

# Electronic Products

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## *Change in 2006 from 2005:*

**U.S. trade deficit: Increased by \$13.0 billion (9 percent) to \$162.8 billion**  
**U.S. exports: Increased by \$13.8 billion (9 percent) to \$169.2 billion**  
**U.S. imports: Increased by \$26.8 billion (9 percent) to \$332.1 billion**

For the fifth consecutive year, the U.S. merchandise trade deficit in electronic products increased in 2006 (table ET-1). The trade deficit increased by \$13.0 billion (9 percent), primarily because of a surge in U.S. imports of computers, peripherals, and parts (\$8.5 billion); television receivers and video monitors (\$5.9 billion); and telephone and telegraph apparatus (\$4.1 billion). Declining prices and continued strong domestic demand for computer products, especially portable products such as laptop PCs, drove the rise in U.S. imports of computers, peripherals, and parts.<sup>1</sup> Increased consumer demand for flat-panel display color television receivers and video monitors fueled the increase in U.S. imports of television receivers and video monitors.<sup>2</sup> Finally, the increase in U.S. imports of telephone and telegraph apparatus was prompted mainly by significant growth in the U.S. telecommunications services market.<sup>3</sup>

U.S. exports of electronic products increased in 2006 by \$13.8 billion (9 percent) to \$169.2 billion (table ET-1). Leading U.S. export sectors were semiconductors and integrated circuits (\$3.0 billion); medical goods (\$2.3 billion); and measuring, testing, and controlling instruments (\$2.3 billion) (table ET-1). Healthy global economic conditions, which created strong demand from foreign electronic systems producers, contributed to increased U.S. semiconductor exports.<sup>4</sup> Increases in U.S. medical goods exports were driven mainly by demand for the latest U.S. innovations in cardiovascular and orthopedic products from the EU.<sup>5</sup> The expansion of U.S. exports of measuring, testing, and controlling instruments benefitted from strong growth in leading country destinations, namely Canada, China, Germany, Japan, and Mexico (table ET-10).<sup>6</sup>

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<sup>1</sup> IDC, "Portable PC Adoption and Emerging Markets."

<sup>2</sup> Wolk, "For TV Retailers."

<sup>3</sup> TIA, "TIA Report: Broadband Demand."

<sup>4</sup> SIA, "Global Chip Sales."

<sup>5</sup> Diller and Gold, 16–19.

<sup>6</sup> OECD, "Country Summaries."

**TABLE ET-1** Electronic products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
China	4,855	5,934	6,902	7,951	11,111	3,160	39.7
Mexico	18,965	16,414	17,383	16,609	18,333	1,724	10.4
Japan	11,810	11,348	11,231	10,963	11,534	571	5.2
Malaysia	5,997	7,290	6,546	6,314	6,960	645	10.2
Canada	17,025	16,637	17,559	18,894	18,336	-558	-3.0
Taiwan	5,961	5,555	5,624	5,463	5,911	448	8.2
Korea	6,380	7,085	7,388	7,896	8,421	524	6.6
Germany	7,639	7,633	7,526	7,944	9,111	1,167	14.7
Singapore	4,600	4,992	6,004	6,039	6,035	-4	-0.1
United Kingdom	7,432	7,065	8,112	7,509	7,492	-17	-0.2
All other	49,764	50,887	55,175	59,825	66,005	6,181	10.3
<b>Total</b>	<b>140,428</b>	<b>140,838</b>	<b>149,450</b>	<b>155,408</b>	<b>169,248</b>	<b>13,840</b>	<b>8.9</b>
EU-15	34,805	34,703	36,641	37,681	40,178	2,497	6.6
EU-25	35,672	35,604	37,600	38,807	41,546	2,739	7.1
OPEC	1,981	1,888	2,957	3,752	4,652	900	24.0
Latin America	27,705	24,648	26,798	27,548	31,745	4,197	15.2
CBERA	2,883	3,098	3,101	3,433	4,347	914	26.6
Asia	51,835	55,638	57,832	59,412	65,098	5,686	9.6
Sub-Saharan Africa	637	778	878	1,008	1,232	223	22.2
Central and Eastern Europe	823	942	996	1,192	1,424	232	19.5
U.S. imports of merchandise for consumption:							
China	36,270	47,150	69,153	86,716	103,117	16,401	18.9
Mexico	35,029	34,560	38,945	40,160	47,044	6,884	17.1
Japan	30,745	29,177	32,020	31,510	30,835	-675	-2.1
Malaysia	19,501	20,695	22,273	27,554	29,401	1,846	6.7
Canada	10,605	9,768	10,960	12,457	11,930	-526	-4.2
Taiwan	16,594	15,654	16,418	16,221	18,332	2,112	13.0
Korea	15,411	15,955	19,699	15,381	14,331	-1,050	-6.8
Germany	7,295	7,983	9,039	9,963	10,919	956	9.6
Singapore	10,669	10,066	10,477	9,853	10,296	443	4.5
United Kingdom	4,597	4,795	5,317	5,411	5,530	119	2.2
All other	42,530	43,030	45,846	50,043	50,329	287	0.6
<b>Total</b>	<b>229,245</b>	<b>238,833</b>	<b>280,146</b>	<b>305,268</b>	<b>332,065</b>	<b>26,797</b>	<b>8.8</b>
EU-15	27,220	28,986	31,986	33,750	34,036	286	0.8
EU-25	28,655	30,656	34,063	36,087	36,279	192	0.5
OPEC	2,093	1,761	2,067	2,233	1,758	-474	-21.2
Latin America	38,299	38,105	41,742	43,528	50,217	6,689	15.4
CBERA	1,732	2,164	2,068	2,306	2,319	13	0.6
Asia	145,645	153,491	185,897	205,118	224,669	19,551	9.5
Sub-Saharan Africa	50	66	71	76	85	9	12.0
Central and Eastern Europe	1,207	1,425	1,783	2,136	2,056	-80	-3.7

**TABLE ET-1** Electronic products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>—*continued*

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005		
						Absolute	Percent	
	<i>Million dollars</i>							
U.S. merchandise trade balance:								
China	-31,414	-41,216	-62,251	-78,764	-92,006	-13,242	-16.8	
Mexico	-16,064	-18,146	-21,562	-23,550	-28,711	-5,161	-21.9	
Japan	-18,935	-17,829	-20,789	-20,547	-19,301	1,246	6.1	
Malaysia	-13,504	-13,406	-15,728	-21,240	-22,441	-1,201	-5.7	
Canada	6,420	6,869	6,600	6,437	6,405	-31	-0.5	
Taiwan	-10,633	-10,099	-10,794	-10,758	-12,422	-1,664	-15.5	
Korea	-9,031	-8,869	-12,311	-7,484	-5,910	1,575	21.0	
Germany	345	-350	-1,513	-2,019	-1,808	211	10.4	
Singapore	-6,069	-5,075	-4,473	-3,814	-4,261	-447	-11.7	
United Kingdom	2,835	2,270	2,795	2,098	1,962	-136	-6.5	
All other	7,235	7,856	9,330	9,782	15,676	5,894	60.3	
Total	-88,817	-97,994	-130,696	-149,859	-162,816	-12,957	-8.6	
EU-15	7,585	5,718	4,655	3,931	6,142	2,211	56.3	
EU-25	7,016	4,948	3,538	2,720	5,267	2,547	93.6	
OPEC	-111	127	891	1,519	2,893	1,374	90.4	
Latin America	-10,594	-13,457	-14,945	-15,980	-18,472	-2,492	-15.6	
CBERA	1,151	934	1,033	1,127	2,028	900	79.9	
Asia	-93,811	-97,852	-128,065	-145,707	-159,571	-13,865	-9.5	
Sub-Saharan Africa	587	711	807	932	1,146	214	23.0	
Central and Eastern Europe	-383	-483	-788	-944	-632	312	33.0	

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2006.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

China, Mexico, and Japan were the leading sources of electronics imports in 2006, accounting for 55 percent of total U.S. imports. China accounted for the largest single country import increase in both absolute (\$16.4 billion) and percentage terms (19 percent), attributable to China's role as a leading producer and exporter of electronic products. Electronic sectors which experienced the largest increases in U.S. imports from China were computers, peripherals, and parts (\$6.3 billion); telephone and telegraph apparatus (\$3.7 billion); and television receivers and video monitors (\$2.7 billion). Over the past five years, U.S. imports from China have grown faster than imports from any other source, increasing China's proportion of total U.S. imports from 16 percent in 2002 to 31 percent in 2006. Electronic sectors that registered the largest increases in U.S. imports from Mexico were television receivers and video monitors (\$4.4 billion), telephone and telegraph apparatus (\$1.5 billion), and medical goods (\$437 million). The largest increases in U.S. imports from Japan were semiconductors and integrated circuits (\$475 million); computers, peripherals, and parts (\$145 million); and measuring, testing, and controlling instruments (\$91 million).

Canada, Mexico, Japan, and China were the electronics sector's leading export markets in 2006, accounting for 35 percent of total U.S. exports. China accounted for the largest single country export increase in both absolute (\$3.2 billion) and percentage terms (40 percent). This was due mainly to an increase in U.S. semiconductor exports. Global semiconductor sales in 2006 increased by 8.9 percent, and China is the world's largest semiconductor market.<sup>7</sup>

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<sup>7</sup> SIA, "Global Chip Sales."

TABLE ET-2 Leading changes in U.S. exports and imports of electronic products, 2002–06<sup>a</sup>

Industry/commodity group	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
<b>U.S. EXPORTS:</b>							
<b>Increases:</b>							
Semiconductors and integrated circuits (ET033) . . . . .	31,738	35,712	35,130	34,195	37,227	3,031	8.9
Medical goods (ET040) . . . . .	15,059	16,827	18,433	20,970	23,311	2,341	11.2
Measuring, testing, and controlling instruments (ET043) . . . . .	14,346	14,683	16,603	17,399	19,669	2,270	13.0
Computers, peripherals, and parts (ET035) . . . . .	29,534	28,038	27,350	28,862	29,969	1,106	3.8
Telephone and telegraph apparatus (ET017) . . . . .	12,952	10,946	13,958	14,183	14,779	597	4.2
<b>Decreases:</b>							
Cathode-ray tubes (ET031) . . . . .	1,762	1,202	998	600	292	-308	-51.3
Prerecorded media (ET020) . . . . .	3,069	3,010	3,124	3,422	3,399	-23	-0.7
<b>All other</b> . . . . .	<b>31,969</b>	<b>30,421</b>	<b>33,852</b>	<b>35,777</b>	<b>40,603</b>	<b>4,826</b>	<b>13.5</b>
<b>TOTAL</b> . . . . .	<b>140,428</b>	<b>140,838</b>	<b>149,450</b>	<b>155,408</b>	<b>169,248</b>	<b>13,840</b>	<b>8.9</b>
<b>U.S. IMPORTS:</b>							
<b>Increases:</b>							
Computers, peripherals, and parts (ET035) . . . . .	75,817	76,940	89,264	93,950	102,468	8,518	9.1
Television receivers and video monitors (ET022) . . . . .	10,586	12,654	17,509	22,712	28,628	5,917	26.1
Telephone and telegraph apparatus (ET017) . . . . .	27,948	30,982	39,341	49,220	53,318	4,098	8.3
Medical goods (ET040) . . . . .	13,232	16,143	19,006	20,548	22,152	1,604	7.8
<b>Decreases:</b>							
Radio and television broadcasting equipment (ET023) . . . . .	4,977	4,120	4,309	3,830	3,527	-304	-7.9
Photographic cameras and equipment (ET039) . . . . .	3,029	2,715	2,382	1,880	1,612	-268	-14.2
Prerecorded media (ET020) . . . . .	1,308	1,436	1,503	1,499	1,263	-236	-15.7
<b>All other</b> . . . . .	<b>92,348</b>	<b>93,843</b>	<b>106,831</b>	<b>111,630</b>	<b>119,098</b>	<b>7,468</b>	<b>6.7</b>
<b>TOTAL</b> . . . . .	<b>229,245</b>	<b>238,833</b>	<b>280,146</b>	<b>305,268</b>	<b>332,065</b>	<b>26,797</b>	<b>8.8</b>

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

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# Telephone and Telegraph Apparatus<sup>8</sup>

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*Change in 2006 from 2005:*

**U.S. trade deficit: Increased by \$3.5 billion (10 percent) to \$38.5 billion**

**U.S. exports: Increased by \$597 million (4 percent) to \$14.8 billion**

**U.S. imports: Increased by \$4.1 billion (8 percent) to \$53.3 billion**

The U.S. trade deficit in telephone and telegraph apparatus increased for the fifth consecutive year (table ET-3). U.S. imports continued to outpace exports, increasing by 8 percent in 2006, approximately double the rate of growth for U.S. exports. Import growth was largely driven by increased U.S. demand for a range of sector products and the growth of telecommunications manufacturing in China, Malaysia, and other Asian economies.

Increased demand was reflected in U.S. sales of products such as cellular telephones and other wireless devices, telecommunications network equipment, and Wi-Fi and Wi-Max equipment, which grew by 11 percent in 2006.<sup>9</sup> U.S. telecommunications service providers, the principal customers for sector equipment, continued to invest in sector apparatus to increase their data carrying capacity in order to accommodate new subscribers and applications. Wireless service providers (e.g., AT&T/Cingular and Verizon Wireless) continued to add capacity to allow new applications for cellular telephones such as high-speed Internet access, while the network expansion of wireline providers (e.g., Bell South and Qwest) allowed them to offer bundled services consisting of telephone service, cable TV, and high-speed Internet.<sup>10</sup>

Manufacturers of sector products continue to expand their Asian operations, especially in countries with relatively low labor costs such as China and Malaysia. This expansion has been enhanced by the increasing reliance by U.S. firms on contract manufacturers such as Flextronics and Solectron, which manufacture a large share of their products in Asia.<sup>11</sup>

## *U.S. Exports*

U.S. exports of telephone and telegraph apparatus increased by \$597 million (4 percent) to \$14.8 billion (table ET-3). Leading U.S. exports consisted largely of parts, transmission and reception apparatus for telecommunications networks, and cellular telephones. The largest markets for U.S. exports were Mexico, the Netherlands, and Canada, which collectively accounted for 32 percent of the total in 2006. U.S. sector exports to Mexico increased by 34 percent in 2006 as Telmex spent \$1.4 billion to upgrade its telecommunications infrastructure.<sup>12</sup> U.S. sector exports to the Netherlands, on the other hand, decreased by 18 percent, reflecting the slow and diminished growth of many segments of the European

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<sup>8</sup> This industry/commodity group includes both wireless and wired telecommunications equipment such as cellular telephones, facsimile machines, switches, and modems.

<sup>9</sup> TIA, *2007 Telecommunications Market Review and Forecast*, 10.

<sup>10</sup> Standard and Poor's, *Industry Surveys: Telecommunications: Wireless*, 15; and Standard and Poor's, *Industry Surveys: Telecommunications: Wireline*, 4.

<sup>11</sup> See, for example, 2006 Form 10-K filings for Motorola, Inc, Nortel Networks Corporation, Flextronics International, Ltd., and Solectron Corporation.

<sup>12</sup> TIA, *2007 Telecommunications Market Review and Forecast*, 273.

market, which has the highest cellular telephone penetration rate in the world.<sup>13</sup> U.S. sector exports to Canada declined by 9 percent.

### ***U.S. Imports***

U.S. imports of telephone and telegraph apparatus increased by approximately \$4.1 billion (8 percent) in 2006, to \$53.3 billion. The largest import sources were China, Malaysia, Mexico, and Korea. U.S. sector imports from China and Mexico each increased by approximately 26 percent in 2006, reaching \$18.1 billion and \$7.1 billion, respectively, while imports from Malaysia increased by a more modest 5 percent to reach \$7.9 billion, and U.S. imports from Korea decreased by 11 percent to \$5.7 billion.

The leading U.S. imports in 2006 included cellular telephones and other wireless devices, printed circuit assemblies and other parts used in the sector (parts), cordless telephone sets, and modems. In 2006, U.S. imports of cellular telephones and other wireless devices increased by 10 percent to \$21.7 billion; parts increased by 9 percent to \$12.0 billion; cordless telephone sets decreased by 3 percent to \$1.4 billion; and modems decreased by 19 percent to \$655 million.

China, the principal U.S. supplier of cellular telephones, now accounts for more than one-half of U.S. imports of these products, whereas its import share was only 15 percent in 2002. U.S. imports of cellular telephones from China increased by 30 percent in 2006, while imports from Korea, the second largest U.S. supplier, and Mexico, the fourth largest, declined by 13 percent and 21 percent, respectively. The leading U.S. import sources of sector parts in 2006 (in descending order) were Malaysia, Mexico, China, and Canada, collectively accounting for nearly three-quarters of the total. U.S. parts imports from the three leading sources increased by 11 to 25 percent, while imports from Canada remained flat.

U.S. imports of cordless telephone sets decreased slightly (3 percent) in 2006, reflecting the relatively flat demand for the mature technology associated with the product. The Philippines increased its share of U.S. imports at the expense of China, as Japanese electronics manufacturer Uniden Electronics relocated its cordless manufacturing facility from China to the Philippines.<sup>14</sup> U.S. imports from China decreased by 7 percent, while imports from the Philippines increased by 406 percent, albeit from a much smaller base, and imports from Malaysia increased 18 percent. U.S. modem imports decreased by 19 percent in 2006. China was by far the largest source, accounting for 72 percent of the total. U.S. modem imports from China increased by 11 percent in 2006, while imports from the next largest suppliers—Mexico, Malaysia, and Taiwan—decreased significantly.

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<sup>13</sup> TIA, *2007 Telecommunications Market Review and Forecast*, 231.

<sup>14</sup> Manila Standard Today, *Japan's Uniden Leaving China, Sets RP Comeback*.

**TABLE ET-3** Telephone and telegraph apparatus (ET017): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
China	756	545	616	645	747	102	15.8
Mexico	1,328	1,229	1,573	1,459	1,949	489	33.5
Malaysia	233	138	151	119	230	111	93.3
Korea	404	373	460	397	324	-73	-18.4
Canada	1,571	1,416	1,506	1,440	1,309	-131	-9.1
Japan	971	858	1,135	895	770	-125	-13.9
Taiwan	247	211	338	205	153	-52	-25.4
Thailand	89	78	102	248	120	-128	-51.6
Netherlands	911	710	1,256	1,734	1,430	-304	-17.5
United Kingdom	707	665	872	751	851	100	13.3
All other	5,735	4,721	5,948	6,290	6,898	607	9.7
Total	12,952	10,946	13,958	14,183	14,779	597	4.2
EU-15	3,165	2,622	3,388	3,849	3,726	-123	-3.2
EU-25	3,302	2,736	3,519	4,018	3,885	-134	-3.3
OPEC	496	380	734	864	1,155	291	33.7
Latin America	3,038	2,770	3,652	3,477	4,305	828	23.8
CBERA	541	568	562	606	715	109	18.0
Asia	3,682	3,027	3,966	3,788	3,583	-205	-5.4
Sub-Saharan Africa	119	169	213	245	328	83	33.9
Central and Eastern Europe	165	128	162	206	184	-22	-10.7
U.S. imports of merchandise for consumption:							
China	4,659	5,932	9,556	14,410	18,083	3,673	25.5
Mexico	4,210	4,664	5,913	5,645	7,123	1,477	26.2
Malaysia	2,326	3,495	3,778	7,512	7,871	359	4.8
Korea	4,556	5,936	8,668	6,435	5,742	-693	-10.8
Canada	2,975	2,470	2,713	3,275	3,335	60	1.8
Japan	1,815	1,477	1,588	1,851	1,719	-132	-7.1
Taiwan	761	810	833	1,282	2,322	1,040	81.1
Thailand	340	711	1,450	2,657	2,042	-615	-23.1
Netherlands	13	30	32	14	16	3	18.5
United Kingdom	281	325	304	352	394	43	12.1
All other	6,012	5,132	4,506	5,787	4,669	-1,118	-19.3
Total	27,948	30,982	39,341	49,220	53,318	4,098	8.3
EU-15	3,642	2,894	2,366	2,968	2,127	-841	-28.3
EU-25	3,667	2,950	2,549	3,327	2,354	-972	-29.2
OPEC	40	31	44	93	80	-14	-14.7
Latin America	5,304	5,704	6,392	6,505	7,739	1,234	19.0
CBERA	27	59	107	103	76	-27	-26.2
Asia	15,313	19,195	26,978	35,290	39,013	3,723	10.6
Sub-Saharan Africa	6	10	6	5	8	3	73.5
Central and Eastern Europe	30	52	180	363	230	-133	-36.7

See footnote(s) at end of table.

**TABLE ET-3** Telephone and telegraph apparatus (ET017): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>—*continued*

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005		
						Absolute	Percent	
	<i>Million dollars</i>							
U.S. merchandise trade balance:								
China	-3,903	-5,387	-8,940	-13,765	-17,336	-3,571	-25.9	
Mexico	-2,882	-3,436	-4,339	-4,186	-5,174	-988	-23.6	
Malaysia	-2,092	-3,357	-3,628	-7,393	-7,641	-248	-3.4	
Korea	-4,152	-5,563	-8,208	-6,039	-5,419	620	10.3	
Canada	-1,404	-1,054	-1,208	-1,835	-2,026	-192	-10.4	
Japan	-844	-619	-453	-956	-949	7	0.7	
Taiwan	-514	-599	-495	-1,077	-2,169	-1,092	-101.3	
Thailand	-250	-633	-1,348	-2,409	-1,922	487	20.2	
Netherlands	897	680	1,224	1,720	1,414	-306	-17.8	
United Kingdom	426	341	568	399	456	58	14.5	
All other	-277	-411	1,443	504	2,228	1,725	342.5	
<b>Total</b>	<b>-14,996</b>	<b>-20,037</b>	<b>-25,382</b>	<b>-35,038</b>	<b>-38,539</b>	<b>-3,501</b>	<b>-10.0</b>	
EU-15	-477	-272	1,021	881	1,599	718	81.4	
EU-25	-365	-214	969	692	1,531	839	121.2	
OPEC	455	349	690	770	1,075	305	39.6	
Latin America	-2,265	-2,934	-2,740	-3,028	-3,434	-406	-13.4	
CBERA	514	510	454	503	639	136	27.0	
Asia	-11,632	-16,168	-23,011	-31,502	-35,431	-3,928	-12.5	
Sub-Saharan Africa	112	160	208	241	320	80	33.1	
Central and Eastern Europe	135	76	-17	-157	-46	111	70.7	

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2006.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

## Television Receivers and Video Monitors<sup>15</sup>

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*Change in 2006 from 2005:*

**U.S. trade deficit: Increased by \$5.7 billion (26 percent) to \$27.5 billion**

**U.S. exports: Increased by \$244 million (29 percent) to \$1.1 billion**

**U.S. imports: Increased by \$5.9 billion (26 percent) to \$28.6 billion**

Imports of television receivers and video monitors grew in 2006 as a result of increased consumer demand for flat-panel display color television receivers (CTVs) and video monitors. Demand for new television receivers is increasing as the United States moves toward the cessation of analog broadcasting on February 17, 2009, after which any television receiver must have a digital tuner in order to receive terrestrial broadcasts.<sup>16</sup> Also, as the cost of flat-panel displays has decreased significantly in the last several years, consumer demand has switched from picture tube-based CTVs to CTVs with flat-panel displays.

Mexico and China continued as the largest suppliers to the United States of sector imports, accounting for \$22.2 billion (78 percent) of imports in 2006, compared to \$15.2 billion (67 percent) in 2005 (see table ET-4).

The largest export markets for the United States are Mexico and Canada, which combined account for 53 percent of U.S. exports. Almost 90 percent of U.S. exports to Mexico were of printed circuit boards and other parts for assembly into CTVs and video monitors intended for subsequent export to the United States. Virtually all exports to Canada were transshipments of finished goods produced elsewhere that have been incorrectly reported as domestic exports.

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<sup>15</sup> This industry/commodity group includes television receivers and video monitors (not computer monitors), set top boxes with a communications function and integral tuners, and parts of the foregoing. Set top boxes with a communications function but without an integral tuner are not included in this digest.

<sup>16</sup> The Federal Communications Commission has mandated that all color television receivers sold in the United States on or after March 1, 2007, must contain a digital tuner. A separate digital-to-analog converter can be used to allow the continued use of CTVs with analog tuners.

**TABLE ET-4** Television receivers and video monitors (ET022): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
Mexico . . . . .	406	171	191	211	296	85	40.5
China . . . . .	22	31	40	44	66	22	50.7
Japan . . . . .	19	17	21	20	25	5	24.2
Taiwan . . . . .	16	11	10	10	11	1	13.5
Thailand . . . . .	2	3	3	1	3	1	100.2
Malaysia . . . . .	9	8	6	3	4	1	28.3
Korea . . . . .	12	15	39	25	34	9	37.1
Canada . . . . .	452	296	291	260	283	23	9.0
India . . . . .	3	5	4	5	6	1	14.2
Belgium . . . . .	27	5	3	3	3	( <sup>2</sup> )	-12.3
All other . . . . .	290	246	265	274	369	95	34.8
<b>Total . . . . .</b>	<b>1,257</b>	<b>809</b>	<b>874</b>	<b>857</b>	<b>1,101</b>	<b>244</b>	<b>28.5</b>
EU-15 . . . . .	129	111	105	100	156	56	56.2
EU-25 . . . . .	133	113	107	105	158	54	51.3
OPEC . . . . .	15	11	24	32	39	7	21.4
Latin America . . . . .	526	253	292	330	435	105	31.8
CBERA . . . . .	43	39	36	42	42	1	1.8
Asia . . . . .	108	122	156	133	194	61	45.5
Sub-Saharan Africa . . . . .	2	2	4	3	8	5	180.4
Central and Eastern Europe . . . . .	5	3	3	6	3	-3	-47.3
U.S. imports of merchandise for consumption:							
Mexico . . . . .	5,165	5,532	7,743	10,029	14,386	4,357	43.4
China . . . . .	849	1,490	2,438	5,130	7,836	2,706	52.8
Japan . . . . .	1,678	2,229	2,987	2,605	1,781	-824	-31.6
Taiwan . . . . .	226	526	1,140	1,699	1,780	81	4.7
Thailand . . . . .	732	682	928	1,015	1,153	138	13.6
Malaysia . . . . .	1,295	1,019	863	955	655	-300	-31.4
Korea . . . . .	353	816	1,054	809	468	-341	-42.2
Canada . . . . .	13	14	8	35	96	61	172.4
India . . . . .	1	1	27	84	162	78	93.3
Belgium . . . . .	65	74	70	90	93	2	2.4
All other . . . . .	208	270	250	260	219	-41	-15.8
<b>Total . . . . .</b>	<b>10,586</b>	<b>12,654</b>	<b>17,509</b>	<b>22,712</b>	<b>28,628</b>	<b>5,917</b>	<b>26.1</b>
EU-15 . . . . .	117	148	154	148	161	13	8.6
EU-25 . . . . .	119	149	154	149	163	13	8.9
OPEC . . . . .	106	89	59	123	44	-80	-64.5
Latin America . . . . .	5,172	5,546	7,769	10,044	14,393	4,349	43.3
CBERA . . . . .	3	2	7	4	7	3	90.0
Asia . . . . .	5,270	6,912	9,554	12,462	13,953	1,491	12.0
Sub-Saharan Africa . . . . .	( <sup>b</sup> )	2	3	( <sup>b</sup> )	1	1	784.8
Central and Eastern Europe . . . . .	2	21	8	1	2	1	47.3

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See footnote(s) at end of table.

**TABLE ET-4** Television receivers and video monitors (ET022): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>—*continued*

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
U.S. merchandise trade balance:							
Mexico . . . . .	-4,760	-5,362	-7,552	-9,818	-14,090	-4,271	-43.5
China . . . . .	-828	-1,459	-2,398	-5,086	-7,770	-2,684	-52.8
Japan . . . . .	-1,660	-2,212	-2,966	-2,585	-1,756	829	32.1
Taiwan . . . . .	-210	-515	-1,130	-1,689	-1,768	-79	-4.7
Thailand . . . . .	-730	-679	-925	-1,013	-1,150	-137	-13.5
Malaysia . . . . .	-1,286	-1,011	-856	-952	-651	301	31.6
Korea . . . . .	-341	-801	-1,015	-784	-434	350	44.7
Canada . . . . .	439	282	284	225	187	-38	-16.7
India . . . . .	2	4	-24	-79	-156	-78	-98.6
Belgium . . . . .	-38	-69	-67	-87	-90	-3	-3.0
All other . . . . .	82	-25	15	14	150	136	1,005.4
<b>Total . . . . .</b>	<b>-9,329</b>	<b>-11,845</b>	<b>-16,636</b>	<b>-21,854</b>	<b>-27,527</b>	<b>-5,673</b>	<b>-26.0</b>
EU-15 . . . . .	12	-37	-49	-48	-5	43	89.6
EU-25 . . . . .	14	-35	-47	-45	-4	40	90.3
OPEC . . . . .	-91	-78	-35	-91	-5	86	95.0
Latin America . . . . .	-4,646	-5,293	-7,477	-9,714	-13,958	-4,244	-43.7
CBERA . . . . .	40	37	29	38	35	-3	-6.6
Asia . . . . .	-5,162	-6,790	-9,398	-12,329	-13,759	-1,430	-11.6
Sub-Saharan Africa . . . . .	2	1	1	3	6	4	144.1
Central and Eastern Europe . . . . .	3	-18	-4	5	1	-3	-70.7

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2006.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

<sup>b</sup>Less than \$500,000.

## U.S. Imports

In 2006, U.S. consumer demand for CTVs continued shifting away from tube-based CTVs to flat-panel display CTVs and monitors.<sup>17</sup> At the same time, direct-view tube-based CTV sales declined to \$2.7 billion in 2006, a 34 percent reduction from \$4.0 billion in 2005. U.S. production of flat-panel CTVs and monitors is small, and most demand is supplied by imports (table ET-5).

Imports from Mexico and China continued to increase in 2006, and they accounted for 78 percent of the value of group imports. Mexico supplied 70 percent of U.S. imports of flat-panel CTVs and China 19 percent. Imports from Japan, the third-largest supplier of flat-panel CTVs, declined from 9 percent to only 2 percent of total imports. An antidumping finding in April 2005 led to the imposition of antidumping duties ranging from 9.69 percent to 78.45 percent<sup>18</sup> on imports from China of tube-based, direct-view CTVs with screen size greater than 35.56cm (14 inches); imports of such CTVs from China fell by 45 percent between 2005 and 2006.

**TABLE ET-5** Changes in U.S. imports of television receivers and video monitors, 2002–06

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
	— million dollars —						
Flat-panel TV receivers . . . . .	461	1,296	3,651	7,467	14,106	6,639	88.9
Flat-panel video monitors . . . . .	730	1,500	2,296	3,389	4,172	783	23.1
CRT-based direct-view color TV receivers . . . . .	5,631	4,988	4,378	4,031	2,669	-1,363	-33.8
Other . . . . .	3,763	4,870	7,184	7,825	7,681	-143	-1.8
Total . . . . .	10,586	12,654	17,509	22,712	28,628	5,917	26.0

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unbounded data.

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<sup>17</sup> CEA, “CEA Forecasts Consumer Electronics Revenue Will Surpass \$155 Billion in 2007”.

<sup>18</sup> *Federal Register*, May 19, 2005 (Volume 69, Number 97), 28879–28880.

## Computers, Peripherals, and Parts

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### *Change in 2006 from 2005:*

**U.S. trade deficit: Increased by \$7.4 billion (11 percent) to \$72.5 billion**

**U.S. exports: Increased by \$1.1 billion (4 percent) to \$30.0 billion**

**U.S. imports: Increased by \$8.5 billion (9 percent) to \$102.5 billion**

The U.S. merchandise trade deficit in computers, peripherals, and parts (computer hardware) increased by \$7.4 billion in 2006 (table ET-6). While U.S. sector exports rose by \$1.1 billion, U.S. imports grew by a much larger \$8.5 billion. Continued U.S. and worldwide consumer demand for computer products led to growth in both U.S. imports and U.S. exports of sector products. Increasing worldwide demand for products such as personal computers (PCs) provided business opportunities for many U.S. computer hardware companies that have significant shares in the international market.<sup>19</sup> Despite some corporate buyers and individual consumers holding off purchases with the pending introduction of Microsoft's new operating system, Vista, U.S. shipments of PCs continued to grow in 2006, though not as rapidly as in previous years.<sup>20</sup>

### ***U.S. Exports***

U.S. exports of computer hardware continued to rise for the second straight year, increasing by \$1.1 billion to \$30.0 billion. The largest U.S. export markets of sector products were Canada (\$3.9 billion), Mexico (\$2.8 billion), and the United Kingdom (\$2.2 billion). Computer parts, many destined for foreign affiliates or contract manufacturers, accounted for a large portion of exports, \$30.9 billion in 2006, an increase of 14 percent (\$3.7 billion) over the previous year.

U.S. exports declined to many markets, including Canada (decrease of \$339 million or 8 percent), Singapore (\$258 million or 18 percent), and Malaysia (\$209 million or 28 percent). However, these declines were offset by increases in U.S. exports to other key markets such as China (increase of \$309 million or 25 percent), Mexico (\$397 million or 16 percent), and Thailand (\$92 million or 14 percent). Furthermore, U.S. exports of computer parts increased to countries such as China and Mexico, accounting for 68 percent (\$209 million) and 62 percent (\$244 million) of the total U.S. sector export increases, respectively.

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<sup>19</sup> IDC, "Portable PC Adoption and Emerging Markets Claim Larger Share of PC Future."

<sup>20</sup> *ZDNet News*, "PCs Aren't Coming to America." Various industry sources provide different PC shipment estimates; however, most of them indicate that there was growth in PC shipments for 2006.

**TABLE ET-6** Computers, peripherals, and parts (ET035): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
<b>U.S. exports of domestic merchandise:</b>							
China	892	1,022	1,038	1,246	1,556	309	24.8
Malaysia	643	459	459	759	550	-209	-27.5
Mexico	3,612	2,660	2,646	2,442	2,839	397	16.3
Japan	2,498	2,246	2,040	1,871	1,890	20	1.1
Singapore	1,125	1,461	1,313	1,463	1,205	-258	-17.6
Canada	3,948	3,655	3,834	4,201	3,863	-339	-8.1
Taiwan	611	509	502	474	445	-28	-6.0
Thailand	367	492	551	675	768	92	13.7
Korea	832	655	580	570	617	47	8.2
United Kingdom	2,371	2,260	2,427	2,278	2,155	-124	-5.4
All other	12,635	12,617	11,958	12,882	14,081	1,199	9.3
Total	29,534	28,038	27,350	28,862	29,969	1,106	3.8
EU-15	9,298	9,357	8,368	8,226	8,134	-92	-1.1
EU-25	9,467	9,537	8,540	8,435	8,441	6	0.1
OPEC	388	362	580	740	886	146	19.7
Latin America	5,894	4,835	5,152	5,522	6,625	1,103	20.0
CBERA	509	466	497	607	766	160	26.3
Asia	8,547	8,292	7,943	8,746	8,845	99	1.1
Sub-Saharan Africa	153	191	186	195	211	15	7.7
Central and Eastern Europe	198	219	206	267	371	104	38.8
<b>U.S. imports of merchandise for consumption:</b>							
China	14,928	22,141	33,985	40,298	46,583	6,284	15.6
Malaysia	9,085	9,978	11,171	12,658	14,590	1,932	15.3
Mexico	8,913	7,640	7,794	7,161	7,050	-111	-1.6
Japan	8,734	6,977	6,799	6,536	6,681	145	2.2
Singapore	7,630	7,151	6,977	6,217	6,235	18	0.3
Canada	1,745	1,533	1,739	1,831	1,677	-154	-8.4
Taiwan	8,725	7,046	6,213	4,948	4,623	-326	-6.6
Thailand	2,382	2,065	2,498	2,833	3,529	696	24.6
Korea	4,600	3,686	3,781	2,995	3,120	125	4.2
United Kingdom	1,021	1,069	1,179	899	766	-133	-14.8
All other	8,054	7,654	7,129	7,574	7,615	41	0.5
Total	75,817	76,940	89,264	93,950	102,468	8,518	9.1
EU-15	4,226	4,455	4,376	4,113	4,131	17	0.4
EU-25	4,944	5,173	5,243	5,121	5,021	-99	-1.9
OPEC	476	441	519	462	373	-89	-19.2
Latin America	9,110	7,818	8,000	7,651	7,519	-133	-1.7
CBERA	121	123	167	457	425	-33	-7.1
Asia	59,625	62,040	73,882	78,865	87,676	8,811	11.2
Sub-Saharan Africa	8	18	7	6	7	2	25.7
Central and Eastern Europe	719	721	866	1,004	896	-108	-10.8

**TABLE ET-6** Computers, peripherals, and parts (ET035): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>—*Continued*

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005		
						Absolute	Percent	
	<i>Million dollars</i>							
U.S. merchandise trade balance:								
China	-14,036	-21,119	-32,947	-39,052	-45,027	-5,975	-15.3	
Malaysia	-8,441	-9,518	-10,712	-11,899	-14,040	-2,141	-18.0	
Mexico	-5,301	-4,979	-5,147	-4,719	-4,211	509	10.8	
Japan	-6,236	-4,731	-4,758	-4,665	-4,791	-126	-2.7	
Singapore	-6,505	-5,689	-5,663	-4,753	-5,030	-276	-5.8	
Canada	2,203	2,122	2,095	2,370	2,186	-185	-7.8	
Taiwan	-8,114	-6,538	-5,711	-4,475	-4,177	297	6.6	
Thailand	-2,015	-1,573	-1,947	-2,157	-2,761	-604	-28.0	
Korea	-3,768	-3,031	-3,201	-2,424	-2,503	-78	-3.2	
United Kingdom	1,350	1,192	1,248	1,379	1,389	10	0.7	
All other	4,580	4,963	4,829	5,308	6,466	1,158	21.8	
Total	-46,283	-48,902	-61,914	-65,087	-72,499	-7,411	-11.4	
EU-15	5,072	4,902	3,992	4,112	4,003	-109	-2.7	
EU-25	4,524	4,363	3,297	3,314	3,420	106	3.2	
OPEC	-89	-79	62	278	512	235	84.4	
Latin America	-3,216	-2,983	-2,848	-2,129	-893	1,235	58.0	
CBERA	388	343	330	149	341	192	129.0	
Asia	-51,078	-53,747	-65,939	-70,120	-78,831	-8,712	-12.4	
Sub-Saharan Africa	145	172	179	190	203	14	7.2	
Central and Eastern Europe	-521	-502	-661	-737	-525	212	28.7	

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2006.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

## ***U.S. Imports***

U.S. imports of computer hardware increased by 9 percent in 2006, to \$102.5 billion. Sector products that registered the largest increases, in terms of absolute value, were notebook computers, various desktop computers, certain computer magnetic disk drive storage units, and computer parts. Growth in U.S. imports of PCs continued in 2006. For example, U.S. imports of notebook computers increased by 17 percent to \$22.7 billion, as continued demand for portability and declining prices drove sales.<sup>21</sup>

The two main U.S. import sources of computer hardware were China, which supplied 45 percent of sector imports (\$46.6 billion), and Malaysia, which supplied 14 percent (\$14.6 billion). In 2006, China accounted for approximately \$12.8 billion (66 percent) of U.S. imports of notebook computers, while Malaysia accounted for \$7.6 billion (39 percent). Many major manufacturers of computer hardware equipment, including Taiwanese notebook manufacturers, have facilities in China that account for the majority of world production, while Dell continues to manufacture a majority of its notebooks in their Malaysian production facility.<sup>22</sup>

The Asia-Pacific region continues to be a large manufacturing base for computer hardware original equipment manufacturers (OEMs) for not only PCs, but also for key components such as magnetic disk drive storage units, which include hard disk drives. U.S. imports of these products increased by nearly 10 percent in 2006 from the previous year, to approximately \$7.6 billion, as computer hard disk drive sales increased.

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<sup>21</sup> Kawamoto, "Report: Notebooks to Take Lead Over Desktops by 2011."

<sup>22</sup> *ZDNet News*, "Dell Bucks the Notebook-Outsourcing Trend."

## Medical Goods

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*Change in 2006 from 2005:*

**U.S. trade surplus: Increased by \$737 million (175 percent) to \$1.2 billion**

**U.S. exports: Increased by \$2.3 billion (11 percent) to \$23.3 billion**

**U.S. imports: Increased by \$1.6 billion (8 percent) to \$22.2 billion**

The U.S. trade surplus in medical goods surged for the second consecutive year, expanding by 175 percent to \$1.2 billion in 2006 (table ET-7). While U.S. imports continued to rise, U.S. exports increased even faster. Demand in the European Union (EU) for the latest U.S. innovations in cardiovascular and orthopedic products fueled much of the growth in U.S. exports, despite growing pressures by governments in the EU to contain escalating healthcare costs.<sup>23</sup> U.S. manufacturers were more successful than their EU rivals in developing less invasive technologies that minimize the overall costs of treating patients.<sup>24</sup>

### *U.S. Exports*

U.S. exports of medical goods increased by 11 percent in 2006, to \$23 billion. Double-digit growth in exports to Germany, the Netherlands, and Mexico compensated for a slowdown in exports to Ireland and Japan. U.S. exports to Germany and the Netherlands increased by 20 percent and 18 percent to \$2.1 billion and \$2.7 billion, respectively, across a broad range of products. Germany continued as the largest EU market for medical devices, accounting for one-third of total sales in that region.<sup>25</sup> The largest portion of U.S. exports to the Netherlands, a much smaller market, was destined for other EU markets through the Dutch port of Rotterdam.<sup>26</sup> In addition to benefitting from increased demand for advanced technology products, such as drug-eluting stents, implantable defibrillators, and orthopedic implants, U.S. exporters to those and other EU countries were also buoyed by intracompany trade in diagnostic imaging and patient monitoring parts and equipment by large German and Dutch multinationals with operations in both the EU and the United States.<sup>27</sup>

In recent years, U.S.-owned operations in Ireland have made that country a leading U.S. export market for parts of high-technology products manufactured there, such as pacemakers.<sup>28</sup> However, U.S. exports dropped by 27 percent in 2006, as Irish affiliates produced more parts and components themselves, relying less on their parent companies.<sup>29</sup>

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<sup>23</sup> Diller and Gold, "Healthcare: Products and Supplies: Europe," March 2007, 16–19.

<sup>24</sup> U.S. industry officials, interviews by Commission staff, United States, June 2006; and German and U.K. industry officials, interviews by Commission staff, Germany and the United Kingdom, September 20–27, 2006.

<sup>25</sup> Diller and Gold, "Healthcare: Products and Supplies: Europe," March 2007, 16–19.

<sup>26</sup> U.S. industry officials, telephone interview by Commission staff, March 19, 2007.

<sup>27</sup> U.S. industry officials, interviews by Commission staff, June 7 and 14, 2006.

<sup>28</sup> U.S. industry official, telephone interview by Commission staff, August 16, 2006; and Irish industry and government officials, interviews by Commission staff, September 28–29, 2007.

<sup>29</sup> U.S. industry officials, telephone interviews by Commission staff, August 21–23, 2006.

**TABLE ET-7** Medical goods (ET040): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
Germany	1,530	1,679	1,602	1,714	2,057	343	20.0
Mexico	848	983	1,030	1,163	1,354	191	16.5
Ireland	875	1,293	1,360	1,342	980	-362	-27.0
Japan	2,203	2,307	2,408	2,624	2,727	103	3.9
Netherlands	1,284	1,618	1,940	2,283	2,691	408	17.9
Canada	1,204	1,337	1,510	1,701	1,864	163	9.6
United Kingdom	822	839	979	1,157	1,163	6	0.5
China	313	453	493	593	631	37	6.3
France	901	859	880	985	1,075	89	9.1
Switzerland	434	477	461	533	650	117	21.9
All other	4,646	4,983	5,771	6,874	8,120	1,246	18.1
Total	15,059	16,827	18,433	20,970	23,311	2,341	11.2
EU-15	7,074	8,059	8,854	9,832	10,908	1,076	10.9
EU-25	7,160	8,164	8,972	9,989	11,065	1,075	10.8
OPEC	193	197	250	336	428	92	27.3
Latin America	1,582	1,724	1,906	2,251	2,639	387	17.2
CBERA	212	249	248	297	343	46	15.6
Asia	3,608	3,974	4,241	4,854	5,165	311	6.4
Sub-Saharan Africa	92	93	113	154	165	10	6.7
Central and Eastern Europe	96	103	119	161	151	-10	-6.2
U.S. imports of merchandise for consumption:							
Germany	1,931	2,342	2,883	3,308	3,634	326	9.9
Mexico	1,957	2,315	2,575	3,015	3,452	437	14.5
Ireland	1,807	2,853	4,056	3,707	3,471	-236	-6.4
Japan	1,329	1,327	1,501	1,694	1,692	-2	-0.1
Netherlands	501	470	530	608	610	2	0.4
Canada	400	466	520	551	619	68	12.4
United Kingdom	415	439	527	646	859	213	32.9
China	531	594	710	864	1,184	319	37.0
France	469	510	604	638	695	57	8.9
Switzerland	708	1,204	1,142	1,069	1,072	4	0.3
All other	3,184	3,621	3,957	4,447	4,863	416	9.4
Total	13,232	16,143	19,006	20,548	22,152	1,604	7.8
EU-15	5,916	7,526	9,633	10,136	10,526	390	3.8
EU-25	5,970	7,591	9,720	10,200	10,612	413	4.0
OPEC	7	8	9	10	7	-3	-32.8
Latin America	2,701	3,260	3,493	3,996	4,494	498	12.4
CBERA	719	917	893	946	1,000	53	5.7
Asia	2,829	2,937	3,321	3,793	4,161	368	9.7
Sub-Saharan Africa	4	6	8	15	17	2	11.8
Central and Eastern Europe	52	62	83	59	80	21	35.7

See footnote(s) at end of table.

**TABLE ET-7** Medical goods (ET040): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>—*continued*

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005		
						Absolute	Percent	
<i>Million dollars</i>								
U.S. merchandise trade balance:								
Germany	-401		-664	-1,282	-1,594	-1,577	16	1.0
Mexico	-1,109		-1,332	-1,546	-1,853	-2,098	-246	-13.3
Ireland	-933		-1,560	-2,696	-2,365	-2,491	-125	-5.3
Japan	875		980	907	930	1,035	105	11.3
Netherlands	782		1,148	1,409	1,675	2,080	406	24.2
Canada	804		870	990	1,150	1,245	95	8.2
United Kingdom	407		399	452	511	304	-207	-40.5
China	-218		-141	-217	-271	-553	-282	-104.2
France	432		350	276	348	380	32	9.3
Switzerland	-274		-728	-681	-535	-422	113	21.1
All other	1,462		1,361	1,814	2,427	3,257	830	34.2
<b>Total</b>	<b>1,826</b>		<b>683</b>	<b>-573</b>	<b>422</b>	<b>1,159</b>	<b>737</b>	<b>174.7</b>
EU-15	1,158		533	-780	-303	382	686	<sup>(b)</sup>
EU-25	1,190		573	-749	-210	452	663	<sup>(b)</sup>
OPEC	186		189	241	326	421	95	29.2
Latin America	-1,120		-1,536	-1,587	-1,745	-1,855	-110	-6.3
CBERA	-506		-668	-645	-649	-656	-7	-1.1
Asia	779		1,037	921	1,061	1,004	-57	-5.4
Sub-Saharan Africa	88		87	105	139	148	9	6.2
Central and Eastern Europe	44		41	36	102	71	-31	-30.2

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2006.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

<sup>b</sup>Not meaningful for purposes of comparison.

U.S. exports to Mexico, which increased by 17 percent to \$1.4 billion, included parts and components of medical devices to be assembled into finished devices in that country, many of which are exported to the United States.<sup>30</sup> U.S. exports to Japan, the largest overseas market for U.S.-made medical goods, continued to slow, rising by only 4 percent, as government regulatory and health insurance reimbursement policies restricted sales of U.S.-made high-technology products in that country.<sup>31</sup>

### ***U.S. Imports***

U.S. imports of medical goods increased by 8 percent (\$1.6 billion) from 2005 through 2006, mainly based on continued growth in U.S. demand and transfers from U.S. affiliate companies abroad. The most significant increases in imports were from Mexico, China, and the United Kingdom. U.S. imports from Mexico rose by 15 percent to \$3.5 billion. Although U.S. firms originally established operations there to take advantage of U.S. and Mexican tax and tariff incentives and relatively low wages, Mexico has moved up the supply chain to manufacture more advanced products, including drug-eluting stents.<sup>32</sup> U.S. imports from China grew by 37 percent, as the number of Chinese manufacturers has been rapidly expanding, with sales estimated at over \$5 billion in 2006, 75 percent of which represented exports to all markets.<sup>33</sup> U.S. imports from China exhibiting the most growth were orthopedic and fracture appliances, syringes, oxygen therapy devices, and massage apparatus. Finally, U.S. imports from the United Kingdom<sup>34</sup> rose by 33 percent, as several major U.S. pharmaceutical companies increased their procurement of recently approved hand-held devices for the administration of respiratory therapy drugs.<sup>35</sup> Other imported products from that country showing significant growth included orthopedic implants and rehabilitation equipment.

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<sup>30</sup> *Mexico Watch*, "Cordis de Mexico VPO Victor Chance," 1.

<sup>31</sup> For further information on the Japanese market for medical goods, see USITC, *Medical Devices and Equipment*, 3-32 – 3-44.

<sup>32</sup> *Mexico Watch*, "Cordis de Mexico VPO Victor Chance," 1.

<sup>33</sup> Zamiska, "Beijing Policy Shift May Boost Local Medical Device Companies," and Hassell and Bella, "Diagnosing China's Medical Device Market."

<sup>34</sup> Arthur D. Little Limited, *UK Sector Competitiveness*, 1-20.

<sup>35</sup> Pfizer Inc. and Schering-Plough Healthcare, *2007 Form 10-K Filing*; and U.S. industry officials, telephone interviews by Commission staff, March 21–22, 2007.

# Measuring, Testing, and Controlling Instruments

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*Change in 2006 from 2005:*

**U.S. trade surplus: Increased by \$1.1 billion (52 percent) to \$3.1 billion**

**U.S. exports: Increased by \$2.3 billion (13 percent) to \$19.7 billion**

**U.S. imports: Increased by \$1.2 billion (8 percent) to \$16.6 billion**

The U.S. trade surplus for measuring, testing, and controlling instruments expanded as the growth in U.S. exports (\$2.3 billion, or 13 percent) nearly doubled that of U.S. imports (\$1.2 billion, or 8 percent) (table ET-8). The measuring, testing, and controlling instruments industry is highly globalized, consisting of large multinational companies that source product and related components from their worldwide production locations to serve global markets. A combination of economic factors contributed to the increased value in U.S. trade in these products in 2006, including relatively strong economic growth, particularly in the United States and its major trading partners—Canada, China, Germany, Japan, and Mexico.

## *U.S. Exports*

The leading market for U.S. exports of measuring, testing, and controlling instruments in 2006 continued to be Canada, which accounted for \$3.0 billion (15 percent) of total sector exports in 2006. Other major growth markets for U.S. exports in 2006 were Japan, Germany, and China,<sup>36</sup> which together accounted for \$4.6 billion (23 percent) of total U.S. exports. The 2006 growth in U.S. exports to these and other countries was dominated by parts for measuring, testing, and controlling instruments (an increase of 38 percent to \$6 billion), followed by instruments for measuring electrical quantities and ionization radiation (increased by 11 percent to \$3.8 billion),<sup>37</sup> instruments for physical or chemical analysis (increased by 10 percent to \$2.6 billion),<sup>38</sup> and instruments for measuring flow, level, and pressure of liquids and gases (increased by 19 percent to \$1.4 billion).<sup>39</sup>

## *U.S. Imports*

Mexico continued to be the leading supplier of measuring, testing, and controlling instruments to the U.S. market in 2006, accounting for \$2.8 billion (17 percent) of total sector imports. However, the value of imports from Mexico decreased for the third consecutive year, by \$50 million (2 percent). At the same time, the value of sector imports from other major suppliers increased (table ET-10). The second- and third-largest suppliers continued to be Japan and Germany, together accounting for \$4.7 billion (29 percent) of

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<sup>36</sup> In 2006, Japan and Germany displaced Mexico as the second- and third-largest U.S. export market for this sector due to the \$53 million decrease (4 percent) in U.S. exports to Mexico. Automatic regulating or controlling instruments (such as thermostats, manostats, and liquid level control instruments) continued to be the leading U.S. export to Mexico, but such exports decreased by 7 percent to \$485 million in 2006.

<sup>37</sup> Along with instruments for measuring ionization radiation, other products include oscilloscopes and spectrum analyzers.

<sup>38</sup> Product examples include gas and smoke analysis instruments and spectrometers, which are instruments that detect and record energy that would otherwise be invisible to the human eye.

<sup>39</sup> Product examples include flow meters, level gauges, manometers, and heat meters.

**TABLE ET-8** Measuring, testing, and controlling instruments (ET043): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
Canada	2,707	2,759	2,897	2,877	3,035	157	5.5
Mexico	1,481	1,346	1,597	1,490	1,438	-53	-3.5
Japan	1,445	1,391	1,508	1,405	1,685	280	19.9
Germany	963	1,013	1,218	1,345	1,535	190	14.1
China	592	782	996	1,109	1,349	240	21.6
United Kingdom	873	845	825	830	909	79	9.5
France	434	498	596	685	833	148	21.6
Singapore	522	511	582	577	692	114	19.8
Malaysia	314	242	265	261	353	92	35.4
Korea	495	548	637	782	754	-28	-3.6
All other	4,522	4,749	5,480	6,037	7,087	1,050	17.4
Total	14,346	14,683	16,603	17,399	19,669	2,270	13.0
EU-15	3,739	3,930	4,352	4,703	5,250	547	11.6
EU-25	3,821	4,027	4,471	4,843	5,438	595	12.3
OPEC	317	351	370	516	713	197	38.2
Latin America	2,121	1,930	2,264	2,325	2,468	143	6.1
CBERA	180	194	198	218	287	69	31.8
Asia	4,552	4,716	5,576	5,755	6,672	916	15.9
Sub-Saharan Africa	91	105	136	148	195	47	31.8
Central and Eastern Europe	98	103	120	148	195	47	31.7
U.S. imports of merchandise for consumption:							
Canada	1,118	1,037	1,152	1,320	1,496	177	13.4
Mexico	2,820	3,106	2,872	2,850	2,800	-50	-1.8
Japan	1,875	2,017	2,359	2,356	2,447	91	3.9
Germany	1,367	1,528	1,889	2,093	2,299	206	9.9
China	641	835	1,162	1,333	1,471	138	10.4
United Kingdom	1,101	1,099	1,201	1,244	1,279	35	2.8
France	289	340	406	515	624	109	21.2
Singapore	223	241	277	277	302	25	8.9
Malaysia	208	252	385	464	565	101	21.7
Korea	60	62	67	81	134	53	64.8
All other	1,893	2,121	2,597	2,825	3,155	330	11.7
Total	11,595	12,638	14,367	15,359	16,573	1,214	7.9
EU-15	3,584	3,925	4,703	5,094	5,472	377	7.4
EU-25	3,644	4,048	4,883	5,274	5,663	389	7.4
OPEC	7	6	13	17	29	12	69.8
Latin America	2,904	3,167	2,930	2,910	2,898	-12	-0.4
CBERA	10	19	12	10	16	7	71.2
Asia	3,330	3,776	4,651	4,994	5,517	523	10.5
Sub-Saharan Africa	8	7	9	10	10	(b)	-4.6
Central and Eastern Europe	73	125	181	200	215	14	7.1

See footnote(s) at end of table.

**TABLE ET-8** Measuring, testing, and controlling instruments (ET043): U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 2002–06<sup>a</sup>—*Continued*

Item	2002	2003	2004	2005	2006	Change, 2006 from 2005		
						Absolute	Percent	
	<i>Million dollars</i>							
U.S. merchandise trade balance:								
Canada	1,590	1,722	1,746	1,557	1,538	-19	-1.2	
Mexico	-1,340	-1,760	-1,276	-1,359	-1,362	-3	-0.2	
Japan	-430	-626	-851	-951	-762	189	19.9	
Germany	-404	-515	-671	-748	-764	-16	-2.2	
China	-49	-53	-166	-224	-123	102	45.3	
United Kingdom	-228	-254	-376	-414	-370	44	10.6	
France	145	158	191	171	210	39	22.9	
Singapore	299	270	305	300	390	89	29.8	
Malaysia	105	-9	-120	-204	-212	-8	-4.1	
Korea	434	486	571	701	620	-81	-11.6	
All other	2,629	2,628	2,883	3,212	3,932	721	22.4	
Total	2,751	2,046	2,237	2,040	3,096	1,056	51.8	
EU-15	155	4	-350	-391	-222	169	43.3	
EU-25	177	-21	-413	-432	-226	206	47.7	
OPEC	311	345	356	499	684	185	37.1	
Latin America	-784	-1,236	-666	-585	-430	155	26.5	
CBERA	171	175	186	208	270	62	29.9	
Asia	1,222	939	924	761	1,155	394	51.7	
Sub-Saharan Africa	84	98	126	138	186	48	34.4	
Central and Eastern Europe	25	-22	-61	-52	-19	33	62.6	

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2006.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

<sup>b</sup>Less than \$500,000.

total imports in 2006. The 2006 growth in U.S. imports from Japan, Germany, and other major suppliers was dominated by parts for sector products (increased by 9 percent to \$4.0 billion), followed by instruments for measuring electrical quantities and ionization radiation (up by 12 percent to \$1.4 billion), and instruments for measuring flow, level, and pressure of liquids and gases (up by 13 percent to \$1.3 billion).

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**TABLE ET-9** Electronic products : U.S. trade for industry/commodity groups and subgroups, 2002–06<sup>a</sup>

USITC code <sup>b</sup>	Industry/commodity group	2002	2003	2004	2005	2006	Change, 2006 from 2005	
							Absolute	Percent
<i>Million dollars</i>								
ET016	Office machines:							
	Exports .....	816	725	682	751	911	159	21.2
	Imports .....	1,491	1,544	1,732	1,793	1,877	84	4.7
	Trade balance .....	-675	-819	-1,050	-1,041	-966	75	7.2
ET017	Telephone and telegraph apparatus:							
	Exports .....	12,952	10,946	13,958	14,183	14,779	597	4.2
	Imports .....	27,948	30,982	39,341	49,220	53,318	4,098	8.3
	Trade balance .....	-14,996	-20,037	-25,382	-35,038	-38,539	-3,501	-10.0
ET018	Consumer electronics (except televisions):							
	Exports .....	2,631	2,392	2,518	2,679	3,130	451	16.8
	Imports .....	21,455	21,471	24,428	25,866	26,203	337	1.3
	Trade balance .....	-18,825	-19,079	-21,911	-23,187	-23,073	114	0.5
ET019	Blank media:							
	Exports .....	970	1,082	1,159	1,195	1,049	-146	-12.2
	Imports .....	2,746	3,127	3,831	4,248	4,486	237	5.6
	Trade balance .....	-1,776	-2,045	-2,672	-3,053	-3,436	-383	-12.5
ET020	Prerecorded media:							
	Exports .....	3,069	3,010	3,124	3,422	3,399	-23	-0.7
	Imports .....	1,308	1,436	1,503	1,499	1,263	-236	-15.7
	Trade balance .....	1,761	1,574	1,621	1,924	2,136	213	11.1
ET021	Navigational instruments and remote control apparatus:							
	Exports .....	2,921	2,866	3,082	3,217	3,786	568	17.7
	Imports .....	1,858	2,286	2,761	3,241	3,996	755	23.3
	Trade balance .....	1,063	580	321	-23	-210	-187	-799.1
ET022	Television receivers and video monitors:							
	Exports .....	1,257	809	874	857	1,101	244	28.5
	Imports .....	10,586	12,654	17,509	22,712	28,628	5,917	26.1
	Trade balance .....	-9,329	-11,845	-16,636	-21,854	-27,527	-5,673	-26.0
ET023	Radio and television broadcasting equipment:							
	Exports .....	1,364	1,241	1,335	1,544	1,535	-9	-0.6
	Imports .....	4,977	4,120	4,309	3,830	3,527	-304	-7.9
	Trade balance .....	-3,613	-2,879	-2,974	-2,286	-1,991	295	12.9
ET024	Electric sound and visual signaling apparatus:							
	Exports .....	1,042	937	1,098	1,092	1,205	112	10.3
	Imports .....	1,797	1,845	2,145	2,409	2,647	238	9.9
	Trade balance .....	-755	-908	-1,047	-1,317	-1,443	-126	-9.6

See footnote(s) at end of table.

**TABLE ET-9** Electronic products : U.S. trade for industry/commodity groups and subgroups, 2002–06<sup>a</sup>—Continued

USITC code <sup>b</sup>	Industry/commodity group	2002	2003	2004	2005	2006	Change, 2006 from 2005	
							Absolute	Percent
<i>Million dollars</i>								
ET025	Electrical capacitors and resistors:							
	Exports .....	1,706	1,623	1,664	1,286	1,825	538	41.9
	Imports .....	2,093	1,964	2,035	2,177	2,721	544	25.0
	Trade balance .....	-386	-341	-371	-891	-896	-5	-0.6
ET026	Printed circuits:							
	Exports .....	1,853	1,742	1,836	1,781	1,864	84	4.7
	Imports .....	1,896	1,785	2,113	2,123	2,215	92	4.3
	Trade balance .....	-44	-44	-277	-342	-351	-8	-2.5
ET027	Circuit apparatus exceeding 1000V:							
	Exports .....	549	487	507	509	539	29	5.8
	Imports .....	338	272	309	401	442	42	10.4
	Trade balance .....	211	215	197	109	97	-12	-11.3
ET028	Circuit apparatus not exceeding 1000V:							
	Exports .....	4,478	4,431	5,138	5,327	6,124	796	14.9
	Imports .....	4,933	5,127	6,259	6,818	7,369	551	8.1
	Trade balance .....	-455	-696	-1,120	-1,491	-1,245	246	16.5
ET029	Circuit apparatus assemblies:							
	Exports .....	1,108	1,150	1,193	1,447	2,250	803	55.5
	Imports .....	2,577	2,920	3,341	3,941	4,496	555	14.1
	Trade balance .....	-1,469	-1,771	-2,148	-2,493	-2,246	248	9.9
ET030	Parts of circuit apparatus:							
	Exports .....	1,592	1,807	2,201	2,348	2,530	182	7.7
	Imports .....	1,087	1,206	1,526	1,730	1,992	262	15.2
	Trade balance .....	506	601	675	619	538	-81	-13.0
ET031	Cathode-ray tubes:							
	Exports .....	1,762	1,202	998	600	292	-308	-51.3
	Imports .....	607	577	673	545	329	-216	-39.7
	Trade balance .....	1,155	625	325	54	-37	-91	( <sup>c</sup> )
ET032	Electron tubes other than CRTs:							
	Exports .....	180	165	175	192	173	-19	-10.0
	Imports .....	247	203	195	214	232	18	8.4
	Trade balance .....	-66	-38	-21	-22	-59	-37	-166.8
ET033	Semiconductors and integrated circuits:							
	Exports .....	31,738	35,712	35,130	34,195	37,227	3,031	8.9
	Imports .....	25,651	24,190	26,256	25,425	27,022	1,597	6.3
	Trade balance .....	6,087	11,522	8,874	8,770	10,205	1,435	16.4

See footnote(s) at end of table.

**TABLE ET-9** Electronic products : U.S. trade for industry/commodity groups and subgroups, 2002–06<sup>a</sup>—Continued

USITC code <sup>b</sup>	Industry/commodity group	2002	2003	2004	2005	2006	Change, 2006 from 2005	
							Absolute	Percent
<i>Million dollars</i>								
ET034	Miscellaneous electrical equipment:							
	Exports .....	1,564	1,426	1,968	2,419	2,537	118	4.9
	Imports .....	2,428	2,649	3,313	3,333	3,738	405	12.2
	Trade balance .....	-865	-1,223	-1,345	-914	-1,201	-287	-31.4
ET035	Computers, peripherals, and parts:							
	Exports .....	29,534	28,038	27,350	28,862	29,969	1,106	3.8
	Imports .....	75,817	76,940	89,264	93,950	102,468	8,518	9.1
	Trade balance .....	-46,283	-48,902	-61,914	-65,087	-72,499	-7,411	-11.4
ET036	Photographic film and paper:							
	Exports .....	2,127	2,233	2,182	2,091	2,336	245	11.7
	Imports .....	1,865	1,820	1,951	1,845	1,657	-188	-10.2
	Trade balance .....	262	413	231	246	679	433	175.9
ET037	Optical fibers, optical fiber bundles and cables:							
	Exports .....	474	437	383	459	568	109	23.7
	Imports .....	252	210	310	408	554	147	35.9
	Trade balance .....	222	227	74	51	14	-38	-73.3
ET038	Optical goods, including ophthalmic goods:							
	Exports .....	3,548	3,309	3,992	4,664	5,041	377	8.1
	Imports .....	4,142	4,495	5,386	5,626	6,294	668	11.9
	Trade balance .....	-594	-1,186	-1,395	-962	-1,253	-291	-30.3
ET039	Photographic cameras and equipment:							
	Exports .....	1,187	954	1,197	1,175	1,177	2	0.2
	Imports .....	3,029	2,715	2,382	1,880	1,612	-268	-14.2
	Trade balance .....	-1,842	-1,761	-1,185	-704	-435	270	38.3
ET040	Medical goods:							
	Exports .....	15,059	16,827	18,433	20,970	23,311	2,341	11.2
	Imports .....	13,232	16,143	19,006	20,548	22,152	1,604	7.8
	Trade balance .....	1,826	683	-573	422	1,159	737	174.7
ET041	Watches and clocks:							
	Exports .....	235	242	271	255	304	48	18.9
	Imports .....	3,098	3,291	3,634	3,795	3,964	170	4.5
	Trade balance .....	-2,864	-3,049	-3,363	-3,539	-3,660	-121	-3.4
ET042	Drawing, drafting, and calculating instruments:							
	Exports .....	368	364	397	485	619	134	27.6
	Imports .....	192	223	264	335	293	-41	-12.4
	Trade balance .....	176	141	133	151	326	175	116.3

See footnote(s) at end of table.

**TABLE ET-9** Electronic products : U.S. trade for industry/commodity groups and subgroups, 2002–06<sup>a</sup>—*Continued*

USITC code <sup>b</sup>	Industry/commodity group	2002	2003	2004	2005	2006	Change, 2006 from 2005	
							Absolute	Percent
<i>Million dollars</i>								
cET043	Measuring, testing, and controlling instruments:							
	Exports .....	14,346	14,683	16,603	17,399	19,669	2,270	13.0
	Imports .....	11,595	12,638	14,367	15,359	16,573	1,214	7.9
	Trade balance .....	2,751	2,046	2,237	2,040	3,096	1,056	51.8

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.—Calculations based on unrounded data.

<sup>a</sup>Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

<sup>b</sup>This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes

<sup>c</sup>Not meaningful for purposes of comparison.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002–06

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET016	Office machines:						
	Number of establishments	119	110	110	110	110	0.0
	Employees (thousands)	10.0	7.0	7.0	7.0	7.0	0.0
	Capacity utilization (percent)	56	43	79	78	78	0.0
	U.S. shipments (million dollars)	2,587	1,932	2,200	2,212	2,072	-6.3
	U.S. exports (million dollars)	816	725	682	751	911	21.2
	U.S. imports (million dollars)	( <sup>1</sup> )	1,544	1,732	( <sup>a</sup> )	1,877	4.7
	Apparent U.S. consumption (million dollars)	3,262	2,751	3,250	3,253	3,038	-6.6
	Trade balance (million dollars)	-675	-819	-1,050	-1,041	-966	7.2
	Ratio of imports to consumption (percent)	45.7	56.1	53.3	55.1	61.8	12.1
	Ratio of exports to shipments (percent)	31.6	37.5	31.0	34.0	44.0	29.4
ET017	Telephone and telegraph apparatus:						
	Number of establishments	1,434	1,200	1,200	1,123	1,100	-2.0
	Employees (thousands)	152.0	125.0	120.0	114.0	113.0	-0.9
	Capacity utilization (percent)	35	32	56	58	60	3.4
	U.S. shipments (million dollars)	50,914	46,022	50,175	46,961	54,007	15.0
	U.S. exports (million dollars)	12,952	10,946	13,958	14,183	14,779	4.2
	U.S. imports (million dollars)	( <sup>a</sup> )	30,982	39,341	( <sup>a</sup> )	53,318	8.3
	Apparent U.S. consumption (million dollars)	65,910	66,059	75,557	81,999	92,546	12.9
	Trade balance (million dollars)	-14,996	-20,037	-25,382	-35,038	-38,539	-10.0
	Ratio of imports to consumption (percent)	42.4	46.9	52.1	60.0	57.6	-4.0
	Ratio of exports to shipments (percent)	25.4	23.8	27.8	30.2	27.4	-9.4
ET018	Consumer electronics (except televisions):						
	Number of establishments	215	205	205	210	210	0.0
	Employees (thousands)	25.0	25.0	23.0	22.0	21.0	-4.5
	Capacity utilization (percent)	54	57	64	71	71	0.0
	U.S. shipments (million dollars)	5,270	5,520	6,306	4,625	4,000	-13.5
	U.S. exports (million dollars)	2,631	2,392	2,518	2,679	3,130	16.8
	U.S. imports (million dollars)	( <sup>a</sup> )	21,471	24,428	( <sup>a</sup> )	26,203	1.3
	Apparent U.S. consumption (million dollars)	24,095	24,599	28,217	27,812	27,073	-2.7
	Trade balance (million dollars)	-18,825	-19,079	-21,911	-23,187	-23,073	0.5
	Ratio of imports to consumption (percent)	89.0	87.3	86.6	93.0	96.8	4.1
	Ratio of exports to shipments (percent)	49.9	43.3	39.9	57.9	78.2	35.1
ET019	Blank media:						
	Number of establishments	212	210	210	205	205	0.0
	Employees (thousands)	7.0	7.0	8.0	7.0	7.0	0.0
	Capacity utilization (percent)	77	81	75	72	72	0.0
	U.S. shipments (million dollars)	2,800	2,600	2,450	2,350	2,350	0.0
	U.S. exports (million dollars)	970	1,082	1,159	1,195	1,049	-12.2
	U.S. imports (million dollars)	( <sup>a</sup> )	3,127	3,831	( <sup>a</sup> )	4,486	5.6
	Apparent U.S. consumption (million dollars)	4,576	4,645	5,122	5,403	5,786	7.1
	Trade balance (million dollars)	-1,776	-2,045	-2,672	-3,053	-3,436	-12.5
	Ratio of imports to consumption (percent)	60.0	67.3	74.8	78.6	77.5	-1.4
	Ratio of exports to shipments (percent)	34.6	41.6	47.3	50.9	44.7	-12.2

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See footnote(s) at end of table.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002–06—*Continued*

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET020	Prerecorded media:						
	Number of establishments	700	708	710	710	705	-0.7
	Employees (thousands)	31.0	29.0	26.0	25.0	25.0	0.0
	Capacity utilization (percent)	73	67	70	70	70	0.0
	U.S. shipments (million dollars)	6,200	6,700	6,700	6,750	6,700	-0.7
	U.S. exports (million dollars)	3,069	3,010	3,124	3,422	3,399	-0.7
	U.S. imports (million dollars)	<sup>(a)</sup>	1,436	1,503	<sup>(a)</sup>	1,263	-15.7
	Apparent U.S. consumption (million dollars)	4,439	5,126	5,079	4,826	4,564	-5.4
	Trade balance (million dollars)	1,761	1,574	1,621	1,924	2,136	11.1
	Ratio of imports to consumption (percent)	29.5	28.0	29.6	31.1	27.7	-10.9
	Ratio of exports to shipments (percent)	49.5	44.9	46.6	50.7	50.7	0.1
ET021	Navigational instruments and remote control apparatus:						
	Number of establishments	653	650	645	640	635	-0.8
	Employees (thousands)	148.0	145.0	151.0	157.0	158.0	0.6
	Capacity utilization (percent)	59	67	56	62	63	1.6
	U.S. shipments (million dollars)	32,258	33,656	36,907	36,739	37,000	0.7
	U.S. exports (million dollars)	2,921	2,866	3,082	3,217	3,786	17.7
	U.S. imports (million dollars)	<sup>(a)</sup>	2,286	2,761	<sup>(a)</sup>	3,996	23.3
	Apparent U.S. consumption (million dollars)	31,195	33,076	36,586	36,762	37,210	1.2
	Trade balance (million dollars)	1,063	580	321	-23	-210	-799.1
	Ratio of imports to consumption (percent)	6.0	6.9	7.5	8.8	10.7	21.8
	Ratio of exports to shipments (percent)	9.1	8.5	8.4	8.8	10.2	16.8
ET022	Television receivers and video monitors:						
	Number of establishments	9	8	8	7	8	14.3
	Employees (thousands)	7.0	7.0	7.0	7.0	8.0	14.3
	Capacity utilization (percent)	54	57	64	71	71	0.0
	U.S. shipments (million dollars)	3,285	3,499	3,705	3,826	3,700	-3.3
	U.S. exports (million dollars)	1,257	809	874	857	1,101	28.5
	U.S. imports (million dollars)	<sup>(a)</sup>	12,654	17,509	<sup>(a)</sup>	28,628	26.1
	Apparent U.S. consumption (million dollars)	12,614	15,344	20,341	25,680	31,227	21.6
	Trade balance (million dollars)	-9,329	-11,845	-16,636	-21,854	-27,527	-26.0
	Ratio of imports to consumption (percent)	83.9	82.5	86.1	88.4	91.7	3.7
	Ratio of exports to shipments (percent)	38.3	23.1	23.6	22.4	29.8	32.8
ET023	Radio and television broadcasting equipment:						
	Number of establishments	170	175	170	170	170	0.0
	Employees (thousands)	12.0	11.0	10.0	10.0	10.0	0.0
	Capacity utilization (percent)	56	52	52	52	52	0.0
	U.S. shipments (million dollars)	3,304	2,932	2,763	3,289	3,900	18.6
	U.S. exports (million dollars)	1,364	1,241	1,335	1,544	1,535	-0.6
	U.S. imports (million dollars)	<sup>(a)</sup>	4,120	4,309	<sup>(a)</sup>	3,527	-7.9
	Apparent U.S. consumption (million dollars)	6,917	5,811	5,737	5,575	5,891	5.7
	Trade balance (million dollars)	-3,613	-2,879	-2,974	-2,286	-1,991	12.9
	Ratio of imports to consumption (percent)	72.0	70.9	75.1	68.7	59.9	-12.9
	Ratio of exports to shipments (percent)	41.3	42.3	48.3	46.9	39.4	-16.2

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See footnote(s) at end of table.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002-06—*Continued*

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET024	Electric sound and visual signaling apparatus:						
	Number of establishments	454	486	494	494	494	0.0
	Employees (thousands)	25.0	22.0	18.0	17.0	17.0	0.0
	Capacity utilization (percent)	66	63	63	60	60	0.0
	U.S. shipments (million dollars)	5,508	4,837	4,086	4,347	4,243	-2.4
	U.S. exports (million dollars)	1,042	937	1,098	1,092	1,205	10.3
	U.S. imports (million dollars)	<sup>(a)</sup>	1,845	2,145	<sup>(a)</sup>	2,647	9.9
	Apparent U.S. consumption (million dollars)	6,263	5,745	5,133	5,664	5,686	0.4
	Trade balance (million dollars)	-755	-908	-1,047	-1,317	-1,443	-9.6
	Ratio of imports to consumption (percent)	28.7	32.1	41.8	42.5	46.6	9.5
	Ratio of exports to shipments (percent)	18.9	19.4	26.9	25.1	28.4	13.0
ET025	Electrical capacitors and resistors:						
	Number of establishments	185	174	166	132	115	-12.9
	Employees (thousands)	16.0	15.0	14.0	13.0	12.0	-7.7
	Capacity utilization (percent)	50	54	53	57	65	14.0
	U.S. shipments (million dollars)	1,991	1,828	1,928	1,681	2,000	19.0
	U.S. exports (million dollars)	1,706	1,623	1,664	1,286	1,825	41.9
	U.S. imports (million dollars)	<sup>(a)</sup>	1,964	2,035	<sup>(a)</sup>	2,721	25.0
	Apparent U.S. consumption (million dollars)	2,377	2,169	2,299	2,572	2,896	12.6
	Trade balance (million dollars)	-386	-341	-371	-891	-896	-0.6
	Ratio of imports to consumption (percent)	88.0	90.5	88.5	84.7	94.0	11.0
	Ratio of exports to shipments (percent)	85.7	88.8	86.3	76.5	91.2	19.2
ET026	Printed circuits:						
	Number of establishments	435	515	418	374	370	-1.1
	Employees (thousands)	82.0	66.0	63.0	60.0	58.0	-3.3
	Capacity utilization (percent)	51	60	56	59	62	5.1
	U.S. shipments (million dollars)	5,764	4,871	4,709	4,794	4,900	2.2
	U.S. exports (million dollars)	1,853	1,742	1,836	1,781	1,864	4.7
	U.S. imports (million dollars)	<sup>(a)</sup>	1,785	2,113	<sup>(a)</sup>	2,215	4.3
	Apparent U.S. consumption (million dollars)	5,808	4,915	4,986	5,136	5,251	2.2
	Trade balance (million dollars)	-44	-44	-277	-342	-351	-2.5
	Ratio of imports to consumption (percent)	32.7	36.3	42.4	41.3	42.2	2.1
	Ratio of exports to shipments (percent)	32.1	35.8	39.0	37.1	38.0	2.4
ET027	Circuit apparatus exceeding 1000V:						
	Number of establishments	200	200	200	200	<sup>(b)</sup>	<sup>(b)</sup>
	Employees (thousands)	15.0	14.0	15.0	15.0	<sup>(b)</sup>	<sup>(b)</sup>
	Capacity utilization (percent)	60	60	60	60	<sup>(b)</sup>	<sup>(b)</sup>
	U.S. production (million dollars)	3,800	3,600	3,800	3,800	<sup>(b)</sup>	<sup>(b)</sup>
	U.S. exports (million dollars)	549	487	507	509	539	5.8
	U.S. imports (million dollars)	<sup>(a)</sup>	272	309	<sup>(a)</sup>	442	10.4
	Apparent U.S. consumption (million dollars)	3,589	3,385	3,603	3,691	<sup>(b)</sup>	<sup>(b)</sup>
	Trade balance (million dollars)	211	215	197	109	97	-11.3
	Ratio of imports to consumption (percent)	9.4	8.0	8.6	10.9	<sup>(b)</sup>	<sup>(b)</sup>
	Ratio of exports to production (percent)	14.4	13.5	13.3	13.4	<sup>(2)</sup>	<sup>(2)</sup>

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See footnote(s) at end of table.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002–06—*Continued*

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET028	Circuit apparatus not exceeding 1000V:						
	Number of establishments	600	600	600	600	600	0.0
	Employees (thousands)	46.0	43.0	46.0	48.0	50.0	4.2
	Capacity utilization (percent)	60	60	60	60	70	16.7
	U.S. shipments (million dollars)	11,800	11,200	11,800	12,240	14,050	14.8
	U.S. exports (million dollars)	4,478	4,431	5,138	5,327	6,124	14.9
	U.S. imports (million dollars)	<sup>(a)</sup>	5,127	6,259	<sup>(a)</sup>	7,369	8.1
	Apparent U.S. consumption (million dollars)	12,255	11,896	12,920	13,731	15,295	11.4
	Trade balance (million dollars)	-455	-696	-1,120	-1,491	-1,245	16.5
	Ratio of imports to consumption (percent)	40.2	43.1	48.4	49.7	48.2	-3.0
	Ratio of exports to shipments (percent)	37.9	39.6	43.5	43.5	43.6	0.1
ET031	Cathode-ray tubes:						
	Number of establishments	14	13	12	7	4	-42.9
	Employees (thousands)	11.0	7.0	6.0	4.0	2.0	-50.0
	Capacity utilization (percent)	73	74	47	43	43	0.0
	U.S. shipments (million dollars)	2,486	1,508	1,049	620	300	-51.6
	U.S. exports (million dollars)	1,762	1,202	998	600	292	-51.3
	U.S. imports (million dollars)	<sup>(a)</sup>	577	673	<sup>(a)</sup>	329	-39.7
	Apparent U.S. consumption (million dollars)	1,331	883	724	566	337	-40.5
	Trade balance (million dollars)	1,155	625	325	54	-37	<sup>(c)</sup>
	Ratio of imports to consumption (percent)	45.6	65.3	93.0	96.4	97.6	1.3
	Ratio of exports to shipments (percent)	70.9	79.7	95.1	96.7	97.4	0.7
ET032	Electron tubes other than CRTs:						
	Number of establishments	35	33	28	24	22	-8.3
	Employees (thousands)	4.0	4.0	3.0	2.0	2.0	0.0
	Capacity utilization (percent)	73	74	47	43	42	-2.3
	U.S. shipments (million dollars)	584	629	641	652	600	-8.0
	U.S. exports (million dollars)	180	165	175	192	173	-10.0
	U.S. imports (million dollars)	<sup>(a)</sup>	203	195	<sup>(a)</sup>	232	8.4
	Apparent U.S. consumption (million dollars)	650	667	662	674	659	-2.2
	Trade balance (million dollars)	-66	-38	-21	-22	-59	-166.8
	Ratio of imports to consumption (percent)	37.9	30.4	29.5	31.7	35.2	10.8
	Ratio of exports to shipments (percent)	30.9	26.2	27.3	29.4	28.8	-2.2
ET033	Semiconductors and integrated circuits:						
	Number of establishments	1,190	1,291	1,274	1,285	1,285	0.0
	Employees (thousands)	251.0	226.0	222.0	223.0	233.0	4.5
	Capacity utilization (percent)	65	79	83	88	89	1.1
	U.S. shipments (million dollars)	61,435	66,608	72,356	75,491	80,257	6.3
	U.S. exports (million dollars)	31,738	35,712	35,130	34,195	37,227	8.9
	U.S. imports (million dollars)	<sup>(a)</sup>	24,190	26,256	<sup>(a)</sup>	27,022	6.3
	Apparent U.S. consumption (million dollars)	55,348	55,086	63,482	66,721	70,052	5.0
	Trade balance (million dollars)	6,087	11,522	8,874	8,770	10,205	16.4
	Ratio of imports to consumption (percent)	46.3	43.9	41.4	38.1	38.6	1.2
	Ratio of exports to shipments (percent)	51.7	53.6	48.6	45.3	46.4	2.4

See footnote(s) at end of table.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002–06—*Continued*

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET035	Computers, peripherals, and parts:						
	Number of establishments	715	715	720	720	715	-0.7
	Employees (thousands)	151.0	143.0	101.0	101.0	100.0	-1.0
	Capacity utilization (percent)	62	65	71	66	65	-1.5
	U.S. shipments (million dollars)	82,100	84,000	84,500	85,000	85,000	0.0
	U.S. exports (million dollars)	29,534	28,038	27,350	28,862	29,969	3.8
	U.S. imports (million dollars)	<sup>(a)</sup>	76,940	89,264	<sup>(a)</sup>	102,468	9.1
	Apparent U.S. consumption (million dollars)	128,383	132,902	146,414	150,087	157,499	4.9
	Trade balance (million dollars)	-46,283	-48,902	-61,914	-65,087	-72,499	-11.4
	Ratio of imports to consumption (percent)	59.1	57.9	61.0	62.6	65.1	3.9
	Ratio of exports to shipments (percent)	36.0	33.4	32.4	34.0	35.3	3.8
ET036	Photographic film and paper:						
	Number of establishments	379	410	403	403	403	0.0
	Employees (thousands)	30.0	34.0	35.0	35.0	35.0	0.0
	Capacity utilization (percent)	69	72	82	89	89	0.0
	U.S. shipments (million dollars)	11,856	12,410	11,726	12,862	12,969	0.8
	U.S. exports (million dollars)	2,127	2,233	2,182	2,091	2,336	11.7
	U.S. imports (million dollars)	<sup>(a)</sup>	1,820	1,951	<sup>(a)</sup>	1,657	-10.2
	Apparent U.S. consumption (million dollars)	11,594	11,997	11,495	12,616	12,290	-2.6
	Trade balance (million dollars)	262	413	231	246	679	175.9
	Ratio of imports to consumption (percent)	16.1	15.2	17.0	14.6	13.5	-7.8
	Ratio of exports to shipments (percent)	17.9	18.0	18.6	16.3	18.0	10.8
ET037	Optical fibers, optical fiber bundles and cables:						
	Number of establishments	96	90	80	70	60	-14.3
	Employees (thousands)	7.0	7.0	7.0	7.0	7.0	0.0
	Capacity utilization (percent)	45	52	61	67	67	0.0
	U.S. shipments (million dollars)	3,000	2,400	2,600	2,800	2,900	3.6
	U.S. exports (million dollars)	474	437	383	459	568	23.7
	U.S. imports (million dollars)	<sup>(a)</sup>	210	310	<sup>(a)</sup>	554	35.9
	Apparent U.S. consumption (million dollars)	2,778	2,173	2,526	2,749	2,886	5.0
	Trade balance (million dollars)	222	227	74	51	14	-73.3
	Ratio of imports to consumption (percent)	9.1	9.6	12.3	14.8	19.2	29.4
	Ratio of exports to shipments (percent)	15.8	18.2	14.7	16.4	19.6	19.4
ET038	Optical goods, including ophthalmic goods:						
	Number of establishments	850	855	850	850	855	0.6
	Employees (thousands)	50.0	50.0	50.0	50.0	55.0	10.0
	Capacity utilization (percent)	54	52	53	59	58	-1.7
	U.S. shipments (million dollars)	7,700	7,800	7,800	7,900	8,100	2.5
	U.S. exports (million dollars)	3,548	3,309	3,992	4,664	5,041	8.1
	U.S. imports (million dollars)	<sup>(a)</sup>	4,495	5,386	<sup>(a)</sup>	6,294	11.9
	Apparent U.S. consumption (million dollars)	8,294	8,986	9,195	8,862	9,353	5.5
	Trade balance (million dollars)	-594	-1,186	-1,395	-962	-1,253	-30.3
	Ratio of imports to consumption (percent)	49.9	50.0	58.6	63.5	67.3	6.0
	Ratio of exports to shipments (percent)	46.1	42.4	51.2	59.0	62.2	5.4

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See footnote(s) at end of table.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002–06—*Continued*

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET039	Photographic cameras and equipment:						
	Number of establishments	316	303	293	293	293	0.0
	Employees (thousands)	9.0	8.0	7.0	7.0	7.0	0.0
	Capacity utilization (percent)	59	70	41	85	85	0.0
	U.S. shipments (million dollars)	1,960	2,017	2,211	2,302	2,109	-8.4
	U.S. exports (million dollars)	1,187	954	1,197	1,175	1,177	0.2
	U.S. imports (million dollars)	<sup>(a)</sup>	2,715	2,382	<sup>(a)</sup>	1,612	-14.2
	Apparent U.S. consumption (million dollars)	3,802	3,778	3,396	3,006	2,544	-15.4
	Trade balance (million dollars)	-1,842	-1,761	-1,185	-704	-435	38.3
	Ratio of imports to consumption (percent)	79.7	71.9	70.1	62.5	63.4	1.4
	Ratio of exports to shipments (percent)	60.5	47.3	54.1	51.1	55.8	9.3
ET040	Medical goods:						
	Number of establishments	4,330	4,320	4,300	4,300	4,300	0.0
	Employees (thousands)	265.0	255.0	247.0	252.0	250.0	-0.8
	Capacity utilization (percent)	63	68	63	67	68	1.5
	U.S. shipments (million dollars)	60,197	63,267	66,999	75,039	81,000	7.9
	U.S. exports (million dollars)	15,059	16,827	18,433	20,970	23,311	11.2
	U.S. imports (million dollars)	<sup>(a)</sup>	16,143	19,006	<sup>(a)</sup>	22,152	7.8
	Apparent U.S. consumption (million dollars)	58,371	62,584	67,572	74,617	79,841	7.0
	Trade balance (million dollars)	1,826	683	-573	422	1,159	174.7
	Ratio of imports to consumption (percent)	22.7	25.8	28.1	27.5	27.7	0.8
	Ratio of exports to shipments (percent)	25.0	26.6	27.5	27.9	28.8	3.0
ET041	Watches and clocks:						
	Number of establishments	124	124	124	124	124	0.0
	Employees (thousands)	6.0	3.0	3.0	2.0	2.0	0.0
	Capacity utilization (percent)	51	46	82	56	56	0.0
	U.S. shipments (million dollars)	668	570	619	641	663	3.4
	U.S. exports (million dollars)	235	242	271	255	304	18.9
	U.S. imports (million dollars)	<sup>(a)</sup>	3,291	3,634	<sup>(a)</sup>	3,964	4.5
	Apparent U.S. consumption (million dollars)	3,532	3,619	3,982	4,180	4,323	3.4
	Trade balance (million dollars)	-2,864	-3,049	-3,363	-3,539	-3,660	-3.4
	Ratio of imports to consumption (percent)	87.7	90.9	91.3	90.8	91.7	1.0
	Ratio of exports to shipments (percent)	35.1	42.5	43.8	39.9	45.8	15.0
ET042	Drawing, drafting, and calculating instruments:						
	Number of establishments	130	130	130	130	130	0.0
	Employees (thousands)	6.0	5.0	5.0	4.0	4.0	0.0
	Capacity utilization (percent)	70	65	70	75	75	0.0
	U.S. shipments (million dollars)	887	814	896	1,100	1,200	9.1
	U.S. exports (million dollars)	368	364	397	485	619	27.6
	U.S. imports (million dollars)	<sup>(a)</sup>	223	264	<sup>(a)</sup>	293	-12.4
	Apparent U.S. consumption (million dollars)	711	673	763	949	874	-7.9
	Trade balance (million dollars)	176	141	133	151	326	116.3
	Ratio of imports to consumption (percent)	26.9	33.2	34.6	35.2	33.6	-4.8
	Ratio of exports to shipments (percent)	41.5	44.7	44.3	44.1	51.6	17.0

See footnote(s) at end of table.

**TABLE ET-10** Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 2002–06—*Continued*

USITC code	Industry/commodity group	2002	2003	2004	2005	2006	Percent change, 2006 from 2005
ET043	Measuring, testing, and controlling instruments:						
	Number of establishments		4,060	4,060	4,060	4,060	0.0
	Employees (thousands)		210.0	192.0	184.0	181.0	0.0
	Capacity utilization (percent)		65	65	70	75	0.0
	U.S. shipments (million dollars)		38,724	38,960	42,735	43,900	0.2
	U.S. exports (million dollars)		14,346	14,683	16,603	17,399	13.0
	U.S. imports (million dollars)		<sup>(a)</sup>	12,638	14,367	<sup>(a)</sup>	7.9
	Apparent U.S. consumption (million dollars)		35,973	36,914	40,498	41,860	-2.3
	Trade balance (million dollars)		2,751	2,046	2,237	2,040	51.8
	Ratio of imports to consumption (percent)		32.2	34.2	35.5	36.7	10.4
	Ratio of exports to shipments (percent)		37.0	37.7	38.9	39.6	12.8

*Source:* These data have been estimated by the Commission's international trade analysts on the basis of primary and secondary data sources including discussions with various Government and industry contacts. These estimated data are subject to change either from secondary sources or from detailed surveys the Commission often conducts in the course of statutory investigations or other work. Further, these data may undergo adjustments based on revisions in tariff nomenclature, classification practices, or redefinitions of industry classes.

*Note.*—Calculations based on unrounded data.

<sup>a</sup>Less than 500,000.

<sup>b</sup>Not available.

<sup>c</sup>Not meaningful.