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INTERNET & TELECOMMUNICATIONS TRADE MISSION TO GERMANY



**MUNICH • FRANKFURT • BERLIN OR HAMBURG
NOVEMBER 4-9, 2001**

MISSION DESCRIPTION

The International Trade Administration's Office of Information Technologies and Office of Telecommunications Technologies will lead a trade mission to Munich, Frankfurt and either Berlin or Hamburg from November 4-9, 2001. It will include representatives from a variety of U.S. firms specializing in products and services for the Internet and telecommunications who are interested in entering or expanding their presence in Germany.

GERMAN MARKET

Telecommunications: Germany has the largest telecommunications market in Europe and the third largest globally, with an estimated value of \$53 billion for telecom services and \$13 billion for telecom equipment during the year 2000. The market is expected to continue to grow at its current rate of 5-10%, fueled by ongoing liberalization, continued expansion of mobile communications and broadband and the convergence of information and communication technologies.

Internet Technologies: Germany boasts the largest number of Internet users in Europe and ranks eighth worldwide in Internet penetration. Twenty-five million Germans were using the Internet at the end of April 2001, a number expected to rise to 47 million by the end of 2003 and a recent survey reports that over 90% of German businesses use the Internet. Demand for Internet technologies and services is growing rapidly due to the liberalization of telecommunications services and need for German businesses to leverage Internet technologies as they move into e-commerce.

WHY PARTICIPATE?

Business Contacts:

- One-on-one business meetings custom tailored to your products/services, market objectives and type of representation/partnership you are seeking
- Business networking receptions at each stop allow you to meet with government and industry representatives and prospective business partners

Market Exposure:

- Publicity in Germany provided through advance press releases, press coverage and other promotional materials

Logistical Support:

- Advance and on-site support provided by staff in Germany and Washington, DC
- Advance and on-site briefings given by government and industry experts on the German Internet and telecom markets and business climate

Participation fee: \$2950 • Closing date: September 7, 2001

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The explorers and traders of the 16th to 19th centuries have much in common with today's entrepreneurs engaged in international trade.

They faced untold risks, no guarantees, pirates, as well as the potential of good fortune and prosperity. The difference lies only in the modernization of business practices. Instead of embarking on a yearlong journey by ship to trade with Southern Africa or India, risking disease and starvation, not to mention pirates, entrepreneurs now engage in business through the Internet, over cell phones and through intermediaries but still face obstacles that can be just as devastating.

The most significant difference between the traders of the 16th century and those of today is that trade is now accessible and profitable for smaller companies. Small businesses also have countless partners to assist them in navigating the waters of international trade; partners such as the Commerce Department's Export Assistance Centers, the U.S. Small Business Administration as well as local and state agencies who will smooth the choppy seas for small and medium-sized companies conducting business abroad.

There is still the threat of pirates (intellectual property rights, trademarks and patents) and the risks can be just as overwhelming as in years past, but assistance from government and community organizations can reduce those risks so that

businesses can successfully pursue opportunities in overseas markets.

This month, as one example, we look at consumer goods exports, specific industries where U.S. manufacturers are globally competitive and efforts to open markets for other goods. We will learn about changes that the U.S. Customs Service is implementing to make trade easier and hear about how trade associations can help their members reach global markets.

Next month, we'll bring the entire trade message to you in one neat package. As you may be aware, President Bush has requested that Congress grant him Trade Promotion Authority (TPA), which will support the President in negotiating agreements with our trading partners. Specifically, we will look at the direct impact TPA will have on industry, hear from businesses on their successes and failures due to open (or closed) markets and find out how trade positively impacts our communities.

Until we meet next month, good luck in your exporting endeavors and we welcome your comments and feedback. Visit us at our web site <http://exportamerica.doc.gov> where you can view past issues, send us email or subscribe.

Cory Churches

Cory Churches
Editor



GLOBAL NEWS LINE

BRAZIL

Companies interested in investing in Education and Training Services will find an attractive market in Brazil. The number of new franchisers grew 109 percent between 1995 and 2000 and is expected to grow another 26 percent in 2001. There are 40 different franchisers in this sector, representing 8.5 percent of the total Brazilian market. Most of these companies operate in the areas of foreign-language and computer training.

According to Ricardo Young Silva, owner of the foreign-language school Yazigi and former president of the Brazilian Franchising Association (ABF), many such schools are fated to merge with one another and form large companies, meaning that smaller franchise operations will most likely struggle to survive. Yazigi was one of the first companies in Brazil to adopt the franchise system (1963) and currently owns more than 300 schools in five different countries.

American franchises planning to enter the Brazilian market should consider hiring a local consultant who can help them understand the various regional aspects of this market. A common strategy for new-to-market companies entering Brazil is to open their first unit in the interior of the state of São Paulo or in Curitiba, the state capital of Paraná. These areas have a high purchasing power, lower operating costs and the competition is not as great as in the major Brazilian cities such as São Paulo and Rio de Janeiro.

MEXICO

Avantel and Alestra announced that they would provide local telephony to residential users by the end of this year or at the beginning of 2002. These companies have already started to provide this service to business of all sizes.

Meanwhile, Avantel, which is a partnership between Grupo Financiero Banamex-Accival (Banacci) and WorldCom, announced last January the beginning of operations in corporate

local telephony in Mexico. This service complements and adds value to the already operating long distance services, data transmission and Internet access in place since 1996. This makes Avantel an integral provider of telecommunication services.

For further information on the telecommunications market and opportunities for U.S. business companies, please contact: M. Angeles Avila Chiquini, E-mail: angeles.avila@mail.doc.gov

INTER-AMERICAN DEVELOPMENT BANK

Finding information on E-Commerce at the Inter-American Development Bank (IDB) just got easier. The Information Technology for Development Division of the IDB now has an online newsletter focusing on the Internet Industry. The newsletter, which is published every two months, covers technology and market trends related to the new economy with a specific focus on Latin America and the Caribbean and on how technology can support economic development. The IDB is a multilateral development bank lending to Latin American and Caribbean countries.

U.S. firms can take advantage of this free, up-to-date data and analysis of the Internet Industry in the Latin American region by logging on to: www.iadb.org/ict4dev/pdf/EcommerceBrief11.pdf.

The current issue focuses on the evolution of venture capital, B2B e-Commerce in the region and features a letter from the CEO of trigonet.com.br, a Brazilian business-to-business online exchange portal for the grain market. For information on other E-opportunities at the IDB direct your browser to www.iadb.org.

DENMARK

Each year the Danish government procures products and services worth more than \$10 billion from different vendors and companies. To ensure that

costs are kept low and in order to streamline the process, a public Internet auction hall is to be established at which enterprises can make bids for the supplying of goods and services to the public sector. It is also possible for public institutions to make joint procurements using the portal. The electronic auction hall is to be based on commercial incentives and commercial business models. The plan is that a large part of public employees use this site in the future when buying and procuring goods and merchandise.

Beginning this October, government procurement worth \$1 billion will be done via this new public web portal. On this date a directive instructing various government institutions to use the portal will take effect, and the plan is that one third of all government procurement should be done this way within a few years-worth more than \$4 billion a year.

gatetrade.net, who is making the portal for the government, is a functioning e-marketplace that was launched in March 2001 by four of Denmark's largest companies, Maersk Data, Danske Bank, Post Danmark and TDC (former TeleDanmark). The portal is open to all companies, mainly medium-sized and larger. **gatetrade.net** expects to reach a revenue of \$5 billion within a couple of years.

American companies that want to sell to the Danish government will have to meet these standards and be able to develop electronic catalogs to be posted on the portal. By being well equipped to meet these demands, U.S. companies have a good chance to be included in the portal and to benefit from their experience and knowledge in B2B eCommerce.

ALBANIA

The government of Albania has issued an announcement for Expressions of Interest in the privatization of Albania's largest state-owned bank, the Savings Bank of Albania (SBA). The largest bank in Albania, SBA was

created in 1991 and operates as a universal and commercial bank while providing retail and wholesale banking services. It has 200 branches throughout Albania that serve approximately 400,000 customers. It holds roughly 80 percent of the country's deposits. As of December 2000, SBA has assets of \$1.2 billion and has paid-up capital of \$4.9 million. In March 2001, the deposit volume was \$940 million. In 2000, SBA reported a profit of over \$27.5 million, double its expectations. The bank will be privatized through an open international tender. The Albanian government hopes to attract a foreign strategic partner and international financial institutions through the tender and will offer minimal shares to the Albanian public. The deadline for expressions of interest is August 20, 2001. For the complete announcement of expressions of interest or further information about doing business in Albania, please contact the Central and Eastern Europe Business Information Center (CEEIBC) at telephone: (202) 482-2645 or e-mail: ceebic@ita.doc.gov or visit the CEEIBC website: www.mac.doc.gov/eebic/ceebic.html

RUSSIA

The Russian medical equipment market has recently been growing rapidly in tandem with a return to growth in Russia's economy. In the medical equipment sector, emergency care equipment and products appear to have potential for U.S. exporters. For Russia, establishing a high-level system of emergency and disaster care is a priority. Internal displacement of the population in Chechnya, to natural disasters and epidemics have demonstrated the need for improved, large-scale emergency services.

The total market for medical equipment is currently estimated at about \$2 billion. Imports continue to play a significant role, accounting for approximately 45 percent of the total market despite a significant increase in local production in the last two years. Currently, high-tech medical devices dominate imports. Until recently relatively inexpensive low-tech

medical devices and equipment represented most imports. Russia still produces some high-end medical equipment such as computer tomographs, ultrasound equipment and sophisticated x-ray equipment. Emergency care equipment and products have recently become a fast growing subsector, in which imports have gained a significant market share. Competition is high from Western European suppliers, especially Germany. However, with aggressive marketing and by exhibiting at appropriate venues, there is the potential for U.S. companies to significantly increase their market share.

The Emergency Medicine international trade show, held annually in Moscow, is the major show in the field. For potential U.S. exporters it represents the best venue to explore the Russian market. This year's show, the second in its history, was held in April 2001 and attracted around 60 exhibitors and approximately 10,000 visitors. In 2002, the Emergency Medicine show is scheduled for April 17 through 20.

KOREA

The Korean government agreed to amend the Enforcement Decree (Presidential Decree) implementing the Telecommunications Business Law during a cabinet meeting presided over by President Kim Dae-jung on June 5 to relax rules on foreign investment in Korea's key telecommunications sector. Currently, Korean companies having foreign equity holdings of 50 percent or more are treated as foreign-firms and, as such, are not eligible to participate in the country's telecommunications sector. The Korean government raised the ceiling on foreign equity stakes in a Korean company from the present 50 percent to 80 percent. As privatization, deregulation and competition emerge, owners of these telecommunications service companies may be looking to enhance the level of customer services, providing opportunities for U.S. companies. This cabinet decision is expected not only to step up the government's effort to attract foreign

investment, but also to develop a favorable image of telecommunications companies currently working with potential foreign investors.

Korea is one of the fastest growing telecommunications markets in the world. To stay ahead of the global competitive curve, U.S. suppliers of telecom equipment and services should carefully monitor the changes in players and in trends in Korea's changing telecom market.

WORLD BANK

The World Bank is funding \$18 billion in projects in the environmental sector throughout developing world. These funds are used by government agencies in developing countries to purchase a wide range of goods and services needed to carry out these projects. As of April 2001, there were 100 active environmental projects which the World Bank is funding totaling \$5.6 billion. There are projects in other sectors with primary environmental objectives as well as those with minor environmental impact, amounting to \$12.4 billion. World Bank projects cover a wide spectrum in the environmental sector including water resources projects, forestry projects and air quality projects.

Information on these projects is available on the World Bank's website at <http://www4.worldbank.org/projects/>. U.S. companies are encouraged to contact Clifton Brown at the U.S. Commercial Service Commercial Liaison Office to the World Bank,

Tel: (202) 458-1954; Fax (202) 477-2967; E-mail Cbrown@worldbank.org.

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 email, is available by calling the Trade Information Center at (800) USA-TRAD(E).

NOTHING TO FEAR BUT FEAR ITSELF

HYDRAULICS PARTS FIRM TAKES THE PLUNGE INTO NEW MARKETS

by Erin Butler,

Office of Director General, U.S. Commercial Service

There are some 23 million small businesses in the United States, but only about 1 percent sell their goods outside the country.

Fortunately, the number of businesses that export is increasing, more than tripling in the past seven years. The main reason behind the surge in exporters is fairly simple: small businesses export in order to grow.

Selling internationally can be an intimidating prospect for a small business

comfortable in markets closer to home. Why bother with freight forwarders and letters of credit when you can simply sell to a customer across town? Anxiety keeps many entrepreneurs at home—and out of reach of 95 percent of the world's consumers.

Knight Hydraulics of Bridgeton, Missouri is one small business that has successfully made the jump into global markets. Brenda Underwood and her husband Zip entered the export business without trying to—but found that succeeding in it took some real effort and some expert assistance.

Their company, Knight Hydraulics, is a small business that sells and services hydraulic parts used in large machinery, such as drilling rigs and construction equipment. They specialize in hard-to-find parts, which may be why their small company started attracting notice from buyers in other countries.

But foreign inquiries alone do not an exporter make. When their web site began to get unexpected hits and inquiries from international buyers, the Underwoods were stumped. “We did not have a clue as to how to actually sell to another country,” recalls Brenda Underwood.

Fortunately, the Underwoods did have a clue about the wealth of business resources offered by government agencies. They contacted their local U.S. Export Assistance Center in St. Louis, part of the global network of the U.S. Commercial Service, a Commerce Department agency that provides international business support to small and medium-sized U.S. companies.

At the St. Louis office, the Underwoods met Margaret Gottlieb and Jennifer Gasparich, the two trade specialists who visited the company's office to go over the basics of exporting, including methods of payment and documentation issues. “We were pleasantly surprised that our size did



Photo courtesy of Knight Hydraulics

A Knight in shining armor: (L-R) Jennifer Gasparich and Margaret Gottlieb of the St. Louis U.S. Export Assistance Center; Jim Hopkins, Brenda Underwood and Zip Underwood of Knight Hydraulics

not make any difference in the quality of service we received from the Commercial Service,” Brenda Underwood remembers. Counseling and market research are other fundamental services that new exporters require. Gottlieb and Gasparich evaluated Knight’s products and their export readiness to determine best markets and help the Underwoods shape their export strategy.

Trade specialist Gottlieb says that U.S. business owners need to carefully target the best markets for their products and then be prepared to deal with cultural differences, unfamiliar labeling standards, customs issues and a host of other challenges. “Helping navigate the exporter through the process involved in making their first sale is a big part of

U.S. companies do not need to be big or in high-tech sectors to find good markets in Canada. While computers, software and telecommunications are hot sectors for U.S. exports, other promising sectors include automotive parts and service equipment, building products, electronic components and power systems. Other advantages of the Canadian market are strong cultural and historic ties between the two countries. Geographic proximity reduces time and expense. Add the advantages of congruent time zones, a straightforward regulatory regime and a common language, doing business in Canada simply makes good sense.

The U.S. exported more to Canada in 2000 than to its number two and three export markets (Mexico and Japan)

is becoming increasingly more comfortable for Underwood and business owners like her. There’s NAFTA, of course, but small businesses should also be aware of plans to integrate South America with the U.S., Mexico and Canada. President Bush is eager to construct a Free Trade Area of the Americas (FTAA) which will progressively eliminate barriers to trade and investment between countries, making it easier for U.S. companies like Knight Hydraulics to do business with buyers in Peru and the rest of Latin America.

This is not to say that exporting is as easy as selling to customers in your own backyard. Underwood still maintains a healthy caution toward international inquiries. She advises other small businesses to be scrupulous

“OUR FEAR OF THE UNKNOWN HAS BEEN REPLACED BY A POSITIVE ATTITUDE TOWARD DEVELOPING SOLID INTERNATIONAL TRADE OPPORTUNITIES.”

— BRENDA UNDERWOOD

what I do,” says Gottlieb. She and her colleagues have access to a vast amount of market research; if more is needed to answer highly specific questions about particular markets and products, customized research is available from one of the Commercial Service experts around the world.

Knight had received inquiries from Canadian buyers and Gottlieb encouraged the Underwoods to pursue these leads. Canada is the United States’ largest export market and is a logical first choice for many new exporters. While documentation, customs and legal requirements exist, business practices and consumer preferences are similar. Plus, NAFTA makes both Canada and Mexico particularly accessible to U.S. companies by offering tariff-free benefits for U.S.-produced goods. For this reason, third-country competition—from Europe, Asia, or elsewhere—tends to be far less prevalent in Canada than in most other international markets.

combined. Two-way trade between the two countries is huge—over \$1 billion in goods crosses the U.S.-Canada border every day.

With Gottlieb and Gasparich to walk them through the process, Knight Hydraulics soon completed their first international sale to Canada and embarked on what Brenda Underwood calls “the great adventure of international trade.” Underwood credits the Export Assistance Center with making her company feel “less alone” in this adventure and declares that “if it were not for the advice and timely service we received, we could not have made this sale.”

Knight Hydraulics now has several Canadian customers and recently made a large sale to a buyer in Peru that they expect will be the beginning of a long relationship. “For now, our comfort zone is in this hemisphere,” laughs Underwood. The same could be said of many small exporters—this hemisphere

about checking the credit and reputation of potential international buyers and enlisting the Commercial Service to help.

“Our fear of the unknown has been replaced by a positive attitude toward developing solid international trade opportunities,” says Underwood. For Knight Hydraulics, the benefits of exporting are clear—they’re now selling to “a great big market as opposed to a little one,” says Underwood. ■

MAKING A GROUP EFFORT

by Mark Wells, Julia Vanover, and Debbie Dirr

U.S. Commercial Service

Trade associations and chambers of commerce can increase their value to members by using the resources of the U.S. Commercial Service to help open up export opportunities.

In 1996, the School, Home and Office Products Association (SHOPA)—a 2,100-member trade association founded in 1991—was looking for ways to help its members expand into global markets. The Dayton, Ohio-based organization decided to undertake some pro-active measures. According to SHOPA's president, Steve Jacober, "we created an annual trade show to meet the growing business needs of our members and attract overseas buyers interested in purchasing our members' products and services."

But the organization also took another step and contacted the U.S. Export Assistance Center (USEAC) located in Cincinnati. "We were introduced to Debbie Dirr, an international trade specialist, with whom we have been working ever since," said SHOPA's Jacober. "Together, working closely with our international affairs manager, she helped us develop our international marketing plan and export strategy, identify our potential export markets and provide us with export trade data. This allowed us to prioritize which markets we wanted to target first."

Using Customized Market Analysis from the U.S. Commercial Service, Jacober says SHOPA was able to provide members with need-to-know

information. The overseas trade staff of the U.S. Commercial Service researched specific questions and provided SHOPA with detailed reports for each target market.

The customized reports answered several important questions:

- What is the market potential for U.S. school and office supplies in the country market?
- Who are the major domestic and overseas competitors?
- What prices do school and office supplies sell for in the country market?
- What are the legal regulations, product certifications, marketing and labeling questions that need to be addressed?

Using the reports, SHOPA's members were able to plan trade missions, participate in overseas trade events (such as PaperWorld in Germany) and make use of other export services provided by the U.S. Commercial Service (such as its "Gold Key Service") to help them locate agents, distributors and business partners in their target markets. To date, more than 200 SHOPA members are now exporting to various overseas markets and many more member companies are attending domestic and overseas trade events each year.

LEVERAGING YOUR ORGANIZATION'S RESOURCES

To increase their members' reach in the global economy, business organizations

help identify potential new markets overseas. Providing good resources for research on the best markets, developing training programs and bridging overseas contacts are important services that associations and chambers of commerce can offer to their members.

As the example of SHOPA's successful partnering with outside organizations such as the network of 105 USEACs and the U.S. Commercial Service shows, business groups can successfully leverage their resources to make the best use of the exporting and marketing tools offered to businesses by these government partners.

The U.S. Commercial Service, which staffs the USEACs in partnership with four other federal agencies, is a results-oriented unit of the U.S. Department of Commerce. With 105 offices located throughout the United States and 157 offices abroad, the U.S. Commercial Service works to increase the number of U.S. organizations that benefit from international trade, protect U.S. business interests abroad and provide a wealth of expertise and online information to assist associations.

THE SEVEN STEPS TO GLOBAL SUCCESS

Guiding members into the global marketplace is a tremendous task for a business organization, but following the seven steps listed below can help the members of your group succeed in getting the most out of the U.S. Commercial Service and other trade development resources.

1. Create a vision for your association's international business program. Determine your members' needs, goals and objectives for expanding their businesses to international markets. Create a comprehensive plan and follow through, designating someone on staff to lead your international program.

2. Develop a solid business relationship with your local USEAC and an international trade specialist. To locate the USEAC nearest you, visit the U.S. Commercial Service's Web site (www.usatrade.gov; the locations of the USEACs are also printed on the back page of *Export America*). The Web site also provides market research information for products and services, the full texts of individual Country Commercial Guides on doing business in more than 120 countries and a detailed listing of all export programs and services offered by the U.S. Commercial Service.

3. Educate members about the availability of research focused on their product or services. While the price varies, such services are inexpensive and an imperative for guiding members to their best markets. The U.S. Commercial Service offers two research options:

- the Flexible Market Research program provides timely, customized, reliable answers to questions about a market's export potential for products or services;
- the Customized Market Analysis Program provides customized research on a single product or service in one overseas market.

4. Get an international trade specialist or a Commercial Service Officer to meet with your members. Practical ways of doing this include:

- Organizing seminars designed to walk companies through the trade process. Your local chamber of commerce may already offer such

seminars, so partnering with it could prove fruitful. The U.S. Commercial Service can also develop a seminar that is tailored to your membership's needs.

- Organizing virtual seminars with local and foreign international trade specialists, to walk members through the exporting process through video conferences with Commercial Service market and industry experts overseas.
- Inviting an international trade specialist or Foreign Service officer to your conference to present information on trends, answer questions, or run a booth.

5. Encourage members to make overseas contacts by using one of the programs offered by the Commercial Service. These include:

- Gold Key Service, where one to two days of meetings are scheduled in the target country, providing a potential exporter with well-matched buyers, distributors, legal experts, etc. (Clients of the U.S. Commercial Service favor this product because it is relatively inexpensive and very successful.)
- Video Gold Key Service, which is the same as the Gold Key Service, except that pre-screened contacts are met through videoconferencing, thereby saving time and travel expenses.
- International Partner Search puts U.S. Commercial Service experts in more than 80 countries to work finding your members the most suitable partners, including buyers, agents, distributors, or overseas representatives.

- International Company Profile is a credit report on one overseas company. Unlike computer-generated reports, the in-country industry experts of the U.S. Commercial

Service will examine a prospective business partner.

6. Organize a trade mission, or encourage your organization to join an ongoing trade mission. These are exciting, valuable programs that can bring great success to your member companies. While on trade missions, the U.S. Commercial Service will match your members with foreign firms interested in discussing business opportunities. The foreign offices of the U.S. Commercial Service already have the contacts, translators and hospitality information you need.

7. Provide your members with information on the best financial resources for trade investments. The U.S. Small Business Administration provides loans for exporters. The Export-Import Bank of the United States provides loans and loan guarantees for trade projects. In addition, local U.S. Commercial Service international trade specialists can assist in connecting companies with local banks that are familiar with export finance options.

PARTNERING: A PROVEN STRATEGY

In broadening its service to members, the School, Home and Office Products Association is now using the U.S. Commercial Service's Flexible Market Research program, which provides customized information about a market's export potential for products or services. This will enable SHOPA's members to plan entry strategies and implement export programs in target markets.

Partnering with the experience, extensive resources and export promotion success of the U.S. Commercial Service should be an ongoing and enjoyable process for any business organization that is beginning to explore market opportunities around the world.

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■ IMPORT ADMINISTRATION

LEVELING THE PLAYING THE FIELD FOR TRADE

by Office of Policy, Import Administration

Unfair foreign pricing and government subsidies distort the free flow of goods and adversely affect American business in the global marketplace.

The Import Administration, within the International Trade Administration of

products, textiles, chemicals and consumer products. In many instances, the enforcement of these laws has meant the difference between survival and extinction for a number of U.S. industries.

For example, in the 1990s, U.S. producers of dynamic random access microchips (known as DRAMs) found themselves under attack from low-priced imports, primarily from

below their cost of production and imposed duties at the border, allowing Micron to compete with its foreign competitors on a level playing field. Micron is now a competitive force in the DRAM industry and continues to develop its markets in the United States and abroad.

The Import Administration's role in administering unfair trade-laws is vital.

THE DUMPING MARGIN IS THE DIFFERENCE BETWEEN THE PRICE (OR COST) IN THE FOREIGN MARKET AND THE PRICE IN THE U.S. MARKET.

the Department of Commerce, enforces laws and agreements designed to protect U.S. businesses from unfair competition within the U.S. that result from below-cost pricing by foreign companies or subsidies to foreign companies provided by their governments.

Many U.S. businesses have benefitted from the enforcement of the U.S. laws to address unfair trade practices. Antidumping and countervailing duty trade remedies have been successfully pursued by a variety of domestic industries, including producers of steel, industrial equipment, computer chips, agricultural

Korea. Most U.S. producers ceased DRAM production under the pressure of these low-priced imports, leaving only one significant U.S. DRAM producer, Micron Technologies of Boise, Idaho. Micron suspected that the low-priced imports were the result of unfair trade practices by Korean producers and petitioned the Import Administration to investigate whether these Korean producers were "dumping" their product into the U.S. market. As a result of its investigation, the Import Administration found that Korean producers were indeed selling DRAMs in the United States at prices

There is nothing more dispiriting to American workers and farmers than believing that they are not competing on equal ground with foreign competitors. When U.S. companies face unfair trade practices, the Import Administration provides relief, while seeking long-term solutions to eliminate government interference and underlying distortions in the market. By enforcing U.S. antidumping and countervailing duty laws, the Import Administration, together with the International Trade Commission and the U.S. Customs Service, ensures that the existing trade regulations are enforced.



WHAT IS DUMPING?

“Dumping” occurs when a foreign producer sells a product in the United States at a price that is below that producer’s sales price in the country of origin (“home market”) or at a price that is lower than the cost of production. The difference between the price (or cost) in the foreign market and the price in the U.S. market is called the dumping margin. Unless the conduct falls within the legal definition of dumping as specified in U.S. law, a foreign producer selling imports at prices below those of American products is not necessarily dumping.



WHAT IS A COUNTERVAILABLE SUBSIDY?

Foreign governments subsidize industries when they provide financial

or countervailing duties (CVD) by filing a petition with both the Import Administration and the U.S. International Trade Commission. The Import Administration investigates foreign producers and governments to determine whether dumping or subsidization has occurred and calculates the amount of dumping or subsidies.



WHAT IS THE ROLE OF THE U.S. INTERNATIONAL TRADE COMMISSION?

The U.S. International Trade Commission (ITC) determines whether the domestic industry is suffering material injury as a result of the imports of the dumped or subsidized products. The ITC considers all relevant economic factors, including the domestic industry’s output, sales, market share, employment and profits. For further information

Customs Service will collect a 35 percent duty on the product at the time of importation into the United States in order to offset the amount of dumping. Information regarding the U.S. Customs Service may be found at www.customs.ustreas.gov.



HOW LONG DOES IT TAKE FOR AD OR CVD ORDERS TO BE ISSUED?

If both the ITC and the Import Administration make affirmative preliminary determinations (within 190 days of initiation of the antidumping investigation, or 130 days for countervailing duty investigation) importers are required to post a bond or cash to cover an estimated amount for the duties which would be collected in the event that an AD or CVD order is issued upon the completion of the investigations. Typically, the final

SUBSIDIZATION OCCURS WHEN A FOREIGN GOVERNMENT PROVIDES FINANCIAL ASSISTANCE TO BENEFIT THE PRODUCTION, MANUFACTURE OR EXPORTATION OF GOODS.

assistance to benefit the production, manufacture or exportation of goods. Subsidies can take many forms, such as direct cash payments, credits against taxes and loans at terms that do not reflect market conditions. U.S. law and regulations establish standards for determining when an unfair subsidy has been conferred. The amount of subsidies the foreign producer receives from the government is the basis for the subsidy rate by which the subsidy is offset or “countervailed” through higher import duties.



HOW IS DUMPING OR SUBSIDIZATION REMEDIED?

If a U.S. industry believes that it is being injured by unfair competition through dumping or subsidization of a foreign product, it may request the imposition of antidumping (AD)

on the ITC’s injury investigation, see www.usitc.gov. Both the ITC and the Import Administration must make affirmative preliminary determinations for an investigation to go forward.



WHAT RELIEF IS THE END RESULT OF AN AD OR CVD INVESTIGATION?

If both the Import Administration and the ITC make affirmative findings of dumping and injury, the Import Administration instructs the U.S. Customs Service to assess duties against imports of that product into the United States. The duties are assessed as a percentage of the value of the imports and are equivalent to the dumping and subsidy margins described above. For example, if the Import Administration finds a dumping margin of 35 percent, the U.S.

phases of the investigations by the Import Administration and the ITC are completed within 12 to 18 months of initiation.



WHAT ARE THE REQUIREMENTS FOR FILING AN AD OR CVD PETITION?

Petitions may be filed by a domestic interested party, including a manufacturer or a union within the domestic industry producing the product which competes with the imports to be investigated. To ensure that there is sufficient support by domestic industry for the investigation, the law requires that the petitioners must represent at least 25 percent of domestic production. The statute requires the petition to contain certain information, including data about conditions of the U.S. market and the domestic industry,

REQUIREMENTS FOR FILING AN ANTIDUMPING OR COUNTERVAILING DUTY PETITION

- **Industry Support:** Must represent at least 25 percent of the industry
- **Scope of the Investigation:** Complete Narrative Description of Merchandise to be Covered (including Harmonized Tariff Schedule Classification)
- **Evidence of Dumping:** Based on comparison of U.S. price and home market price or cost.
- **Evidence of Subsidization:** Based on information reasonably available to the U.S. industry on foreign government subsidies

as well as evidence of dumping or unfair subsidization.

PRE-PETITION COUNSELING:

Both the Import Administration and the ITC have staff available to assist domestic industries in deciding whether there is sufficient evidence to file a petition for antidumping or countervailing duty investigations. The Import Administration's Office of Policy assists U.S. businesses in preparing materials to be submitted to the Department as part of the petitions needed to initiate an investigation. This office can assist businesses with identifying import trends (including volume and value of the products in question), defining the merchandise to be covered under a potential investigation and by offering suggestions for compiling information on alleged dumping or subsidization.

An example of this process began last year, when the Great Eastern Mussels Company of Maine found that many of their customers were turning to lower-priced mussels from Canada. Great Eastern suspected that their Canadian competitors were able to undercut U.S. producer's prices by unfair trade practices. Great Eastern contacted the Import Administration for help. The Import Administration was able to direct this small Maine company to utilize the U.S. unfair trade laws and initiate an investigation into allegations that Canadian producers were dumping mussels into the U.S. market. The Import Administration is now conducting this investigation and is scheduled to make its final determination later this year.

Through its enforcement of the antidumping and countervailing duty laws, the Import Administration can assist a U.S. industry under attack from the unfair trade practices of foreign producers and foreign governments. Look for upcoming articles in *Export America* that will discuss how the Import Administration also assists U.S.

companies in identifying foreign market-distorting practices that inhibit the growth of their export markets. Pursuant to the Uruguay Round Agreements Act, Import Administration is also responsible for coordinating multilateral subsidies enforcement efforts through the Subsidies Enforcement Office. This office works actively with the private sector to remedy harm caused by subsidies provided to foreign competitors of U.S. exporters. ■

How can I learn more about filing a petition?

Contact the Import Administration, Office of Policy at (202) 482-4412 or by e-mail at Petitioners_Support@ita.doc.gov. Additional information can also be found at the Import Administration web site: www.trade.gov/ia.

EXPORT MARKETS DEVELOPING A PENCHANT FOR ACCURACY

by Mark Bello,

Office of Public and Business Affairs, National Institute of Standards and Technology

Measurements are the common language of global commerce. They are used to specify product features and performance, to characterize processes and to assess compliance with regulations. But the words of this technical discourse can become jumbled and hollow if they are not backed by reliable sources—internationally recognized measurement references.

Suppliers, for example, may assert that their parts or products meet specifications. But can customers be confident that measurements underlying these claims are accurate? And how can suppliers demonstrate the validity and reliability of their measurement results to skeptical buyers or regulators?

The validity of measurements is easily challenged by a deceptively simple question: “Compared to what?” Measurements that are beyond compare might inspire an offbeat poet, but they can be dismissed by customers and regulators. In contrast, measurements that are compared to accepted international or national standards inspire the confidence of trading partners.

Increasingly, exporters are being required to demonstrate that their measurement results, as realized in product specifications and tolerances, are “traceable” to recognized standards. In response, the Commerce

Department’s National Institute of Standards and Technology—the premier measurement laboratory in the United States—has created a new web site (www.nist.gov/traceability/) to provide traceability novices and veterans with key information on this increasingly important topic.

UNBROKEN CHAIN

“More and more of our customers are asking questions about traceability,” explains NIST Acting Director Karen Brown. “These range from the most basic—What is it?—to the more complex—How can I judge the credibility of suppliers’ claims that their measurements are linked to those developed and maintained by NIST and ultimately to the SI, the International System of Units?”

Claims of accuracy can be judged on the basis of a kind of pedigree, a well documented and continuous line of measurement comparisons—each with an established level of uncertainty. In effect, this unbroken chain of comparisons transfers accuracy—link by link—to the manufacturing floor, clinic or anywhere else that reliable measurements matter.

The chain typically begins with state-of-the-art, high-accuracy measurement references and services supplied by NIST or a counterpart national measurement laboratory in another country.

Testing laboratories, makers of high-precision instruments and regulatory agencies are among the types of organizations that calibrate their measurement equipment directly against NIST references.

Most organizations have less demanding measurement needs, however. They can tolerate the additional—and accumulating—uncertainty that is introduced with each successive comparison along the chain. To demonstrate traceability, they can calibrate equipment against intermediate or lower-tier references that may be several interconnected links away from the highest-order standard available from NIST or another accepted authority.

Except for defense suppliers and heavily regulated U.S. industries, such as utilities and pharmaceuticals, formal measurement traceability requirements have been relatively rare. For the most part, measurement-intensive sectors established their own systems for assessing accuracy and ensuring high levels of quality control.

MORE SYSTEMATIC APPROACH

The 21st century marketplace appears to be moving toward more formalized and more systematic approaches for ensuring—and demonstrating—measurement accuracy. Major impetus for this transition has come from quality

management system standards issued by the International Organization for Standardization, or ISO. Adopted by more than 350,000 organizations in 150 nations, the so-called ISO 9000 family of standards specifies that, when possible, measuring equipment should be calibrated against standards traceable to international or national measurement standards.

Since many large manufacturers require their regular suppliers to be ISO 9000 registered, a growing legion of businesses is becoming familiar with measurement traceability.

Another ISO Standard—the recently approved standard in the “geometrical product specifications” series (ISO 14523: Part 1)—deals with rules for deciding whether a part meets specifications. It obliges suppliers and purchasers of parts to quantify the uncertainty of their dimensional and geometric measurements, necessitating traceability to higher-order standards. It also requires suppliers to subtract their measurement uncertainty from the tolerance.

“This could cause some trouble in industries, such as advanced optics, where they are making parts close to the limits of measurement technology,” says NIST precision engineering expert Chris Evans. “Unless suppliers make contractual arrangements to the contrary, parts may be required, by default,

to comply with the standard, leaving little room for manufacturing variation.”

Also, the European Union will require makers of in vitro diagnostic test systems (IVD products) to demonstrate, by 2003, traceability to “reference materials of a higher order.” Vendors will have the option of establishing independently the accuracy of their measurement results. Yet, observers suggest that alternatives to formal traceability may prove to be more difficult and ultimately may complicate efforts to secure the CE mark for IVD products.

These developments and others—including a proliferation of regulations in some sectors—are making traceability a matter of interest for more than measurement professionals.

At NIST’s traceability web site, a heavy stream of visitors is already exploring the ins and outs of this systematic approach to demonstrating accuracy. There, they can learn about NIST’s calibration services and its more than 1,300 different Standard Reference Materials—benchmark references for measurements of everything from the carbon content of steel to cholesterol levels and from temperature to the diameter of optical fiber. Visitors can read the NIST policy on traceability. They also can review easy-to-understand answers to an extensive set of “frequently asked questions”

about traceability, from the most general to specific points about laboratory accreditation. Other resources include a glossary of terms and a traceability checklist for users of calibration services.

GLOBAL ACCEPTANCE SOUGHT

“Businesses know the level of accuracy they must achieve in product and process measurements,” explains Richard Kayser, NIST’s director of Technology Services. “To satisfy traceability requirements they will have to make certain that each step they take to reach this level can be related back to national or international standards. And they must know how to support their claims of measurement traceability. Just as important, they must be able to evaluate traceability claims made by suppliers and by providers of measurement services.”

But NIST and its counterparts must go beyond supporting traceability within their borders. “We should enable global acceptance of measurement results traceable to individual National Metrology Institutes (NMIs), be it NIST in the United States, the Physikalisch-Technische Bundesanstalt in Germany or the National Metrology Laboratory in South Africa,” says Robert Watters, manager of a NIST program focused on this objective.

“We need comparability and harmonization of measurement results across national borders,” he explains. “Otherwise, we will not make any progress in reducing redundant testing that can impede access to export markets.”

Now, for example, a regulator or a customer in a foreign market may only recognize measurement results that are traceable to a particular NMI. This may necessitate testing U.S.-made products at a foreign laboratory, duplicating testing already done in the United States.



TRACEABILITY IN THE CLINIC

Traceability provides a way of relating the results of a measurement to higher-level standards, helping to ensure consistency and reliability. In the United States, traceability systems are well established in the radiopharmaceutical industry.

YOUR NMI OR MINE

Watters and his collaborators are building the machinery to establish the equivalence of measurement results on regional and, ultimately, global scales. NIST has set up the International Comparisons Database, a vehicle for comparing the measurement and calibration capabilities of NMIs around the world, with special emphasis on the Western Hemisphere. With the database, a Brazilian purchaser of electrical equipment manufactured in the United States could determine that power and voltage measurements shown to be traceable to NIST are equivalent to those traceable to INMETRO, Brazil's NMI.

The database supporting the so-called Inter-American Metrology System also contains data from other NMIs, as supplied by a comparison and calibration database maintained by the International Bureau of Weights and Measures, a treaty organization that has the task of ensuring worldwide unification of physical measurements. With links to all of the world's regional metrology organizations, this organization's database will eventually provide direct and indirect means to judge the degree of equivalence of measurement capabilities in different countries, which could ease the burdens retesting.

"The databases should open the door to achieving traceability by alternative routes," Watters says. "Our aim is to move the database from the exclusive realm of the measurement scientist and make it an easy-to-use tool for companies and regulators, providing them with a clear line of sight for assessing the degree of equivalence of measurement results. Ultimately, our hope is that this tool will help to eliminate technical barriers to market entry."

To learn more about the International Comparisons Database visit the program's web site at: <http://icdb.nist.gov/>. ■

About 37,000 nuclear medicine procedures are performed daily in U.S. hospitals and clinics. Used mainly in the diagnosis of cancer, cardiovascular disease and neurological disorders, radioactively labeled drugs must be administered in exceedingly accurate doses. The aim is to limit radiation exposure to the level needed to capture essential information on the patient's condition. In addition to diagnostic procedures, more than 100,000 therapeutic nuclear medicine procedures are performed annually. The primary example is the treatment of thyroid cancer patients with iodine-131, but new radiopharmaceutical therapies are emerging. Here, too, the accuracy of dosage is key. Accuracy in the administration of radiopharmaceuticals to patients depends on the accuracy of measurement instruments used in the manufacturing process. These instruments are traceable to NIST primary standards for radioactivity. Organizations involved in establishing this traceability system include the pharmaceutical manufacturers of North America, under the auspices of the Nuclear Energy Institute, the U.S. Food and Drug Administration, the NIST Physics Laboratory and the NIST Standard Reference Materials Program.

WEB SITES OF INTEREST

Traceability: NIST Policy and Supplementary Materials:

www.nist.gov/traceability/

Features include answers to frequently asked questions, calibration checklist and more.

Reference on constants, measurement units and uncertainty:

physics.nist.gov/cuu/

Offers information and guidance on expressing measurement uncertainty—a key element of traceability—as well as useful background material on the international measurement system.

NIST International Comparisons Database: <http://icdb.nist.gov/>

Developing resource for comparing the capabilities, measurements and measurement standards of "national metrology institutes," especially those in the Western Hemisphere. Links to the Key Comparison and Calibration Database of the International Bureau of Weights and Measures.

NIST Standard Reference Materials Program: <http://ts.nist.gov/srm>

NIST offers about 1,300 different types of measurement standards to support industrial, environmental, health and science applications.

NIST Calibration Services: <http://ts.nist.gov/calibrations>

Features detailed listing of types of instrument calibrations and special tests that NIST performs in support of makers and users of high-precision equipment.

Conformity Assessment: <http://ts.nist.gov/ca>

Provides "one-stop shopping" for background information on conformity assessment—the various and sometimes confusing procedures used to assess whether products or services comply with requirements.

ACCURACY MATTERS



ASK THE TIC

ISSUES WITH SOFTWARE EXPORTATION

by Dava Kunneman,
Trade Information Center

and Jim Golsen,
Office of Information Technologies

Foreign sales of packaged software are projected to grow 49 percent by 2004 to \$153 billion, according to IDC. The following article is meant as a guide for businesses exporting software.



DO ALL COUNTRIES CLASSIFY SOFTWARE FOR CUSTOMS PURPOSES IN AN IDENTICAL MANNER?

Many countries, including the United States, will classify software products under an identical Harmonized Tariff System (HTS) category. However, software classification poses similar challenges that arise with other products. Since only the first six digits of the HTS code are harmonized globally, a country may designate a more specific classification beyond those six digits. In rare cases, the customs authority in another country may dispute the general classification of a product altogether based on interpretation of its purpose and use. The rapid evolution of information technology (IT) products is making the process of determining classification more difficult for this sector. Advancements in technologies are outpacing updates to the existing HTS. Therefore, it is prudent to check with the customs authority in the recipient country to ensure proper classification of a product.



HOW IS SOFTWARE VALUATION DETERMINED?

Countries vary in their methods for the valuation and assessment of software duties on imports. Under Article VII of the 1984 General Agreement on Tariffs and Trade (GATT), it was declared that software valuation may either be inclusive or exclusive of the cost or value for the intellectual property component of the product. However, it was recommended that software valuation be based on the value or cost of the carrier medium (i.e., optical disk) rather than the "intellectual property" embedded on the medium. This decision was based on the premise that the cost or value of the intellectual property is distinguishable from the value of the medium. This requirement is satisfied if the cost or value of

either the medium or intellectual property is identified separately on the commercial invoice. It is important to note that this GATT ruling does not cover software that includes features such as sound, cinematic or video recordings. Software incorporating these features (e.g., game software) will be subject to a separate valuation policy. For example, India differentiates entertainment software, healthcare software and telecom software from standard software.

This decision has granted customs authorities broad latitude in determining software valuation. Therefore, one can expect to encounter different software valuation regimes. The United States maintains the practice of valuing software on the carrier medium. In general, Canada, Western Europe and many Asian countries also adhere to this method of valuation. In the Middle East, the method of valuing software on its full value or cost is frequently applied. Africa and Latin America are regions where no defined trend for software valuation exists.

An additional consideration with software is the assessment of taxes on the product. Unlike tariffs, taxes on imports from the United States (e.g., value added taxes imposed at the border) are always assessed on the full value of the software, including intellectual property, unless the United States has a special tax treaty with a particular country.



WHAT IS THE INFORMATION TECHNOLOGY AGREEMENT AND HOW DOES IT RELATE TO EXPORTING SOFTWARE?

The Information Technology Agreement (ITA) is a plurilateral trade agreement that requires participants to eliminate tariffs on a specific list of IT products. These products include computer hardware and peripherals, telecommunications equipment, computer software, semiconductor manufacturing equipment, analytical instruments and semiconductors and other electronic components. The agreement covers approximately 95 percent of world trade in defined IT products.

Twenty-nine countries (or customs territories), including the United States, originally signed the ITA in 1997. The ITA now has 56 signatories with China and Russia scheduled to join upon their accessions to the World Trade Organization. Currently, only three Latin American countries, Costa Rica, El Salvador and Panama are signatories to the ITA. The U.S. Government is working diligently to encourage more participation by South and Central American countries.

Computer software is included in the ITA. To ensure that only computer software and not recorded movies or music, are accorded duty-free treatment, most ITA signatories use a strict definition of computer software, developed by the World Customs Organization, in their tariff schedules. U.S. exporters must be aware that, although software imports may be duty-free in many countries, VAT and other taxes often are applied.

IS CUSTOMIZED SOFTWARE TREATED DIFFERENTLY THAN PACKAGED SOFTWARE?

In most cases, the answer is no. Packaged software is defined as software that is generally available to the public by sale from stock at retail selling points or directly from the software developer or supplier. The vast majority of customs agencies do not treat customized software differently from packaged software. To confirm that the software's destination does not treat the two types of software differently, contact the Trade Information Center or the customs authority in the recipient country.

DOES ONE HAVE TO WORRY ABOUT ENCRYPTION TECHNOLOGY CONTROLS WHEN SENDING SOFTWARE ABROAD?

Yes. If one's product utilizes encryption technology, it may require an export license from the Bureau of Export Administration (BXA) and depending on the destination, an import license may be necessary to get the product into market. "Retail" encryption products, which are widely available in the open market, may now be exported to any end-user, including foreign governments. For all new software products with encryption capabilities a one-time product review by the BXA continues to be required. In general, U.S. companies may export any encryption product to commercial firms, individuals and other non-government end-users under a license exception (no license required). It is imperative for exporters of encryption technology to become familiar with the BXA regulations pertaining to these products. If one has a concern about the legality of their shipment, it is important to consult with the BXA.

Some countries, most notably France, have specific requirements on the importation of encryption technology. Systems that incorporate encryption of 128 KB and above are particularly subject to review, although certain programs incorporating encryption less than 128 KB have been known to be restricted in certain cases.

WHAT ARE THE ADVANTAGES OF SOFTWARE DELIVERY VIA THE INTERNET?

The delivery of software via the Internet offers several advantages. First, it allows one to avoid tariffs and taxes due to the WTO moratorium on taxing Internet commerce. Second, it provides for expedited delivery to the customer and allows one to circumvent customs clearance procedures. Third, it lowers costs by eliminating shipping and handling fees. However, one must consider the recipient's Internet capacity for this mode of delivery. It may not be an option in some regions of the world due to a lack of supporting high-speed Internet infrastructure. Most countries in Latin America and Africa are examples of such places. Exporters need to keep in mind that electronic shipments are subject to encryption export controls and the exporter should contact the BXA if they have questions regarding the legality of their shipment.

FOR MORE INFORMATION:

- To obtain more information about software valuation, contact the Trade Information Center at 1-800-USA-TRAD(E) or visit the "Tariff and Taxes" section of the Office of Information Technologies' website at: <http://exportIT.ita.doc.gov>
- To receive additional information about the ITA, contact Danielle Kriz in the Office of Information Technologies at Danielle_Kriz@ita.doc.gov or (202) 482-0568.
- Questions relating to encryption controls should be directed to the Bureau of Export Administration at (202) 482-4811 or visit their web site www.bxa.doc.gov/encryption

The Trade Information Center (TIC) is operated by the International Trade Administration of the U.S. Department of Commerce for the 20 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. Or visit the TIC's website at <http://tradeinfo.doc.gov>.



U.S. CONSUMER GOODS

EXPORTING THE GOOD LIFE

by The Office of Consumer Goods, Trade Development

The United States is a leading producer and exporter of a wide variety of consumer goods including processed food, beverages, furniture, appliances, motorcycles, boats, marine engines, printing, publishing, sporting goods, jewelry, toys and tableware, among others.

Industries covered by the International Trade Administration's (ITA) Office of Consumer Goods employ roughly 4.4 million Americans or 24 percent of total U.S. manufacturing employment.

Exports from these industries account for more than \$54 billion or 8 percent of U.S. manufacturing exports. Imports of these products, at \$121 billion, amount to approximately 12 percent of all U.S. manufacturing imports.

Today, many U.S. manufacturers of consumer goods face intense competition from countries with lower labor costs not only in the domestic market, but in foreign markets. This competition is especially acute for firms that produce standardized products using mature, labor-intensive technologies commonly available throughout the world. Nevertheless, many U.S. consumer goods manufacturers are fully competitive in the global marketplace because consumers worldwide value

the superior design, quality, technology or other attributes.

ADVOCATE AND SUPPORTER OF INDUSTRY

The Office of Consumer Goods (OCG) is one of several industry offices within the International Trade Administration that specialize in responding to the needs of U.S. industries in the international marketplace. Analysts cover both durable and non-durable goods. Each provides analysis of competitiveness of U.S. industries, identifies tariff and non-tariff barriers to U.S. exports, participates in bilateral and multilateral negotiations to ensure consumer goods industries receive fair treatment abroad and provides research on promising

export markets for consumer goods products. Additionally, analysts work together with export promotion specialists to encourage companies to participate in trade shows and other promotional events designed to gain market exposure for U.S. products overseas.

MARKET OPPORTUNITES AND CHALLENGES

The Office of Consumer Goods provides information and assistance on more than 100 industries within the classification of consumer goods. Below is an example of market opportunities as well as how analysts work to improve market access and global competition for these industries.

PRODUCING FURNITURE FOR WORLD MARKETS

World markets are increasingly important to the furniture industry. While U.S. exports of furniture totaled almost \$5 billion in 2000, up from \$3.3 billion in 1996, the industry is just beginning to realize its export potential. On average, U.S. manufacturers export less than 10 percent of domestic production. The top export markets are Canada, Mexico, Japan, the United Kingdom and Saudi Arabia. Progress is being made to allow U.S. producers greater access to Latin America, particularly Venezuela, Brazil and Argentina, which represent an area of strong export potential.

Tariffs, however, still remain as prohibitive trade barriers affecting U.S. furniture exports in several countries. Tariff rates in Asia can range as high as 20 to 30 percent, as in Malaysia, while in South America, Brazilian and Argentine furniture tariffs are 21 percent.

Evidence of the efficacy of free trade policies is demonstrated by the tremendous growth in exports that occurred following reduction in tariffs under the Canada Free Trade Agreement (CFTA) and the North American Free Trade Agreement (NAFTA). Prior to the

trade agreements, Canada and Mexico levied furniture tariffs of 15 and 20 percent respectively. Since the CFTA in 1989, U.S. exports of household furniture to Canada increased at a compound annual growth rate of 15.8 percent. After the implementation of NAFTA in 1994, U.S. exports to Mexico increased at a compound annual growth rate of 6.8 percent. Canada and Mexico are now the largest U.S. export markets for household furniture.

The industry also benefitted from tariff elimination in key developed markets during the Uruguay Round. Beginning in 2001, all tariffs on wood and metal household and office furniture have been eliminated in Canada, the European Union, Hong Kong, Japan, Korea, Norway, Singapore, Switzerland and the United States.

Some manufacturers have been very successful in marketing their products abroad despite problems inherent in exporting furniture: size and weight and the differing ways furniture is designed and used in other cultures. Japan has been an excellent market for U.S. furniture, particularly for manufacturers willing to reduce the size of some of their products and to make other product modifications necessary to appeal to Japanese consumers.

BATTLING BOOK BANDITS IN ASIA

The United States is the world's largest publisher of books. It exports many of these books overseas, almost 230 million books last year alone. Asia has high literacy rates and a strong interest in technical and scientific fields. Thus, it is one of the largest potential markets for U.S. English-language books. Asia already encompasses seven of the top 20 export markets for U.S. books, with U.S. exports exceeding \$327 million in 2000. This region also has the dubious honor of being the largest source of book piracy in the world. The industry estimates that Asian piracy cost U.S. publishers an estimated \$282 million in sales in 2000 alone. More importantly, many small and medium-sized U.S. publishers do not even attempt to enter the Asian market due to fears of rampant book piracy.

To combat this problem, OCG supports the publishing industry's initiative to protect U.S. books in Asia. OCG provides the industry's trade association, the Association of American Publishers (AAP), with information on specific cases of book piracy. OCG obtains this information from ITA commercial staff in embassies and consulates abroad and from U.S. publishers who contact ITA



in Washington. The association has used this information and other sources to find actual book pirates and persuade local authorities to raid the facilities of those pirates and to prosecute them.

AAP announced in its March/April 2001 Monthly Report that these efforts have begun to pay off. In what AAP believes is the largest raid in publishing history, Korean authorities found 600,000 counterfeit English-language books worth an estimated \$14.5 million. These books were high-quality counterfeits sold as legitimate books by the book pirate and customers were charged full retail price for the books. The Office of Consumer Goods plans to expand its cooperation with AAP in the future.

BRINGING AMERICAN-STYLE MOTORCYCLES TO INTERNATIONAL CONSUMERS

Harley-Davidson Motor Company is the primary U.S. manufacturer of motorcycles. Other manufacturers include two Japanese-owned production facilities and several much smaller firms. These producers manufacture large-size motorcycles, over 750cc with most of them around 1400cc. Harley-Davidson's motorcycles are mostly

cruiser and touring motorcycles that have a unique appeal worldwide.

World markets are increasingly important to the motorcycle industry. U.S. exports of motorcycles totaled almost \$563 million in 2000, up 20 percent from 1999. U.S. manufacturers export an estimated 30 percent of domestic production. The top export markets are Canada, Japan, Australia and Germany. Japan has been the strongest Asian market for U.S. manufacturers, as Harley-Davidson became the largest supplier of motorcycles with engines over 750cc in 2000 thanks to market opening activities and the unique design and appeal of the products. Other Asian markets also have great potential as these countries have a high per capita usage of motorcycles.

REFORMING MOTORCYCLE ROAD TRAFFIC LAWS IN JAPAN

Beginning in 1994, OCG has led several initiatives to reform outdated Japanese road traffic laws. These laws severely limited the market for large motorcycles like those exported from the United States. In 1996, after a U.S. petition requesting several reforms, Japan instituted motorcycle operator license reforms that improved training and removed restrictive testing requirements. These reforms led to a large increase in the number of qualified riders and to a 30 percent increase

in sales of U.S.-made motorcycles. They also led to a 70 percent reduction in the accident rate for newly licensed riders of large-sized motorcycles. In 2000, the Japanese responded to another U.S. request and raised the motorcycle highway speed limit to equal the automobile speed limit. This reform allows motorcycles to move legally at the same speed as other traffic, enhancing safety.

OCG is continuing efforts to end Japan's prohibition on motorcycle tandem riding (i.e., carrying a passenger) on expressways. No other country in the world bans tandem riding on expressways, which safety research data prove are by far the safest roads for motorcycles. OCG drafted a petition and presented testimony in a subsequent hearing with Japan's Office of Trade and Investment Ombudsman (OTO). The merits of the U.S. position are such that it is supported, not only by European governments and the European motorcycle industry, but by the Japanese motorcycle industry as well.

OPENING THE TAIWAN MARKET TO U.S. MOTORCYCLES: SUCCESS IS JUST DOWN THE ROAD

Large-size motorcycles have long been banned in Taiwan. Although this ban applies to both domestic and imported products, it disproportionately affects the U.S. motorcycle industry. All U.S. motorcycles are larger than the permitted size. In addition, Taiwan's environmental laws do not take account of the unique pollution signature of these large motorcycles.

At U.S. industry's request, OCG made sure that ending the large-sized motorcycle ban was included among U.S. objectives when Taiwan negotiated to become a WTO member. The Taiwanese Government agreed to remove the ban on motorcycles over 150cc upon accession. In addition, Taiwan's Environmental Protection Agency agreed to new emission standards for large-size motorcycles that



Photo courtesy of the Harley-Davidson Motor Company

will be implemented upon accession. This agreement is pending a final vote of WTO members on Taiwan's accession. Should this agreement pass, as expected, U.S. motorcycle manufacturers will be able to sell in a market that has the world's highest per capita usage of motorcycles.

INCREASING U.S. TOY EXPORTS THROUGH INTERNATIONAL STANDARDIZATION

Safety is important to the U.S. toy industry and to countries throughout the world where toys are sold. But if each country were to adopt different safety standards, different toys would have to be made for each market. Costs would skyrocket and trade would be much more difficult.

To overcome this problem, the toy industries in the United States and the European Union, working through the International Organization for Standardization (ISO), drafted a new toy safety standard. To encourage the 21 Asia-Pacific Economic Cooperation (APEC) countries to adopt the standard, the U.S. industry requested OCG's help. These countries are important because the APEC region produces more than 80 percent of the world's toys.

OCG, in collaboration with U.S. industry, arranged for a three-day seminar in Hong Kong to inform attendees about the technical aspects of the ISO standard and encouraged APEC economies to align their toy safety standards to conform to the standard. The APEC seminar attracted 256 participants from fourteen economies. Included were ten APEC economies, namely, Australia, China, Hong Kong, Japan, New Zealand, the Philippines, Russia, Chinese Taipei (Taiwan), Thailand and the United States.

The U.S.-sponsored project resulted in the significant advancement of one of

the U.S. toy industry's key international goals. The seminar provided technical information about the standard, demonstrated testing methods and supplied a forum in which all members of the industry and government officials could openly discuss the standard. All participating countries expressed the desire and willingness to work towards harmonization. In those economies that currently lack a toy standard, full adoption of the ISO was mentioned, thereby encouraging increased U.S. toy exports to these potentially lucrative markets. The adoption of a uniform and transparent standard will reduce the costs of compliance, product testing and enforcement, but more importantly, represents a giant step towards ensuring the safety of toys.

INCREASING OPPORTUNITIES FOR U.S. WINE EXPORTS

Export markets are increasingly important to the \$7 billion U.S. wine industry. In 2000, total U.S. wine exports were \$521 million, up from \$385 million in 1996. These exports could grow to \$800 million by 2006, if export barriers are reduced. OCG is an active participant in two separate initiatives to remove wine export barriers.

New World Wine Producers: OCG has been active in discussions of the New World Wine Producers (NWWP) on reducing wine trade barriers since its inception in 1998. Members of this organization include Argentina, Australia, Canada, Chile, New Zealand, South Africa, the United States and Uruguay. These discussions have resulted in a draft Mutual Acceptance Agreement for wine making (oenological) practices. New Zealand, Australia, Canada and the United States have already initialed the agreement. The next key issue on the NWWP agenda is a wine labeling agreement. These agreements will greatly ease trade among the NWWP countries.

U.S.-EU Wine Negotiations: In 1999, the United States and the European Union began intensive bilateral negotiations to reduce barriers that unnecessarily restrict the trade of wine. OCG participates actively in these negotiations. The most recent negotiating session took place in Brussels in June. Discussions centered on oenological practices, recognition of wine names on labels, U.S. and EU regulatory developments, import certification issues, EU subsidies and tariffs. Resolution of these issues is essential for continued and improved U.S. access to the EU wine market.

GETTING INDUSTRY INPUT DURING TRADE NEGOTIATIONS

The Office of Consumer Goods represents the interests of industry at trade negotiations, solicits input from industry in formulating trade policy and looks to industry for direction in trade promotion. Industry representatives help identify trade barriers that when removed will help firms realize their export potential.

OCG oversees two advisory committees that give industry a forum to bring market barriers to light, confer with negotiators at ITA and USTR during trade talks and at the same time, allow government to get industry perspective on trade issues. The Industry Sector Advisory Committee (ISAC) members develop their industry's specific positions on U.S. trade policy and negotiation objectives and provide advice to officials in the Department of Commerce and the Office of the U.S. Trade Representative. The committees address trade agreements; market access problems; tariff levels; discriminatory foreign procurement practices; electronic commerce, marketing and other advocacy needs of their sector. ISAC members are executives and managers of U.S. manufacturing or service companies involved in international trade or are trade association executives.

OCG industry analysts study U.S. consumer goods industries to learn their competitive strengths and weaknesses and determine which markets have the greatest potential for growth and which barriers are the most significant. They are in regular contact with principal firms and trade associations. OCG will be using this expertise to help set the agenda for future negotiations, such as the U.S.-Chile Free Trade Area, the Free Trade Area of the Americas and the new round of WTO negotiations.

OPPORTUNITIES TO PROMOTE PRODUCTS THROUGH TRADE EVENTS

How can a small or medium size consumer goods company introduce its products to an overseas market? Exhibiting at trade shows can be a cost-effective way to find agents, distributors and customers. Each year, OCG organizes several different USA pavilions and exhibits at major foreign trade shows around the world to showcase American products. Upcoming

OCG trade events are described on the web site www.trade.gov/td/ocg/.

ISPO SUMMER 2001

U.S. sporting goods firms exhibited at the U.S. Product Sample/Literature Center at the most recent ISPO Summer Show. This trade fair took place in July of this year in Munich. The OCG exhibit displayed U.S. products to retail and wholesale buyers from all over Europe. Held annually, ISPO has more than 1,500 exhibitors and attracts more than 40,000 trade visitors. It has become recognized as a key event to reach Europe's sporting goods market.

The Product Sample/Literature Center offers a convenient and affordable way to stimulate sales leads and find representation. It showcases a company's product literature, videos and other visuals. Participating companies need not travel to the show. OCG and overseas U.S. Commercial Service staff plan a high-visibility catalog exhibition and publicize it to potential customers. The

U.S. exhibit is a low-cost and effective way for new-to-export and new-to-market sports equipment companies to introduce themselves to the German and European markets.

GOLF EUROPE 2001

OCG is now recruiting firms to participate in a large Product Sample/Literature Center at Golf Europe, October 7-9, 2001, in Munich, Germany. The services offered will be the same as those described for ISPO above. This annual event is a specialized show for golf course owners and operators. It has become recognized as a key event that fuels Europe's golf market. Major product categories that would benefit from participating in such a show are all kinds of golf equipment, apparel, accessories and other golf-related products. The trade visitors will include retail and wholesale buyers and golf pros from all over Europe. At last year's event, nearly 300 firms from 21 countries exhibited and a total of 5,500 strictly trade-only buyers from 47 countries visited the show. In Germany alone, sales generated by golf equipment, clothing and accessories grew to more than \$165 million in 1999. Retail sales rose by 16.3 percent compared with 1999. The German golf market is the fastest growing and is now the fifth largest foreign market for U.S. golf equipment exports. Excellent opportunities exist for U.S. golf companies in the German and European golf markets. The sophisticated, quality-conscious German market highly regards U.S.-made golf equipment. In Germany, trade fairs play a major role in product marketing. For more information please contact Ludene Capone (e-mail Ludene_Capone@ita.doc.gov).

FRANKFURT BOOK FAIR

Prospective distributors, buyers and rights licensees from all over Europe and the world descend on Frankfurt, Germany every year. They seek the best books offered by the biggest and smallest publishers worldwide. For the 2001 show, to



Photo courtesy of the Office of Consumer Goods

Ludene Capone (center) displays U.S. golf merchandise at the Golf Europe 2000 exhibition in Munich, Germany. Seven U.S. companies participated sending products and literature that were displayed to 5,500 visitors from 47 countries.



be held October 10-15, OCG will sponsor a by-the-book exhibition open to all U.S. publishers, but highlighting U.S. minority publishers. Each book will be displayed full face to attract the attention of trade visitors. Participating companies need not travel to the show. OCG and overseas U.S. Commercial Service staff plan and publicize the U.S. exhibit. They will translate information about the publisher and the book for foreign visitors. OCG collects information on agents or publishers interested in importing books or purchasing translation rights and sends it to the U.S. company. The U.S. exhibit is a low-cost and effective way for new-to-export and new-to-market publishers to introduce themselves to a world wide market.

The Frankfurt Book Fair is an ideal venue to find foreign publishers. It offers more than 380,000 books published by more than 6,600 individual exhibitors and 80 national exhibitions representing more than 110 countries. English-language books are increasingly important in Europe. The Frankfurt Book Fair is host to one of the world's largest exhibitions for such books, devoting an entire hall to English-language books. Last year, more than 300,000 trade professionals visited the fair, making the Frankfurt Book Fair the largest and most important trade show in the industry.

U.S. books have significant growth potential in Europe, with current sales equating only a small part of the entire European book market. For example, the combined size of just the French, German and British book markets totals more than \$4 billion.

For additional information on the Frankfort Book Fair, please contact Nate Herman (e-mail Nate_Herman@ita.doc.gov).

PROVIDING ESSENTIAL INFORMATION AND ANALYSIS FOR U.S. COMPANIES

All of this work depends upon the expertise of OCG industry specialists. These experts analyze trends in production, employment and imports and exports for consumer goods industries. Much of this work provides specialists with the expertise to represent consumer goods interests at the negotiating table. In addition, this expertise is made available directly to U.S. companies. OCG contributes several chapters to the Department of Commerce's U.S. Industry & Trade Outlook, including Footwear, Leather and Leather Products, Household Consumer Durables, Other Consumer Durables, Printing and Publishing, Processed Food and Beverages and Recreational Equipment. These chapters present a comprehensive overview of each of the covered industries, including its present status and outlook for the next five years.

OCG's web site www.trade.gov/td/ocg/ provides trade statistics and other information, updated quarterly, for most major consumer goods industries. OCG analysts respond every week to dozens of information requests from U.S. business and others. This data and information allow consumer goods companies, many of whom are small and medium-sized enterprises, to make better informed business decisions. They are also valuable resources for academia and policy makers. ■

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Tel: (336) 884-5000
Fax: (336) 884-5303
<http://www.afma4u.org>*

*Association of American Publishers, Inc.
Tel: (202) 232-3335
Fax: (202) 347-3690
<http://www.publishers.org>*

*International Housewares Association
Tel: (847) 292-4200
Fax: (847) 292-4211
<http://www.housewares.org>*

*Lawn & Garden Marketing & Distribution Association
Tel: (215) 564-3484
Fax: (215) 564-2175
<http://www.lgmda.org>*

*Manufacturing Jewelers & Suppliers of America
Tel: (401) 274-3840
Fax: (401) 274-0265
<http://mjsa.polygon.net>*

*National Marine Manufacturers Association
Tel: (312) 946-6200
Fax: (312) 946-0388
<http://www.nmma.org>*

*Sporting Goods Manufacturers Association
Tel: (561) 842-4100
Fax: (561) 863-8984
<http://www.sgma.com>*

*Toy Industry Association
Tel: (212) 675-1141
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UPCOMING TRADE EVENTS

SEPTEMBER 2001 - JANUARY 2002

DATES	EVENT	LOCATION
September 1 - 3	Lyon Mode City The Lyon Mode City trade fair is the top lingerie and swimwear trade show in the world and brings together over 800 exhibitors from 27 different countries. For several years, the show has confirmed its international reputation by attracting lingerie and swimwear trade professionals. The 2000 show attracted 18,446 visitors.	Lyon, France
September 4 - 6	Health and Aged Care 2001 Health and Aged Care is Australia's only trade show dedicated to medical equipment. It is held biennially and attracts around 3,000 visitors and 120 exhibitors. The show features hospital furniture and fittings, sterilizers, disability aids, educational materials, laundry and waste facilities and information technology and communication systems.	Melbourne, Australia
September 9 - 12	Deco Contract Fair Deco Contract is the professional trade fair for the hotel, cruise, office and theater design, showing fabrics, floorcoverings and wallcoverings. This fair will include trend presentations and technical information.	Brussels, Belgium
September 15 - 18	Arab Oil and Gas Show The 10th international exhibition for the Oil, Gas and Petrochemical Onshore and Offshore industries serving the Arab Gulf states is held every two years. This event enables international suppliers to mount a comprehensive presentation of technology, services and equipment to nearly 4,000 specialist visitors.	Dubai, United Arab Emirates
October 1 - 5	Medical Industry Product Literature Show Panama, Peru and Ecuador buy nearly \$50 million in medical equipment and supplies each year from the U.S. This tri-product literature show is a cost effective tool for small and mid-sized companies to find agents and distributors in each country. American companies will have their products attractively showcased and displays will be staffed by medical industry specialists of the U.S. Commercial Service in each country.	Panama, Ecuador, Peru
October 8 - 13	Bucharest International Fair BIF, a member of the International Fair Union, is the leading commercial event in Romania and one of the prominent trade fairs in Eastern Europe. It is a general technical fair with a strong emphasis on industrial equipment and consumer goods.	Bucharest, Romania
October 9 - 14	Kyung Hyang Housing Fair This housing fair is the most prestigious and largest housing/building product exhibition in Korea. It features a wide range of building products, construction equipment and architectural/engineering services. This year it is expected to draw over 50,000 qualified and invited visitors. This event is an excellent marketing forum for foreign companies to enter the Korean market.	Kyung Hyang, South Korea
October 9 - 12	IKK - Refrigerating and Air Conditioning IKK is a major trade fair offering a full range of refrigeration components and units for building services, process technology and logistics.	Hannover, Germany
October 12 - 17	China Hi-Tech Fair/Biotech 2001 This is the third edition of this event which will feature products in the following industries: biotech equipment, bioinformatics, biotech services, bioengineering material, technology and management and bio-agriculture. More than 350,000 professional visitors are expected to attend.	Shenzhen, China
October 22 - 26	Environmental Technologies Matchmaker There will be the traditional matchmaker offering of one-on-one, prescreened appointments at each stop as well as briefings, logistical support and hospitality events.	Czech Republic, Hungary, Poland
October 22 - 26	Healthcare Technologies Matchmaker to Brazil and Chile This event will be a traditional Matchmaker with two days of pre-screened appointments at each stop. Participants will also benefit from in-depth briefings and hospitality events.	Brazil and Chile
October 30 - 31	Electrical Power Trade Mission & Seminar This trade event and seminar is designed to provide small to medium-sized export ready companies, utilities and their suppliers with a first-hand opportunity to become familiar with the Canadian electrical power market, establish new and profitable commercial relations and provide valuable trade and market-related information from up-to-date industry briefings.	Toronto, Canada

HIGHLIGHTED EVENTS

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CRECEX TRADE MISSION

SEPTEMBER 6 – 7, 2001
SAN JOSÉ, COSTA RICA

The Costa Rican Importers Association (CRECEX) is organizing its International Business Roundtable and Trade Fair. CRECEX's primary mission is to facilitate and promote international trade. CRECEX has over 800 associates that represent every dimension of international commerce, including: importers, distributors, customs agencies and transportation providers. Some of the industries that will be represented at this trade mission will be apparel, processed foods, medical equipment, pumps, valves and compressors, toys and games, textile fabrics and veterinary medicine equipment and supplies.

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TEXTILE TRADE MISSION TO MEXICO

SEPTEMBER 24 – 28, 2001
MEXICO CITY AND GUADALAJARA, MEXICO

The Office of Textiles and Apparel will sponsor a textile trade mission to Mexico for representatives from U.S. apparel and home furnishing fabric companies interested in selling their products in Mexico or establishing representation agreements. Companies selling apparel fabrics made from natural fibers and cotton blends of fibers and yarns in the better price and quality ranges are likely to have the best chance of success. This event is a good opportunity for companies selling home furnishing fabric remnants as well.

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ENVIRO-PRO 2001

SEPTEMBER 25 – 28, 2001
MEXICO CITY, MEXICO

Environment Technology Industry Washington Specialists will showcase companies' technologies at the 8th annual Enviro-Pro 2001 by displaying the company's catalogs at the show. After the 2000 show, 67 percent of the attendees planned on purchasing products on exhibit within twelve months. This is a great time for companies to enter the Mexican environmental market. In recent years the Mexican economy has been on an upward trend and the demand for environmental technologies is forecasted to grow by 7 percent in 2001.

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DATES	EVENT	LOCATION
October 30 - November 1	European Banking Technology Fair 2001 The European Banking Technology Fair is the leading European technology show for banks and financial institutions. Exhibitors include hard and software products, security products and financial services.	Frankfurt, Germany
November 10 - 13	MediPhar Taipei - American Products Literature Center Mediphar is a major exhibition for the health care industry in Taiwan focusing on hi-tech products and the latest technologies. This event attracts decision-makers from some of the most advanced health care systems in Asia. American Products Literature Center offers smaller companies new to Taiwan a very cost-effective market introduction to the Taiwanese market.	Taipei, Taiwan
November 14 - 17	International Amusement Parks Show IAAPA is the premier trade show for the amusement park and entertainment industry, encompassing the entire spectrum of companies from small family-run operation to large multi-national corporations. Exhibitors run the gamut from high technology such as virtual reality simulators to the latest games, rides, food and beverage and state of the art themed attractions.	Atlanta, Georgia
November 10 - 14	6th International Transmission and Distribution Exhibition The biennial Distribution 2001 Exhibition is the leading event on the energy calendar for transmission and distribution utilities, manufacturers and suppliers in the Asia/Pacific region. This is an important forum for the presentation and discussion on new developments in transmission and distribution.	Brisbane, Australia
November 21 - 24	CEO Medica 2001 This trade mission is a world's forum for doctors' surgeries and hospitals. A Congress will be held in conjunction with this leading international trade fair.	Dusseldorf, Germany
December 3 - 5	International Tourism and Infrastructure Conference The goal of this conference is to introduce and network participating U.S. companies with business and government decision-makers from countries in Europe and the surrounding regions. This growing market is constantly seeking innovative and experienced overseas suppliers to fill its vast need. As one of Japanese government's export-to-Japan facilitation efforts, JETRO invites environmental companies looking to enter and/or expand their business in Japan to Environment Japan 2001.	Athens, Greece
December 3 - 5	Maintenance, Repair & Overhaul Conference and Exhibition (MRO Asia) MRO Asia consists of a conference and an exhibition. They are targeting participants from high-level management positions from airlines, OEM/suppliers, the government, the military and the aviation industry.	Hong Kong
December 4 - 7	Marintec China 2001 Marintec China is a major maritime event and will attract the most influential Chinese personalities and worldwide maritime companies. From ship building to ship registries, this is the maritime event in which to participate if you are interested in the world maritime industry.	Shanghai, China
December 14 - 17	Paperex 2001 This is the 5th International Trade Fair and Conference on Pulp, Paper & Conversion Industry featuring raw material handling and preparation, pulping, bleaching and paper making, news print manufacture, conversion technology and automation in paper mills among others.	New Delhi, India
January 9 - 15 2002	Maison & Objet Maison et Objet is a European event for the homeware market. The show attracts more than 2,200 exhibitors with more than half coming from overseas. Visitors include 55,000 professional buyers with more than 15,000 coming from outside France.	Paris, France
January 29 - 30 2002	Visit North America Seminar The Visit North America Seminar is the main travel trade event promoting Swiss tourism exclusively to the U.S. and Canada. The exhibit features some 130 exhibitors, mostly from the U.S. and the program includes 70 educational workshops. Representatives from over 800 Swiss travel agencies will attend. The 400,000 Swiss tourists to the U.S. produced revenues in excess of \$2 billion in 2000.	Zurich, Switzerland
January 29 - February 1, 2002	Pacific 2002 International Maritime Exhibition Pacific 2002 will showcase the world's latest developments in maritime and naval technology.	Sydney, Australia

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GENOA INTERNATIONAL BOAT SHOW

**OCTOBER 13 – 21, 2001
GENOA, ITALY**

Genoa's International Boat Show is one of the largest and leading international boat shows in the world for motor boats, sailing boats, surf boards, inflatable crafts, diving and fishing equipment, engines, instruments and accessories. This show is an excellent opportunity for U.S. companies to get involved in the international boating market. Last year's event attracted 350,000 visitors and had 1,468 exhibitors. This is the fourth consecutive year that the U.S. Commercial Service will hold a U.S. Catalog Exhibit at the Show.

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INTERNET/TELECOMMUNICATIONS TRADE MISSION

**NOVEMBER 4 – 9, 2001
MUNICH, FRANKFURT, BERLIN AND HAMBURG**

This trade mission will include representatives from a variety of U.S. firms providing products and services for the Internet and telecommunications who are interested in entering or expanding their presence in Germany. The mission aims to provide the participants with first-hand market information as well as access to potential business partners and key government official. It will also generate publicity and market exposure for participating companies. In sum, the mission will facilitate access for the firms and opportunities resulting from the increasing market demand in Germany for U.S. products and services in the Internet and telecommunications industries.

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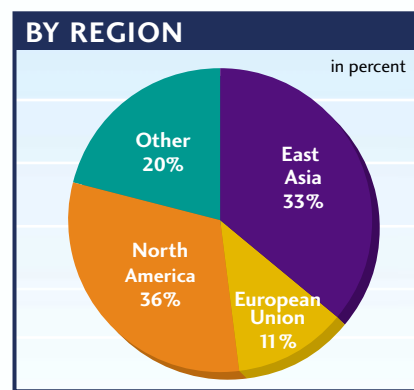
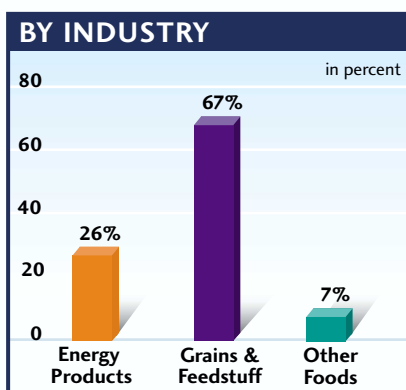
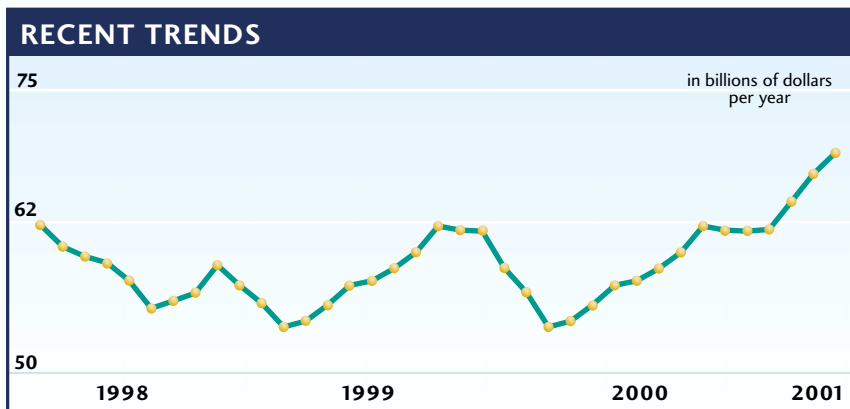
INTERNATIONAL SHOPA SHOW

**NOVEMBER 14 – 17, 2001
MIAMI, FLORIDA**

School, Home and Office Products Association (SHOPA) Show is one of the 200 largest trade shows in the United States, according to Tradeshows Week. The show is offering seminars the day before the show and customized local store tours with association executives serving as speakers on an as-needed basis. Products will include: computer accessories and software, desk accessories, furniture, writing instruments and accessories, office storage, school supplies and much more.

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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.

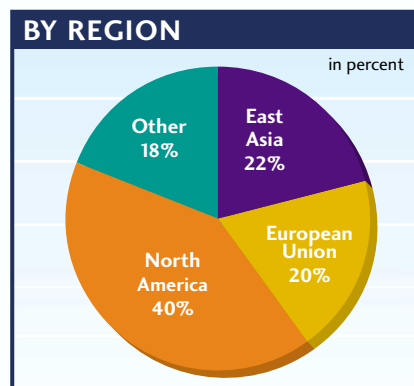
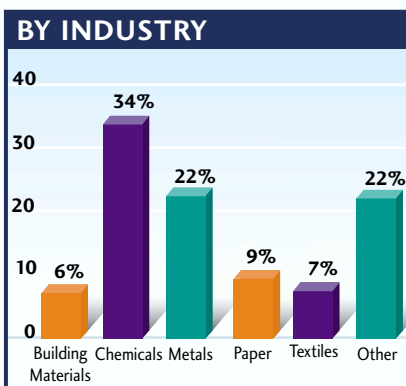
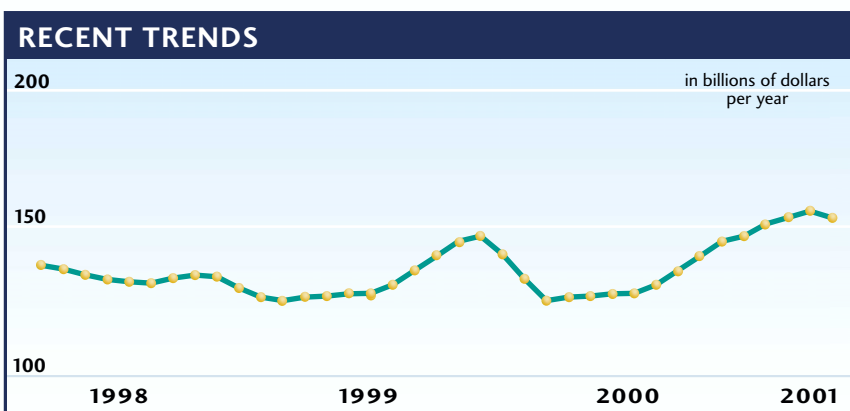
North America: Canada and Mexico.

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

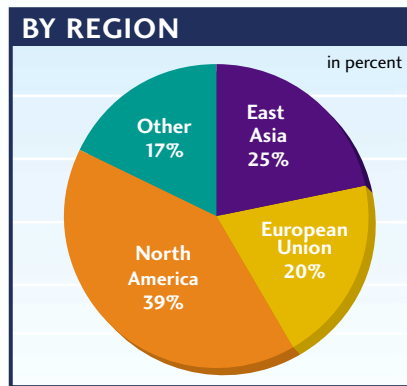
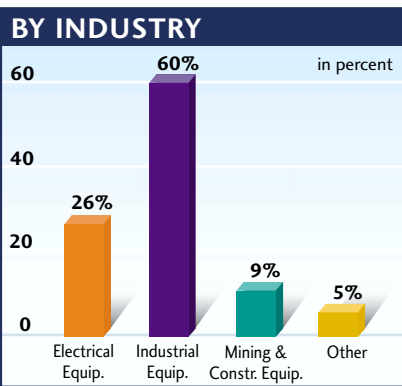
East Asia: China, Hong Kong, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Taiwan and Thailand.

The chart showing exports of services by region is based on data for calendar year 1999. Other charts showing product mix and geographic destination are based on data for the year ending April 2001.

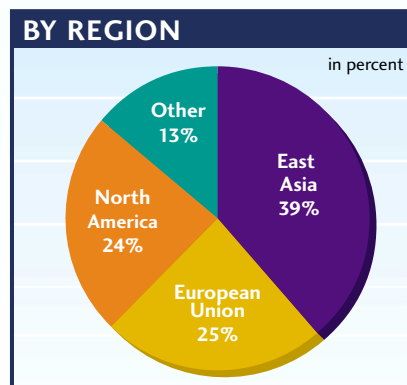
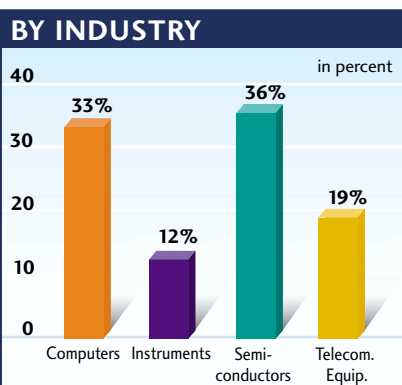
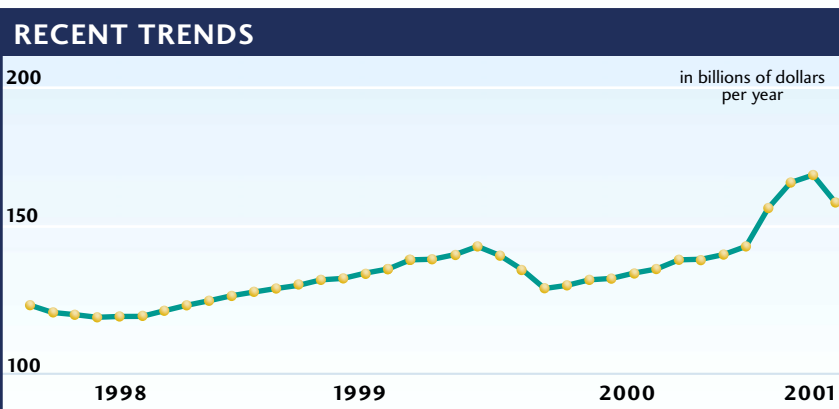
Source: Bureau of the Census (goods), Bureau of Economic Analysis (services).



MACHINERY



ELECTRONICS & INSTRUMENTS

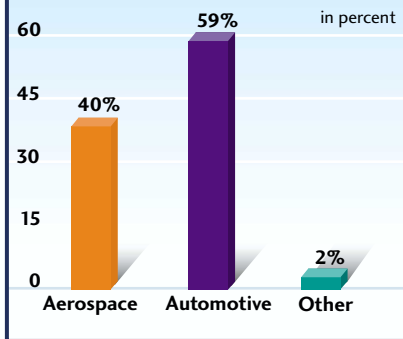


TRANSPORTATION EQUIPMENT (CIVILIAN)

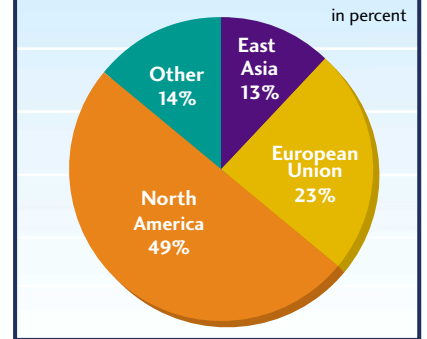
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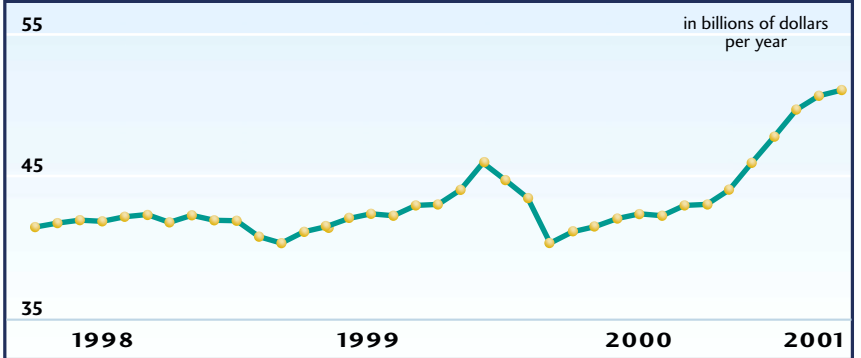


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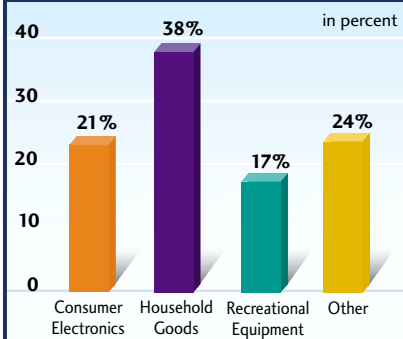


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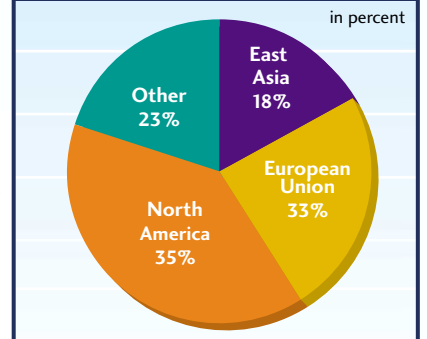
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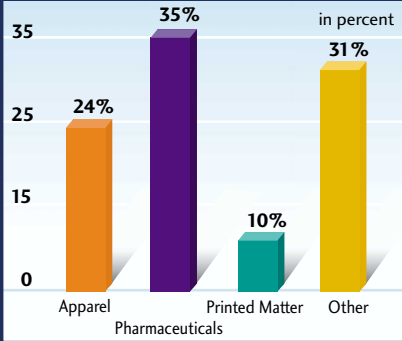
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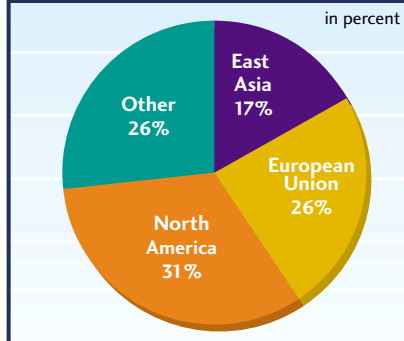
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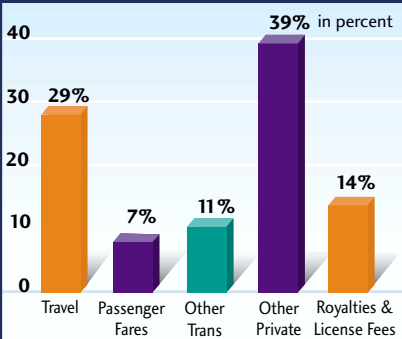


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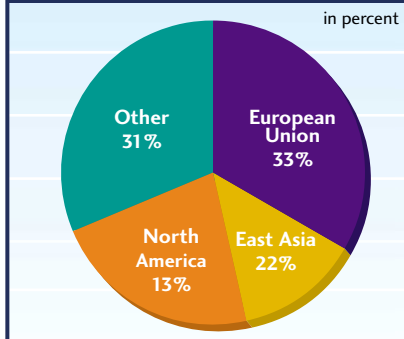
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 the Bureau of the Census
www.census.gov/foreign-trade/www/,
 and the Bureau of Economic Analysis
www.bea.doc.gov/bea/.

Prepared by the Office of Trade and Economic Analysis, Trade Development. For more information call (202) 482-2056.

STREAMLINING TRADE

U.S. CUSTOMS GOES HIGH TECH

by Virginia Noordewier

Customs Modernization Office, U.S. Customs Service

The U.S. Customs Service is embarking on a modernization effort—the Customs Modernization Program—to improve Customs trade, enforcement and administrative operations. The Customs Modernization Program will bring an enterprise approach to the planning, definition, development and implementation of new business processes and the infrastructure that supports these processes.

The Modernization Program will have a positive impact on almost every aspect of U.S. and international trade and travel, Customs operations and related federal and international government agency

missions and programs. The Modernization effort will impact its many stakeholders on a day-to-day basis.

With the challenges of explosive growth in international trade and travel and ever-increasing law enforcement demands, Customs is relying on technology to enhance operations. Modernization will include the re-engineering of Customs operational processes and the development of new technology infrastructure, computer systems and software applications to support these processes. It will address Customs commercial, enforcement and administrative operations. The first Modernization project is the development of the Automated Commercial Environment (ACE), Customs new high-tech trade system.

Although ACE will be the first significant accomplishment, the Modernization process is much more. The entire Modernization program will span 15 years and will cover each of Customs mission areas: Trade, Enforcement and Administration.

Modernization will update the systems that Customs uses to do business by:

- Reducing maintenance costs
- Maximizing service to other government agencies and to industry
- Allowing greater access by the public
- Using technologies that are interoperable and easy to upgrade.

CUSTOMS CHOOSES MODERNIZATION PARTNER

On April 27, 2001 the U.S. Customs Service accomplished a major goal—award of the Customs Modernization Prime Integration Contract to the “e-Customs Partnership,” led by IBM Global Services. Key team members include Lockheed Martin Corporation, KPMG Consulting, Computer Sciences Corporation (CSC) and Sandler & Travis Trade Advisory Services (STTAS), Inc.

“The selection of our Modernization partner, the Prime Integration Contractor, is a significant achievement for Customs,” says Acting Commissioner Charles Winwood. “We can now begin bringing 21st century business practices to America’s borders.”



Photo courtesy of Gerald L. Nino

U.S. Customs Acting Commissioner Charles Winwood announces the selection of a Customs Modernization prime contractor.

Modernization will deliver new tools and cutting-edge technologies to Customs employees so that they can accomplish mission responsibilities in an environment that is constantly changing. It will also simplify transactions, allowing Customs to interact and communicate more easily with the trade community and other agencies.

“The Prime Integration Contractor will help Customs design, build and implement new information systems,” says S.W. Hall, Jr., Assistant Commissioner for the Office of Information and Technology and Customs Chief Information Officer. “The e-Customs Partnership is a team of top-notch companies and highly-qualified professionals. They have successfully developed and managed large information systems projects similar to Customs Modernization. The team’s business knowledge and technical capabilities, combined with the institutional and operational knowledge of dedicated Customs employees, as well as input from stakeholders like the trade community, is our blueprint for successfully building modernized systems that meet Customs mission needs.”

The team name, “e-Customs Partnership,” conveys a vision of Customs future as a paperless organization that uses electronic means to carry out mission responsibilities. Team members have a long history of working together, assisting customers in transforming their enterprise and employing technology to solve business challenges. The team offers a balance of commercial and government experience that can leverage best practices from both sectors for designing and engineering innovative solutions to Customs challenges. The team also has trade and enforcement experience, which will help them understand and address the complexities of Customs mission and operating environment. Each member of the e-Customs Partnership will play an integral role in ensuring that Modernization goals are achieved.

- IBM Global Services will lead and manage the e-Customs Partnership. IBM is the world’s largest systems integration and infrastructure management firm and will be accountable for achieving Modernization goals and objectives.

- Lockheed Martin Mission Systems (LMMS) will develop and integrate new systems and software. LMMS is certified at Level 5 of the Capability Maturity Model for Software (SW-CMM®) and Level 3 of the Systems Engineering Capability Maturity Model (SE-CMM®). This level of capability reduces risk in delivery of software and systems.

- KPMG Consulting will contribute business transformation, knowledge management and training expertise to the e-Customs Partnership.

- CSC brings its experience in information security and telecommunications to the team. STTAS is the nation’s largest dedicated provider of international trade and customs services and will provide global trade and Customs expertise.

TRADE SUPPORT NETWORK PLAYING A ROLE IN ACE DEVELOPMENT

Modernization should benefit everyone. With this goal in mind, Customs has established a subcommittee structure within the Trade Support Network (TSN) to collect user requirements for the Automated Commercial Environment.

The TSN was established in 1994 to be a forum for discussions regarding the redesign of its trade systems. The group’s more than 120 members represent a cross-section of the trade community and include importers, exporters, brokers, carriers, sureties, couriers, software vendors, attorneys and consultants.

Now revitalized, the TSN held its first ACE meeting in May of this year in

Washington, D.C. In addition to the May plenary hearing, the TSN accomplishes its work through subcommittees, which are small working groups comprised of TSN members who discuss specific components of the trade compliance process. The subcommittees are formed on an as-needed basis. Current TSN subcommittees are as follows:

- Account Management
- Entry Revision Project
- Revenue
- Multi-modal Manifest
- Trade Interface
- International Trade Data System
- Business Technology

Each subcommittee is co-chaired by a Customs and Trade representative. The two co-chairs of each subcommittee also serve as the Trade User Requirements Integration Committee.

This summer, the subcommittees will meet periodically to continue working on their recommendations for the first increment of ACE, which will include a foundation for account management, periodic payment processing, fast release of cargo for compliant companies and a single interface for the trade.

TSN recommendations for the first increment of ACE are due to Customs by early fall 2001 so that they may be evaluated and incorporated into the ACE requirements being developed by the e-Customs Partnership. ■

For more information on the TSN and how to become a member, please contact

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