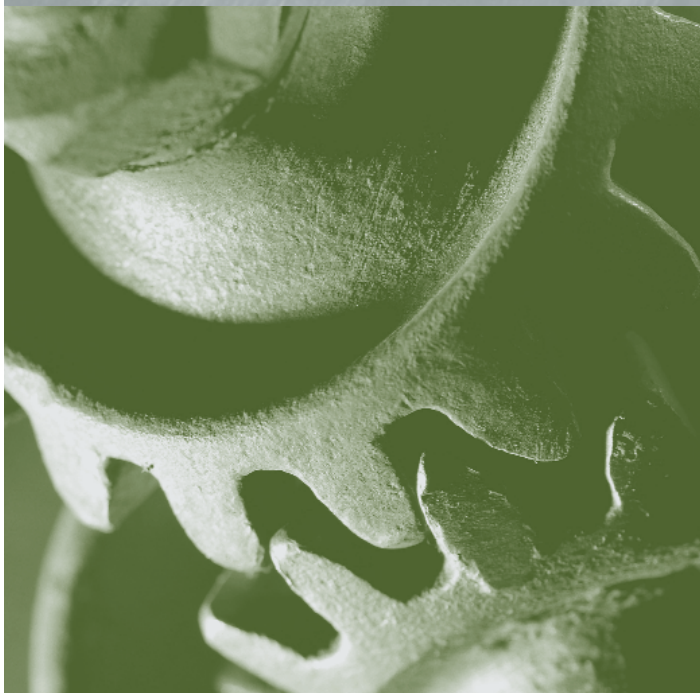



2002-
2003

TOP MARKETS *FOR* MACHINERY

EXPORT PROMOTION OF
U.S. MACHINERY PRODUCTS
IN LEADING WORLD MARKETS



U.S. Department of Commerce
International Trade Administration



A MESSAGE FROM THE
SECRETARY OF COMMERCE

Manufacturing matters. This administration recognizes the vital contribution that U.S. manufacturing industries make to the success of the American economy. Since the 1950s, large productivity increases in the

manufacturing sector have led America's economic boom. For example, in durable goods, the heart of the technology-intensive U.S. manufacturing sector, productivity surged 39 percent from 1994 to 2001, while productivity in the overall economy rose 16 percent.

In the fast-changing, technology-driven goods sector, research and innovation are the keys to productivity, competitiveness, and growth. U.S. manufacturing industries account for about two-thirds of private research and development expenditures. More than 90 percent of all U.S. patent approvals originate in the manufacturing sector. U.S. investment in knowledge-based industries leads the world and allows us to have over twice the amount of high-technology exports as Japan and more than three times that of Germany. Even during the industrial downturn of the last two years, manufacturing industries have maintained a high level of research and development spending, which is the seed of future growth.

Service industries depend on manufacturing firms for technological innovation. Much of the productivity gains in recent years in service industries, such as finance or retail and wholesale trade, derives directly from the advancements achieved by manufacturing industries, such as the computer and telecommunications industries.

Manufacturing is more than just an engine for growth. Its remarkable productivity has resulted in higher incomes and an exceptionally high standard of living for all Americans. We are confident that the U.S. manufacturing sector will continue to grow and prosper and be a principal pillar of strength for the U.S. economy for many years to come.



Donald L. Evans
Secretary of Commerce

**U.S. Department of Commerce
International Trade Administration**

Linda M. Conlin
Assistant Secretary for Trade Development

Joseph Bogosian
Deputy Assistant Secretary for Transportation and Machinery

The Office of Machinery (OM) assists U.S. businesses in the exportation of capital equipment, production machinery, and general components. Its analysts work with the Capital Goods Industry Sector Advisory Committee (ISAC2) to provide confidential advice to U.S. trade experts and negotiators on industry issues. OM analysts provide input on trade policy through their development of industry sector analyses and forecasts, and they are actively involved in the Commerce Department's trade promotion programs. To further the International Trade Administration's goal of aiding U.S. businesses competing abroad, OM trade specialists work closely with other Department of Commerce offices, government agencies, trade associations, and individual companies in developing and expanding export markets.

Top Markets for Machinery highlights outstanding markets for U.S.-made machinery products, ranked by potential gain in export sales over the next two years. For each of 10 key machinery sectors, 10 countries were identified as having the strongest market potential for U.S. products in 2003.

OM staff initially identified the top markets for each key machinery sector, mainly from Census Bureau trade statistics as well as overseas market reports produced by the U.S. and Foreign Commercial Service. Further analysis on each selection was then conducted using a common set of market factors, which gauge both potential demand for the individual product sectors and expected overall economic growth of the countries.

Market factors include measures of the size and projected growth of the total market, imports, and U.S. exports, as well as judgements on local and third-country competition.

This booklet also lists the major trade shows in 2003–2004, for each machinery sector covered.

For further information or questions concerning the selection and ranking of markets, contact Alan O. Maurer, Ph.D., of the Office of Machinery, at (202) 482-3486. For market information on the various machinery sectors, contact the industry analysts listed below:

Air Conditioning, Refrigeration, and Heating Equipment

Alan Maurer, (202) 482-3486

Agricultural Machinery

Padraic Sweeney, (202) 482-5024

Construction Machinery

Leonard Heimowitz, (202) 482-0558

Electric Power Equipment

Suleiman Bengharsa, (202) 482-0552

Food Processing and Packaging Machinery

John Bodson, (202) 482-0681

Materials Handling Equipment

Padraic Sweeney, (202) 482-5024

Metalworking Machinery and Machine Tools

Todd DeLelle, (202) 482-4877

Mining Machinery

Leonard Heimowitz, (202) 482-0558

Oil and Gas Field Equipment

Suleiman Bengharsa, (202) 482-0552

Printing and Graphic Arts Equipment

Raymond Robinson, (202) 482-0610

Other questions on machinery sectors should be addressed to Jerry Morse, director, Office of Machinery, (202) 482-0314.



AIR-CONDITIONING, REFRIGERATION, and HEATING EQUIPMENT

TOP MARKETS, 2003

- China
- Mexico
- Saudi Arabia
- India
- South Korea
- Spain
- Poland
- Sweden
- Canada
- United Kingdom

WORLD TRADE SHOWS

- International AHR Expo . . . January 2003 United States
- IKK. October 2003 Germany
- HVAC Asia. July 2003 Singapore
- International AHR Expo . . January 2004 United States
- IKK. October 2004 Germany

For more market information, contact Alan Maurer, Office of Machinery, (202) 482-3486.



AGRICULTURAL MACHINERY

TOP MARKETS, 2003

- China
- Russia
- Saudi Arabia
- Mexico
- Poland
- Canada
- United Kingdom
- Brazil
- South Korea
- Peru

WORLD TRADE SHOWS

- World Ag Expo February 2003 United States
- SIMA 2003 February 2003 France
- International Irrigation Show November 2003 United States
- Perth Royal Show September 2003 Australia
- World Ag Expo February 2004 United States

For more market information, contact Padraic Sweeney, Office of Machinery, (202) 482-5024.

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Ypsilanti (734) 487-0259

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CONSTRUCTION MACHINERY

TOP MARKETS, 2003

- China
- Mexico
- Germany
- Peru
- Italy
- Australia
- Singapore
- Saudi Arabia
- Spain
- South Africa

WORLD TRADE SHOWS

- World of Asphalt March 2003 United States
- Intermat May 2003 France
- International Construction and
Utility Equipment Exposition . . . September 2003 United States
- BAUMA April 2004 Germany
- Expomin May 2004 Chile
- Minexpo 2004 September 2004 United States

*For more market information, contact
Leonard Heimowitz, Office of Machinery, (202) 482-0558.*

FOOD PROCESSING AND PACKAGING MACHINERY

TOP MARKETS, 2003

- Canada
- Sweden
- Egypt
- Italy
- Saudi Arabia
- China
- Spain
- Poland
- Thailand
- United Arab Emirates

WORLD TRADE SHOWS

- Expo Pack Mexico June 2003 Mexico
- Pro Pack China 2003 July 2003 China
- Pro Pack Expo October 2003 United States
- Expo Pack Mexico June 2004 Mexico
- Pack Expo International . . . November 2004 United States

*For more market information, contact
John Bodson, Office of Machinery, (202) 482-0681.*

ELECTRIC POWER GENERATION, TRANSMISSION, AND DISTRIBUTION EQUIPMENT

TOP MARKETS, 2003

- Brazil
- Germany
- Spain
- Turkey
- France
- South Korea
- Mexico
- United Arab Emirates
- United Kingdom
- South Africa

WORLD TRADE SHOWS

- Electric Power 2003 March 2003 United States
- Hanover Fair April 2003 Germany
- Power-Gen Europe June 2003 Italy
- Electric 2003 June 2003 United States
- Texas Technology Showcase . . March 2003 United States
- Power-Gen Asia 2003 October 2003 Singapore

*For more market information, contact
Suleiman Bengharsa, Office of Machinery, (202) 482-0552.*

MATERIALS HANDLING MACHINERY

TOP MARKETS, 2003

- Mexico
- Italy
- France
- Canada
- United Kingdom
- The Netherlands
- Israel
- Finland
- Taiwan
- Ecuador

WORLD TRADE SHOWS

- Manutention 2003 March 2003 France
- Pro-Mat 2003 February 2003 United States
- 2004 Materials Handling
and Logistics Show and
Conference March 2004 United States

*For more market information, contact
Padraic Sweeney, Office of Machinery, (202) 482-5024.*

MACHINE TOOLS AND METALWORKING MACHINERY

TOP MARKETS, 2003

- China
- Canada
- Israel
- Russia
- Mexico
- Italy
- Taiwan
- Germany
- Ireland
- India

WORLD TRADE SHOWS

- Euro MoldDecember 2002Germany
- International Robots and Vision ShowJune 2003United States
- International Robot ExhibitionNovember 2003Japan
- International Manufacturing Technology ShowSeptember 2004United States
- EMO 2005September 2005Germany

*For more market information, contact
Todd DeLelle, Office of Machinery, (202) 482-4877.*

OIL AND GAS FIELD MACHINERY

TOP MARKETS, 2003

- Brazil
- Germany
- China
- Russia
- Saudi Arabia
- Egypt
- United Kingdom
- Central Asia
- Venezuela
- United Arab Emirates
- Independent States (CIS)

WORLD TRADE SHOWS

- Middle East Oil Show and ConferenceMarch 2003Bahrain
- Texas Technology ShowcaseMarch 2003United States
- International Gas Industry ExhibitionApril 2003Germany
- Offshore Technology ConferenceMay 2003United States
- Global Petroleum Show 2004June 2004Canada

*For more market information, contact
Suleiman Bengharsa, Office of Machinery, (202) 482-0552.*

MINING MACHINERY

TOP MARKETS, 2003

- China
- Sweden
- Russia
- Singapore
- France
- Egypt
- Canada
- Ireland
- Mexico
- Central Asia Independent States (CIS)

WORLD TRADE SHOWS

- IntermatMay 2003France
- BAUMAApril 2004Germany
- ExpominMay 2004Chile
- Minexpo 2004September 2004United States
- Conexpo - Con/Agg 2005March 2005United States

*For more market information, contact
Leonard Heimowitz, Office of Machinery, (202) 482-0558.*

PRINTING AND GRAPHIC ARTS EQUIPMENT

TOP MARKETS, 2003

- Saudi Arabia
- Israel
- Italy
- Egypt
- China
- South Africa
- Spain
- Japan
- Poland
- Switzerland

WORLD TRADE SHOWS

- Gutenberg FestivalMay 2003United States
- PRINT 05September 2005United States

*For more market information, contact
Raymond Robinson, Office of Machinery, (202) 482-0610.*

Looking to expand your sales of machinery in new markets overseas?

Find all the information you need for successful exporting. Visit the Office of Machinery's Web site at www.ita.doc.gov/machinery.

The International Trade Administration's Office of Machinery makes available research, forecasts of best potential markets, trade statistics, reports from the U.S. and Foreign Commercial Service, and Office of Machinery overviews covering:

- cutting tools
- oil and gas field machinery
- farm machinery
- packaging machinery
- food processing
- textile machinery
- general components
- many other machinery sectors

New Machinery Statistical Service

The Office of Machinery now offers its business clients tailor-made statistics covering exports and imports, compiled by the Census Bureau for all machinery sectors at any product level, from a four-digit Harmonized System (HS) industry level to a 10-digit product level. The data are presented in tables, with growth rates, for any and all countries desired.

For more information, contact:

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The International Trade Administration (ITA) has as its mission the creation of economic opportunity for U.S. workers and firms by promoting international trade, opening foreign markets, ensuring compliance with trade laws and agreements, and supporting U.S. commercial interests at home and abroad. To learn more about the ITA, write to: International Trade Administration, Office of Public Affairs, U.S. Department of Commerce, Washington, DC 20230, or visit the ITA's Internet site at www.ita.doc.gov.