

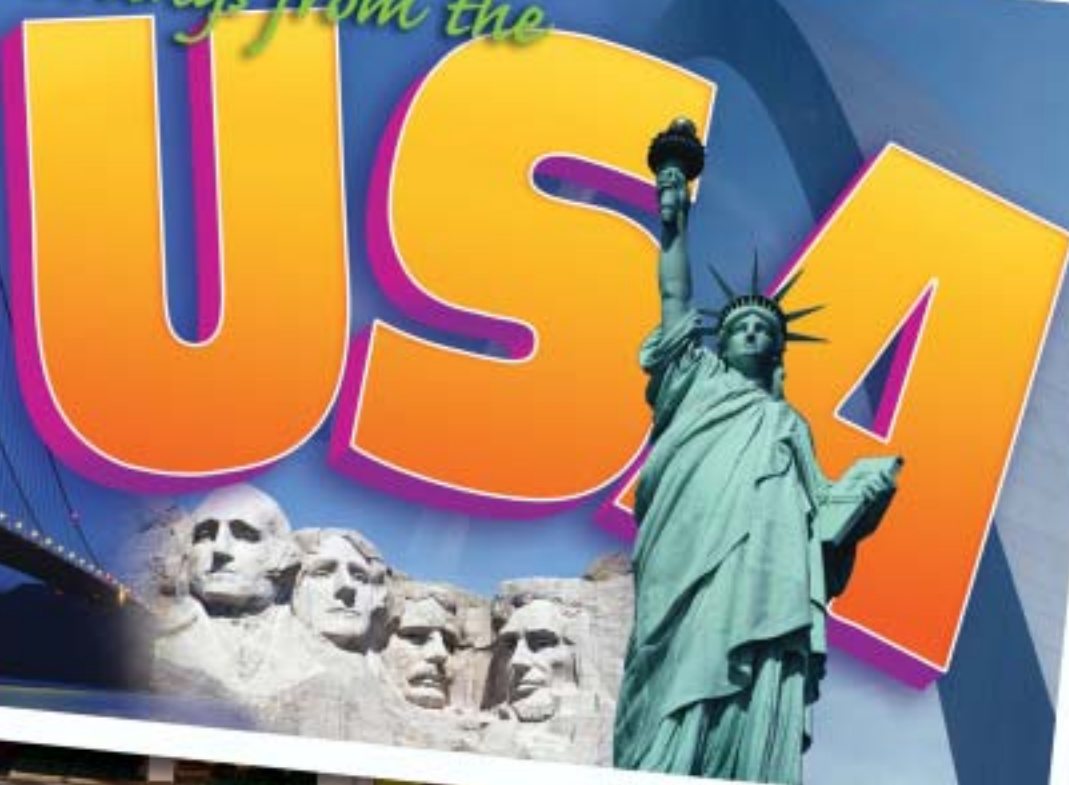
EXPORT *America*[®]

August 2002 \$5.50
Volume 3 Number 8
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THE FEDERAL SOURCE FOR YOUR GLOBAL BUSINESS NEEDS

Helping the Tourism Industry Recover

Greetings from the



Where the...

INSIDE:
Promoting Good Corporate Citizenship
Commercial Law Development Program
CEEBIC News Update



Sponsored by American Management Association and
Co-sponsored by the National Leadership Forum on Global Challenges

Business Opportunities and Pitfalls in Today's China

Risk Assessments from the American Intelligence Profession

This special AMA Current Issues Forum will dramatically increase your knowledge and sophistication about the business challenges and opportunities in China. It features a high-level group of experts put together by the National Leadership Forum on Global Challenges, a nonprofit organization that draws from the American intelligence profession and other seasoned professionals who have lived and worked overseas.

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Ambassador Chas. W. Freeman, Jr., Chairman, Projects International, Inc., former Deputy Chief of Mission in China, former Assistant Secretary of Defense for International Security Affairs.

Mary Beth Fulcher, Acting National Intelligence Officer for East Asia, long-time C.I.A. expert in the region.

David Gries, President of the Asian Strategies Group, former National Intelligence Officer for East Asia, and a China specialist who has worked in China for many years.

Nicholas Lardy, Senior Fellow at the Brookings Institution and widely published expert on Chinese business and economics.

Thomas J. Reckford, President of the World Affairs Council of Washington, D.C., Senior Associate at the Center for Strategic and International Studies, and former senior analyst at the C.I.A.

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Gain an insider's view of:

- Practical problems in doing business in China, and do's and don'ts based on the experience of many foreign investors
- The implications of China's recent admission to the World Trade Organization
- Where the Chinese economy is headed and why
- The changing relations between Washington and Beijing, and why this matters to U.S. corporations
- The implication of China's complicated relationships with Hong Kong and Taiwan

What you will cover:

- The Chinese Government's attitude towards foreign direct investment and traders
- Practical problems in doing business in China, and do's and don'ts based on the experience of many foreign investors
- The implications of China's recent admission to the World Trade Organization
- Where the Chinese economy is headed and why, including how the government is coping with huge state-owned enterprises and banks overwhelmed with non-performing loans
- Prospects for political change, the new team of leaders coming in 2003 and the likely impact they'll have on doing business in China
- The implication of China's complicated relationship with Hong Kong and Taiwan and the prospects for further engagement or hostility across the Taiwan Straits

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- Seize the opportunity to hear some of the best informed experts in the country on China
- Get an insider's view into the real benefits and risks involved in doing business in China
- Apply what you learn to your firm's day-to-day operations and plans in China
- Come to understand what is likely to happen in China over the next three to ten years
- Interact with speakers and attendees to share experiences and ideas

Who should attend:

Business executives, managers and strategic planners whose companies already invest or trade in China or are contemplating investing there... professionals whose career paths involve operations overseas... corporate leaders who are required to handle "big picture" issues and challenges.

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EXPORT America

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August 2002 Volume 3 Number 8 <http://exportamerica.doc.gov>

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Living and working in Washington, DC, gives one a unique perspective on the world.

As with most major cities, residents of the District believe that we're the center of the universe and what happens here is quite common. However, our nation's capital is a mixing bowl of cultures and draws visitors, residents, and performers from across the globe. It is incredibly easy to take in local and global culture with little to no effort. There are usually several exhibits, performances, or lectures taking place simultaneously where one can glimpse these varying cultures, or just walk through any one of the dozens of neighborhoods in the city and hear languages ranging from Vietnamese to Swahili. That's one of the great things about life in the District: it's truly an international city.

During all this cultural exchange and better understanding of life beyond our sphere of influence, one can truly appreciate how interdependent, dependent, and global we've become. Our approaches toward our global partners have changed significantly since the era of the Cold War. Whereas in the past, local cultures and traditions were disregarded, current global participants are aware of and sensitive to cultural traditions. Engaging in business in Kazakhstan or Belarus brings you face to face with emerging economies as well as timeworn cultural traditions, which may be quite unfamiliar to us.

The opportunity of this exchange is to experience, absorb, and also learn from this contact, trade, and transmission of values and traditions. Emerging economies can learn a great deal about American entrepreneurship and innovation, but we can learn from them as well.

This cultural swap also occurs when international visitors come to the United States to see our country. This month's feature focuses on efforts to promote America as a vacation destination to foreign visitors. Doug Baker, the Deputy Assistant Secretary for Service Industries, Tourism, and Finance discusses the efforts to help the tourism industry recover, and the Commercial Service staff in France reports on the success of U.S. destinations at Top Resa 2001, France's leading travel and tourism show. Also in this issue Jeffrey Anspacher explains how export trade certificates of review can aid U.S. firms in pursuing export markets, and William Corley begins a series of articles on logistics.

Next month, we'll examine the opportunities for education and training service exports and learn how to effectively follow up on leads gathered from trade shows. Until then, happy exporting, and e-mail our editorial staff with comments or future article suggestions at Export_America@ita.doc.gov.

Cory Churches

Cory Churches
Editor



PROMOTING GOOD CORPORATE CITIZENSHIP

by Don Evans

Secretary, U.S. Department of Commerce

If you look through a keyhole, an entire company is viewed through a single individual — the chief executive officer. Great authority is vested in the men and women who run our public corporations, and with such power comes responsibility. CEOs aren't simply stewards of their individual companies; they are stewards of American capitalism itself. That is why it is so vital that American companies and executives follow the highest standards of conduct anywhere they do business.

The public sector may set the rules, but the private sector makes the system work. The charge of our corporate leaders, in that context, is a great one. And in the current environment, it is even greater. Our CEOs are public servants. The responsibility falls to them to provide workers with the chance to create, to build and to pursue.

The public is gradually coming to expect firms to act as good corporate citizens, understanding that businesses are responsible for more than simply "the bottom line." This administration has made corporate governance and citizenship a top priority, and is working hard

on several initiatives to severely punish those responsible for corporate deceit. I accompanied the president on his trip to New York and fully believe that our efforts to encourage proper ethical and moral behavior by corporate executives are a top priority. As President Bush stated in his speech on Wall Street recently, "In the long run, there's no capitalism without conscience; there is no wealth without character."

Character, it has been said, is what you exhibit when no one is watching. And we need it now more than ever. The story of America is one of breathtaking accomplishment. We have always aimed higher than our mark. Ours has been and continues to be the greatest economic engine that the world has ever known.

Trust is indispensable. It isn't found on a balance sheet, but it is the most important asset that a Chief Executive has. Trust is essential because ultimately our capacity to deal with corporate deceit has to be about more than passing new laws and setting thresholds. The right statutory and regulatory framework is critical. But our moral character will be determining.

It is just as important for companies to conduct themselves honorably at home as it is abroad. In fact, there is often a special responsibility for companies that set up operations overseas or export their goods and services to other nations. Many companies have recognized their ability to promote a greater good and a higher standard than the



Photo courtesy of U.S. Department of Commerce

Secretary Evans visits the Ford Elementary School in Mexico City with the U.S. trade delegation. Ford Motor Company sponsors the schools in cooperation with its Mexican Dealers. The Ford Motor Company has built, equipped and continuously supported 200 schools in poor neighborhoods throughout Mexico.



Secretary Evans and leaders from Johnson & Johnson, Baxter Healthcare and Motorola toured Shanghai Children's Medical Center, where critically ill children receive state-of-the-art care, thanks to a joint initiative of the community of Shanghai and Project HOPE.

norm when they conduct business internationally. They see the opportunity to improve the communities in which they operate and recognize the need to become better global citizens. Companies are expected to not just share their value, but their values.

I have made it my business when I travel to recognize U.S. firms that are

Mexican grocery stores to help feed children in orphanages, community lunch kitchens and schools. And while in China, I was able to witness the work that Johnson & Johnson, Baxter Healthcare, and Motorola are doing by contributing to Project HOPE, an organization helping to provide sick children with state-of-the-art care. These American businesses bring not

executives know that increased prosperity leads to greater economic freedom and higher standards of living, which, in turn, create a demand for greater social and political freedoms and a higher quality of life.

Government and the public are calling for better, more socially responsible businesses. Now is the time for

"IN THE LONG RUN, THERE'S NO CAPITALISM WITHOUT CONSCIENCE; THERE IS NO WEALTH WITHOUT CHARACTER."

— PRESIDENT GEORGE W. BUSH, SPEECH TO WALL STREET EXECUTIVES, JULY 9, 2002

setting a good example by practicing good global corporate citizenship. These companies understand that they are not merely representing themselves, but America and its values.

During my most recent trade mission to Mexico, for example, I visited HEB Foods in Monterrey and the Ford Elementary School in Mexico City. HEB donates food from 19 of its

only expanded economic opportunity and world-class products and services, but also the true American spirit of volunteerism and giving.

CEOs must aim to spread prosperity around the globe, through good citizenship programs or simply through positive examples of good corporate character. This goal is not only good policy, but good business as well. Smart

companies to support a common good through their business activities both at home and abroad. ■

GLOBAL NEWS LINE

CHINA

A 1,500-unit housing development project in Beijing has reached an important milestone that may pave the way for U.S. building products firms wishing to enter China's rapidly growing housing market, a Chinese Ministry of Construction official said during a June 12, 2002, meeting with U.S. Commerce Department representatives. The Chinese developer of the project, a component of the U.S.-China Housing Initiative, has completed the planning and design phase and is beginning construction work at the site. The developer hopes to identify and procure the latest U.S. building materials and technologies for incorporation into the first 50 units of the planned multi-family homes. This presents an excellent opportunity for U.S. manufacturers and suppliers of doors and windows, HVAC systems, water equipment, high-end bathroom fixtures, interior moldings, and energy efficient and environmentally friendly technologies. A similar 1,500-unit housing project is under way in Shanghai, and there are comparable proposals for at least three other major cities in China.

U.S. building products manufacturers and suppliers can obtain detailed information about this opportunity by contacting Gary Stanley at (202) 482-0376 or gary_stanley@ita.doc.gov.

SRI LANKA

The enduring cease-fire in Sri Lanka has allowed the government and private sector to embark on delayed initiatives to improve infrastructure and foster economic growth. Not waiting for official notification, firms already active in the region are seizing opportunities that exist at this initial stage of reform and development. Commitments have been made on many large projects, though many substantial projects still remain available.

The economic landscape in Sri Lanka has changed dramatically in the seven months since a new government came to power. Peace and economic reform are top priorities. Firms active in this transitional period are now tapping the potential for growth and development that was latent during the conflict. Waiting for a peace accord and regulatory reform are the conservative approach, but for firms willing to take the risk, big projects exist.

Opportunities in Sri Lanka for foreign firms can come through official government tenders, unsolicited proposals, and purely private sector arrangements. The government is attempting to inject transparency into procurement processes, with limited success so far. Personal and familial relationships, traditional partnerships, influence peddling, rumor, and exaggeration still may affect any proposal. It is, however, possible in this environment for U.S. companies, with high standards and tenacity, to play by the rules and win.

AUSTRALIA

The government will spend over \$950 million to protect Australia's environment in the next fiscal year, \$100 million more than was spent in 2001-02. This is the highest amount ever spent by any federal government to preserve Australia's environment.

The Natural Heritage Trust is being extended for the next five years with a \$500 million injection. A key focus of the next phase of the Natural Heritage Trust will be water quality. At least \$185 million of the new trust funding will be spent directly on measures to improve water quality. Additional environmental initiatives include rehabilitating the historic Sydney Harbor foreshore, implementing new national fuel quality standards legislation, and developing sewage schemes in several areas.

U.S. companies interested in the Australian environmental market are encouraged to contact John Kanawati by calling (+61) 2-9373-9207, or e-mailing john.kanawati@mail.doc.gov.

VENEZUELA

The Venezuelan footwear industry reports that over 400 companies have had to close with a loss of 35,000 workers, due to a steep rise in the incidence of contraband merchandise, mainly from Colombia and China.

In 1995 Venezuela produced 35 million pairs of shoes, imported 11.2 million pairs, and absorbed contraband of 1.2 million. In the year 2001, production dropped to 12.9 million pairs. Legal imports rose to 17 million pairs, but contraband rose to 68.7 million pairs. The footwear manufacturers' association believes that the preferred method of smuggling is the "recycling" of shipping documents. For instance, the shipping documents for one legally imported container load may be used for another 10 containers without paying duty or VAT (since the reused documentation shows these fees as paid). Such smuggling is of course done through collusion with customs officials. The footwear association estimates that the loss of income to the state totaled \$621 million in 2001.

The association reports that the majority of illegal imports are sports shoes. Illegal imports also include dress shoes and even very cheap, plastic beach sandals. High-priced dress shoes from the United States and women's shoes from Italy apparently have not been affected and are sold mainly in upscale shopping centers. It is expected that U.S.-made footwear will not be affected appreciably by the illegal practices described above. Also, there are no current reports of illegal copying of U.S.-made brand name shoes.



ICELAND

According to the Icelandic Ministry for Foreign Affairs, Iceland has eliminated a 10 percent tariff on infants' and children's car seats under customs classification 9401.2002.

Icelandic regulations now permit the sale of car seats that meet U.S., Canadian, or EU standards.

SPAIN

Oil plays an important, although decreasing role in the Spanish energy sector. In the 1970s, oil accounted for 73 percent of Spain's primary energy consumption, compared with 53.9 percent in 2001.

Natural gas is expected to account for a much larger share of Spain's total energy consumption in coming years, especially as new pipelines and natural gas-fired power plants expand operations. Natural gas consumption is expected to grow 15 percent annually in this decade. Almost all of this consumption will be satisfied by imports, because Spain has extremely limited domestic natural gas reserves.

For more information about the Spanish energy market, please

contact Carmen Adrada of the Commercial Service in Madrid, at (+34) 915-648-976, ext. 2606, or carmen.adrada@mail.doc.gov.

The Spanish environmental market has grown significantly in the last 10 years. European support plays a major role in Spain's growth within the European Union. In 2001, European environmental investments in Spain totaled \$12 billion.

The air pollution control sector is worth \$79 million, 1.6 percent of the total Spanish environmental market. Private investment is \$267 million, or 31.7 percent of total private investment. Public investment is \$26 million, which is only 1 percent of total public investment.

The Organization for Economic Cooperation and Development (OECD) estimates that Spanish public and private investment needs to increase up to \$4.8 billion a year in order to attain the present EU environmental protection level by the year 2005.

Most investments for air pollution control equipment are made by the

private sector, although there are some direct public and publicly promoted investments. Industries with the best immediate market potential for air pollution control equipment are thermal power, ornamental stone, ceramic, chemical, pharmaceutical, petrochemical, cement, iron, steel and food; industrial processes using incinerators and boilers; and the auto emission control sector. With a general upturn in the economy, public and private investments in the air pollution control sector are expected to increase.

EGYPT

Despite Egypt's status as a developing country, its pharmaceutical industry is relatively mature.

Domestic production grew at a compounded annual growth rate (CAGR) of 10.7 percent over the last six years, while consumption per capita grew at a CAGR of 8.7 percent. Domestic production covers 93 percent of demand; the balance is covered by imports. Egypt exports 5 percent of production, which is disappointingly low in comparison with other countries in the region. New strategies are required if the industry is to fully develop, meet the social policy demands of an increasing population, compete internationally, and export at its full potential.

To obtain a complete report on this subject, plus Commercial Service Egypt analysis and commentary, please contact the author, Heba Abdel-Aziz, at heba.abdel-aziz@mail.doc.gov, or Commercial Service Egypt at cairo.office.box@mail.doc.gov. ■

NEED MORE DETAIL?

Ask a foreign commercial officer at one of the Department of Commerce's posts located around the globe. Contact information, including phone, fax and e-mail, is available by calling the Trade Information Center at (800) USA-TRAD(E).

BuyUSA RINGS UP A SALE FOR CALIFORNIA PHONE EQUIPMENT COMPANY

by Doug Barry
U.S. Commercial Service

If your cell phone connection in Peru is improving, thank a small technology company in California's Silicon Valley and BuyUSA.com.

It's a long way from the Golden Gate to Machu Picchu, but Telewave Inc., a veteran manufacturer of two-way radio equipment, is no stranger to long distance. When Telewave wanted a way to expand its South American business to Peru, it recognized in BuyUSA.com—the U.S. Commercial Service's on-line marketplace—an effective, inexpensive, low-risk way to make new sales.

Turns out it was right. Telewave recently completed the first of what it hopes will be many sales to buyers in Peru. "The first purchase was worth about \$80,000, which is a great start," says Jack Waldbewohner, who manages Latin American sales and is known at Telewave as "Jack W."

Jack says Telewave has tried some high-priced private consultants to drum up business abroad, but results varied greatly. In contrast, he's found that the U.S. Commercial Service consistently delivers qualified buyers, useful market

research, and that the Service's domestic and international trade specialists add value that no other e-marketplace offers. "We've used the Commercial Service in Brazil, Mexico, Chile, Paraguay, and Venezuela—and it has never dropped us in the grease."

Nor will it if trade specialist Keith Hwang, who sold the BuyUSA.com subscription to Telewave for \$400, has anything to say about it. "I talk to Jack pretty regularly and help coordinate the other services we provide Telewave in the Latin American markets."

Hwang also says that Telewave continues to expand its international sales while many other tech companies in and around Silicon Valley have cut back or tanked during the dot-com meltdown and recession. Jack adds that the company has endured some tough times, but the domestic and international economies seem to be slowly improving.

He says Telewave was spared worse because of the management skills of President Raymond Collins, who owns the company. Collins followed a conservative investment strategy that did not rely on the stock market and focused on lower to mid-level technology products instead of spending huge amounts of borrowed capital in a search for breakthrough gadgets. "We're still

selling a lot of watt meters that we first made 25 years ago," says Collins. Telewave makes about 1,000 different products.

ESCAPING THE MEAT AX

"Many companies in this area went through their staffing with a meat ax," Jack says. International sales were hit especially hard, he explains, because costs for trips abroad and phone calls stuck out like a sore thumb. "It was very shortsighted of these companies, because it will take many months to staff up again."

Meanwhile, amid tech sector chaos and bloodletting, Telewave chugs ahead, increasing international sales to 25 percent of total income and aiming to get more. The Peru sale involved a product called a ceramic autotune combiner or "gray box," 53 pounds of motors and software that decreases the number of dropped cell calls, reduces electricity usage by 20 percent, and takes over equipment monitoring functions otherwise performed by costly technicians.

And while doing business in some Latin America countries is not without risk and turmoil, Jack says there is a continuous stream of opportunities that cause hearts to beat faster among the 43 employees at Telewave. "You read a lot of things in the press about

Photo courtesy of U.S. Commercial Service



Phoning it in: Telewave International President Raymond L. Collins (center) with International Sales Manager Jack Waldbewohner and International Trade Specialist Keith Hwang of the Silicon Valley Export Assistance Center.

Colombia. But the fact is the government is investing \$100 million in telephone trunking equipment this year, and we'd like a piece of that business."

Jack has already asked the Commercial Service for help. And he continues to monitor his BuyUSA.com account, receiving at least one solid lead per week from the thousands of buyers that the Commercial Service have vetted and congregated there. "That one sale to Peru pays for 50 years of BuyUSA.com."

What is it about Jack that contributes to Telewave's export success? The Commercial Service's Hwang says that, in part, it's because Jack is a positive thinker: "To him, nothing is impossible. So a lost order here or a setback there doesn't really slow him down. Once he finds an interested distributor, he does not fail to follow up, and my guess is that this responsiveness eventually is persuasive so that he gets good results from his overseas network."

Hwang believes that responsiveness and reliability can make or break companies that rely on the Internet to do business across multiple country

markets and cultures. Buyers still crave personal contact, and international sales managers like Jack are still salesmen. Their most important tools remain the telephone, the face-to-face deal, and their dedication to pleasing the customer.

The strength of the Internet is its ability to bring the wares of a small company like Telewave to the attention of buyers in markets that have only recently gotten connected. For Telewave and its buyers, having the U.S. government bring the parties together via the Internet adds a measure of trust that Jack believes can be a decisive ingredient.

Jack puts in lots of hours scouring the world for sales opportunities, but he likes his job and is proud of Telewave products that help people get connected in faraway places. "My wife says when I die, I'll probably want a 'gray box' in the coffin with me. No dropped calls in the afterlife." ■

BuyUSA is a combination of on-line and off-line services that together create a powerful international e-marketplace.

The program pairs the vast global resources of the U.S. Department of Commerce with the power of IBM technology. Our mission is to bring suppliers of U.S. products and services together with companies outside the United States, to give both groups the services they need to conduct successful business worldwide.

For over 20 years the U.S. Commercial Service of the U.S. Department of Commerce has successfully matched small and medium-sized U.S. exporters with international business partners across the globe. Our extensive team of more than 1,800 trade experts in 107 U.S. Export Assistance Centers and 151 posts located in U.S. embassies, consulates, and trade centers in 84 countries is there to help companies navigate the complex international trade process. To learn more about the U.S. Commercial Service, please visit our home page on the export.gov Web site.

It's easy and cost-effective to join BuyUSA. U.S. suppliers have two membership options. The free option allows you to promote your company and save a list of prospective buyers. The paid option requires a low annual subscription fee and allows you to create your own brochure with 20 product or service listings, your own URL, and unlimited messaging capabilities. You can also upgrade to our Enhanced Catalog subscription, which allows you to effortlessly convert your print marketing materials and catalogs to the Web.

International companies outside the United States that are looking to purchase U.S. goods or services can join for free and tell U.S. suppliers what they're looking for.

Once you learn more about what BuyUSA has to offer, we are sure you will agree it is a tremendous value that can greatly expand your business opportunities. ■

CEEBC NEWS UPDATE

by Leah Markowitz
CEEBC

ITA'S EU ACCESSION TASK FORCE LAUNCHES WEB SITE AND HOTLINE

The European Union (EU) Accession Task Force, headquartered at the U.S. Department of Commerce's International Trade Administration (ITA), presents to U.S. businesses the emerging opportunities inherent in the accession of Central and Eastern European countries to the EU. Begun in January 2002, the team helps U.S. companies seize trade and investment opportunities in the acceding countries' markets.

Currently the EU is negotiating the admittance of 10 Central and Eastern European countries: Estonia, Latvia, Lithuania, Poland, the Czech Republic, Slovakia, Hungary, Slovenia, Romania, and Bulgaria. The accession of some of these countries may occur over the next several years. This lengthy and complicated process requires the candidate countries to harmonize many aspects of their commercial and legal systems with those of the EU, as well as to make wide-ranging economic and administrative reforms. While this is an enormous task, the benefits are significant. When completed, accession should add about 75 million new consumers to the EU's single market.

This process presents both opportunities and challenges for U.S. firms that do business in Central and Eastern Europe. On April 18, 2002, the EU Accession Task Force unveiled both a Web presence (www.export.gov/ceebic) and a hotline (202-482-9090), housed at the ITA's Central and Eastern Europe Business Information Center (CEEBC). Both

are tools designed to help U.S. companies identify export opportunities and interpret commercial changes in the region, as well as to help them contact ITA analysts for these issues.

CEEBC OPEN HOUSE

On April 18, 2002, the International Trade Administration's Central and Eastern Europe Business Information Center (CEEBC) held an open house at the Department of Commerce. The daylong event gave U.S. business representatives the unique opportunity to meet with CEEBC's U.S. and overseas trade specialists representing 15 countries of the region (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Estonia, FR Yugoslavia, FYR Macedonia, Hungary, Latvia, Lithuania, Poland, Romania, the Slovak Republic, and Slovenia). In addition, the event included a business seminar on

European Union accession that outlined the benefits and barriers of this transformation for U.S. companies, including topics such as export and investment opportunities, the changing nature of European business risk, and safety standards and product certification in accession countries.

CEEBC has developed a virtual open house tour on its Web site for those companies that were unable to attend the open house. Companies may obtain open house materials and get information on open house participants via the Internet.

AGRIBUSINESS OPPORTUNITIES IN FYR MACEDONIA

The food and beverage industry is one of Macedonia's most promising sectors. Most food processing facilities are privately owned. The industry

The screenshot shows the CEEBCnet website interface. At the top, it reads "CEEBCnet U.S. Department of Commerce CENTRAL AND EASTERN EUROPE BUSINESS INFORMATION CENTER" with a date of "Friday, June 07, 2002". Below this is a navigation bar with links: "About CEEBC", "A.A.G.", "CEEBC Decision Network", "Contact Us", and "Knowledge". The main content area features a large heading "EU ACCESSION" with a subtitle "A U.S. BUSINESS IN CENTRAL AND EASTERN EUROPE" and the European Union flag. A map of Europe highlights accession countries in red and yellow. A "HOTLINE 202-482-9090" is prominently displayed. Below the map, there is a section titled "EU ACCESSION PROCESS" with text explaining the process and a "New Flash" section. On the left side, there are several menu items: "Go To Country Page", "New Flash", "Missions in the EU Accession Process", "Accession Criteria", "Accession Candidates' Progress in EU Negotiations", "Deadline: Europe and EU Accession", "European Monetary Union", and "EU Sources of Finance in CEE".

nearly doubled between 1989 and 1995 relative to the rest of the economy. Agribusiness in Macedonia, including agriculture and food processing, accounts for almost 19 percent of GDP. Macedonia exports approximately 20 percent of its agricultural products.

Food Processing

Companies in Macedonia produce wine, as well as canned and bottled fruits and vegetables, for export. There are about 30 food processing companies in Macedonia. Ten of these have facilities for canning, 10 have fruit juice production and bottling equipment, and 14 have facilities for drying. Most food processing companies have storage and cooling facilities, and 11 have deep freezing equipment, which more than meet the country's domestic demand.

Processed foods are dominated by two major sectors, semi-finished products (including frozen, dried, and concentrated) and finished products (canned and preserved). Processed frozen foods are mostly exported to Germany, the Netherlands, and other European countries. Processed dried foods are mainly exported to France, Germany, Austria, and Switzerland. Preserved fruits and vegetables are sold to neighboring countries, Australia, and Western Europe.

Agribusiness Opportunities

Macedonia needs agricultural machinery and equipment, meat and dairy equipment, and veterinary equipment and supplies to expand the quality and quantity of its production. The Agency for the Development of Agriculture in Macedonia promotes the introduction of new agricultural technologies and products. Domestic production of agricultural machinery is minimal, and the market relies on imports. There are substantial opportunities for U.S. companies for equipment that can add value to the Macedonian food processing sector, such as bottling, packaging, and refining equipment.



The domestic and overseas staff of CEEBIC gather outside the main Department of Commerce Building just after their annual open house.

Photo courtesy of U.S. Department of Commerce

Macedonia produces approximately 1 million hectoliters of beer annually, mostly for domestic consumption, as well as 1.3 to 1.4 hectoliters of wine. The wine sector needs investment if it is to remain competitive and reach its full potential. Currently, Macedonia exports its wine in bulk to be bottled in other countries and then sold. Export opportunities exist for U.S. companies for equipment to increase the volume of bottled wine, as well as for technology and supplies to stimulate grape production.

Free Advertising

U.S. companies have an opportunity to enter this market via the American catalog show on October 1-5, 2002. The catalog show is a cost-effective method for U.S. companies to advertise their products to companies in Macedonia, by sending company materials that will be displayed at a booth run by U.S. embassy personnel. The catalog show will focus on three sectors: agricultural machinery and equipment, meat and dairy equipment, and veterinary equipment and supplies. The catalog show is funded by the U.S. State Department, and there is no cost to participating companies other than expenses

associated with mailing catalogs to Macedonia. Materials should be received by the U.S. Embassy Skopje by September 20, 2002. For additional information about the catalog show as well as general information about exporting to Macedonia, visit the Central and Eastern Europe Business Information Center at www.export.gov/ceebic, or call (202) 482-2645. ■

THE COMMERCIAL LAW DEVELOPMENT PROGRAM

LOWERING OVERSEAS BARRIERS FOR U.S. EXPORTERS

by Justin Marx and Faraaz Siddiqi

Commercial Law Development Program

Exporting can be a daunting experience, especially if your company's target market lies in a country riddled with corruption, inadequate laws and enforcement mechanisms to protect commercial interests, and a bureaucracy that is anything but transparent. The U.S. government has many initiatives to assist exporters, some of which are less obvious than others. The Commercial Law Development Program (CLDP) of the U.S. Department of Commerce (DOC) is working behind the scenes, in developing democracies that have nascent but risky overseas export markets, to alleviate the legal and administrative barriers that U.S. exporters face.

The CLDP helps developing countries modernize their commercial legal systems to enable them to take advantage of opportunities in the global economy by creating or enhancing laws, regulations, and administrative practices that affect domestic and foreign investment and trade. These development efforts benefit U.S. exporters by increasing the stability and predictability of foreign legal regimes.

While working at the Overseas Private Investment Corporation (OPIC) in the late 1980s on deals to finance U.S. investment in developing countries, Linda Wells, chief counsel and co-founder of the CLDP, encountered many recurring legal and administrative obstacles. Ms. Wells and other U.S. government officials had been providing commercial law technical assistance on a sporadic basis, but it became apparent that a more consistent and comprehensive program would be more effective. The DOC's Office of the General Counsel and the United States Agency for International Development (USAID) agreed, and the CLDP was launched. The CLDP began work in Eastern Europe and the former Soviet Union. From there, it expanded throughout Africa and the Middle East. It is now in the initial stages of developing programs in Latin America and the Caribbean.

DEVELOPING A WORK PLAN

The CLDP is distinguished from non-governmental assistance providers because it utilizes current or former government experts to provide government-to-government assistance. When an actual need and a practical way to effect change is identified, the CLDP develops a work plan through consultations with interested U.S. government entities, foreign governments, and

private sector representatives abroad. Working with stakeholders to design the program ensures client support and commitment.

Every CLDP program is likely to include one or more of the following activities: advisors sent overseas to work with a small group of host government representatives; consultations in the United States for a select group of foreign government officials; or consultations overseas for a large number of individuals. While those three techniques are most common, the CLDP also uses other methods. For example, the CLDP recently conducted a public awareness campaign in Egypt designed to inform the public of the types and benefits of insurance, to increase the sales of policies provided by domestic and foreign insurers. This involved working with the Insurance Information Institute to produce television commercials and informational brochures for public dissemination in Egypt.

HANDS-ON TRAINING

Perhaps the best way to illustrate CLDP activities is to look at a recent month. In May 2002, the CLDP trained Algerian judges to adjudicate intellectual property cases, worked with Egyptian standards officials on internationally accepted conformity

assessment and quality control practices, facilitated the creation of government procurement rules in Nigeria, helped create an Albanian Center for International Trade, and trained Angolan judges on case management techniques, as discussed below.

INTELLECTUAL PROPERTY RIGHTS ENFORCEMENT ABROAD PROMOTES U.S. EXPORTS

Insufficient protection of intellectual property rights is a major deterrent to foreign investment and trade. U.S. companies' losses arising from piracy were estimated to be over \$8 billion in 2001. For this reason, the CLDP has spent considerable time working with Algerian judges on proper adjudication of intellectual property cases. The CLDP has also worked with several other clients on developing intellectual property legislation and educating government officials and the public on the economic importance of protecting intellectual property rights and institutional capacity building. CLDP efforts contribute to governments' abilities to more effectively implement and enforce their intellectual property laws, which reduces the number of knock-off drugs, bootleg compact discs, and unlicensed copies of software that are produced. As the black market shrinks, the demand for legitimate versions of drugs, software, and artistic works increases, which ultimately benefits the host country as well as U.S. producers who wish to operate in emerging markets.

PROMULGATION OF U.S. STANDARDS SIMPLIFIES TRADE

Each country utilizes a system of standards, which dictates the specifications that imported products must meet. For example, a product created according to American standards may encounter obstacles when exported to a country that uses European standards. Often, the goods will simply be rejected at the border regardless of whether the difference is obvious or very subtle. The

CLDP recently hosted an Egyptian delegation of standards officials to familiarize them with the American standards system. This program is just one example of CLDP efforts to promote functioning standards regimes in developing countries in order to help create systems that are both practical for the countries and compatible with the standards U.S. exporters employ.

TRANSPARENCY IN GOVERNMENT PROCUREMENT PRACTICES OPENS MARKETS

Procurement practices vary widely among and within countries, making it difficult for U.S. exporters to sell products to foreign governments. Further complicating the process of identifying the procedures necessary to win a government tender are corrupt regimes that allow government officials to accept bribes, or favor certain suppliers over others. Almost always, it is the foreign supplier that is disadvantaged. Realizing that a more competitive and transparent process is beneficial for the government and the public, countries like Nigeria have solicited the CLDP to work with them to improve their processes. The CLDP has assisted countries in creating corruption oversight bodies, propagating new and equitable procurement rules, improving enforcement mechanisms, and training officials on government ethics and transparency.

CASE MANAGEMENT TECHNIQUES HELP PROTECT U.S. INTERESTS OVERSEAS

One of the paramount concerns of U.S. companies doing business abroad is whether they will have recourse to courts if they have disputes when dealing with local businesses. While a particular country may be a good market for U.S. exports, its court system may be antiquated and overburdened, often to the degree that the risk of non-recourse makes doing business in that country not worth the effort.

The CLDP's Angola program has tackled judicial deficiencies by introducing the Angolan legal community to case management techniques that create efficiencies and reduce opportunities for corruption. In September 2002, with CLDP support, Angola will launch a pilot project in which an Angolan court will implement case management techniques and serve as a model for other courts. With modern case management techniques implemented, a U.S. business will be more likely to have recourse through the courts.

These examples simply highlight CLDP involvement in behind-the-scenes export promotion in a single month. Throughout the year, the CLDP conducts long-term programs such as these as well as others that concentrate on helping countries accede to the World Trade Organization (WTO) and implement laws that comply with the WTO agreements.

So, when the day comes when your products suddenly meet Senegal's standards, when the government of Albania is soliciting your tenders, or when Ukrainian sales of your new CD hit the roof, you need not wonder why. It is likely that long-term CLDP reform strategies have helped pave the way for your expanded business overseas. ■

For more information about the Commercial Law Development Program, contact Joan MacKenzie at (202) 482-2400 or e-mail JMackenzie@doc.gov.

The CLDP Web site is under construction and will be operational by December 2002. It will be accessible through www.doc.gov.

EXPORT TRADE CERTIFICATES OF REVIEW

JOINT EFFORTS REDUCE COSTS AND RISKS

by Jeffrey Anspacher

Office of Export Trading Company Affairs

When beginning to export, companies face many challenges, from arranging international transportation to bidding for overseas projects. Small companies in particular find shipping, marketing, overseas representation, and other export-related activities prohibitively expensive, or nearly so. And even if these obstacles are overcome, exporters may risk violating antitrust legislation if they pool their activities.

EASIER EXPORTING

There is a way to reduce some of the expense and risk of exporting. The U.S. Department of Commerce, in conjunction with the U.S. Department of Justice, offers a special certificate that exempts U.S. companies from some antitrust laws. An Export Trade

Certificate of Review (COR) provides an individual firm or a group of companies with immunity from antitrust suits regarding export activities specified in the document. A COR provides, with a few exceptions, immunity from federal and state civil and criminal antitrust legislation, as well as immunity from unfair competition suits.

By reducing the threat of antitrust litigation, a COR facilitates export activities. U.S. companies can work together more easily, combining efforts as varied as appointment of exclusive distributors and agents to limitations on pricing and the handling of competitive products. Small and medium-sized companies, the targets of the COR program, are thus able to spread costs and minimize risks in exporting, engaging in activities that normally

would set off all sorts of antitrust alarms. Companies may even cooperate with competitors in joint export activities, provided such activities are covered in a certificate. It should be noted, however, that a COR does not exempt a U.S. exporter from foreign laws. Exporters should therefore apprise themselves of the appropriate commercial legislation in new markets overseas.

SIMPLE APPLICATION

A COR is not difficult to obtain from the Department of Commerce, although application is not a guarantee of approval or unlimited antitrust exemption. The application is straightforward and free of charge. If an application meets certification standards and gains concurrence of the Department of Justice, the Commerce Department can issue a COR within 90 days of submission.

The Commerce Department's Office of Export Trading Company Affairs assists companies throughout the application process and offers no-cost counseling about the COR program. (The Export Trading Company Affairs staff recommends preparing a draft application for review prior to actual application submission.) The application form and supporting materials are treated with confidentiality and are also exempt from disclosure under the Freedom of Information Act.

BROAD USAGE

Certificates cover a wide range of business organizations, such as individual firms, shippers' associations, trade

PREREQUISITES FOR EXPORT TRADE CERTIFICATES OF REVIEW

Four basic conditions apply to certificates:

- The export activity in question results in neither a substantial lessening of competition nor restraint of trade within the United States. Concurrently, the activity does not result in substantial restraint of export trade of any U.S. competitor.
- The export activity does not unreasonably affect prices of the covered products or services in the United States.
- The export activity is not an unfair method of competition against competitors exporting similar products or services.
- There is no expectation that the products or services will be re-exported to the United States.

associations, producers' cooperatives, port authorities, and export management companies. Certification may include a variety of industries, such as agriculture, manufacturing, and services.

The COR program neither reduces all risks nor eliminates all challenges that arise in exporting. Nevertheless, small and medium-sized companies benefit

substantially from antitrust exemptions, and the COR program eases entry into the global marketplace.

For more information about Export Trade Certificates of Review, visit the Web site of the Office of Export Trading Company Affairs, www.ita.doc.gov/oetca, or call (202) 482-5131. ■

MANUFACTURING

The Association for Manufacturing Technology

"From the beginning, (on May 19, 1987) when AMT received the first Certificate of Review issued to a trade association, AMT has seen the certificate as a valuable means of enhancing the trade competitiveness of our members. As you know, the certificate has allowed our members to combine for overseas bids. In one notable case, our members were able to combine and cooperate to win the contract to supply a large Chinese aircraft plant with the machinery necessary to modernize and win Western aircraft parts contracts. Without the certificate, such cooperation could never have occurred."

Dr. Paul Freedenberg
Government Relations Director, AMT

UNUSUAL USE

American Film Export Association

Among the first trade associations to receive an Export Trade Certificate of Review, AFMA (formerly the American Film Marketing Association) has used its antitrust protection to implement several programs tailored to help its members expand export business. "With the Certificate in hand, we gained the needed flexibility to create meaningful export programs and encourage our members to participate," states Jean Prewitt, president and CEO of AFMA.

Operating with the antitrust protection of its Export Trade Certificate of Review, AFMA offers international model licensing agreements and financing documents that are the standard for the independent film and TV industry; established and administrates the AFMA Arbitration Tribunal, which resolves disputes regarding distribution; produces a membership sales survey to measure the licensing of motion picture and television products in 33 territories; and encourages, through the independently compiled Credit Watch, the sharing of vital credit data on more than 500 film and television buyers from 56 countries.

"The Export Trade Certificate of Review helps AFMA to foster the exchange of information among its exporting members on all aspects of foreign market conditions and customers," says Lawrence Garrett, chairman of AFMA.

Under the auspices of its Export Trade Certificate of Review, AFMA also offers its members a program that enables AFMA to officially authenticate the origin of a member's product destined for export markets. The program assists AFMA members in eliminating delays in product delivery to overseas distributors.

BENEFITS OF AN EXPORT TRADE CERTIFICATE OF REVIEW

Companies holding certificates may

- Avoid export rivalries with domestic competitors
- Offer full lines of complementary products
- Reduce transportation costs
- Cut warehousing costs
- Set common prices
- Divide markets and sales territories
- Bid on large contracts
- Make integrated bids on complex projects
- Conduct joint marketing
- Share market research costs
- Jointly buy space at overseas trade shows
- Combine to hire foreign representation.

Further, companies are immune from federal and state antitrust actions, and certificates create significant disincentives to private suits by

- Providing a presumption of legality, since the certificates are legal documents
- Reducing maximum liability from treble to single damages
- Allowing successful defendants to recover court costs, including attorney's fees.

TRADE LOGISTICS 101

AN INTRODUCTION TO FORWARDING

by William Corley

Export America

As the world economy recovers, opportunities increase for U.S. companies to export their products. But international shipping remains daunting for many new or relatively inexperienced exporters, particularly small and medium-sized firms. To assist these firms, we offer the first in a series of articles about international trade logistics.

WHAT IS A FREIGHT FORWARDER?

A freight forwarder is an agent who arranges the transportation of goods for others. A forwarder functions as a travel agent for cargo or a designer of logistics. Forwarding includes booking cargo space for shippers, providing shipping documents, and sometimes arranging other services as varied as shipment packing and cargo insurance.

Many forwarding companies offer assistance in transportation logistics, including freight consolidation, customs brokerage, warehousing, distribution, and other value-added services. Further, they operate networks of offices and agents for export and import.

Freight forwarders are generally non-asset-based providers, meaning that they do not own planes, ships, and other means of transport. When forwarders book cargo space for customers, they have the flexibility to choose the best routes and transit

schedules. Forwarders typically have service contracts with many air and ocean carriers to facilitate economical shipping around the globe.

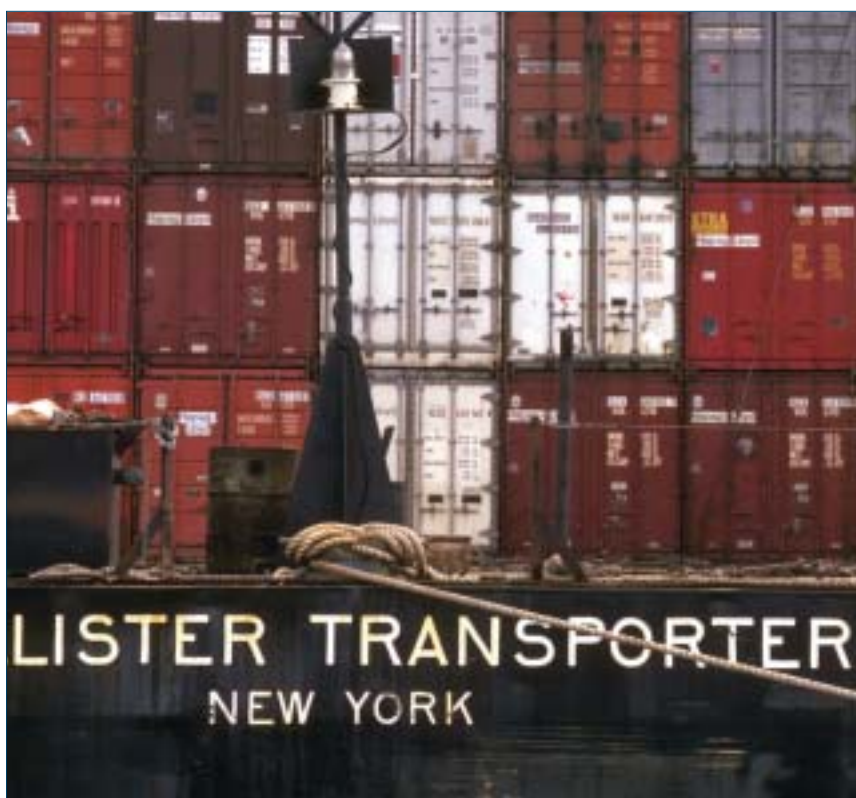
FORWARDING AND INTEGRATING

Some forwarders are integrators. Integrators wholly own or control assets such as planes and trucks that are used for their shipping services. Integrators roughly fall into two categories: integrated express carriers, and integrated heavyweight forwarders. Express carriers transport documents and small packages, while integrated

forwarders transport heavyweight packages and other types of freight.

Vertical integration is costly; airfreight with an integrator tends to be expensive yet often the fastest and most reliable air service. However, integrated service is limited by integrators' inflexible, standardized flight schedules for hub-and-spoke operating systems.

Forwarders, nevertheless, benefit from their status as transportation intermediaries. They are usually much more flexible than integrators in their service offerings, because forwarders



use many different carriers and transportation modes.

Forwarders typically can provide door-to-door solutions or more limited shipping options. Integrators may offer such services as well, but forwarders have a much longer tradition in operating international networks.

In ocean freight, forwarders are the dominant shippers. In airfreight, more than 80 percent of international tonnage comes from forwarders as opposed to integrators. Further, forwarders provide most of the airlines' cargo business, and they also purchase excess capacity on integrators' international flights. Forwarders, given their flexibility, may also book cargo space with all-cargo airlines.

SAVING MONEY AND TAPPING EXPERTISE

Freight forwarders are not courier companies, which are often associated with words such as parcel, express, package, and air. A prudent exporter will find that a forwarder offers more options and usually better rates than a courier for anything other than documents and small parcels—even if the forwarder books cargo space on a courier's aircraft.

New exporters should understand that freight forwarders provide essential assistance in international trade. Forwarders facilitated world trade long before the advent of cargo aircraft and container ships, and this experience overshadows the transportation background of modern couriers and integrators. Further, forwarders' contractual relationships with carriers translate into rates that exporters alone would never find. (A simple analogy is that when we travel, airfare is more economical from an agent, who selects from a variety of airlines and has access to more information and special discounts, than directly from an airline.) Additionally, due to the service contracts and inherent complexity of trade logistics, many carriers regularly work only with forwarders

and similar agents, and not directly with small exporters.

OCEAN AND AIR CARGO

While integrators and couriers emphasize airfreight, forwarders are ready to help determine whether ocean transportation is a viable option. Most world trade (in volume terms) travels by container ship. Airfreight is obviously faster, but it is significantly more expensive: long-distance airfreight rates per kilogram are commonly seven to 10 times higher than long-distance ocean freight rates.

About 40 percent of world trade (in value terms) moves in cargo planes and in cargo holds of passenger aircraft. Airfreight is suitable for perishable goods; it may also include light, high-value commodities such as semiconductors and electronic components essential to running industry or fulfilling an inventory shortfall (and unexpected consumer demand). Ocean cargo often includes goods such as automobiles, toys, and household appliances—items whose bulk, weight, and steady consumer demand allow slow transportation. The question, then, is whether a forwarder can help an exporter ship cost-effectively and yet meet both the production schedule of the exporter and the requirements of the exporter's customers overseas.

Freight consolidation offers additional savings. Exporters need not have the cargo to fill a standard air or ocean container in order to benefit from the cost savings full loads have over individual shipment rates. For instance, freight forwarders may combine the individual shipments of several exporters, thereby obtaining a full container rate from a carrier. Although the forwarder of course marks up the carrier's freight rate to sell cargo space to his customers, individual exporters benefit from a significantly reduced rate for individual shipments in a consolidated load. Alternatively, an exporter with a full load again receives the benefit of the forwarder's container rate.

Considering the Options

Effective use of transportation equipment and modes reduces shipping and logistics costs. However, export planning entails all sorts of considerations, from inventory levels and manufacturing lead times to customers' preferences and transportation options. Ocean export is generally much cheaper than air export, but the transits from warehouse dock to consignee door are measured in weeks instead of days.

Freight forwarders can assist exporters in choosing and managing transportation, particularly if both parties are flexible and forthcoming. To facilitate rate quoting and mode selection, exporters should be prepared to answer a host of questions about these and related issues:

- Commodity (description and use)
- Destination (ports/cities)
- Pieces, weight, dimensions
- Terms of sale
- Terms of payment
- Number/frequency of shipments
- Routing/transit requirements
- Insurance requirements.

Further, when comparing different modes of transportation, these are some of the issues to consider:

- Speed
- Frequency of shipments
- Cost
- Dependability
- Capacity
- Availability/accessibility
- Additional/special services.

It's More than Just Shipping Something Out of the Country

Freight forwarding encompasses dispatching shipments on behalf of others to facilitate shipment by a common carrier. The services of a forwarder may be very extensive and are often essential to getting an exporter's goods from the United States to an overseas customer. A forwarder can not only arrange export, but also (with an overseas office or agent) import, clearance, and delivery.

Service Offerings

Freight forwarding services may include, but are not limited to, the following:

- Booking, arranging for, or confirming cargo space
- Ordering cargo to seaport/airport
- Preparing and/or processing export declarations
- Preparing and/or processing delivery orders and dock receipts
- Preparing and/or processing bills of lading
- Preparing and/or processing consular documents, or arranging for their certification
- Arranging for warehouse storage
- Arranging for cargo insurance
- Expediting shipments in accordance with U.S. government export regulations
- Preparing and/or sending advance notifications of shipments or other documents to banks, shippers, or consignees, as required
- Handling freight or monies advanced by shippers, or remitting or advancing freight, other monies, or credit in connection with the dispatching of shipments
- Coordinating the movement of shipments from origin to vessel/aircraft
- Giving expert advice to exporters on letters of credit, other documents, licenses or inspections, or problems related to the dispatch of cargo.

These forwarding services follow in part the list for ocean forwarders in 46 CFR 510.2.

Industry Standards

The Federal Maritime Commission licenses U.S. freight forwarders for ocean operations. U.S. forwarders may also be affiliated with various industry organizations, the best known of which is the International Air Transport Association (IATA). IATA has approved cargo agents (only airlines can be members of IATA); IATA is not a licensing body.

Forwarders may receive training and certification to ship dangerous goods (also known as hazardous materials). The relevant accreditation comes from bodies such as the International Civil Aviation Organization, the U.S. Department of Transportation, and the International Maritime Organization. ■

Forwarding companies can also help exporters with vendor consolidation, managing purchase orders from one customer that affect multiple suppliers. Depending upon the overseas customer's needs, the forwarder can then arrange individual or consolidated shipments of the suppliers' freight. Similarly, forwarders can assist in planning cost-effective shipments to one area for multiple customers of an exporter, through consolidating freight and arranging unloading, segregation, and delivery of individual shipments by an overseas forwarding office or agent.

FORWARD THINKING

Trade logistics involves planning. Exporters should not only apprise themselves of transportation alternatives but also try to anticipate shipping requirements. Planning tends to reduce costs, particularly if an exporter can consolidate shipments and select slower modes of transportation. Forwarding companies provide an important array of services that facilitate supply chain management. However, exporters should shop around before shipping, asking for rate quotes from several forwarders, integrators, or couriers, depending on exporting needs. Exporters will find that generally freight forwarders have the service and expertise to handle many transportation issues more economically, efficiently, and effectively for regular shipping. ■

ASK THE TIC

HUMANITARIAN SHIPMENTS

by Ashley Miller

Trade Information Center

Many U.S. businesses engage in humanitarian efforts around the world. From shipping used computer equipment to a university in Mali, to sending blankets to hurricane victims in Mexico, humanitarian shipments involve special handling and logistics.

HOW DO HUMANITARIAN SHIPMENTS DIFFER FROM COMMERCIAL SHIPMENTS?

When exporting from the United States, humanitarian shipments follow the same procedures as other shipments and require a commercial invoice, a packing list, and a Shipper's Export Declaration (for shipments valued more than \$2,500). Nevertheless, there can be additional requirements for humanitarian shipments, depending on the destination country and the merchandise. Goodwill shipments should also include a "gift certificate," which is a notarized letter stating that no money has been exchanged between the donating and receiving organization and detailing the contents of the shipment.

Often, the importer of humanitarian shipments is a not-for-profit organization, church, or even a local government office. However, like commercial trade transactions, when undertaking a humanitarian shipment an exporter must conduct proper due diligence on the importer or receiving organization to ensure it is reputable, well established, and has the capacity to handle the shipment.

HOW DO I DETERMINE WHAT SPECIAL PROCEDURES A COUNTRY REQUIRES FOR HUMANITARIAN SHIPMENTS?

Every country varies with respect to handling humanitarian shipments. Some countries, like Russia, have very specific and well-documented procedures for humanitarian shipments, with efforts coordinated through its State Commission on Humanitarian Aid. Other governments, like Mexico, do not facilitate humanitarian shipments through a central government authority. Therefore, each humanitarian shipment goes through

the regular customs procedures and is handled on a shipment-by-shipment basis. Ecuador requires that a humanitarian shipment be legalized through an Ecuadorian consular office in the United States before shipping. The U.S. exporter drafts a letter to be notarized by the consul detailing the donating organization's contact information, the contents of the shipment, and the receiving organization's contact information in Ecuador. Furthermore, the receiving organization must then take the notarized letter along with the shipping documentation to the Corporacion Aduanera Ecuatoriana (Ecuador's Customs Authority) to obtain authorization for the shipment before the shipment leaves the United States.

Due to the varying requirements for humanitarian shipments in each country, it is critical that the U.S. exporter follows a few general rules when working with humanitarian shipments:

- Allow ample time to coordinate all logistics for humanitarian shipments (usually a couple of months). Do not expect to collect goods and ship them in a week.
- Ensure that the goods in your shipment are actually needed in the country and that they are culturally appropriate.
- Conduct proper due diligence on the receiving organization and work closely with the staff to determine the specific customs procedures and documentation necessary for that country. As the importers, they should become familiar with the customs process and documentation procedures necessary to bring the shipment into their country.
- Research freight forwarders and customs brokers in the United States who can be invaluable assistants in ensuring the safe arrival of humanitarian shipments. Often, freight forwarders and customs brokers have special rates for humanitarian shipments, so it is worthwhile to inquire.

WILL I HAVE TO PAY DUTIES AND TAXES ON A HUMANITARIAN SHIPMENT?

Humanitarian shipments are not automatically duty- and tax-free. U.S. exporters should work with the receiving organization to exempt the shipment from duties and taxes, if permitted. The receiving organization will most likely have to work with the country's customs office and



possibly a government ministry before the shipment leaves the United States. If the receiving organization drafts documents in the country's official language, it can speed up the customs process. The receiving organization should try to obtain a pre-clearance from government authorities stating the shipment's exemption from duties and taxes.



DO I NEED TO PLACE A VALUE ON A HUMANITARIAN SHIPMENT?

Yes, but shipment valuations for humanitarian goods are very difficult, especially when the goods are used. The U.S. exporter is ultimately responsible for accurately valuing the shipment. The commercial invoice should also read, HUMANITARIAN SHIPMENT: VALUE FOR CUSTOMS PURPOSES ONLY.



DOES THE UNITED STATES RESTRICT HUMANITARIAN SHIPMENTS TO CERTAIN COUNTRIES?

Yes. The United States has a trade embargo in place with certain countries, including Cuba and Iran. However, in certain circumstances, exports of humanitarian items may be approved. When donating to embargoed countries, U.S. exporters of humanitarian aid shipments must apply for an export license or follow particular procedures.

Cuba: Humanitarian shipments to Cuba fall primarily under the licensing jurisdiction of the Bureau of Industry and Security (BIS, the former Bureau of Export Administration or BXA). A license is required from the BIS for the export of any item subject to the Export Administration Regulations (EAR; 15 CFR, 730-774), including most humanitarian items. However, certain items may be eligible for export to Cuba without a license from the BIS pursuant to one of two license exceptions contained in Section 740 of the EAR:

- **License Exception "GFT"** (Section 740.12: Gift parcels and humanitarian donations): U.S. individuals can use license exception GFT for exports of gift parcels to Cuba, provided they contain only items specified in Section 740.12(a)(2)(i), e.g., food, clothing, vitamins, medicines, and personal hygiene items. Such gift parcels, which must be donated, cannot be valued at more than \$200, excluding food items on which there is no value limit. Donors must comply with certain packaging requirements, and non-food parcels may only be sent once per calendar month to the same recipient.

U.S. charitable organizations may use license exception GFT to export most donated humanitarian items to meet basic human needs. Eligible items can be found on the list of "items that may be donated to meet basic human needs," located in Supplement 2 to Section 740. Note, however, that U.S. charitable organizations must apply for a license to export medicine and other medical items to Cuba. Section 740.12(b) also includes additional eligibility and record keeping requirements.

- **License Exception "AGR"** (Section 740.18: Agricultural commodities): In addition to the foregoing, exports of agricultural commodities, defined for the purposes of the EAR to include such items as food, livestock, tobacco, bottled water, vitamins and food additives, may be made pursuant to the requirements set forth under license exception AGR. License exception AGR provides a streamlined interagency process for reviewing proposed exports of agricultural (food and non-food) commodities to Cuba. The AGR requirements include notification of the BIS prior to the export based on procedures set forth in Section 742.18(c), and exportation of the items within 12 months of the date of BIS notification of approval. (Note that sales of agricultural commodities require a written contract between the U.S. exporter and the Cuban importer and exports must be made within 12 months of the signing of the contract.) To begin this process, submit the BIS Multipurpose Application Form 748P, which can be obtained through U.S. Department of Commerce Export Assistance Centers. Call (800) USA-TRAD (E) or consult www.export.gov to find your local Export Assistance Center. If the U.S. exporter has previously required an export license for any export transaction, it can use the SNAP (Simplified Network Application Process) found on the BIS Web site, www.bis.doc.gov.

Transactions involving Cuba may also trigger certain licensing requirements maintained by the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC), particularly with respect to transportation and travel incident to humanitarian transactions. Exporters are advised to review the OFAC's licensing requirements prior to undertaking any shipment or transaction involving Cuba.

North Korea: The comprehensive embargo maintained by the United States with respect to North Korea was partially removed as of June 19, 2000. As a result, humanitarian items generally do not require a license for shipment to North Korea, unless a proliferation concern is present.

Libya, Iran, Iraq, and Sudan: For these embargoed countries, licensing of shipments from the United States is required by the OFAC. Humanitarian shipments to Iraq are also handled by the United Nations (UN) under the Oil for Food program and require both OFAC and UN approval. Information on the Oil for Food program and OFAC can be obtained through OFAC's licensing division at (202) 622-2480 or the OFAC Web site, www.treas.gov/offices/enforcement/ofac/.



ARE CERTAIN GOODS EASIER TO SHIP THAN OTHERS?

Humanitarian shipments often include used clothing, medicines, medical equipment, and food. Each of these items has its own set of import restrictions in many developing countries.

Medicine: Pharmaceuticals are among the most difficult items to ship because of strict regulations in many countries. Additionally, most countries require a letter from an institution in the importing country requesting the pharmaceutical supplies. Most drugs need at least a certificate of analysis and a certificate of conformity from the importing country, but others require special, individual licenses. Major pharmaceutical companies are best equipped to handle shipments of donated drugs and are most familiar with the complex importing procedures.

Clothing/Used Clothing: Many poor countries have regulations on used clothing and do not want to be overrun with such shipments. Used clothing usually must be certified as cleaned, sorted, billed, and fumigated. For large shipments, a fumigation company will fumigate the container with a special device that remains in the container during shipment and is removed upon arrival. For smaller shipments, a fumigation company can fumigate the clothing before shipment and include a certified letter verifying the fumigation process. Some used clothing shipments may also require a Food and Drug Administration certificate for imports from the United States.

Food: The donating organization must be sensitive to a number of issues with food shipments. It should be culturally aware of food preferences in the receiving country. The American Red Cross' Logistics Division in Washington, DC, recommends that, whenever possible, food be purchased in the country

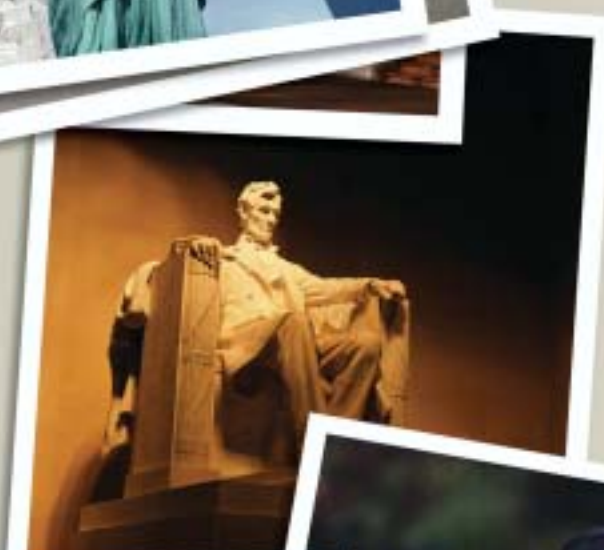
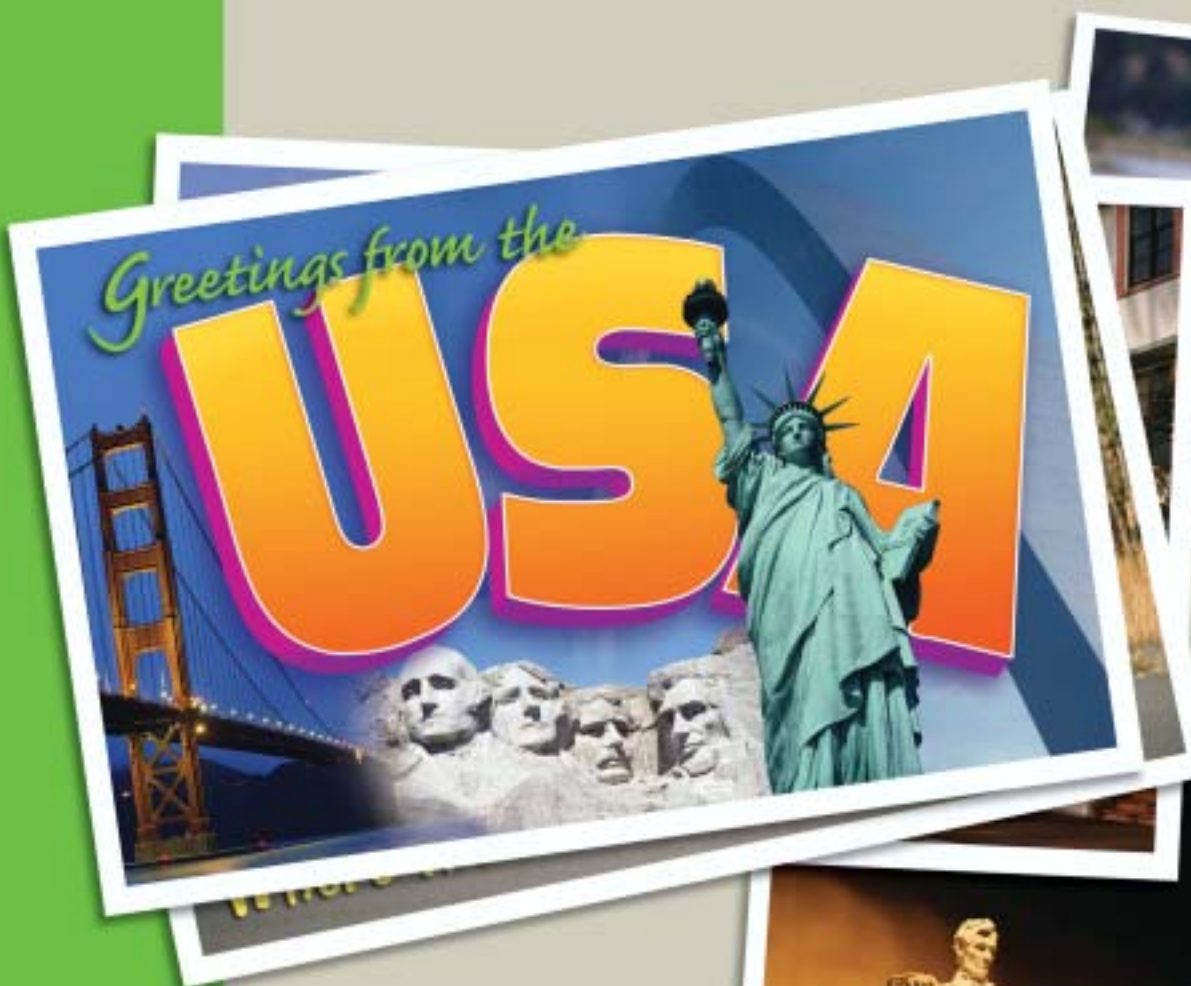
where the U.S. exporter wishes to donate. Often receiving country governments do not want to import food that is already produced in the home country because it can flood the market. Additionally, food and agricultural products often need special documentation, such as a certificate of analysis, certificate of conformity, certificate of origin, and a phytosanitary certificate.

Additional Contacts

The Trade Information Center can be reached at www.export.gov/tic, or (800) USA-TRAD(E). For information on Russia and the former Soviet Union, see www.bisnis.doc.gov, or call (800) USA-TRAD(E), ext. 24655. See www.export.gov/ceebic or call (800) USA-TRAD(E), ext. 22645, for information about Central and Eastern Europe. Information about licenses for Cuba can be obtained at the Bureau of Industry and Security's Web site, www.bis.doc.gov, or by calling (202) 482-4811. For information on licenses for Iran, Iraq, Sudan, and Libya, see the Web site of the U.S. Treasury's Office of Foreign Assets Control, www.ustreas.gov/ofac, or call (202) 622-2480. Information regarding food shipments is available from the Foreign Agricultural Service of the U.S. Department of Agriculture, www.fas.usda.gov or (202) 720-7420. ■

FOR MORE INFORMATION

The Trade Information Center (TIC) is operated by the International Trade Administration of the U.S. Department of Commerce for the 19 federal agencies comprising the Trade Promotion Coordinating Committee. These agencies are responsible for managing the U.S. government's export promotion programs and activities. You, too, can "Ask the TIC" by calling 1 (800) USA-TRAD(E) toll free, Monday through Friday, 8:30-5:30 EST. Or visit the TIC's Web site at www.export.gov/tic.



HELPING THE TOURISM INDUSTRY RECOVER

by Doug Baker

Office of Service Industries, Tourism, and Finance

The devastation and trauma of September 11 rocked many U.S. industries, perhaps none more than travel and tourism.

While the data shows that international tourism to the United States had already been slowing, the attacks gave further reason for international visitors to stay home. The Bush administration and industry increased their efforts to allay the fears of travelers. The Department of Commerce's latest international travel forecast indicates that these efforts seem to be working, as the U.S. travel and tourism industry shows signs of steady improvement well into 2005.

Travel and tourism is a driving force behind the United States' economy. It is the third-largest retail sales industry and generated \$545 billion in direct spending in 2001. The industry supported 7 million American jobs in 2001 and created \$94 billion in tax revenue for federal, state, and local governments in 2000. In addition, travel and tourism represents the top services export for the United States and produced a travel trade surplus of nearly \$9 billion in 2001.

However, data collected by the Department of Commerce shows that

in 2001, international travel to the United States dropped by 11 percent and tourism spending fell by 12 percent. Most of these losses were incurred immediately following September 11. In addition, the travel trade surplus declined by 38 percent. And while state and city figures for 2001 are not yet in, Commerce predicts that destinations that rely on air travel and states whose visitors have to travel from longer distances will be most hurt. Destinations with heavy reliance on business travelers will also see deep declines.

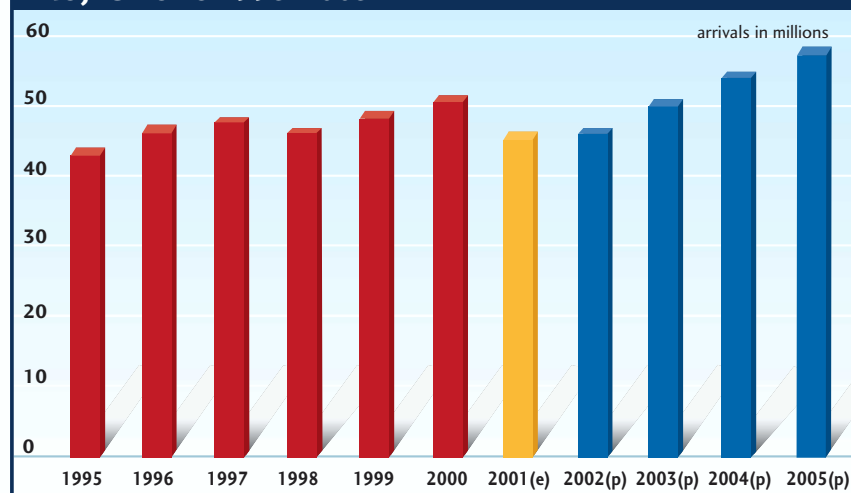
But there is good news. According to recent figures released by the

Department of Commerce, international travelers are beginning to return to the United States. Commerce's semi-annual *Forecast of International Travel to the United States* shows a recovery to the record visitation levels of 2000 by 2004 and real growth in 2005.

The key markets responsible for an improved long-term forecast are our neighbors, Canada and Mexico. The number of visitors from these markets is expected to grow by 35 and 26 percent, respectively, between now and 2005.

Europe is also expected to rebound by 2003, especially as its economy

INTERNATIONAL ARRIVALS TO THE UNITED STATES AND PROJECTIONS 1995-2005



Source: U.S. Department of Commerce; Secretaria de Turismo (Mexico); Statistics Canada
e = preliminary estimate; p = projection; One or more nights.



strengthens. Total visitor arrivals to the United States were down 19 percent in 2001, but arrivals should bounce back with 10 percent growth in 2003.

The strength of the European recovery is with the top market, the United Kingdom, which will maintain its new lead position over Japan as the top overseas source market. Japan was consistently the top source of international visitors to the United States until 2001, and in fact it has been the top source for 28 of the last 30 years. However, Japan is forecasted for weak growth this year. Economic improvements are anticipated, and Japan should see an overall increase of 23 percent over the 2001 levels by 2005. A recovery of Asian travelers in general is expected to be slow, with the exception of South Korea, Taiwan, and China, which are forecasted to rebound much more rapidly.

ENCOURAGING RECOVERY

The tourism industry's overall forecasted recovery can be attributed in large part to the administration's immediate response to the drop in tourism following September 11. Recognizing the potential devastating affects to the U.S.

economy, President Bush wasted no time securing our airports and skies. His actions hammered home the message to Americans and people around the world that it is safe to travel to and within the United States.

In addition, Secretary Evans responded to the need to spur travel to the United States by reconvening the Tourism Policy Council (TPC) soon after September 11. The TPC coordinates national policies and programs related to travel and tourism, recreation, and national heritage resources that involve federal agencies. The TPC also provides a forum to ensure that U.S. government agencies work together to enhance consumer confidence in the safety and security of travel, while taking into account the needs of tourists and business travelers.

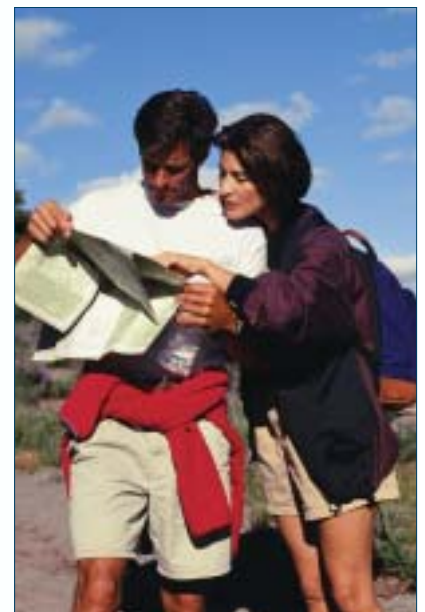
Over 15 federal agencies participate in the TPC meetings where testimony is heard regularly from industry and local government representatives. Through the TPC, issues of concern to all federal agencies that have a role in domestic and international travel and tourism policies can be addressed. The TPC has also

been an effective way for agencies to discuss the impact of new security initiatives, especially on international visitors.

COLLABORATING WITH TOP MARKETS

Secretary Evans has also been a leader in bringing international travelers back to the United States. This has been especially important in markets like Japan, where declines in travel to the United States have been devastating. In 2001, Japanese visitor levels fell from 5 million to 4 million, amounting to a total loss of \$2.3 billion in revenue or exports for the United States from Japanese spending to visit the country.

In an effort to reassure Japan that it is safe to travel to the United States, Secretary Evans hosted a Japanese tourism delegation earlier this year. The Japanese vice-minister for international affairs, Ministry of Land, Infrastructure and Transport, led the delegation. Accompanying him were the heads of Japan's airlines and major travel and tourism industry businesses. During the visit, Secretary Evans highlighted the changes that have been made in this country since September 11 to ensure the safety and security of all travelers. It was this visit that laid the groundwork for an important new partnership between the U.S. and



Japanese governments and our respective travel and tourism industries.

On April 19, in Tokyo, Secretary Evans and Minister Oogi of Japan's Ministry of Land, Infrastructure and Transport signed a memorandum of understanding between our two nations. Evans called the signing a "milestone event" for the travel and tourism industries in the United States and Japan. The signing was witnessed by Japanese Prime Minister Koizumi and U.S. Ambassador to Japan Howard Baker.

The memorandum formalized the Tourism Export Expansion Initiative, which established a public-private partnership to recover and expand the travel and tourism traveler base between the United States and Japan over the next five years. The council will be led by Secretary Evans and Minister Oogi or their designees and co-chaired by John Marriott III,



executive vice-president of Marriott Corporation, and George Kirkland, president of the Los Angeles Convention and Visitors Bureau. They will work with their counterparts in Japan on this council.

In an effort to replicate this memorandum of understanding, the Department of Commerce has formulated a key markets strategy, which focuses attention on the top five markets for overseas visitors, namely, Japan, the United Kingdom, Germany, France, and Brazil. Canada and Mexico, as they rank first and second as source markets for international visitors, will also be a part of the key markets strategy in the future. In addition, policy missions, collaborative research, and intensified attention will be generated to help reinvigorate these key source markets for travel to the United States.

While travel and tourism to the United States has indeed suffered, the Bush administration has proven its commitment to the recovery and growth of this vital industry. This administration is determined to ensure that travel to the United States is safe and secure. We will continue to work to welcome visitors back to our country and see to it that the U.S. travel and tourism industry flourishes for years to come. ■

For more information on the U.S. travel and tourism industry, visit <http://tinet.ita.doc.gov>.

ESTIMATES AND PROJECTIONS OF TRAVEL TO THE U.S.

(in thousands)	2001e	2005p	2005p/2001e % Change
EUROPEAN TRAVEL			
U.K.	4,199	5,464	30%
Germany	1,347	1,698	26%
France	935	1,201	28%
Italy	491	621	27%
Netherlands	432	571	32%
Europe Total	9,815	12,210	24%
ASIA PACIFIC TRAVEL			
Japan	4,124	5,064	23%
South Korea	627	852	36%
Australia	445	581	31%
China/Hong Kong	406	551	36%
Taiwan	362	481	33%
Philippines	181	228	26%
New Zealand	158	212	34%
Thailand	74	93	26%
Asia-Pacific Total	6,377	8,062	26%

Source: U.S. Department of Commerce.
Some variance in data may occur due to rounding e = preliminary estimate; p = projection.

COMING TO AMERICA

PROMOTING FRENCH TOURISM TO THE USA

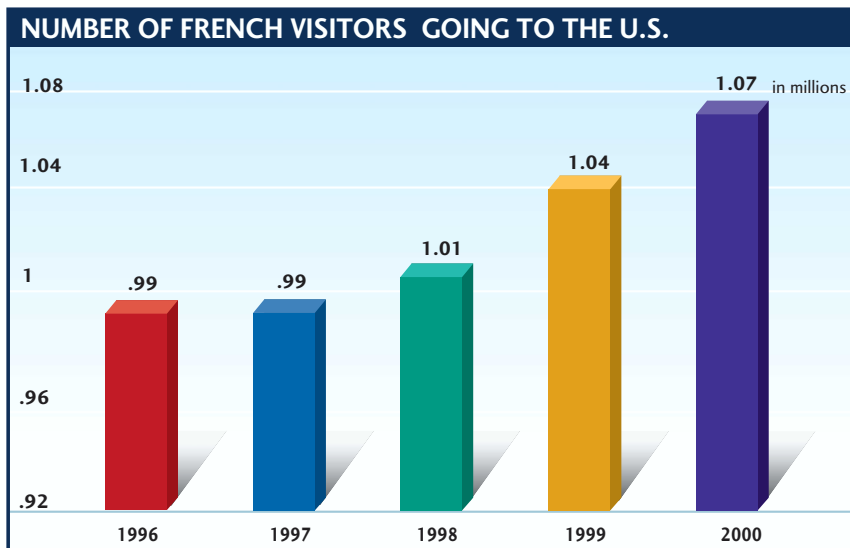
by Valerie Ferriere and Ronald Soriano

Commercial Service France

Reviving the U.S. pavilion at Top Resa, France's leading travel and tourism trade show seemed a simple enough idea in the fall of 2000. The last time a U.S. pavilion was part of the show was 1995. Little did the meeting participants know that a year later, they would be trying to promote travel to the United States in the wake of the events of September 11, 2001.

U.S. PAVILION IS CENTER OF ATTENTION

Top Resa attracts more than 15,000 travel and tourism professionals. Top Resa 2001, held September 20-22, 2001, in Deauville, on the coast of Normandy, offered plenty of challenges, not the least of which was Commercial Service France's recruitment of U.S. tourist destinations



willing to exhibit at the show. Fifteen signed up following an extensive promotional campaign. The events of September 11 caused concern that many of the exhibitors would choose not to participate. As it turned out, all

but one of the destinations originally slated to exhibit in the U.S. pavilion managed to fulfill their commitments. The destinations represented included, among others, the City of New York, the National Capital Area (Maryland, Virginia, and Washington, DC), Chicago and the State of Illinois, the State of Pennsylvania, Houston and the State of Texas, Visit Florida, Orlando, and Palm Beach County (Florida).

Then French Minister of Tourism Michelle Demessine opened the show with a "minute of silence" in front of the New York booth in the U.S. pavilion, an emotional moment for all show participants. The U.S. pavilion attracted a great deal of media coverage, including major television networks. Hundreds of people visited the pavilion to express their solidarity with the United States and to obtain information on the various destinations represented.





TOP DESTINATION FOR FRENCH TRAVELERS

The United States is the top long-haul destination for French travelers abroad and the sixth most important overall. According to the Visit USA Committee in France, the annual growth rate of French travelers to the United States had been 13 percent until 2000, higher than that of German and British travelers. Today, however, the challenge remains great for American destinations, as travelers seek destinations closer to home. More than 1.1 million French travelers went to the United States in 2000.

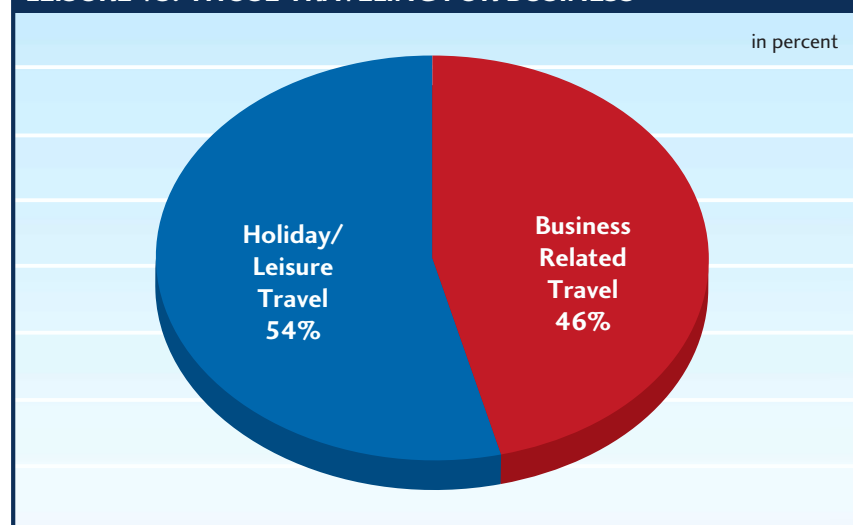
Nevertheless, the French, particularly young people, remain interested in traveling to the United States. While New York, Florida, and California continue to be top choices for first- and second-time travelers, other destinations are increasingly popular, particularly those in the Rocky Mountain states, the Southwest, and the Midwest.

VISIT USA COMMITTEE ACTIVITIES IN FRANCE

The Visit USA Committee has tirelessly promoted travel to the United States, even during troubled times, by urging tour operators to offer special

travel packages. The Commercial Service office at the U.S. Embassy in Paris has been working closely with the local Visit USA Committee and individual U.S. destinations to develop French travel to and tourism in the

PERCENTAGE OF FRENCH TRAVELING TO THE U.S. FOR LEISURE VS. THOSE TRAVELING FOR BUSINESS



United States. The first U.S. pavilion at Top Resa in five years was only the most visible and fruitful of such efforts.

THE ROAD AHEAD

Almost a year later, there are signs that travel to the United States from France is recovering. The Visit USA Committee and other trade professionals remain cautiously optimistic that travel and tourism will continue to improve. As then French Prime Minister Lionel Jospin stated when he concluded France's national conference on tourism last year in Paris, the traveler is "motivated by the curiosity of differences" and thus cannot be long deterred in exploring new places. At Top Resa 2001, three destinations, Key West, Ft. Lauderdale, and Pennsylvania, reported placements in tour operators' catalogs, a measure of success in the industry. In addition, the recent leveling of the euro and the dollar will also stimulate travel, as America appears more affordable than ever.

TOP RESA 2002 SOLD OUT

The U.S. pavilion at Top Resa 2002, to be held again in Deauville, September 19-21, 2002, is already sold out. Twenty-one destinations have signed up, with most of the exhibitors from 2001 scheduled to return. Although the Commercial Service in France



The U.S. Pavilion at Top Resa makes the cover of *Tour Hebdo*, France's leading tourism magazine.



Minute of Silence at U.S. Pavilion at Top RESA (September 20, 2001): from left to right, President of Visit USA Committee Michel-Yves Labbe, Cesar Balderacchi, President of National Association of Travel Agents, French Minister of Tourism Michelle Demessine.

is pleased with what has been accomplished, it is not very surprised by the response.

The most important impetus to tourism is that, in the spirit of the need for life to continue and develop, people will always seek travel opportunities. Discovering new lands and interacting with the people of those lands are part of the human condition. Exploring and understanding different cultures creates more peaceful relationships between people. Both private sector organizations and governments at every level need to make the necessary effort and investment to ensure that tourism continues to grow in the years ahead.

ROLE FOR THE COMMERCIAL SERVICE

In its own way, the Commercial Service in France is determined to continue to promote what is the world's greatest and most diversified destination, the

United States of America. The beauty and expanse of its land is only surpassed by the spirit and courage of its people, as exemplified by the U.S. exhibitors at Top Resa 2001. The Commercial Service stands all the more ready and available to assist U.S. destinations to market themselves in France, through promotional missions, seminars, and, of course, trade events like Top Resa. ■

For more information about French-U.S. travel and tourism promotion, contact the U.S. embassy in Paris at www.csfrance.amb-usa.fr, or e-mail Valerie.Ferriere@mail.doc.gov.

TOURISM TRADE PROMOTION EVENTS 2002 – 2003**ARGENTINA**

October 19 – 22, 2002

The 7th Annual FIT

(Feria Internacional de Turismo)

Predio Ferial de Palermo

Buenos Aires, Argentina

FIT 2002 will bring together exhibitors from all over the world. A combined audience of more than 15,000 trade and consumer buyers visited FIT during 2001.

Contact: Tel: 305-66-7650

Fax: 305-66-7399

E-mail: fconil@conexgroup.com

www.conexgroup.com

AUSTRALIA

February 2 – 6, 2003

Visit USA

Perth, Melbourne, Sydney and Brisbane, Australia

Contact: Monique Roos

Tel: 61 2 937 3 9210

E-mail: Monique.Roos@mail.doc.gov

CANADA

October 2, 2002

See America Pavilion

Toronto, Canada

Contact: Viktoria Palfi

Tel: 416-595-5412 x229

E-mail: Viktoria.Palfi@mail.doc.gov

FINLAND

January 16 – 19, 2003

Matka Travel Fair 2003

Helsinki, Finland

The International Matka Travel Fair is organized annually and is the largest travel fair in Scandinavia by number of visitors.

Contact: Merja Poikolainen

Tel: 359-9-171-931

Email: Merja.Poikolainen@mail.doc.gov

FRANCE

September 20 – 23, 2002

Top Resa 2002 - Travel & Tourism

U.S. Pavilion

Deauville, France

The U.S. pavilion at Top Resa 2002 is the most effective business platform to tackle the French travel and tourism market. Given the strong potential of the French market, the U.S. Department of

Commerce's Commercial Service at the U.S. embassy in Paris is working in close coordination with the Visit USA Committee France and Top Resa to offer a unique opportunity to promote travel and tourism to U.S. destinations.

Contact: Valerie Ferriere

Tel: 33 1 43 12 27 70

E-mail: Valerie.Ferriere@mail.doc.gov

ITALY

February 19 – 23, 2003

BIT 2003

Milan, Italy

Contact: Simonetta Busnelli

Tel: 39 02 659 2260

E-mail:

Simonetta.Busnelli@mail.doc.gov

JAPAN

September 24 – 27, 2002

See America Week 2002 – Japan

Tokyo, Japan

A series of tourism promotion events in coordination with the Japan Visit USA Committee and the Travel Industry Association of America.

Contact: Yoko Hatano

Tel: 81-3-3224-5318

E-mail: Yoko.Hatano@mail.doc.gov

NEW ZEALAND

September 26, 2002

US Marine Scene

Auckland, New Zealand

In conjunction with the start of the Louis Vuiton Cup on October 1, 2002, post plans to have a catalog show.

Contact: Lisa Struneski

Tel: 649 309 9812

E-mail: Lisa.Struneski@mail.doc.gov

NORWAY

January 9 – 12, 2003

Reiseliv 2003

Oslo, Norway

The annual Reiseliv is Norway's only national travel and tourism show. The show is one of the premier travel shows in northern Europe.

Contact: James Koloditch

Tel: 47 21 30 87 60

E-mail: James.Koloditch@mail.doc.gov

PORTUGAL

January 22 – 26, 2003

BTL – Bolsa de Turismo de Lisboa

Contact: Ana Vila

Tel: 351 21 770 2532

E-mail: Ana.Vila@mail.doc.gov

SWITZERLAND

October 29 – 31, 2002

TTW 2002 - Travel Trade**Workshop**

Bern, Switzerland

TTW is the main trade event covering Switzerland's \$9 billion (outbound) travel market. Some 1,000 exhibitors from over 100 countries attend.

Contact: Werner Wiedmer

Tel: 41 31 357 7342

E-mail:

Werner.Wiedmer@mail.doc.gov

UKRAINE

October 9 – 12, 2002

Transportation & Logistics and Ukraine 2002

Tourism Salon

Kiev, Ukraine

National Exhibition Center, Kiev

Contact: Yuriy Prikhodko

Tel: 380 44 490 0424

E-mail:

Yuriy.Prikhodko@mail.doc.gov

UNITED KINGDOM

November 10 – 15, 2002

World Travel Market

Earl's Court Convention Center

London, United Kingdom

World Travel Market is one of the key trade shows in Europe for the travel and tourism industry.

Contact: Ingeborg Doblinger

Tel: 43 1 31339 2120

E-mail:

Ingeborg.Doblinger@mail.doc.gov

UPCOMING TRADE EVENTS

AUGUST - DECEMBER 2002

DATES	EVENT	LOCATION
August 26 – 29	Comdex Korea Comdex Korea is one of the largest IT and telecommunication exhibitions in South Korea. U.S. IT and telecommunication companies will find this event an excellent chance to expand their market exposure in the South Korean market.	Seoul, South Korea
September 1 – 3	Lyon Mode City Lyon Mode City is the top lingerie and swimwear trade show in the world. It brings together over 800 exhibitors from some 27 different countries. The last show in 2000 attracted more than 18,000 visitors.	Lyon, France
September 3 – 6	GlobTronics GlobTronics integrates six specialized electronics exhibitions. The event covers the full spectrum of products and services in microelectronics systems integration and components. The Commerce Department is sponsoring an American Product Literature Center and will display participating company catalogs, sales brochures, and other graphic sales aids.	Singapore
September 3 – 6	La Cumbre La Cumbre is the premier travel industry conference for the sales and marketing of travel to the United States from Latin America and the Caribbean. The event, now in its 13th year, features a structured, computer-matched marketplace enabling buyers and suppliers to meet during scheduled appointments.	Las Vegas, Nevada
September 4 – 7	Asia Food Expo 2002 Asia Food Expo 2002 is the largest trade show for the food industry in the Philippines. More than 600 local and foreign exhibitors participated in the 2000 show, which attracted over 18,000 visitors.	Manila, Philippines
September 15 - 24	Medical Device Trade Mission The Commerce Department plans to lead a trade delegation of up to 17 U.S. medical device companies to major metropolitan centers in China. Group briefings from local experts, regulatory officials, and embassy and consulate staff, visits to medical facilities, and one-on-one meetings specially arranged based upon each firm's business interests will help participating U.S. companies make the contacts needed to establish or expand business in China's fast-growing medical market.	Beijing and Chendu, China; Hong Kong
September 17 – 22	Automechanika Exhibition Automechanika is the largest and most important automotive parts and accessories trade event in the world. It occurs every two years. Automotive industry trade associations organize four to six group pavilions for U.S. companies.	Frankfurt, Germany
September 18 – 20	Global Franchising 2002 The fourth annual Global Franchising Expo will be held in the International Convention and Exhibition Center in Suntec City, Singapore. This year's themes for franchising opportunities include retail trade, food service, and service industries.	Suntec City, Singapore
September 18 – 22	Intermot '02 The Intermot International Trade Fair for Motorcycles and Scooters is the world's key trade fair in this industry. It is held every two years and is both a classic trade fair and a fascinating show for the general public. In 2000 a record number of exhibitors, more than 1,000 from 33 countries, took part. There were almost 150,000 visitors from 85 countries.	Munich, Germany
September 19 – 20	RepCan Montreal Matchmaker RepCan Montreal 2002 is designed to help small American firms establish long-term business relationships in the Canadian market. The United States is Quebec's seventh-largest trading partner, with more than 40 percent of its imports coming from the United States. Montreal, with an annual economic production estimated at \$70 billion, ranks as the number one city in North America for density of high-tech jobs.	Montreal, Canada
September 25 – 28	Manufacturing Indonesia 2002 Manufacturing Indonesia is the largest manufacturing show in Indonesia, and it is the only event of its kind targeted solely to trade professionals. In 2001, this show brought together 1,151 exhibitors in nine national pavilions, and it registered 26,861 industry professionals from over 30 countries representing a broad spectrum of manufacturing sectors.	Jakarta, Indonesia

INDUSTRY CONTACT INFORMATION

Computers/ Peripherals, Software, Services	Chris Ahn Tel: (+82 2) 397-4186 E-mail: Chris.Ahn@mail.doc.gov
Apparel	Pamela Kirkland Tel: (202) 482-3587 E-mail: Pamela_Kirkland@ita.doc.gov
Microelectronics	Marlene Ruffin Tel: (202) 482-0570 E-mail: Marlene_Ruffin@ita.doc.gov
Tourism	La Cumbre, Inc. Tel: (904) 285-3333 Web site: www.lacumbre.com
Food Processing/ Packaging Equipment	Cleo Alday Tel: (632) 888-6619 E-mail: Cleo.Alday@mail.doc.gov
Medical Equipment	Lisa Huot Tel: (202) 482-2796 E-mail: Lisa_Huot@ita.doc.gov
Automotive Parts/Sporting Goods	Michael Thompson Tel: (202) 482-0671 E-mail: Michael_Thompson@ita.doc.gov
Franchising	Sharon Slender Tel: (201) 652-7070 E-mail: Sharon@Kallmanic.com Web site: www.kallman.com
Automotive Parts/Sporting Goods	Edward Kimmel Tel: (202) 482-3640 E-mail: Edward_Kimmel@ita.doc.gov
Multi-industry	Connie Irrera Tel: (514) 398-9695, ext. 2262 E-mail: Connie.Irrera@mail.doc.gov
Multi-industry	Kalung Riang Tel: 62-21 526 2850 Ext.3010 E-mail: Kalung.Riang@mail.doc.gov

HIGHLIGHTED EVENTS**AEROSPACE TRADE MISSION TO VIETNAM****AUGUST 25 – 31, 2002****HANOI AND HO CHI MINH CITY, VIETNAM**

The Office of Aerospace, in the Department of Commerce's International Trade Administration, will lead an aerospace mission to Vietnam. Vietnam offers substantial market opportunities for aerospace companies and is one of the more attractive markets in Asia.

The mission will include representatives from a variety of U.S. aerospace firms interested in gaining a foothold in the fast-growing Vietnamese aerospace market. The program's goals are to gain first-hand market information and to provide access to key government officials and potential business partners for U.S. aerospace firms desiring to expand their presence in Vietnam.

Contact: Mara Yachnin,
Office of Aerospace
Tel: (202) 482-6238
E-mail: Mara_Yachnin@ita.doc.gov

DEPUTY SECRETARIAL BUSINESS DEVELOPMENT MISSION**SEPTEMBER 8 – 13, 2002****MONTREAL, TORONTO, OTTAWA, AND VANCOUVER, CANADA**

Deputy Secretary of Commerce Samuel Bodman will lead a senior-level business development mission to Montreal, Toronto, Ottawa, and Vancouver, Canada.

The focus of the mission will be to help U.S. companies explore business opportunities in Canada. The delegation will include approximately 15 U.S.-based senior executives of small, medium, and large U.S. businesses representing, but not limited to, the following key growth sectors: automotive, information technology, telecommunications, safety and security, electric power generation, aerospace, and pharmaceuticals.

The business development mission will provide participants with exposure to high-level business and government contacts and an understanding of market trends and the commercial environment. American embassy officials will provide a detailed briefing on the economic, commercial, and political climate, and participants will receive individual counseling on their specific interests from U.S. Commercial Service industry specialists. Meetings will be arranged as appropriate with senior government officials and potential business partners. Representational events also will be organized to provide mission participants with opportunities to meet Canada's business and government representatives.

Contact:
Office of Business Liaison
Tel: (202) 482-1360
Fax: (202) 482-4054

DATES	EVENT	LOCATION
September 26 – 29	Aquatech 2002 Aquatech is one of the largest and most important events in the water sector. It draws not only Europeans but a worldwide audience. The American Product Literature Center offers smaller companies a very cost-effective market introduction and contact with potential representatives.	Amsterdam, The Netherlands
September 30 – October 2	Golf Europe Golf Europe is a specialized show for golf course operators. Germany itself is the fastest-growing and fifth-largest foreign market for U.S. golf equipment. The focus of the show is on golf equipment, accessories, apparel, and other golf-related products.	Munich, Germany
October 7 – 12	The Bucharest International Trade Fair The Bucharest International Trade Fair is the leading commercial event in Romania and one of the most prominent trade fairs in Eastern Europe. It is a general technical fair, with a strong emphasis on industrial equipment and industrial consumer goods.	Bucharest, Romania
October 8 – 12	Machine Tools and Robotics Catalog Show The catalog show will take place in connection with the technical fair, which is the leading Scandinavian industrial trade fair, attracting visitors from northern European and Baltic Sea countries. The product groups include machine tools, robotics, industrial IT, special welding, and other industrial techniques.	Stockholm, Sweden
October 10 – 13	Corporate Executive Office (CEO) Mission at Expopharm '02 Expopharm '02 is Europe's largest pharmaceutical, over-the-counter products, and health supplements show, with over 450 exhibitors and over 20,000 trade-only visitors from 67 countries. The Corporate Executive Office (CEO) at Expopharm is organized by the U.S. Department of Commerce to provide an alternative to exhibiting individually.	Berlin, Germany
October 14 – 18	Aerospace Business Development Mission The Aerospace trade mission will focus on regional airport infrastructure, ground support equipment, perimeter security, baggage handling, cargo operations, aircraft maintenance, and air traffic control systems. Participants will visit six regional airports and meet with civil aviation procurement officers in one-on-one and group settings.	Durbin and Johannesburg, South Africa
October 15 – 18	R&D in Life Sciences and REACH for Process Solutions The international trade show for life sciences research has joined with REACH for Process Solutions to form this event. The show takes advantage of Basel as a European center for the pharmaceutical and chemical industries. Some 200 relevant companies are headquartered in the area. All of these large companies will contribute to the conference, which will be attended by over 1,500 researchers and industry representatives.	Basel, Switzerland
October 29 – November 1	Fire Rescue Safety & Security Expo Security and safety equipment and services are in high demand in Indonesia and represent an excellent opportunity for U.S. suppliers.	Jakarta, Indonesia
November 4 – 8	Laboratory, Analytical, and Scientific Instruments Brussels, Belgium, and Utrecht, the Netherlands, are the stops for a laboratory, analytical, and scientific instruments matchmaker trade delegation. The focus of the delegation will be to match participating U.S. companies with qualified agents, distributors, representatives, licensees, and joint venture partners in these markets.	Brussels, Belgium, and Utrecht, The Netherlands
November 6 – 8	Metal Mechanica 2002 This is the fourth international exhibition and conference for precision metal forming, steel construction, manufacturing, transportation, welding, electro-mechanical technologies, and related arts and sciences. This event attracts more than 200 exhibitors and 4,500 professional trade visitors.	Mexico City, Mexico
November 13 – 17	Aviex 2002 Air Show This business forum and exhibition is for the general aviation industry. This year's annual Airline Pilots and Owners Association Conference will be held in conjunction with Aviex. The professional environment will enable small and medium-sized companies to gain exposure for their products and services.	Sydney, Australia
November 29 – December 8	Essen Motor Show This is Europe's largest trade event for automotive specialty products. It focuses on customizing and tuning. It attracts close to 400,000 visitors from the specialty equipment trade as well as car enthusiasts from the general public.	Essen, Germany
December 2 – 7	ITU Telecom Asia 2002 This fair will be the largest and most successful regional telecom event ever, attracting world and regional leaders from telecommunications industries and information technology fields, as well as key government officials from across the region. More than 30,000 buyers and 20,000 exhibitors will be present.	Hong Kong

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ELECTRIC POWER TRADE MISSION**SEPTEMBER 30 – OCTOBER 4, 2002
VIETNAM AND THAILAND**

The Deputy Assistant Secretary for Basic Industries will lead an electric power trade mission to Hanoi and Ho Chi Minh City, Vietnam and Bangkok, Thailand. The mission will include representatives from U.S. electric power companies and equipment manufacturers interested in entering or expanding their presence in Vietnam and Thailand.

Although there is currently an excess of generating capacity in Thailand due to the economic downturn of a few years ago, there are many medium-term opportunities for U.S. companies. Demand is expected to increase in about 2006, and the Electricity Generating Authority of Thailand (EGAT) is planning to re-power some older hydro and thermal power plants to meet this demand.

During this week-long visit to Bangkok, Hanoi and HCMC, U.S. Commercial Service posts will host briefings by leading Vietnamese and Thai experts, industry counseling by American experts on the Vietnamese and Thai market, one-on-one meetings with pre-qualified potential partners/end-users, and a reception for U.S. delegates and significant Vietnamese and Thai contacts.

Contact: Andy Collier,
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Email: Andy_Collier@ita.doc.gov

INFORMATION SECURITY TRADE MISSION**OCTOBER 28- NOVEMBER 1, 2002
BRUSSELS, PARIS, AND AMSTERDAM**

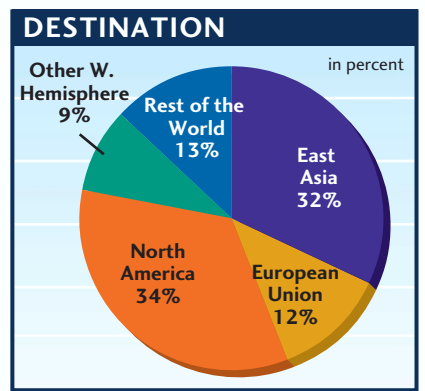
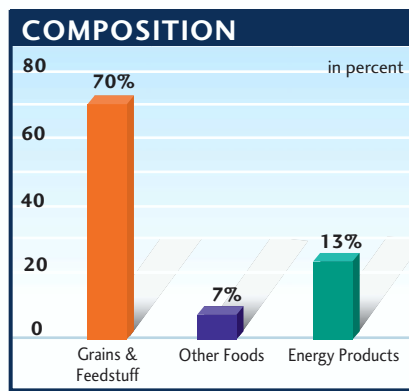
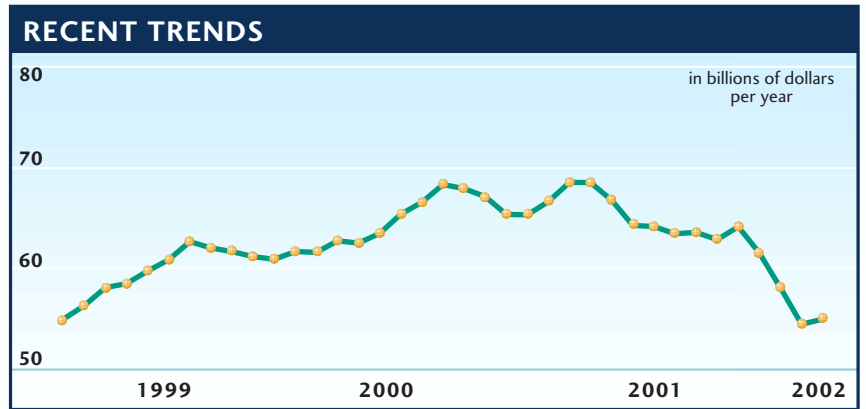
Information systems security is a rapidly rising priority in Europe and has become a mandatory budget line in corporate IT budgets. The total European market for security products will more than triple from \$1.8 billion in 2000 to \$6.2 billion in 2005. Given this fast-growing market, the Software & Information Industry Association and Michelle O'Neill, deputy assistant secretary for information technology industries at the U.S. Department of Commerce, are co-leading an information security trade mission to Brussels, Paris, and Amsterdam from October 28 to November 1. The mission opens in Brussels with a full-day seminar highlighting key drivers affecting the security market, and corporate and government strategies in the information security arena. In addition, the mission will feature market briefings, tailored one-on-one meetings for each participating company, and networking events at each stop. This itinerary is designed to help U.S. information security companies learn about the markets, build partnerships, and increase sales in Europe. The mission cost is \$4,000. Participants are accepted on a first-come, first-serve basis. For more information see www.siiia.net/divisions/global/trademissions/tmparis.html.

Contact: Eric Fredell
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QUARTERLY TRADE DATA

AS OF FIRST QUARTER 2002

FOOD AND ENERGY



MATERIALS

Monthly data are centered three-month moving averages, based on seasonally adjusted figures and expressed as annual rates.

Product categories (except for services) are based on end-use classification. Commercial services include all private services.

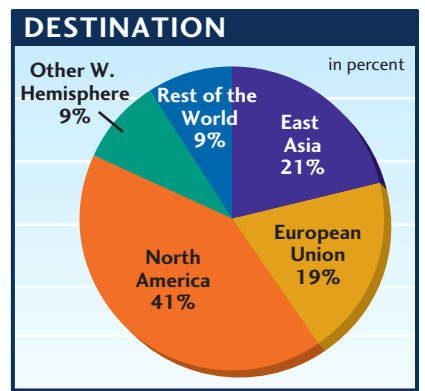
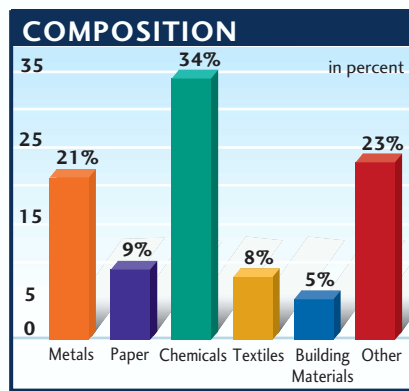
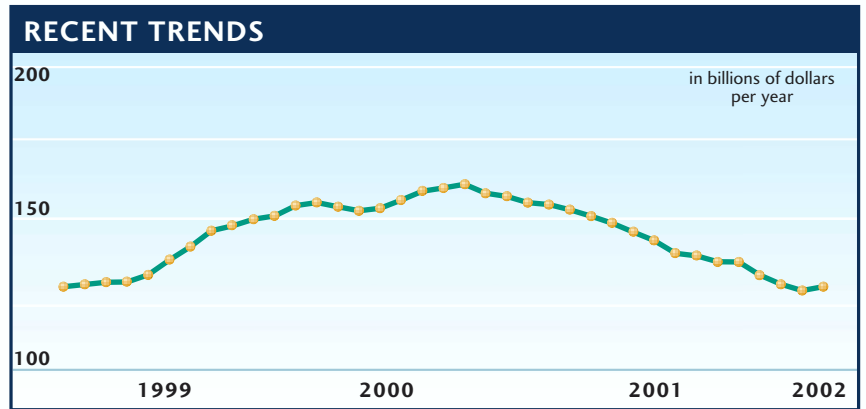
North America: Canada and Mexico.

European Union: Austria, Belgium, Denmark, France, Finland, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, Sweden, and the United Kingdom.

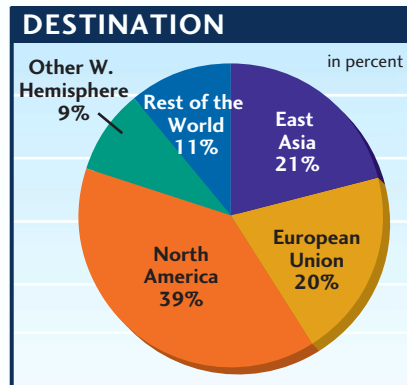
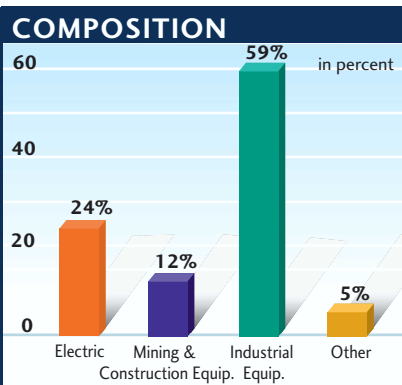
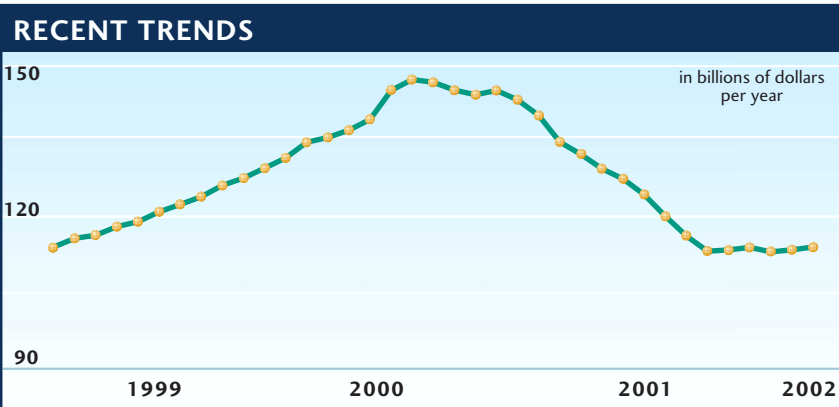
East Asia: China, Hong Kong, Indonesia, Japan, Malaysia, the Philippines, Singapore, South Korea, Taiwan, and Thailand.

The chart showing exports of services by region is based on data for calendar year 2000. Other charts showing product mix and geographic destination are based on data for the year ending April 2002.

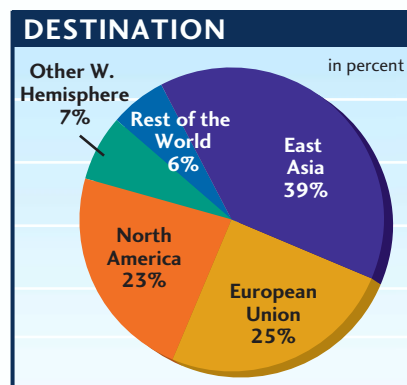
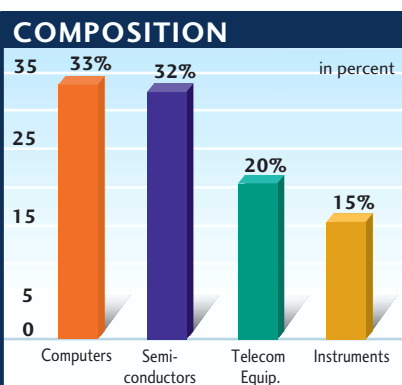
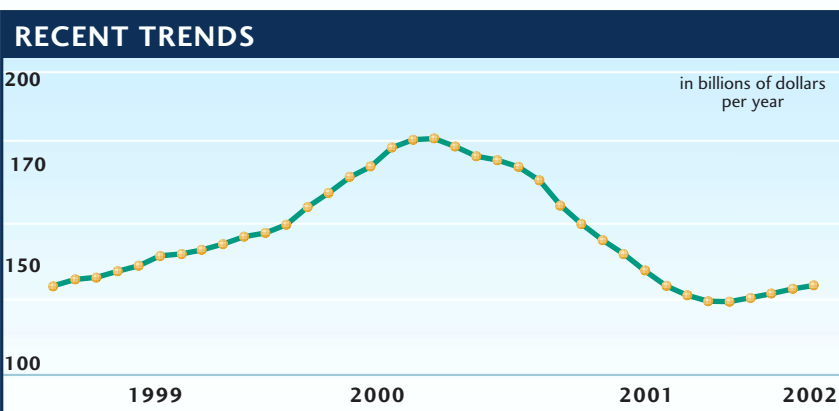
Source: Bureau of the Census (goods), Bureau of Economic Analysis (services).



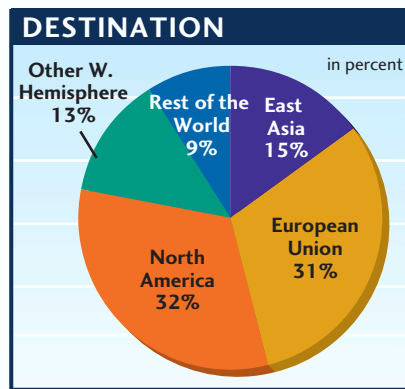
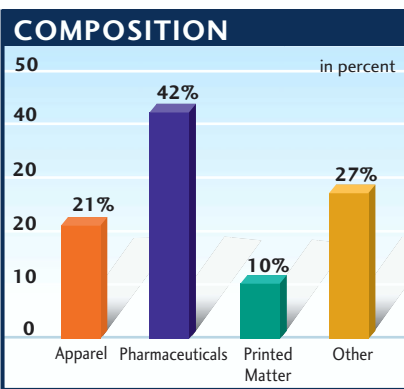
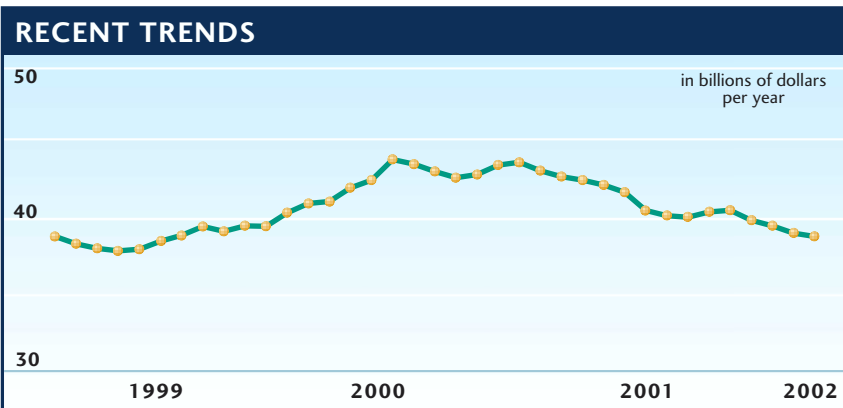
MACHINERY



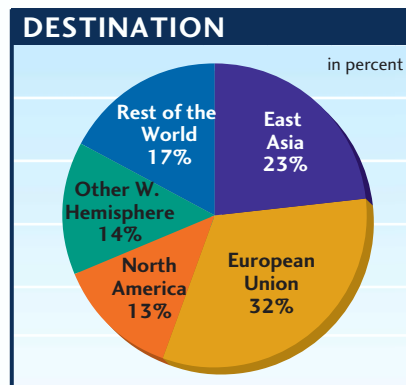
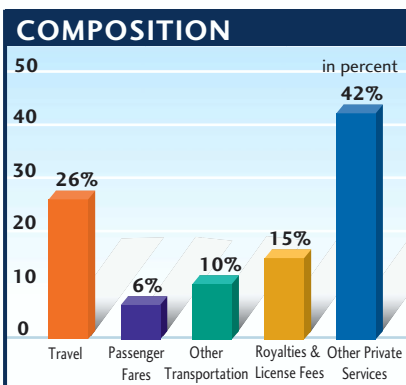
ELECTRONICS AND INSTRUMENTS



CONSUMER NON-DURABLES



COMMERCIAL SERVICES



Additional information is available from the International Trade Administration (www.trade.gov/tradestats), the Bureau of the Census (www.census.gov/foreign-trade/www/) and the Bureau of Economic Analysis (www.bea.gov).

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