

International Trade UPDATE

JULY-AUGUST 2006

NAFTA Partners Lead Strong U.S. Export Growth

Free trade means more trade for the United States. That is a key conclusion drawn from an analysis by the International Trade Administration.

The past three years have been marked by significant, steep increases in U.S. exports to its key trading partners, particularly those countries with which it enjoys low trade barriers, according to an analysis of trade figures conducted by the International Trade Administration. The analysis uses the Commerce Department's Trade Policy Information System (TPIS), which draws on data from the Census Bureau, the United Nations, the World Bank, and the International Monetary Fund to track international trade.

Of the 25 largest export markets for U.S. goods, 23 of them showed increases in 2005. (See table on page 4.) Overall, U.S. exports of goods grew by more than \$86 billion in 2005 and are poised for significant growth in 2006.

NAFTA Partners at the Forefront

The export trend is particularly evident in the numbers for U.S. trade with its two largest trading partners, Canada and Mexico. (See chart on page 4.) These two countries are partners with the United States in the North American Free Trade Agreement (NAFTA). NAFTA is the United States' largest free trade agreement and one of the world's largest free

trade areas. Since implementation of NAFTA in 1994, U.S. shipments to Mexico and Canada have more than doubled. This trend is continuing in 2006, with exports to Canada growing 10.2 percent and those to Mexico growing 15.1 percent through the end of May compared with the same period last year.

Importance of Emerging Markets

Among the fastest growing U.S. markets are the emerging economies of China and India. These rising economic powers have populations of more than a billion people each, with a growing middle class of a hundred million or more. Consumers in these countries seek many of the products the United States makes, from basic food products to high technology and the services that support them.

U.S. exports to China grew by 20.5 percent from 2004 to 2005 and are continuing to grow rapidly, with an increase of 36.5 percent during the first five months of this year, compared to 2005. Exports to India are growing at a similarly rapid pace, rising 23.5 percent over the same period in 2006, after climbing 30.6 percent last year.

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ADMINISTRATION

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Tourism Marketing Campaign Promotes U.S. Destinations to Japanese Travelers

In support of the \$100 billion international travel and tourism industry, the U.S. Department of Commerce, in concert with many private-sector partners, has just launched a campaign in Japan to promote the United States as a tourist destination.

This past June, the U.S. Department of Commerce launched a new international tourism promotion campaign in Japan, using the theme “You’ve Seen the Films, Now Visit the Set.”™ The campaign uses clips and stills from American films featuring U.S. destinations to showcase the United States as an exciting place to visit.

The fully integrated market campaign was developed and implemented by the U.S. Department of Commerce’s Office of Travel and Tourism Industries (OTTI) and the Visit America Alliance, which includes Edelman, a public relations firm; M&C Saatchi, an advertising agency; and their subcontractors. The campaign was based on detailed consumer research. Its advertising components include 30-second commercials for television and cinema, billboard posters in Tokyo subway and train stations, and special promotions in stores and online.

The objectives of the campaign are to increase awareness of and interest in the United States as a travel destination, to encourage future interest in visiting the United States, and to bring economic benefits from visits to U.S. destinations.

Japan ranks first in producing tourism receipts, generating \$16.5 billion in 2005, an increase of 26 percent over 2004. It is the fourth-largest arrivals market in terms of number of visitors. In 2005, 3.9 million Japanese visited the United States, a 4 percent increase over 2004.

Ana Guevara, the deputy assistant secretary of commerce for services, kicked off the campaign on June 19, 2006, in Tokyo. J. Thomas Schieffer, U.S. ambassador to Japan, joined Guevara in announcing the campaign at various events during the week.

Partnerships Enhance Campaign

The Commerce Department’s tourism office worked closely with the U.S. and Foreign Commercial Service’s office at the U.S. embassy in Tokyo, as well as with advertising and public relations contractors, to create the campaign. The Commerce Department also developed several key partnerships that will support the success of the campaign.

One of those partners, the Travel Industry Association of America (TIAA), donated the use of its Web site for the campaign (www.seeamerica.jp). The TIAA site now has new content that has been translated into Japanese, which makes the site fully functional as a marketing tool to the Japanese public.

Other partners in the campaign include two Japanese retail chains, Tsutaya and Mitsukoshi. Tsutaya is Japan’s largest record, book, and DVD retail outlet, and Mitsukoshi is Japan’s oldest and most prestigious department store. Both retailers are promoting the campaign through sweepstakes and promotional prize giveaways. Prizes include airline tickets, deluxe hotel stays, travel merchandise, and generous grand prize packages.

Nearly 50 travel and tourism industry partners from both countries are supporting the campaign.

Following in the Steps of Successful U.K. Campaign

This current campaign is a follow-up to a similar 2004 campaign in the United Kingdom. Advertising in that campaign increased consumer awareness in the United Kingdom by reaching approximately 12.8 million people. According to a postcampaign survey, people who had seen the promotion were 10 percent more likely to mention the United States as a “dream destination.” The campaign increased the number of

“ Japan ranks first in producing tourism receipts, and is the fourth-largest arrivals market in terms of visitors. ”

people who said they intend to travel to the United States by approximately 2 million. A high percentage of those intended travelers actually converted into sales, with 362,000 visitors who saw the campaign reporting that they had booked a trip to the United States.

First-year results of the U.K. campaign, as reported by Longwoods International, an independent research firm, indicated that the return on investment for the campaign was \$117 per \$1 invested in advertising.

Julie Heizer, an international trade specialist in the International Trade Administration, contributed to this report.

For More Information

More information about international tourism can be found on the Web site of the International Trade Administration's Office of Travel and Tourism Industries, <http://tinet.ita.doc.gov/>. Market research and analysis of the Japanese market for travel to the United States can be found at www.tinet.ita.doc.gov/outreachpages/inbound.country_in_asia.japan.html



Scenes from two U.S. films, *Forrest Gump* and *King Kong*, are featured in the tourism marketing campaign launched in Japan by the U.S. Department of Commerce.

Top U.S. Trade Partners in 2005

Total export value for goods (in millions of dollars) and percent change over 2004 for top 25 U.S. export markets.

Country	2005 Exports	Percent Change, 2004-2005
Canada	211,420	10.2
Mexico	120,049	15.1
Japan	55,410	8.3
China	41,837	36.5
United Kingdom	38,629	12.9
Germany	34,149	16.0
Korea	27,670	17.8
Netherlands	26,496	11.8
France	22,402	5.9
Taiwan	22,050	-9.0
Singapore	20,646	9.3
Belgium	18,605	7.6
Hong Kong	16,323	4.2
Australia	15,771	11.4
Brazil	15,345	20.4
Italy	11,512	6.0
Switzerland	10,7402	24.6
Malaysia	10,451	38.8
Israel	9,732	7.2
Ireland	9,335	-12
United Arab Emirates	8,477	62.8
India	7,958	23.5
Thailand	7,233	-1.8
Spain	6,934	6.4
Philippines	6,893	16.5

Source: U.S. Department of Commerce, International Trade Administration, Trade Policy Information System; U.S. Census Bureau.

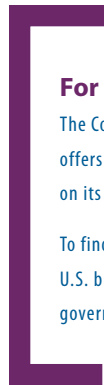
U.S. Export Growth

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New FTAs Lead the Way

Perhaps the most interesting trend identified by these trade figures is the impact that free trade agreements (FTAs) are having on trade flows between the United States and other, non-NAFTA, FTA countries. Of the world's total gross domestic product (excluding the United States) in 2005, some 6.8 percent was accounted for by the United States' free trade partners. Yet these same FTA countries represented a much greater share—42.4 percent—of U.S. exports.

Included among this latter group of FTA countries are some of our newest FTA partners, such as Chile and Australia. Since the implementation of a free trade agreement with Chile in 2004, exports have nearly doubled. For Australia, an already developed economy with a mature relationship with the U.S., exports have increased by more than 10 percent since implementation of the FTA in January 2005.

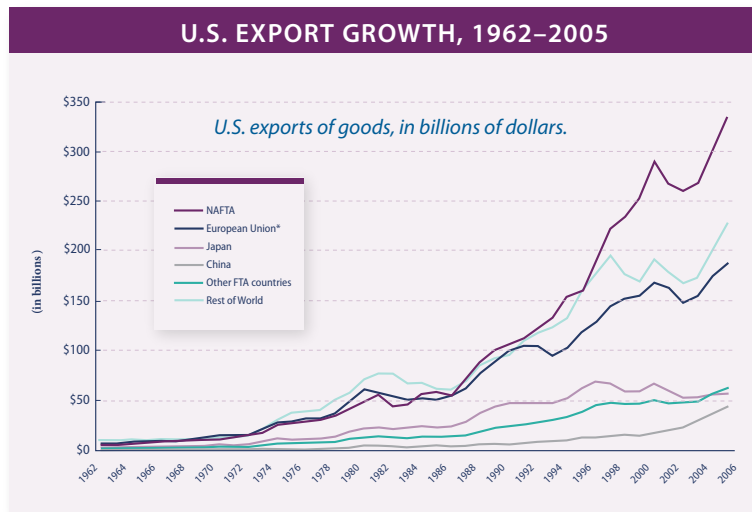


For More Information

The Commerce Department's International Trade Administration offers current and historical trade data, as well as trade analysis, on its Web site. Go to www.trade.gov and click on "Find Analysis."

To find out more about U.S. strategy to increase exports and how U.S. businesses can be a part of that success, visit the federal government's export portal, www.export.gov

Today, another half dozen countries—Colombia, Malaysia, Panama, Peru, South Korea, and Thailand—are in various stages of negotiating or ratifying a free trade agreement with the United States. They all represent growth opportunities for U.S. exports. Just one of them, the South Korea FTA, will be the largest FTA with the United States since NAFTA



NAFTA = North American Free Trade Agreement
FTA = free trade agreement

* Figures for the European Union include historical data for all current 25 member nations, except for Estonia, Latvia, and Lithuania (data are for 1992-2005) and Slovenia (data are for 1992 to 2005).

Note: Dollar figures are actual dollars.

Sources: UN Merchandise Trade Data, SITC Rev1; U.S. Department of Commerce, International Trade Administration, Trade Policy Information System (TPIS).

Economic Development and Clean Energy Are Twin Goals of Asia-Pacific Partnership

Cleaner and more efficient technologies used to reduce carbon and greenhouse gas emissions can promote economic growth and poverty reduction. The Asia-Pacific Partnership on Clean Development and Climate is working to prove this theory.

Work on implementing an ambitious program to reduce air pollution and to promote the development of clean energy resources by six Pacific Rim countries took an important step forward with the conclusion of a four-day meeting in Berkeley, California, this past April. At the meeting, representatives of the six member countries of the Asia-Pacific Partnership (APP) on Clean Development and Climate discussed the next steps in implementing a workplan developed in January.

The meeting focused on eight task forces (see sidebar on page 9) formed to steer APP work. Each task force was charged with developing an action plan for implementing the goals of the organization. Those plans include several industry-specific strategies for promoting cleaner, more efficient energy technologies to curtail greenhouse gas emissions

A New Approach to Pollution Reduction

The APP was first announced in July 2005. In January 2006, ministers from the six member countries met in Sydney, Australia, to officially launch it. The APP is a non-binding partnership made up of Australia, China, India, Japan, South Korea, and the United States.

The partnership promotes economic development while meeting the ecological and environmental challenges that accompany development. Because the member countries account for 50 percent of the world's greenhouse gas emissions, energy consumption, gross domestic product, and population, this partnership can have a significant effect on the environment.

When President George W. Bush announced the APP, he called it a "new results-oriented partnership"

that will "allow our nations to develop and accelerate deployment of cleaner, more efficient energy technologies to meet national pollution reduction, energy security, and climate change concerns in ways that reduce poverty and promote economic development." He named Secretary of State Condoleezza Rice and Energy Secretary Samuel Bodman to lead U.S. participation.

Addressing the Challenges of Climate Change

The vision statement for the APP outlines the partnership's principal goals:

- To "promote and create an enabling environment for the development, diffusion, deployment, and transfer of existing and emerging cost-effective, cleaner technologies and practices"
- To cooperate in the development of energy technologies to "promote economic growth while enabling significant reductions in greenhouse gas intensities"
- To share "experiences in developing and implementing our national sustainable development and energy strategies"

The ministers emphasized that the APP is a complement to, not a replacement for, the U.N. Framework Convention on Climate Change and its Kyoto Protocol. Unlike the Kyoto Protocol, the APP's focus is on information sharing and establishing voluntary measures to improve greenhouse gas emissions.

Benefits for U.S. Companies

U.S. companies can benefit from the strategies that will eventually be adopted by the APP. The companies will enjoy substantial commercial advantages in the

“Because member countries account for 50 percent of the world's greenhouse gas emissions, energy consumption, gross domestic product, and population, this partnership can have a significant effect on the environment.”

Business Summit, Spin-Off Missions Confirmed for India Trade Mission

U.S. companies interested in the Indian market will have a great opportunity to meet with potential partners and clients when the U.S. Department of Commerce conducts its India Business Development Mission in late November and early December. (See related story in the June 2006 issue of *International Trade Update*.)

Planning continues on the details of the mission, with the following dates and events now confirmed:

- **India Business Summit, November 29 and 30.** This two-day meeting will be held in Mumbai. It will feature a mix of high-level business, industry, and government representatives. Breakout sessions will focus on aspects of India's trade and investment climate.
- **Spin-Off Missions, December 4 and 5.** Market briefings and networking receptions will be the highlights of these spin-off missions to Bangalore, Chennai, Hyderabad, Kolkata, Mumbai, and New Delhi.

Participants can choose to register for the summit and a spin-off mission, just the summit, or just a spin-off mission. The cost is \$500 for the business summit and \$1,600 for a spin-off mission. (These prices do not include travel, lodging, meals, or third-party registration fees.)

During the months leading to the mission, the U.S. and Foreign Commercial Service will be conducting a series of Webinars focused on the various cities on the itinerary. Upcoming Webinars include Chennai (July 31), Hyderabad (August 17), and Mumbai (August 31).

For details about the Webinars, updated information on the business development mission, and online registration, visit the mission's Web site at www.export.gov.

CAFTA-DR Implemented with Guatemala

On July 1, 2006, the Central America–Dominican Republic–United States Free Trade Agreement (CAFTA-DR) entered into force with respect to Guatemala. A proclamation from President George W. Bush was issued June 30, 2006, and came after Guatemala met its commitments under the agreement. On March 10, 2005, the Guatemalan government ratified CAFTA-DR. The agreement was approved by the U.S. Senate in June 2005 and by the U.S. House of Representatives in July 2005. President Bush signed the agreement into law in August 2005.

CAFTA-DR came into force on March 1, 2006, for El Salvador and on April 1, 2006, for Honduras and Nicaragua. Implementation awaits for Costa Rica and the Dominican Republic.

In a statement issued on the implementation announcement, Secretary of Commerce Carlos M. Gutierrez noted that "with initiatives like CAFTA-DR, the United States has offered a positive vision to the region that advances economic freedom and social reform while strengthening democracies and the rule of law."

The United States is Guatemala's largest trading partner. In 2005, the United States accounted for 38 percent of Guatemala's imports and received 50 percent of Guatemala's exports.

For more than 20 years, most exports from Guatemala have entered the United States duty-free under the terms of the Caribbean Basin Initiative. CAFTA-DR expands beyond the system of one-way preferences and allows U.S. exports to benefit from duty-free access to the Guatemalan market.

Under the agreement, CAFTA-DR eliminates customs tariffs on most goods, opens service sectors, and creates clear and readily enforceable rules in areas such as investment, government procurement, intellectual property protection, customs procedures, electronic commerce, use of sanitary and phytosanitary measures to protect public health, and resolution of business disputes.

Congress Passes U.S.–Oman Free Trade Agreement

By a 221–205 vote on July 20, 2006, the House of Representatives joined the Senate in approving the U.S.–Oman Free Trade Agreement (FTA). The FTA now goes to President Bush for signature. The Senate had approved the agreement on June 29, 2006, by a vote of 60 to 34. The Oman FTA is a key part of the administration’s regional and global efforts to open markets around the world in order to expand U.S. opportunities overseas.

Commenting on the House vote, Secretary of Commerce Carlos M. Gutierrez noted “The Oman FTA levels the playing field for U.S. farmers, ranchers, businesses and service providers, while strengthening the bonds of friendship in a strategically important part of the world.”

In a statement, U.S. Trade Representative Susan C. Schwab applauded the vote: “Congress has sent the world a powerful message—America is committed to opening markets and contributing to economic growth and development.”

Negotiations for the Oman FTA began in March 2005, and it was concluded in October 2005. The agreement will eliminate tariffs immediately on nearly all industrial and consumer products, except certain textiles and apparel, and on 87 percent of U.S. agricultural exports.

Two-way trade in goods between the United States and Oman was \$1.1 billion in 2005. That same year, U.S. exports of goods to Oman totaled \$595 million. Top markets were machinery, automobiles, optical and medical instruments, and electrical machinery. Also, U.S. exports of agricultural products to Oman totaled \$12.3 million, including hardwood lumber, wheat, and sugars and other sweeteners.

Oman is the fifth country in the Middle East and North Africa to negotiate an FTA with the United States. It is an integral component of President Bush’s Middle East Free Trade Area (MEFTA) initiative, which will promote economic growth and opportunity to the Middle East through regional integration. MEFTA will

also transform the individual countries of that area into a cohesive market for the United States.

The United States has active FTAs with Israel, Jordan, and Morocco. An FTA with Bahrain is expected to enter into force this year. For information on trade opportunities in this region, go to the Middle East and North Africa Business Information Center at www.export.gov/middleeast.

Baghdad Visit by Secretary Gutierrez Promotes Economic Vitality and Growth in Iraq

During a visit to Baghdad on July 17, U.S. Secretary of Commerce Carlos Gutierrez announced several initiatives to foster economic development in Iraq. “Promoting private-sector development in Iraq is a key part of the new [Iraqi] government’s strategy to expand the economy and foster peace, stability, and prosperity for the Iraqi people. President Bush and the entire administration are committed to helping the Iraqi people along the way,” said Secretary Gutierrez in a public statement.

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Secretary of Commerce Carlos M. Gutierrez (R) and Iraqi Minister of Trade Abd al-Falah al-Sudani (L) speak with the press after signing the Joint Statement on Commercial Cooperation on July 17 in Baghdad. (U.S. Department of Commerce photo)

August 3

U.S. Housing Seminar and Mini Exhibition 2006
Sapporo, Japan
www.export.gov

This seminar and expo is a one-day event that promotes U.S. residential building materials to homebuilders, architects, and other building professionals. A keynote presentation will show how U.S. residential building materials can be used to build high-quality homes. For more information, contact Kazuhisa Takabatake of the USFCS Osaka-Kobe, tel. +81 (6) 6315-5955; e-mail: kazuhisa.takabatake@mail.doc.gov

August 4–6

Franchising International Malaysia Exhibition
Kuala Lumpur, Malaysia
www.mfa.org.my

Last year, this annual franchise show hosted about 10,000 visitors and 86 exhibitors. The show will feature a U.S. pavilion and catalog show. For more information, contact LayHwa Teh at the USFCS, tel.: +60 (3) 2168-5048; e-mail: layhwa.teh@mail.doc.gov.

August 10

The Import Administration will release final determinations of the antidumping duty and countervailing duty investigations on imports of certain lined paper products from Indonesia. For more information, contact Tim Truman, tel.: (202) 482-5435; e-mail: tim.truman@mail.doc.gov.

August 10

The Battle at the Border—China’s Fake Products in the United States

This program is part of a continuing series of “Webinars” on the protection of intellectual property rights (IPR) in China. It is sponsored by ITA’s China office and begins at 2:00 p.m. Eastern time. For more information or to register, send an e-mail to chinaipr@mail.doc.gov.

August 17

China: Risk, Reward, and How to Win
Erlanger, Kentucky
www.chinabizconference.com

This one-day program will provide practical tips and resources for evaluating export opportunities to China, finding trade partners, and overcoming market risks. Bill Lawton, former USFCS commercial officer in Shanghai, will be the featured speaker. For more information, contact Marcia Brandstadt, tel.: (513) 684-2944; e-mail: marcia.brandstadt@mail.doc.gov.

August 26–28

SIGOLD/Oil, Gas, Infrastructure
Vladivostok, Russia
www.export.gov

This trade show will feature major oil and gas development projects on Sakhalin Island in the Russian Far East. Small and medium-sized U.S. companies will have a chance to meet the main market players or to open their business on the island. For more information, contact Elena Borodina of the USFCS, tel.: +7 (4232) 30-00-70, ext. 4509; e-mail: elena.borodina@mail.doc.gov.

August 25–29

Tendence Lifestyle
Frankfurt, Germany
www.tendence.messefrankfurt.com

This international trade fair is for giftware, household consumer goods, and novelties. The show will have about 3,700 exhibitors and 91,000 trade visitors. For more information, contact Sabine Winkels of the USFCS, tel.: +49 (211) 737-767-40; e-mail: sabine.winkels@mail.doc.gov.

August 28–31

Magic International 2006
Las Vegas, Nevada
www.magiconline.com

The semiyearly MAGIC Marketplace is one of the most comprehensive fashion industry trade events in the world. More than 3,000 companies will display men’s, women’s, and children’s clothing and accessories. For more information, contact Jennifer Harrington of the USFCS, tel.: (202) 482-0595; e-mail: jennifer.harrington@mail.doc.gov.

August 31

The Import Administration will release its final determination in the antidumping duty investigation on imports of certain lined paper products from the People’s Republic of China. For more information, contact Tim Truman, tel.: (202) 482-5435; e-mail: tim.truman@mail.doc.gov.

Here is a selected list of international trade events of interest, including ITA-sponsored events, as well as a selection of upcoming international trade fairs. The U.S. and Foreign Commercial Service (USFCS) maintains a comprehensive listing of industry shows at www.export.gov

On The Horizon

September 18

Webinar on New Delhi

www.export.gov/indiamission

This program, one in a series of “Webinars” focusing on Indian cities that are part of the Commerce Department’s India Business Development Mission scheduled for November 29–December 5, 2006, begins at 11:00 a.m. Eastern time. For more information or to register, send an e-mail to linda.abbruzzese@mail.doc.gov.

September 18 and 20

U.S.–Canada A/E Partnering

Seminar

Toronto and Vancouver, Canada

www.export.gov

This seminar is an opportunity for architects to showcase and partner with Canadian firms in the green building and sustainable design market. For more information, contact Rita Patlan of the USFCS, tel.: (416) 595-5412, ext. 223; e-mail: rita.patlan@mail.doc.gov.

September 21–22

Protecting Your Intellectual Property in China

Boston, Massachusetts

www.export.gov

This free, two-day program will provide comprehensive information on protecting and enforcing intellectual property in China for all companies—those contemplating entering the China market, those with an established presence in China, and those that simply want to know more about better protecting themselves against intellectual property theft. For more information, contact Susan Tong, tel.: (571) 272-9300; e-mail: susan.tong@uspto.gov

Asia-Pacific Partnership

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world market for technologies that reduce energy consumption and limit greenhouse gas emissions.

The adoption of environmental goals envisioned by the APP will expand the demand for those technologies.

Laura Rear, an analyst in the Manufacturing and Services unit of the International Trade Administration on a rotational assignment from the Commerce Department’s National Ocean Service, contributed to this report.

The Commerce Department’s Role in the APP

The Commerce Department plays an important role in the APP through the eight public-private sector task forces set up under the agreement. The task forces focus on the following areas: (1) cleaner fossil energy, (2) renewable energy and distributed generation, (3) steel, (4) aluminum, (5) cement, (6) coal mining, (7) power generation and transmission, and (8) buildings and appliances.

Each task force is co-chaired by two member nations. The Department of Commerce is the lead U.S. agency on the following four task forces:

Renewable Energy and Distributed Generation (co-chaired by South Korea and Australia).

This task force facilitates the demonstration and deployment of renewable energy and of distributed generation technologies. It also works to identify and to remove market and policy barriers.

Power Generation and Transmission (co-chaired by China and the United States). This task force works to identify and implement best practices for power generation, transmission and distribution, and site management, such as smart metering, voltage controls, and end-user energy efficiency.

Aluminum (co-chaired by Australia and the United States). This task force develops activities in six areas: measuring and benchmarking, management of perfluorocarbon emissions, recycling, energy efficiency, management of bauxite residues, and processing of high silica bauxite.

Steel (co-chaired by Japan and India). This task force identifies effective technologies that reduce energy consumption and greenhouse gas emissions and develops indicators of energy efficiency and recycling. Through field tests, the task force will research plants for energy-saving purposes. It will also promote the introduction of cost-effective technologies that reduce energy consumption and protect the environment.

For more information, visit the APP’s Web site at www.asiapacificpartnership.org.

Baghdad Visit

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During his visit, Gutierrez signed a Joint Statement on Commercial Cooperation with Iraqi Minister of Trade al-Sudani that has as its goal the enhancement of commercial cooperation between the U.S. Department of Commerce and Iraqi, Ministry of Trade.

Among the specific initiatives announced by Gutierrez during his visit were:

- establishment of a Commercial Law Development Program for Iraq
- intent to create a U.S.-Iraq Business Dialogue
- assignment of two trade advisors to advise the Iraqi government on standards and trade development and promotion issues

Since 2003, the Commerce Department has worked with the government of Iraq to help build a strong Iraqi economy, develop Iraq's private sector, and enhance U.S.-Iraq commercial ties. Much of this work is coordinated by the department's Iraq Investment and Reconstruction Task Force and the U.S. and Foreign Commercial Service post in the U.S. embassy in Baghdad. For more information on the task force, go to www.export.gov/iraq. The Commercial Service's Iraq site is www.buyusa.gov/iraq.



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For more information and news, visit ITA's Web site at www.trade.gov or contact the Office of Public Affairs, International Trade Administration, 1401 Constitution Avenue, NW, Washington, DC 20230; tel. (202) 482-3809.

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