line through the National Civil Aviation Fund](#) and [a USD 185 million working capital credit line](#). Furthermore, Brasilia initiated an [antidumping investigation on Chinese imports of soy protein from](#), following an application by ADM do Brasil

and Solae do Brasil. The government also imposed [definitive antidumping duties of up to 97.3% on ethanolamine imports from China](#).

Canada launched the [USD 36.8 billion Build Communities Strong Fund](#) for infrastructure projects over ten years. The programme is subject to Canada's Buy Canadian Procurement Policy Framework, including the [use of domestic steel, wood, and aluminium](#) in covered procurements and [discriminatory preference mechanisms](#). The Business Development Bank of Canada unveiled a [USD 108.45 million Life Sciences Venture Fund](#) for early-stage companies in therapeutics and medical technologies. In trade defence, Ottawa initiated [a safeguard investigation on imports of certain wood goods](#), including cabinets, hardwood flooring, and engineered-wood furniture. It also opened parallel [antidumping](#) and [countervailing investigations on Chinese imports of steel racks](#) and [decorative and non-structural plywood](#).

Chinese Taipei updated its Strategic High-Tech Commodities Export Entity Management List. The Ministry of Economic Affairs [added 65 entities to the list](#), including 36 Russian companies, alongside firms from China, Hong Kong, Türkiye, the UAE, and Pakistan. Exports of strategic high-tech goods for these entities are now subject to export licenses. Conversely, it [removed eight Pakistani entities from the list](#).

The **Eurasian Economic Union** established import tariff exemptions on certain vegetables for retailers in [Russia, Armenia, Belarus, Kazakhstan, and Kyrgyzstan](#). The Union also [exempted aircraft components and equipment from import duties](#) and introduced [a zero-duty import quota for civil training aeroplanes and helicopters imported into Kazakhstan](#).

India deployed a mix of subsidy, trade, and export tax measures across sectors. It [extended export promotion support to 167 additional steel products](#) targeting micro and small enterprises. The Department of Fertilisers [increased subsidy rates for nitrogen, phosphate, and sulphur](#) under the Nutrient Based Subsidy scheme, with annual support estimated at USD 4.5 billion. New Delhi also [approved an additional 2.5 million tonne wheat export quota](#), supplementing earlier approvals. Citing supply security amid Strait of Hormuz disruptions, the Ministry of Finance temporarily raised export duties on [aviation turbine fuel, high-speed diesel, and related products](#), though all increases were reversed on 30 April 2026.

Iraq reopened [imports for five crops](#): cabbage, cauliflower, turnip, beetroot, and lettuce. The government had introduced these bans in December 2025.

Israel introduced a [USD 150 million export insurance line for Israeli firms exporting to Argentina](#). Beneficiaries can access medium and long-term credit insurance for up to 15 years through the government-owned trade risk insurance company, Ashra.

Japan acted across defence, energy, and overseas investment. It expanded the [categories of finished arms eligible for export](#) to allied nations, subject to case-by-case review. The government [released national petroleum reserves](#) worth USD 3.3 billion to four domestic refiners. The Japan Bank for International Cooperation extended over USD 4 billion in loans to support strategic acquisitions abroad, including [USD 2.4 billion to Mitsubishi Corporation](#) for US natural gas assets, [USD 1.5 billion to Sumitomo Corporation](#) for Air Lease Corporation, and [USD 400 million to JSA International](#) for aircraft leasing.

Malaysia rolled out a support package for SMEs affected by the global energy crisis. This includes [USD 1.3 billion under the Business Financing Guarantee Company \(SJPP\)](#) in guarantees for SMEs in construction, agriculture, logistics, and tourism. It also introduced [an exemption](#)

[from import duties](#) and [sales tax](#) on the re-importation of Malaysian-made goods unable to complete the export process.

Mexico initiated an [antidumping investigation on imports of certain thermal paper rolls from China](#), following an application by Papeles y Conversiones de México. The government also [introduced an automatic import notification requirement for 42 aluminium tariff lines](#), including unwrought aluminium, bars, sheets, and pipe fittings. The measure will enter into force once the procedure through the Mexican Digital Trade Window is enabled.

Morocco initiated a [safeguard investigation on imports of white and parboiled rice](#), excluding aromatic varieties such as basmati. The petition by domestic producers Mlah Mechich Alami and Mundiriz alleges import surges of 52% and 31% in 2023 and 2025, respectively.

South Korea directed state financing toward energy security, SME support, and strategic technology. The [Export-Import Bank](#) and [Korea Development Bank](#) jointly committed USD 3 billion to the Korea National Oil Corporation for crude oil imports and liquidity. KODIT signed guarantee agreements totalling over USD 1.2 billion, covering [outstanding SMEs, regional firms and startups](#), and [deep-tech and "glocal" startups](#). The government also approved [USD 270 million in low-interest loans to Naver Corporation](#) for AI data centre expansion. On the trade side, Seoul [expanded the crude oil import tariff-rate quota](#) for restructured petrochemical firms and [initiated an antidumping investigation on sodium hydroxide imports](#) from China and Chinese Taipei.

The **Philippines** launched the [USD 167.1 million Presidential Assistance for Farmers and Fisherfolk Program](#), providing unconditional cash grants to over 4.1 million beneficiaries. In another effort to mitigate the economic impact of rising fuel prices, Manila announced [transport subsidies of up to USD 1.7 per kilometre travelled](#) and a [USD 0.2 per litre fuel](#). The President also issued the [Thirteenth Regular Foreign Investment Negative List](#), introducing a 40% foreign equity cap on domestic enterprises engaged in defence materiel.

Russia announced a wide range of trade measures during April. On energy, the government [raised export duties on liquefied hydrocarbon gases](#) from USD 5.2 to USD 131.6 per tonne, and [extended the export ban on gasoline to producers of petroleum products](#) until 31 July. On grains, Moscow [increased the temporary export tariff-rate quota for wheat, meslin, barley, and corn by 5 million tonnes](#), and adjusted their weekly in-quota duties under the "grain damper" system. The Ministry of Agriculture also [zeroed the export duty on sunflower meal](#) and [reduced the duty on sunflower oil](#) from USD 213.8 to USD 61.3 per tonne. On fertilisers, it [decreased export quotas for complex mineral fertilisers](#) by nearly 1 million tonnes. Conversely, it [increased quotas for nitrogen-based fertilisers](#). Russia also [introduced temporary export licenses for ferrotungsten](#), [added helium to the export licensing regime](#) until the end of 2027, and [replaced the export ban on lower-grade technical sulphur with an export license](#).

Saudi Arabia's Local Content and Government Procurement Authority set a [30% minimum local requirement for management-consulting tenders](#) worth USD 2.6 million or more. From 2028, this threshold will be [lowered to 1.3 million](#). It also introduced [a weighting preference mechanism for certain IT service tenders](#). In addition, the Ministry of Human Resources rolled out a 100% Saudisation requirement [immediately covering 19 administrative support occupations](#) and [a further 50 occupations following a six-month transition period](#).

The **Southern African Customs Union** initiated an [antidumping investigation on imports of certain hexagon-headed screws and bolts from China and Malaysia](#). Separately, the Union [raised](#)

[the customs duty on certain conical steel drums from zero to 15%](#). Imports from the EU, UK, EFTA, SADC, and AfCFTA partners are exempted.

Thailand's Board of Investment [approved a USD 460 million investment promotion for Isuzu Motors](#) to upgrade its pick-up truck production base. The approval includes [corporate income tax exemptions, import duty exemptions on machinery and R&D inputs](#), among other benefits.

Türkiye introduced an [export ban on most types of sulphur](#), citing global supply disruptions linked to the Gulf conflict and a 40% rise in sulphur prices. In a similar effort to strengthen agricultural input supply security, the government [eliminated the 6.5% import duty on solid ammonium nitrate and monoammonium phosphate fertilisers](#), as well as [the 6.5% import duty on nitrogen-based and compound fertilisers](#). Furthermore, the Ministry of Industry and Technology [approved tax support for Ford Otomotiv's USD 705 million investment](#) in next-generation heavy commercial vehicles.

The UAE strengthened its industrial localisation agenda. The Cabinet established the [USD 272.3 million National Industrial Resilience Fund](#) targeting food, manufacturing, metals, chemicals, pharmaceuticals, and advanced technology. The same announcement [made the National In-Country Value Programme mandatory](#) for all federal entities and companies with at least 25% government ownership, replacing a voluntary framework. The Abu Dhabi Exports Office and Emirates Development Bank also launched a [USD 272.3 million export financing framework](#) for advanced manufacturing, food, healthcare, and renewable energy.

The United Kingdom's British Business Bank invested [USD 135.6 million in Apposite Healthcare Growth I](#). The commitment will support onward investment in scale-up companies across health technology, diagnostics, digital health, and pharmaceutical outsourcing.

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