

Services Trade Restrictiveness Index: Logistics storage and warehouse services

Key findings

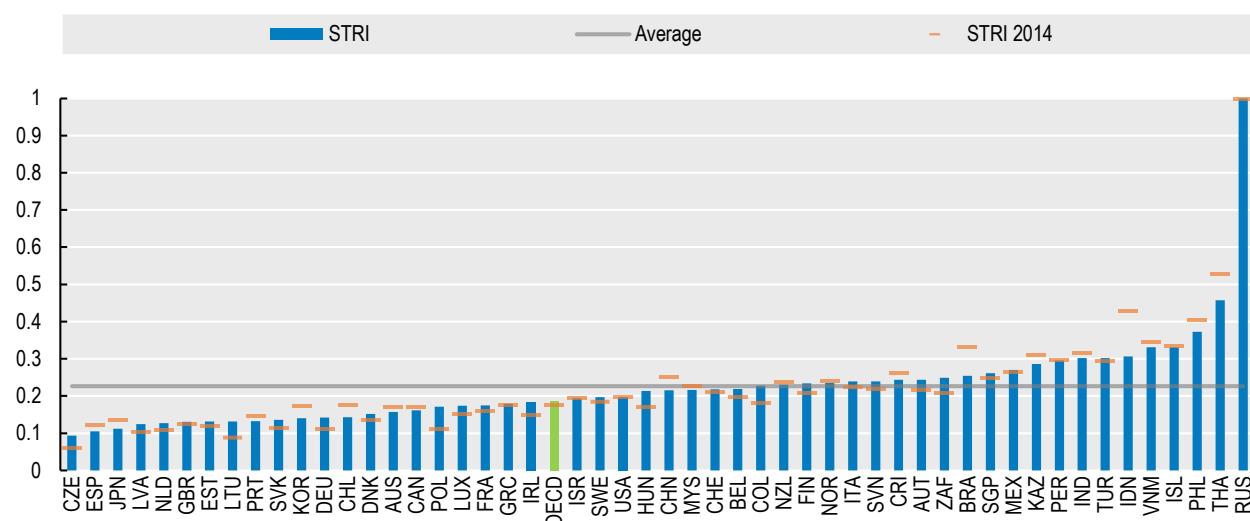
- The average 2024 STRI in the logistics storage and warehouse sector is 0.23 out of a maximum of 1 (most trade restricted) indicating substantial scope for reductions of barriers to services trade. However, individual country scores diverge considerably, ranging between 0.09 and 1.00.
- The best performing countries in the sector are Czechia, Spain and Japan. Most reforms in 2024 were recorded in Greece.
- In this sector, barriers related to regulatory transparency are most prominent in OECD economies and amount to 30% of all restrictions, whereas in non-OECD economies, restrictions on foreign entry are most prominent and amount to 40% of all restrictions.
- OECD estimates suggest that halving the distance to best practice in this sector is associated with a reduction in the costs of cross-border trade in storage and warehouse services between 5% and 13% for the average country included in the STRI database.

Logistics services in the STRI are defined as cargo-handling services (ISIC 5224), storage and warehousing services (including customs warehouse services) (ISIC 5210), freight transport agency services and customs brokerage services (ISIC 5229). Since the regulatory framework for these four sub-sectors can be different in many countries, separate indices are developed for each of them.

The 2024 STRIs in the logistics storage and warehouse sector range between 0.09 and 1.00, with a sample average of 0.23 (Figure 1). There are 29 countries below and 22 countries above the average. The best performing countries in the sector are Czechia, Spain and Japan.

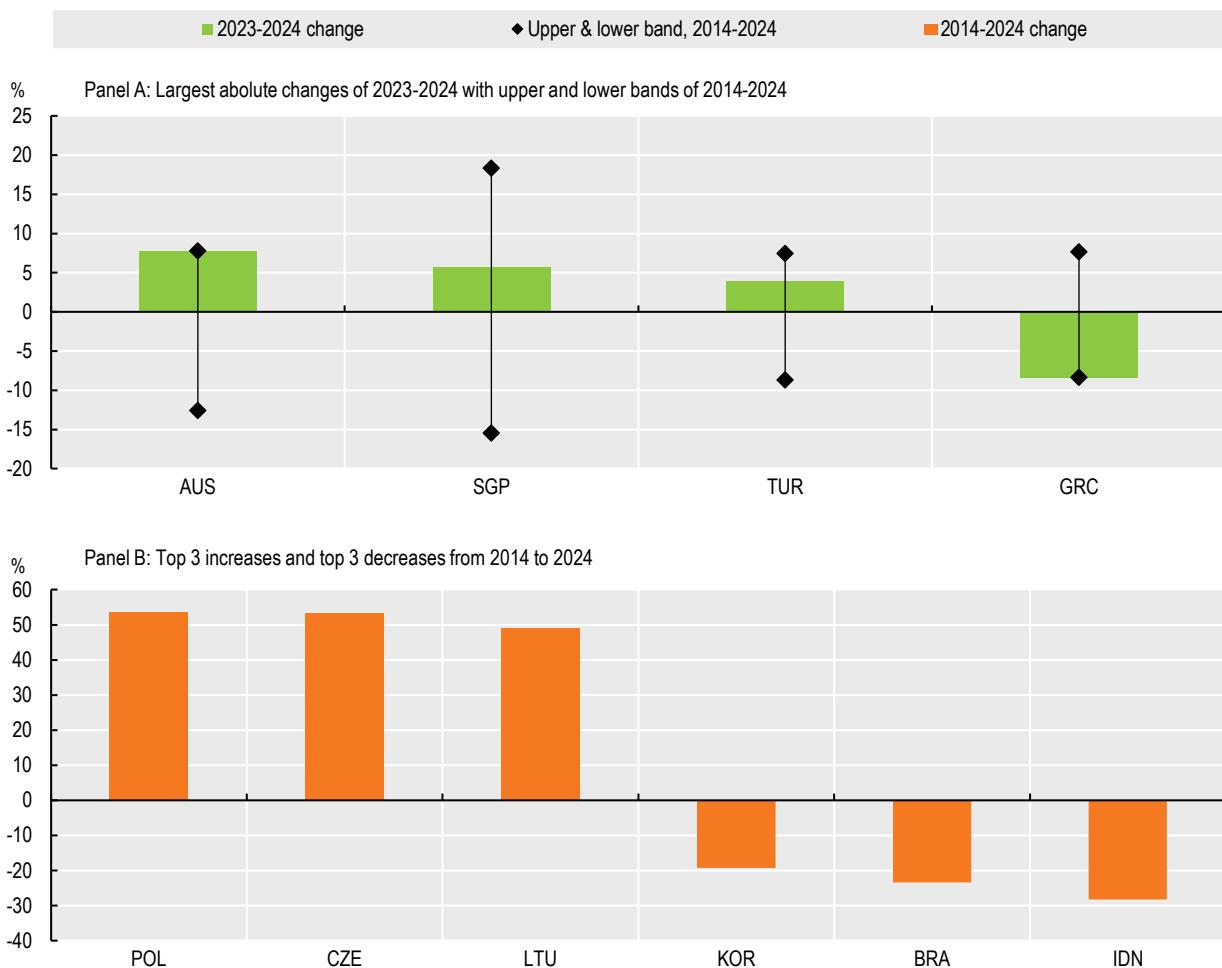
Several countries introduced regulatory changes affecting the STRIs in 2024 and more so since 2014 (Figure 2). In 2024, the STRIs in this sector saw the biggest policy changes in Australia (8%), Singapore (6%), Türkiye (4%), and Greece (-8%). Since 2014, on the one hand, countries that have had the strongest restrictive trends in the logistics storage and warehouse services sector include Poland (54%), Czechia (53%) and Lithuania (49%). On the other hand, strong liberalisation has taken place in Korea (-19%), Brazil (-23%), and Indonesia (-28%).

Figure 1. STRI in logistics storage and warehouse services, 2024



Source: OECD (2024). STRI database.

Figure 2. Change in the last year and since 2014, by country



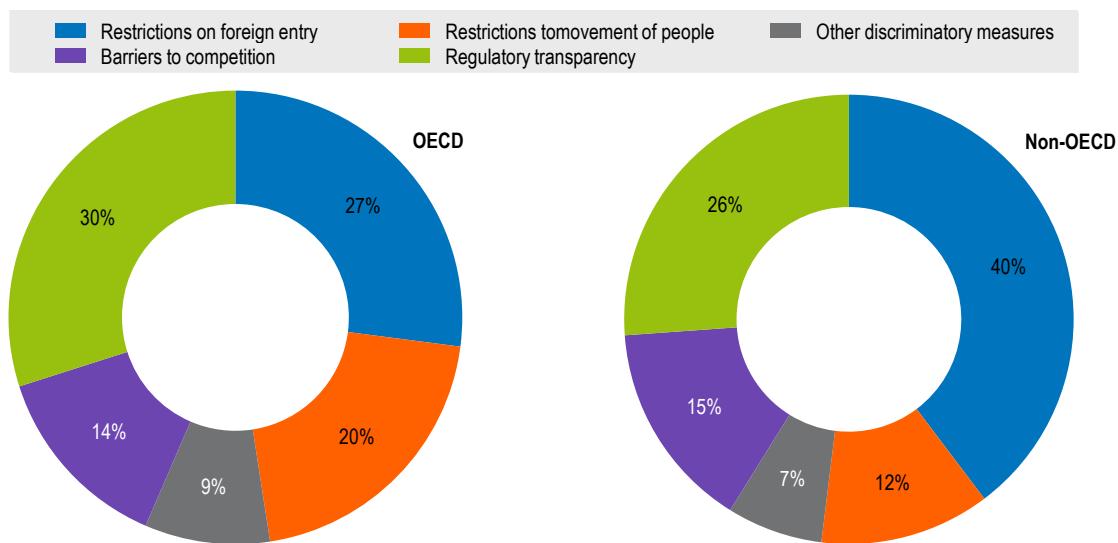
Note: Selection criteria for Panel A was based on largest absolute changes since 2023. Panel B selection shows the three largest increases and the three largest decreases in the STRI since 2014.

Source: OECD (2024). STRI database.

The measures in the STRI database are organised under five policy areas (Figure 3). Restrictions on foreign entry include barriers related to establishing and operating companies such as foreign equity limits or requirements on board of directors and cross-border data flows. Restrictions on the movement of people cover barriers that affect the temporary entry of foreign services providers through quotas, labour market tests and short durations of stay. Other discriminatory measures include discrimination of foreign services suppliers as far as taxes, subsidies and public procurement are concerned. Barriers to competition include information on anti-trust policy, government ownership of major firms and the extent to which government-owned enterprises are exempt from competition laws. Regulatory transparency includes information on consultations and dissemination prior to laws and regulations entering into force. It also records information on obtaining a license or a visa.

In the logistics storage and warehouse sector, barriers related to regulatory transparency are most prominent in OECD economies and amount to 30% of all restrictions, whereas in non-OECD economies, restrictions on foreign entry are most prominent and amount to 40% of all restrictions.

Figure 3. STRI for logistics storage and warehouse services by policy areas in OECD and non-OECD economies, 2024



Source: OECD (2024). STRI database.

In the logistics storage and warehouse services sector, the Russian Federation is fully closed to foreign firms, with an STRI index of 1.

Table 1 lists the most relevant restrictions identified in each policy area. Under restrictions on foreign entry, common impediments to trade relate to acquisition and use of land and real estate, screening requirements for foreign investments, and licensing requirements. 33 out of the 51 countries covered maintain foreign investment screening mechanisms that do not explicitly rule out the consideration of economic motives or interests. A licence or authorisation is required to enter the customs storage market in 48 countries, 25 of which maintain quotas or economic needs tests in the allocation of such licences or authorisations.

In this sector, temporary cross-border movement of natural persons is often conditional on labour market testing or similar economic considerations, and the initial duration of a work or residence permit is relatively short in many countries. Under other discriminatory measures, barriers related to accessing public procurement markets for foreign tenderers remain the most common challenge. Additionally, national standards on transport packages deviate from international standards in three countries.

The selection procedure for suppliers authorised to provide logistics services at facilities represents a barrier to competition in many countries, where contracts are not awarded through a competitive bidding

process. This is the case in 26 countries with regard to storage and warehouse service provision at ports, and 23 countries with regard to airports. In addition, prices or fees are regulated in some countries.

Restrictions related to regulatory transparency are significant in the sector. The most common restrictions in this area relate to the temporary entry/transit of crew. 40 countries do not have visa on arrival or visa exemption for the temporary entry/transit of truck drivers, whereas 17 countries do not offer either option for aircrew. In addition, in 30 countries, individual licences or registration are required for warehousing, freight forwarding, and customs brokerage services, thereby limiting the ability of providers to integrate their activities.

Table 1. Top 5 most relevant measures by policy area, 2024

Policy area	Measure	Countries having a restriction
Restrictions on foreign entry	Memo: Licence/authorisation is required to enter the market (storage customs)	48
	Acquisition and use of land and real estate by foreigners is restricted	35
	Screening exists without exclusion of economic interests	33
	Licences are subject to quotas or economic needs test (storage customs)	25
	Memo: Licensing or authorization is required to enter the market (storage other)	23
Restrictions to movement of people	Labour market tests or similar economic considerations: contractual services suppliers	38
	Labour market tests or similar economic considerations: intra-corporate transferees	35
	Labour market tests or similar economic considerations: independent services suppliers	35
	Limitation on duration of stay for contractual services suppliers (months)	35
	Quotas: contractual services suppliers	11
Other discriminatory measures	Public procurement: Procurement regulation explicitly prohibits discrimination of foreign suppliers	44
	Access to the procurement market is conditional on reciprocity	31
	Public procurement: The procurement process affects the conditions of competition in favour of local firms	24
	Public procurement: Explicit preferences for local suppliers	21
	National standards on transport packages deviate from international standards	3
Barriers to competition	Minimum capital requirements	33
	Contracts for service provision are awarded through competitive bidding (storage and warehouse at ports)	26
	National, state or provincial government control at least one major firm in the sector (rail facilities)	25
	Contracts for service provision are awarded through competitive bidding (storage and warehouse at airports)	23
	Prices or fees are regulated	9
Regulatory transparency	Visas on arrival or visa exemption are available for temporary entry/transit of crew: truck drivers	40
	Memo: Applications in electronic format are accepted	36
	Range of visa processing time (days)	33
	Individual licensing/registration requirements are imposed on warehousing, freight forwarding and customs brokerage services	30
	Visas on arrival or visa exemption are available for temporary entry/transit of crew: aircrew	17

Note: The count for “memo” type of measures, which are not scored in the STRI, indicates the number of positive answers recorded for that measure across the 51 countries covered. The topmost relevant measures are selected on the basis of the following criteria: (1) most restricted horizontal measures (i.e. same answer across sectors), (2) most restricted sector-specific measures, (3) key measures, or (4) memos affecting the score of other measures through hierarchy rules.

Source: OECD STRI database (2024).

More information

- » Access all country notes, sector notes, and interactive STRI tools at oe.cd/servicestrade.
- » Read more on evidence from ten years of monitoring services trade policies through the STRI in [Revitalising Services Trade for Global Growth](#).
- » Calculation based on: Benz, S. and A. Jaax (2020), "The costs of regulatory barriers to trade in services: New estimates of *ad valorem* tariff equivalents", *OECD Trade Policy Papers*, No. 238, OECD Publishing, Paris, <https://doi.org/10.1787/bae97f98-en>
- » Learn more about current services trade issues on the [OECD website](#).
- » Contact the OECD Trade and Agriculture Directorate with your questions at stri.contact@oecd.org.

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The STRI indices take values between zero and one, one being the most restrictive. The STRI database records measures on a Most Favoured Nation basis. Air transport and road freight cover only commercial establishment (with accompanying movement of people). The indices are based on laws and regulations made public by 31 October 2024 and in force on 31 December 2024. The STRI regulatory database covers the 38 OECD Members, Brazil, China, India, Indonesia, Kazakhstan, Malaysia, Peru, the Philippines, the Russian Federation, Singapore, South Africa, Thailand and Viet Nam. The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

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