

SECRETARY OF LABOR
WASHINGTON

MAY - 4 2005

The Honorable J. Dennis Hastert
Speaker of the House
of Representatives
Washington, D.C. 20515

Dear Mr. Speaker:

Transmitted herewith is the eleventh report prepared in accordance with section 207 of the Andean Trade Preference Act (ATPA). Section 207 provides that the Secretary of Labor, in consultation with other appropriate Federal agencies, shall undertake a continuing review and analysis of the impact that implementation of the provisions of the ATPA have with respect to United States labor, and shall submit an annual report to Congress on the results of such review and analysis. The eleventh report analyzes the impact of the ATPA on U.S. trade and employment from 2002 to 2003.

The report describes the ATPA and the benefits it provides to beneficiary countries, and analyzes changes in U.S. international merchandise trade with the ATPA beneficiary countries. Trends in U.S. employment in those industries which have been identified as having undergone the most significant changes in trade flows are analyzed. The report closes with some general conclusions on the impact on U.S. labor after the eleventh year of operation of the ATPA.

Sincerely,



Elaine L. Chao

Enclosure

SECRETARY OF LABOR
WASHINGTON

MAY - 4 2005


The Honorable Richard B. Cheney
President of the Senate
Washington, D.C. 20510

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Elaine L. Chao

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**TRADE AND EMPLOYMENT EFFECTS OF THE
ANDEAN TRADE PREFERENCE ACT**

Eleventh Annual Report for 2004
Submitted to the Congress
Pursuant to Section 207 of the
Andean Trade Preference Act

Prepared by
The U.S. Department of Labor
Bureau of International Labor Affairs

April 2005

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SECRETARY OF LABOR
WASHINGTON

MAY - 4 2005

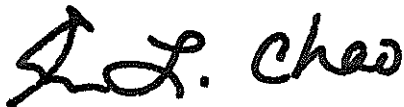
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The Honorable Speaker
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The report describes the ATPA and the benefits it provides to beneficiary countries, and analyzes changes in U.S. international merchandise trade with the ATPA beneficiary countries. Trends in U.S. employment in those industries which have been identified as having undergone the most significant changes in trade flows are analyzed. The report closes with some general conclusions on the impact on U.S. labor after the eleventh year of operation of the ATPA.

Sincerely,

A handwritten signature in black ink that reads "E.L. Chao". The signature is written in a cursive style with a large initial "E" and "L".

Elaine L. Chao

Enclosure

EXECUTIVE SUMMARY

The submission of this report to the Congress continues a series of reports by the U.S. Department of Labor on the impact of the Andean Trade Preference Act (ATPA) on U.S. employment. The current report covers calendar year 2003 and represents the eleventh in the series.

The ATPA, enacted on December 4, 1991, authorized the President to proclaim duty-free treatment for eligible articles from Bolivia, Colombia, Ecuador, and Peru. The ATPA expired on December 4, 2001, but was subsequently expanded in product coverage and renewed to December 31, 2006 by the Andean Trade Promotion and Drug Eradication Act (ATPDEA) that was signed into law by the President on August 6, 2002. Section 207 of the ATPA directs the Secretary of Labor to undertake a continuing review and analysis of the impact of the agreement on U.S. employment and submit a summary report of such analysis annually to the Congress.

During 2003, \$1.6 billion in U.S. imports from the beneficiary countries entered the United States duty-free under provisions in the ATPA; however, a significant portion of these duty-free entries (about 40 percent) probably would have qualified for duty-free entry under other existing U.S. trade preference programs such as the Generalized System of Preferences. In addition, \$4.2 billion in U.S. imports from the beneficiary countries benefited exclusively from the ATPDEA and entered the United States duty-free under its provisions for expanded product coverage. ATPA duty-free benefits in 2003 represented 14 percent of total U.S. imports from the beneficiary countries and only 0.1 percent of total U.S. imports from all nations. ATPDEA duty-free benefits in 2003 accounted for 36 percent of total U.S. imports from the beneficiary countries, but only 0.3 percent of total U.S. imports from all sources. Overall, U.S. imports from the beneficiary countries that benefited exclusively from the ATPA (on eligible products not eligible for GSP) and the ATPDEA (all covered products) amounted to \$5.2 billion in 2003, which represented about 45 percent of all U.S. imports from the beneficiary countries, but just 0.4 percent of total U.S. imports from all sources.

The main finding of this report is that preferential tariff treatment under the ATPA/ATPDEA has neither had an adverse impact on nor posed a significant threat to U.S. employment.

INTRODUCTION

The Andean Trade Preference Act (ATPA), which was enacted on December 4, 1991 (Public Law 102-182, Title II), contains the trade component of the Andean Initiative that was launched by the United States in 1991. The primary goal of the Initiative was to expand private sector opportunities and investment in nontraditional sectors of the Andean countries as an alternative to production of illegal drugs and to help them diversify their economies and expand their exports. The ATPA authorized the President to proclaim duty-free treatment for eligible articles from Bolivia, Colombia, Ecuador, and Peru (hereafter, “the beneficiary countries”). The President proclaimed duty-free treatment of certain eligible articles from Bolivia and Colombia on July 2, 1992, Ecuador on April 13, 1993, and Peru on August 11, 1993. ATPA preferential duty treatment expired on December 4, 2001, but was renewed retroactively to that expiration date (until December 31, 2006) on August 6, 2002 by the Andean Trade Promotion and Drug Eradication Act (ATPDEA) as part of the Trade Act of 2002 (Public Law 107-210, Title XXXI); this legislation also significantly expanded the product coverage of the ATPA program. On October 31, 2002, all four ATPA beneficiary countries were designated as ATPDEA beneficiary countries, entitled to duty-free entry of specific items previously excluded from the original ATPA program as well as renewal of benefits under the ATPA. The year 2003 represents the first full year that the expanded benefits under the ATPDEA were in effect.

Section 207 of the ATPA requires the Secretary of Labor, in consultation with other appropriate federal agencies, to undertake a continuing review and analysis of the impact of the implementation of the ATPA on U.S. labor. The legislation also directs the Secretary to submit an annual report to the Congress that presents a summary of the results of the review and analysis. This report is the eleventh in a series of annual reports to the Congress pursuant to Section 207 of the ATPA. It presents a summary of the analysis of the impact of duty-free treatment of U.S. imports from beneficiary Andean nations under the ATPA/ATPDEA on U.S. trade and employment during calendar 2003.

First, this report reviews trends in U.S. trade with the four beneficiary nations and identifies the leading items in U.S. trade (imports and exports) with those nations. Next, U.S. imports from the beneficiary nations are examined with regard to the various U.S. import programs, e.g., the ATPA/ATPDEA and the Generalized System of Preferences (GSP).¹ The report then identifies U.S. trade preferences that are exclusively available to the beneficiary countries under the ATPA/ATPDEA and the import product groups that have increased significantly or established significant U.S. market share as a result of duty-free benefits offered exclusively by the ATPA/ATPDEA. Finally, the report reviews domestic employment trends in the domestic industries that produce goods similar to those imports which received significant exclusive duty-free benefits under the ATPA/ATPDEA. The report closes with some general conclusions on the

¹ The U.S. GSP program was initiated in 1975 and provides for duty-free treatment of approximately 4,650 tariff items from more than 140 designated beneficiary developing countries and territories.

impact of the ATPA/ATPDEA on U.S. employment. All of the referenced data tables appear at the end of this report.

The value of U.S. imports for consumption and domestic exports used in this report are based on compilations of official statistics by the U.S. Department of Commerce, Bureau of the Census. U.S. employment is tabulated from establishment and household survey data of the U.S. Department of Labor's Bureau of Labor Statistics.

U.S. TRADE WITH THE ATPA/ATPDEA BENEFICIARY COUNTRIES IN 2003

Total U.S. Trade with the Beneficiary Countries

U.S. imports from the four beneficiary countries in 2003 accounted for 0.9 percent of total U.S. merchandise imports from all sources and amounted to \$11.6 billion, a 21.1 percent increase over their level in 2002 (see Table 1). U.S. exports to the beneficiary countries in 2003 accounted for 1.0 percent of all U.S. merchandise exports to the world and amounted to \$6.5 billion, a 1.0 percent increase over their level in 2002 (see Table 2).

By broad industrial sector, 43.4 percent of U.S. imports from the beneficiary countries in 2003 were manufactured products; 35.2 percent were oil, gas, minerals and ores; 16.7 percent were agricultural, livestock, forestry and fishery products; and 4.7 percent were other miscellaneous items. By comparison, 85.5 percent of U.S. exports to the beneficiary countries in 2003 were manufactured products; 9.5 percent were agricultural products; 4.8 percent were other miscellaneous items; and less than one percent was oil, gas, minerals and ores.

The leading 5-digit North American Industry Classification System (NAICS)-based industries² of U.S. imports from the beneficiary nations in 2003 included: oil and gas (\$3,618 million); nonferrous metal smelting and refining (\$1,519 million); noncitrus fruits and tree nuts (\$941 million); petroleum refinery products (\$742 million); men's and boy's apparel (\$520 million); women's and girls' apparel (\$472 million); nursery products, flowers, seeds, and foliage (\$456 million); coal (\$442 million); fresh, chilled or frozen fish and other marine products (\$405 million); items imported under special classification provisions (\$338 million);

² For the purposes of relating foreign trade statistics to U.S. industrial output and employment, the Bureau of the Census has mapped 10-digit Harmonized Tariff Schedule (HTS) numbers used for U.S. exports and import statistics to their closest NAICS-based code. Some categories of traded items have no direct domestic counterpart and are classified in specially created NAICS-based 91000-99000 categories which have no direct domestic counterpart. For example, NAICS 99000—Special Classification Provisions, not otherwise specified or included, contains primarily imports and exports of low-value shipments not specified by kind, exposed film and prerecorded tapes, articles imported for repairs, returned goods, and articles donated to charity.

jewelry and silverware (\$205 million); U.S. goods returned and reimported (\$182 million); prepared, canned and packaged seafood products (\$157 million); and vegetables and melons (\$106 million). These top fourteen industries accounted for 86.8 percent of all U.S. imports from the beneficiary countries in 2003 (see Table 3).

The leading 5-digit NAICS-based industries of U.S. exports to the ATPA/ATPDEA beneficiary nations in 2003 included: other basic organic chemicals (\$536 million); computer equipment (\$366 million); mining and oil and gas field machinery (\$364 million); resin and synthetic rubbers (\$303 million); petroleum refinery products (\$259 million); items exported under special classification provisions (\$240 million); wheat (\$229 million); radio and television broadcasting and wireless communication equipment (\$218 million); corn (\$201 million); construction machinery (\$163 million); aerospace products and parts (\$163 million); other general purpose machinery (\$156 million); paper mill products (\$154 million); navigational, measuring, electromedical, and control instruments (\$108 million); and cotton (\$107 million). These top fifteen industries accounted for 55 percent of all U.S. exports to the ATPA/ATPDEA beneficiary countries in 2003 (see Table 4).

U.S. Imports under the ATPA/ATPDEA and Other U.S. Import Programs

Several U.S. programs are available to beneficiary countries that permit duty-free access to the United States market for qualifying goods. The major U.S. programs utilized by the Andean countries include the ATPA, ATPDEA, and GSP programs as well as negligible amounts under other import programs based on WTO agreements that the United States has signed on trade in pharmaceuticals and civil aircraft.

ATPA/ATPDEA

To be eligible for duty-free treatment under the ATPA/ATPDEA, all products unless specifically excluded must meet one of these conditions: (1) be wholly grown, produced, or manufactured in a ATPA beneficiary country; or (2) have at least 35 percent of the direct processing costs and materials produced in any one or more of the ATPA beneficiary countries, any of the 24 Caribbean Basin Economic Recovery Act (CBERA) beneficiary countries,³ Puerto Rico, or the U.S. Virgin Islands—inputs from the United States (up to 15 percent of the value) are allowed to account for a portion of the 35 percent content rule. In addition, the articles must be exported directly to the customs territory of the United States.

³ The CBERA is a U.S. trade initiative similar to the ATPA that was implemented in 1984 and directed toward countries and dependent territories in Central America and the Caribbean as part of a broader Caribbean Basin Initiative (CBI). The 24 CBERA beneficiary countries and territories are: Antigua and Barbuda; Aruba; the Bahamas; Barbados; Belize; the British Virgin Islands; Costa Rica; Dominica; the Dominican Republic; El Salvador; Grenada; Guatemala; Guyana; Haiti; Honduras; Jamaica; Montserrat; the Netherlands Antilles; Nicaragua; Panama; St. Kitts-Nevis; St. Lucia; St. Vincent and the Grenadines; and Trinidad and Tobago. Anguilla, the Cayman Islands, Suriname, and the Turks and Caicos Islands are potentially eligible for CBERA benefits, but they have not been designated so by the United States although Suriname has requested designation.

Products specifically excluded from ATPA duty-free treatment include most textile and apparel items; certain footwear; rum and tafia; canned tuna; certain agricultural products subject to tariff rate quotas including sugar, syrup, and molasses products.

The ATPDEA came into force on November 1, 2002 and significantly increased the amount of U.S. imports from the beneficiary countries that was eligible for duty-free treatment. Newly eligible items included petroleum and petroleum products; some leather items including certain gloves and footwear; tuna packaged in foil; and certain watches and watch parts. In 2001, only 20 percent of the value of U.S. imports from the beneficiary countries was eligible for ATPA duty-free treatment; with the implementation of the ATPDEA, the ATPA/ATPDEA benefits extended to the beneficiary countries increased to 50 percent of all U.S. imports from the beneficiary countries. Beginning in 1992, reduced rates of duty were applied to handbags, luggage, flat goods, work gloves, and leather wearing apparel from the beneficiary countries, and duties on these items were reduced by a maximum of 20 percent over the following five-year period; most of these items were granted duty-free eligibility under the ATPDEA.

GSP

All of the ATPA beneficiary countries are also eligible for the tariff preferences provided by the U.S. GSP program. The ATPA differs from the GSP program in three significant ways: (1) the number of items eligible for the duty-free entry is greater under the ATPA; (2) the percentage of value-added that must be produced in the exporting country is lower under the ATPA; and (3) there are no dollar limits on the amount of an item that can enter duty-free from a beneficiary country under the ATPA program, while there are limits (referred to as competitive need limits) under the GSP program.⁴

Nearly all products eligible for GSP duty-free entry are also eligible for duty-free entry under the ATPA. For products that were already eligible for GSP treatment when the ATPA came into effect in 1992, the ATPA beneficiaries have increased their utilization of available U.S. tariff preferences (i.e., the percentage of eligible products that actually entered duty-free under either GSP or ATPA has risen moderately). For products eligible for ATPA, but not GSP, utilization has been substantial. Thus, almost all items that are eligible for duty-free treatment under either the ATPA or the GSP are actually imported duty free.

Due to the temporary lapses of the GSP and ATPA programs during 2001-2002, this report presents U.S. trade data with the ATPA/ATPDEA beneficiary countries over the period 2000-2003. The GSP program expired on September 30, 2001 and the ATPA program expired on

⁴ Under the GSP program, a beneficiary country loses duty-free eligibility for a product (defined at the HTS-8 level) if, during the previous calendar year, U.S. imports of a GSP article from that country account for 50 percent or more of the value of total U.S. imports of that product, or exceed a certain inflation-indexed dollar value. GSP modifications that result from imports that exceed competitive-need limitations in one year take effect on July 1 of the next calendar year.

December 4, 2001;⁵ although both of these programs were reauthorized in the Trade Act of 2002 and made retroactive back to their expiration dates, monthly U.S. import statistics only reflect the initial declaration of duty treatment upon entry into the United States and not the final determination of duty treatment that an item ultimately received.⁶ Thus, the value of U.S. imports that ultimately received ATPA and (to a lesser extent) GSP duty-free treatment during 2001 and 2002 may be undercounted. The fact that these programs had expired probably did not significantly reduce imports of items eligible for duty-free entry because there was a strong expectation that these programs would be renewed retroactively as has happened several times in the past with the GSP program.

U.S. customs procedures make it administratively easier for importers to obtain a retroactive duty rebate for a qualifying item under the GSP program than under the ATPA program. As a result, some items which qualified for both GSP and ATPA duty-free entry that had historically entered duty free under the ATPA program were probably entered under the GSP program between December 4, 2001 and August 6, 2002, with the expectation of more timely rebates when the GSP program was renewed. It is partially for this reason that GSP duty-free imports increased during 2001 and 2002 even though total ATPA duty-free imports declined during 2001 and 2002.

U.S. Imports from the ATPA/ATPDEA Beneficiary Countries in 2003

Approximately 86 percent of all U.S. imports from the beneficiary countries entered the United States duty-free in 2003, while the remaining 14 percent was subject to an average 3.9 percent rate of duty. The duty-free entries included: \$1.6 billion under the ATPA; \$4.2 billion under the ATPDEA; and \$327 million under the GSP program.⁷ (see Table 5).

In 2003, U.S. imports of items entered duty-free under the ATPA increased by 106 percent over their level in 2002 (due in part to the lapse of the program during 2001-2002), but remained 3 percent lower than their level in 2001. Duty-free U.S. imports under the ATPDEA jumped from \$212 million in 2002 to \$4.2 billion in 2003, the first full year that the program was in operation. Approximately, one-third of all U.S. imports from the beneficiary countries entered NTR duty-free and consisted mainly of traditional products from the region such as gold and silver bullion, coal, coffee, and bananas. The dutiable value of U.S. imports from the beneficiary countries fell

⁵ When a trade preference program expires, importers are required to pay the normal rate of duty; if the program is re-authorized and made retroactive, importers can request that those duties be refunded.

⁶ Since there are administrative costs (filing forms, etc.) for requesting duty-free entry under these programs, importers often wait until the programs are re-authorized and made retroactive before they submit the required forms. If the corrections are available before June of the following year, they are reported in an addendum to that year's statistics; there were no corrections for the 2001 statistics and only a partial correction for the 2002 statistics.

⁷ Another \$3.9 million entered either normal trade relations (NTR) duty-free or duty-free under special temporary rate provisions. Almost all nations, except several communist nations, are eligible for NTR duty treatment; NTR was formerly known as most-favored-nation (MFN) duty treatment. Provisions in Chapter 99 of the HTS provide for temporary tariff reductions that are often available to only certain specified countries and may only cover a subset of the products in an eight-digit tariff line item.

dramatically in 2003 to \$1.6 billion from its level of \$4.6 billion in 2002, in large part due to the fact that 2003 was the first full year benefits were available under the ATPDEA.

Peru accounted for 46 percent of the value of ATPA duty-free U.S. imports in 2003, followed by Colombia (38 percent), Ecuador (15 percent), and Bolivia (4 percent). Colombia accounted for 55 percent of the value of ATPDEA duty-free U.S. imports in 2003, followed by Ecuador (31 percent), Peru (14 percent), and Bolivia (0.7 percent). Finally, Colombia accounted for 49 percent of the value of GSP duty-free U.S. imports from the ATPA/ATPDEA beneficiary countries in 2003, followed by Peru (34 percent), Ecuador (15 percent), and Bolivia (3 percent). The average rate of duty paid on imports subject to duty from the beneficiary countries was 3.9 percent in 2003 and ranged from 3.4 percent for items from Colombia to 10.5 percent for items from Bolivia (see Table 6).

The leading industrial sectors of duty-free U.S. imports under the ATPA in 2003 were: agricultural products (\$596 million); primary metal manufacturing (\$513 million); food manufacturing (\$147 million); miscellaneous manufactured commodities (\$130 million); beverages and tobacco products (\$57 million); wood products (\$43 million); nonmetallic mineral products (\$42 million); chemicals (\$28 million); plastics and rubber products (\$17 million); and fabricated metal products (\$15 million). These ten 3-digit NAICS-based sectors accounted for 98 percent of all duty-free U.S. imports under the ATPA in 2003 (see Table 7).

The leading industrial sectors of duty-free U.S. imports under the ATPDEA in 2003 were: oil and gas (\$2,992 million); apparel and accessories (\$757 million); petroleum and coal products (\$414 million); food manufacturing (\$28 million); and leather and allied products (\$21 million). These five 3-digit NAICS-based sectors accounted for virtually all duty-free U.S. imports under the ATPDEA in 2003 (see Table 7).

The leading industrial sectors of duty-free U.S. imports from the ATPA/ATPDEA beneficiary countries under the GSP program in 2003 were: food manufacturing (\$87 million); nonmetallic mineral products (\$54 million); plastics and rubber products (\$44 million); primary metal manufacturing (\$33 million); miscellaneous manufactured commodities (\$26 million); agricultural products (\$17 million); chemicals (\$16 million); fabricated metal products (\$14 million); electrical equipment, appliances, and components (\$13 million); and wood products (\$8 million). These ten 3-digit NAICS-based sectors accounted for 95 percent of all GSP duty-free U.S. imports from the ATPA/ATPDEA beneficiary countries in 2003 (see Table 7).

The U.S. tariff provision (HTS 9802.00.80) covering the assembly of articles made from U.S.-made parts and materials, which is not included under the U.S. import programs discussed above, permits duty-free entry of the U.S.-content value of a good and is available for U.S. imports from any country. The value of U.S. imports of products assembled in the ATPA/ATPDEA beneficiary countries from U.S.-made parts or materials has decreased every year since 1997.⁸

⁸ These assembled products are primarily products not eligible for ATPA/ATPDEA duty-free entry or products that do not meet ATPA/ATPDEA or GSP rules-of-origin requirements.

The value of U.S. imports of assembled items from the ATPA/ATPDEA beneficiary countries that were entered under HTS 9802.00.80 peaked at \$280 million in 1995, but fell to \$72 million (or 0.3 percent of all U.S. imports from the beneficiary countries) in 2003. U.S. components comprised 41 percent of the value of these items in 2003. Assembled women's and girls' apparel and men's and boy' apparel as well as some other textile products accounted for nearly all of the value of U.S. imports from beneficiary countries under HTS 9802.00.80 in 2003.

U.S. Trade Preferences Provided Exclusively by the ATPA /ATPDEA

The leading NAICS-based industries of ATPA duty-free U.S. imports in 2003 were: nonferrous metal (except aluminum) smelting and refining (\$460 million); nursery products, flowers, seeds, and foliage (\$451 million); jewelry and silverware (\$123 million); vegetables and melons (\$97 million); tobacco products (\$55 million); noncitrus fruits and tree nuts (\$41 million); sugars (\$39 million); fruits and vegetables (\$39 million); frozen foods (\$27 million); and iron and steel and ferroalloy (\$25 million). These ten 5-digit NAICS-based industries accounted for 83 percent of all ATPA duty-free U.S. imports in 2003 (see Table 8). Some of the constituent HTS-8 items that are classified in these import-based industries are also eligible for duty-free entry under the U.S. GSP program.

The ATPA provided the beneficiary nations exclusive duty-free treatment of their exports to the United States in 2003 in the following cases: (1) products eligible for ATPA duty-free entry, but not eligible for duty-free entry under GSP; and (2) products eligible for both ATPA and GSP duty-free entry that were imported from an ATPA/ATPDEA beneficiary country that had lost their GSP product eligibility due to exceeding the program's competitive-need limitations in the previous year.

The constituent HTS-8 numbers in each of the 20 leading NAICS-based import industries (in terms of ATPA duty-free entries in 2003), which are listed in Table 8, were examined to determine if they were also eligible for duty-free entry under the GSP program and, if so, whether any ATPA beneficiary country had exceeded the GSP competitive-need limit for that item. Table 9 presents a listing of the constituent HTS-8 items that benefited exclusively from the ATPA for each 5-digit NAICS-based industry. The total value of ATPA duty-free imports for all constituent HTS-8 numbers benefiting exclusively from the ATPA in each industry was then compared to the total value of ATPA duty-free imports for all constituent HTS-8 items.

Based on the above analysis, there were seven import-based industries in which more than two-thirds of the ATPA duty-free value was accounted for by HTS-8 items benefiting exclusively from the ATPA in 2003:

- **NAICS 33141—Nonferrous metal (except aluminum) smelting and refining** (\$448 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 97 percent of industry imports entered ATPA duty-free and 4.2 percent of industry imports from all sources);

- **NAICS 11142—Nursery products, flowers, seeds, and foliage**
(\$303 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 67 percent of industry imports entered ATPA duty-free and 24.0 percent of industry imports from all sources);
- **NAICS 11121—Vegetables and melons**
(\$81 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 84 percent of industry imports entered ATPA duty-free and 2.5 percent of industry imports from all sources);
- **NAICS 31222—Tobacco products**
(\$55 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 100 percent of industry imports entered ATPA duty-free and 10.2 percent of industry imports from all sources);
- **NAICS 31141—Frozen foods**
(\$20 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 75 percent of industry imports entered ATPA duty-free and 1.5 percent of industry imports from all sources);
- **NAICS 31171—Seafood products, prepared, canned and packaged**
(\$16 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 84 percent of industry imports entered ATPA duty-free and 1.1 percent of industry imports from all sources); and
- **NAICS 32712—Clay and refractory building materials**
(\$16 million in ATPA duty-free industry imports that benefited exclusively from the ATPA, which was 93 percent of industry imports entered ATPA duty-free and 0.9 percent of industry imports from all sources).

In addition to the above NAICS-based import industries that benefited exclusively from the ATPA, there were ten industries (listed in Table 10) that benefited significantly from the duty-free provisions of the ATPDEA in 2003:

- **NAICS 21111—Oil and gas**
(\$2,992 million in ATPDEA duty-free imports, which was 2.9 percent of industry imports from all sources);
- **NAICS 32411—Petroleum refinery products**
(\$414 million in ATPDEA duty-free imports, which was 1.1 percent of industry imports from all sources);
- **NAICS 31522—Men’s and boys’ apparel**
(\$367 million in ATPDEA duty-free imports, which was 1.6 percent of industry imports from all sources);
- **NAICS 31523—Women’s and girls’ apparel**
(\$338 million in ATPDEA duty-free imports, which was 1.0 percent of industry imports from all sources);
- **NAICS 31171—Seafood products, prepared, canned and packaged**
(\$28 million in ATPDEA duty-free imports, which was 1.9 percent of industry imports from all sources);
- **NAICS 31511—Hosiery and socks**
(\$26 million in ATPDEA duty-free imports, which was 2.4 percent of industry imports from all sources);
- **NAICS 31529—Other apparel**
(\$23 million in ATPDEA duty-free imports, which was 0.7 percent of industry imports from all sources);
- **NAICS 31699—Other leather products**
(\$17 million in ATPDEA duty-free imports, which was 0.3 percent of industry imports from all sources);

- **NAICS 31621—Footwear**
(\$4 million in ATPDEA duty-free imports, which was 0.03 percent of industry imports from all sources); and
- **NAICS 31599—Apparel accessories**
(\$2 million in ATPDEA duty-free imports, which was 0.05 percent of industry imports from all sources).

U.S. EMPLOYMENT AND TRADE WITH THE ANDEAN NATIONS

Any adverse U.S. employment effects due to the exclusive benefits of the ATPA/ATPDEA would result from increased imports of items due to these tariff preferences. Given the availability of several U.S. trade preference programs with different requirements, it is often not possible to isolate the effects of the ATPA. This task was especially difficult for the period 2001-2002, since a significant amount of U.S. imports that actually entered duty-free under the ATPA program may not have been accurately recorded in the official trade statistics.

This report examines the value of ATPA/ATPDEA duty-free imports that benefited exclusively from the ATPA/ATPDEA provisions (i.e., items entered ATPA duty-free that were not eligible for duty-free entry under the GSP program and items entered ATPDEA duty-free), focusing on the import industries that showed a significant value of duty-free imports benefiting exclusively from the ATPA/ATPDEA and represented a significant share of total industry U.S. imports from all sources in 2003.

Three import industries (based on the 5-digit NAICS) were identified for which exclusive ATPA/ATPDEA duty-free benefits in 2003 exceeded \$20 million *and* accounted for more than 3 percent of total U.S. industry imports from all sources:

- **NAICS 11142—Nursery products, flowers, seeds, and foliage**
- **NAICS 31222—Tobacco products**
- **NAICS 33141—Nonferrous metal (except aluminum) smelting and refining.**

Each of these three import industries benefited exclusively from the duty-free benefits of the ATPA; none of the import industries with exclusive ATPDEA duty-free benefits met the selection criteria. As the benefits under the ATPDEA only became available to the beneficiary countries starting in November 2002, it may be too early to fully assess their impact as there has been only one full-year experience.

Trends in U.S. imports in the three NAICS-based product groups above and trends in industry employment in each of the U.S. industries producing products like the three import product groups are examined below. Significant increases in U.S. imports of these products from the beneficiary countries may, in part, reflect the availability of exclusive duty-free treatment under the ATPA. To place the analysis of domestic employment trends in perspective, the overall U.S. employment situation in 2003-2004 is discussed first.

The U.S. Employment Situation, 2003-2004

U.S. nonagricultural payroll employment was 130 million workers in 2002 and 2003, and 131.5 million in 2004. The largest segment of the U.S. workforce is the service-providing sector which has showed steady and continuing growth. Service-providing sector employment was approximately 108 million in 2002 and 2003, and an estimated 109.6 million in 2004 (see Table 11).

The goods-producing sector experienced a sustained period of employment growth from 1992 to 2000 before declining sharply between 2001 and 2003. With the economic recovery, employment in this sector reached approximately 22 million in 2004. Employment in manufacturing accounts for approximately two-thirds of goods-producing industry employment. Manufacturing employment stood at 15.3 million in 2002, 14.5 million in 2003, and 14.3 million in 2004. Agricultural employment was approximately 2.3 million in 2002 and 2003, and 2.2 million in 2004.⁹

The civilian unemployment rate, which is based on household survey data, increased modestly from 5.8 percent (8.4 million workers) in 2002 to 6.0 percent in 2003 (8.8 million workers), but fell to 5.5 percent in 2004 (8.1 million workers).

U.S. Import and Domestic Employment Trends in Selected Industrial Sectors Receiving Significant Benefits Provided under the ATPA in 2003

Nursery products, flowers, seeds, and foliage (NAICS 11142)

In 2003, U.S. imports of nursery products, flowers, seeds, and foliage from the beneficiary countries increased 19.2 percent to \$456.0 million from their level of \$382.4 million in 2002, but were only 3.3 percent of their level of \$441.3 million in 2000 (see Table 3). ATPA duty-free imports of these items increased by 161 percent from \$172.9 million in 2002 to \$451.2 million in 2003, but were only 2.6 percent above their level of \$439.4 million in 2000 (see Table 8). ATPA

⁹ Agricultural employment is derived from the Current Population Survey (CPS), which is administered by the U.S. Census Bureau for the U.S. Department of Labor's Bureau of Labor Statistics. Caution should be exercised in comparing employment in agricultural and non-agricultural sectors because the data are collected using different survey instruments and from different populations (e.g., the CPS collects information from households, and the CES collects information from business establishments). Also, as a result of recent changes introduced to the CPS instrument and estimation procedures, agricultural employment figures in 2002, 2003, and 2004 are not strictly comparable.

duty-free imports accounted for 35.7 percent of total U.S. imports of nursery products, flowers, and seeds from all sources in 2003, down slightly from their share of 37.2 percent in 2000.

U.S. imports of nursery products, flowers, and seeds include: bulbs and tubers (HTS 0601); live plants and cuttings (HTS 0602); fresh cut flowers and buds (HTS 0603); and foliage, branches, and Christmas trees (HTS 0604). Nearly all U.S. imports of these items from the beneficiary countries in 2003 were fresh cut flowers (99 percent), followed by foliage (0.4 percent) and live plants (0.1 percent). Slightly over 45 percent of all U.S. imports of fresh cut flowers (HTS 0603) from the beneficiary countries were fresh cut roses, which are not eligible for duty-free entry under the GSP program. In addition to roses, the tariff classification for fresh cut flowers covers a number of other flower types (including chrysanthemums, carnations, anthuriums, orchids, flower buds, alstroemeria, gypsophila, lilies, and snapdragons), which are normally eligible for duty-free entry under the GSP program.

Approximately two-thirds of the ATPA duty-free imports of nursery products, flowers, and seeds benefited exclusively from the ATPA. ATPA duty-free imports in this category were items in two HTS-8 numbers: HTS 0603.1060—Fresh cut roses from all beneficiary countries and HTS 0603.1070—Fresh-cut chrysanthemums, standard carnations, anthuriums, and orchids from Colombia (see Table 9). While fresh cut roses are not eligible for GSP duty-free treatment, fresh cut chrysanthemums, standard carnations, anthuriums, and orchids are eligible for duty-free treatment under both programs, Colombia has lost its GSP eligibility due to exceeding the program's competitive need limits.

U.S. imports of Colombian chrysanthemums, standard carnations, anthuriums, and orchids amounted to \$98.6 million in 2003; by flower type, 63.0 percent were chrysanthemums, 36.6 percent were carnations, 0.3 percent were orchids, and 0.01 percent were anthuriums.

ATPA duty-free entries of fresh cut roses from all the beneficiary countries and Colombian chrysanthemums, standard carnations, anthuriums, and orchids, which were \$116.0 million in 2002, rose to \$302.7 million in 2003 and accounted for 67.6 percent of the ATPA duty-free entries of nursery products, flowers, seeds, and foliage products in 2003 (see Table 9).

U.S. Imports of Fresh Cut Roses from All the Beneficiary Countries: In 2003, U.S. ATPA duty-free imports of fresh cut roses increased to \$204.5 million from their level of \$175.4 million in 2002, but remained only 6 percent above their level of \$192.4 million in 2000. ATPA duty-free fresh cut roses accounted for 94.4 percent of all U.S. imports of fresh cut roses in 2003, up slightly from 90.3 percent in 2000.¹⁰ During the 2001-2002 lapse of the ATPA, 4.0 percent of all U.S. imports of fresh cut roses in 2001 and 55.4 percent in 2002 (which came from Ecuador and Colombia) were subject to an *ad valorem* NTR duty of 6.8 percent.

¹⁰ U.S. imports of fresh cut roses from the NAFTA and CBERA beneficiary countries are also eligible for duty-free entry. In 2003, NAFTA duty-free entries of fresh cut roses accounted for 2.1 percent of total fresh cut rose imports and CBERA duty-free entries for 1.9 percent.

According to the United States International Trade Commission (USITC), U.S. imports of fresh cut roses from all sources accounted for 82 percent, and the ATPA beneficiaries for 78 percent (Colombia accounting for 55 percent and Ecuador for 23 percent), of domestic consumption in 2003.¹¹ The ATPA beneficiary countries have accounted for an increasing share of domestic consumption of fresh cut roses, growing from 34 percent in 1993 to its current level.

U.S. Imports of Fresh Cut Chrysanthemums, Standard Carnations, Anthuriums, and Orchids from Colombia: U.S. ATPA duty-free imports of chrysanthemums and standard carnations (HTS 0603.10.70) from Colombia increased to \$98.2 million in 2003 from their level of \$46.3 million in 2002, but remained 17.8 percent below their level of \$119.5 million in 2000. ATPA duty-free imports of these items from Colombia accounted for 90.8 percent of U.S. imports of these items from all sources in 2003, up slightly from 88.0 percent in 2000. During the 2001-2002 lapse of the ATPA, \$6.7 million in 2001 and \$39.7 million in 2002 of U.S. imports of these items from Colombia were subject to an *ad valorem* duty of 6.4 percent.

According to the USITC, U.S. imports of fresh cut chrysanthemums, standard carnations, anthuriums, and orchids from all sources accounted for 75 percent of the value of domestic consumption in 2003. U.S. imports from Colombia, which accounted for virtually all of the ATPA duty-free entries of these items, accounted for 68 percent of domestic consumption in 2003.

Domestic Production, Sales, Wholesale Prices of Production, and Number of Hired Workers for Fresh Cut Roses, Chrysanthemums, Carnations, and Orchids: While the Department of Labor's Bureau of Labor statistics does not collect information on industry employment in agriculture, the U.S. Department of Agriculture does collect and publish information on the number of domestic growers, quantity and value sold at wholesale, wholesale production price, and number of hired workers for a number of agricultural crops. As part of its survey on floriculture crops, which include fresh cut flowers, the Department of Agriculture reports some information on fresh cut flowers grown by large growers (commercial growers with \$100,000 or more in sales located in 36 states) and some information by fresh cut flower type.¹²

Cut flower types that are comparable to those receiving significant exclusive ATPA duty-free benefits include all roses, pompon chrysanthemums, standard carnations, and all orchids (referred to hereafter as the "like ATPA cut flowers"). The most recent information available on these domestically produced fresh cut flower types is presented below:

¹¹ Domestic consumption is defined as the landed value of imports plus domestic production less the value of exports.

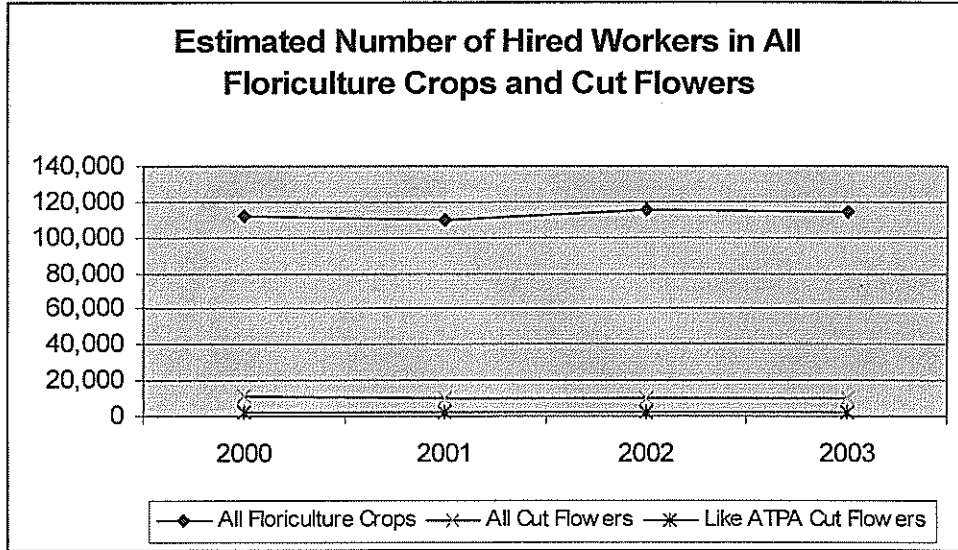
¹² See *Floriculture and Nursery Crops Situation and Outlook Yearbook/FLO-2004* (U.S. Department of Agriculture, Economic Research Service, June 2004). Large growers account for about 93-94 percent of the value of sales at wholesale of all floriculture crops and about 86 percent of all hired workers in floriculture crops; about 95-96 percent of the large grower floriculture operations have hired workers.

- The number of domestic rose growers and the quantity and value of roses sold have declined steadily over the last twelve years. The number of growers has fallen from 357 in 1992 to 74 in 2003 (10.8 percent less than in 2002); the quantity of production sold has dropped from 533.6 million units in 1992 to 134.8 million units in 2003 (14.2 percent less than in 2002); the value of production sold at wholesale has declined from \$174.5 million in 1992 to \$51.9 million in 2003 (11.9 percent less than in 2002). Over this same time period, the wholesale price of production has risen from 32.7 cents per unit in 1992 to 38.5 cents per unit in 2003 (5.1 percent more than in 2002).
- The number of domestic pompon chrysanthemum growers has fallen from 172 in 1992 to 63 in 2003, while the quantity sold has declined from 15.4 million units in 1992 to 13.7 million units in 2003 and the value sold has increased from \$18.0 million in 1992 to \$18.2 million in 2003.¹³ Over the same period, the wholesale price of production has risen from 1.16 cents per unit to 1.32 cents per unit, and the share of domestic consumption accounted for by imports has averaged 70 percent.
- The number of domestic standard carnation growers has fallen from 139 in 1992 to 26 in 2003, while the quantity sold has declined from 213.6 million units in 1992 to 13.3 million units in 2003 and the value sold has decreased from \$30.8 million in 1992 to \$2.2 million in 2003. Over the same period, the wholesale price of production has risen from 14.4 cents per unit to 16.7 cents per unit, and the share of domestic consumption accounted for by imports has risen from 67 percent to 94 percent. About 87 percent of the domestic standard carnations are grown in California.
- The number of domestic orchid growers has fallen from 52 in 2000 (earliest year for which national data are available) to 49 in 2003, while the quantity sold has increased from 11.7 million units in 2000 to 12.3 million units in 2003 and the value sold has increased from \$8.1 million in 2000 to \$8.5 million in 2003. Over the same period, the wholesale price of production has risen from 68.9 cents per unit to 69.5 cents per unit, and the share of domestic consumption accounted for by imports has averaged 35 percent.

The Department of Agriculture only publishes estimates of the number of hired workers in all floriculture crops, which include cut flowers, foliage plants, bedding garden plants, herbaceous perennials, and cut cultivated greens. For large growers of floriculture crops, cut flowers account for about 12-13 percent of the number of growers and 9-10 percent of the value of sales at wholesale. The number of domestic hired workers in cut flowers and “like ATPA cut flowers” was estimated, based on cut flowers’ annual share of sales at wholesale of all floriculture crops and like ATPA cut flowers’ annual share of all cut flower sales at wholesale.

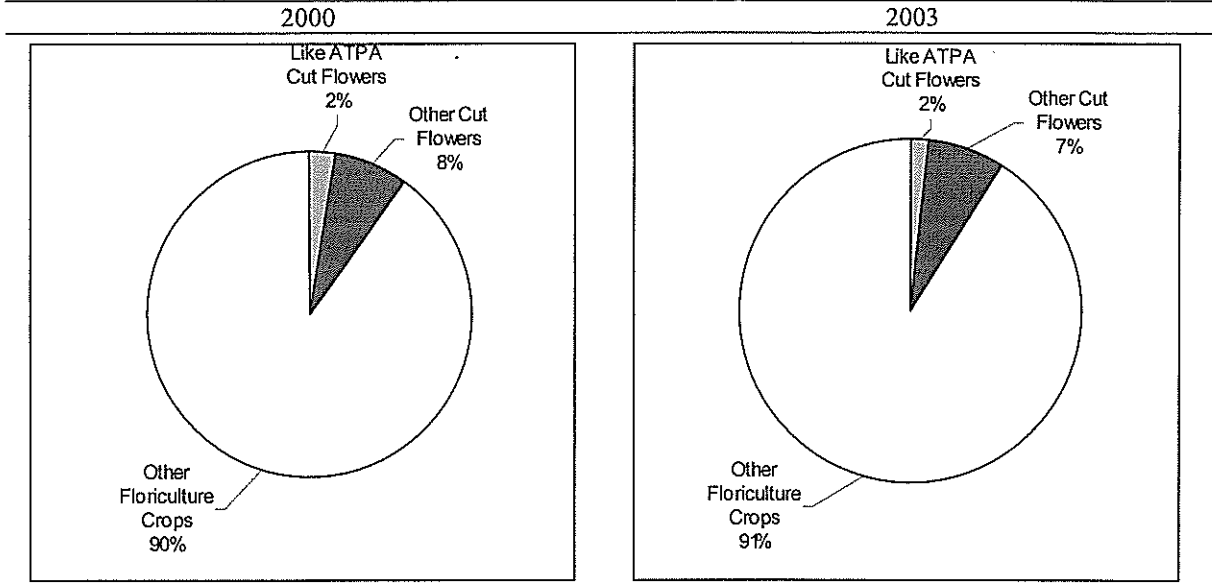
¹³ See *Floriculture and Nursery Crops Situation and Outlook Yearbook/FLO-2004* (U.S. Department of Agriculture, Economic Research Service, June 2004), p. 60. The U.S. Department of Agriculture discontinued reporting domestic production of standard chrysanthemums in 2001, but continued reporting domestic production of pompon chrysanthemums, which are sold in bunches.

In 2003, there were an estimated 114,116 hired workers in floriculture crops (about 1.9 percent above its level in 2000), 10,042 hired workers in cut flowers of all types (about 11.2 percent below its level in 2000), and 1,908 hired workers in like ATPA cut flowers (about 28.2 below its level in 2000) (see text chart below).



Clearly, the number of hired workers involved in the domestic production of like ATPA cut flower types represents an extremely small segment (about 2 percent) of the total number of hired workers in the floriculture industry (see text figure below).

Estimated Number of Hired Workers in Floriculture Crops and Cut Flowers, 2000 and 2003



111,984 hired workers were employed in all floriculture crops

114,116 hired workers were employed in all floriculture crops

Considering the domestic production trends over the period 2000-2003 for the like ATPA cut flower types, the share of domestic cut flower growers producing standard carnations has fallen from 7.9 percent in 2000 to 4.7 percent, those producing pompon chrysanthemums from 12.9 percent to 11.5 percent, and those producing roses from 16.2 percent to 13.5 percent, while those producing orchids has risen slightly from 7.8 percent to 8.9 percent (perhaps reflecting a slight shift to higher valued added flower types). Given the complexities involved, it is difficult to isolate conclusively the factors responsible for this trend; however, it would appear that imports from the ATPA and other foreign producers may have been responsible for the contraction of domestic production of standard carnations and roses.

Trends in U.S. domestic production and U.S. imports from the ATPA beneficiary countries since implementation of the ATPA suggest that increased imports of fresh roses, standard carnations, and standard and pompon chrysanthemums due to the trade preferences in the ATPA may have displaced some domestic growers and workers. Despite the large increases in U.S. imports of these items from the ATPA beneficiary countries in 2003 over their levels in the prior year, it is nevertheless difficult to determine the extent to which these increases may have been responsible for any domestic employment displacements in 2003 since U.S. imports of these items from the ATPA beneficiary countries were up only slightly over their levels in 2000.

Domestic production of chrysanthemums appears to have stabilized over the last several years, while domestic production of roses and especially carnations continues to fall by significant percentages each year. Although the number of hired workers directly affected is likely to have been small, the employment opportunities in the cut flower and floriculture industries are probably limited and it is difficult to determine the degree of adjustment difficulty such workers may face should they seek employment in other industries. As import competition has increased in certain cut flower types (such as the like ATPA cut flowers group), growers have switched to growing other flowers types or other floriculture crops which face less import competition. The share of hired workers in floriculture crops other than cut flowers has increased slightly from 90 percent in 2000 to 91 percent in 2003 (see text figure above). However, the availability of lower cost import types of cut flowers may have created more choices for consumers and boosted retail florists' sales and employment.

Tobacco products (NAICS 31222)

U.S. imports of tobacco products from the beneficiary countries increased to \$55.7 million in 2003 from their level of \$33.4 million in 2002, a 66.8 percent increase. U.S. imports of these items from the beneficiary countries have been increasing dramatically each year since 2000 when they were \$1.1 million and subsequently \$16.4 million in 2001. U.S. imports of these items from the beneficiary countries accounted for 10.3 percent of U.S. tobacco product imports from all sources in 2003. Nearly all (99.9 percent) of these imports from the beneficiaries were

eligible for ATPA, but not for GSP duty-free treatment. During 2003, \$55.4 million entered ATPA duty-free, of which \$54.3 benefited exclusively from ATPA.

The primary tobacco product that benefited exclusively from the ATPA was paper-wrapped cigarettes containing tobacco but not clove (HTS 2402.20.80).¹⁴ ATPA duty-free imports of this item increased from \$20.5 million in 2002 to \$55.3 million in 2003 and accounted for 24.5 percent of U.S. imports from all sources (Canada accounted for 14.2 percent, South Korea for 12.2 percent, and Japan for 11.1 percent.). During the 2001-2002 lapse of the ATPA, 1.4 percent of all U.S. imports of these items in 2001 and 5.7 percent in 2002 (which came from Colombia and Peru) were subject to NTR duty. The NTR tariff on this item is \$1.05 per kilogram plus 2.3 percent of the value; the *ad valorem* equivalent tariff rate is about 12.3 percent.

According to the USITC, ATPA duty-free imports of paper-wrapped cigarettes containing tobacco but not clove represented less than one percent of U.S. apparent consumption of cigarettes in 2003. The United States is the world's largest producer and exporter of cigarettes, and U.S. imports from Colombia are mostly inexpensive discount items that are sold primarily in Latino niche markets.¹⁵

The text chart below presents the trend in U.S. employment in the tobacco manufacturing industry group for the years 1990 to 2004.¹⁶ Employment has declined steadily over this time period, with the exception of a temporary increase in 2002 to 34 thousand workers. Employment in tobacco manufacturing was 31 thousand workers in 2003 and 29 thousand workers in 2004.

Annual unemployment rates are available for the subsector that includes tobacco manufacturing, tobacco and beverage products (NAICS 312), in which the unemployment rate increased sharply from 2.0 percent in 2002 to 4.4 percent in 2003, and 5.7 percent in 2004. Hourly wage rates are available only for the tobacco and beverage products subsector. While employment has declined in this subsector, the hourly wage of production workers has increased by 1.3 percent in 2003 and 6.5 percent in 2004.¹⁷ To the extent that tobacco manufacturing employment trends follow those in the larger subsector, the coupling of decreased employment with higher hourly earnings for production workers suggests that labor productivity may have improved in the industry.

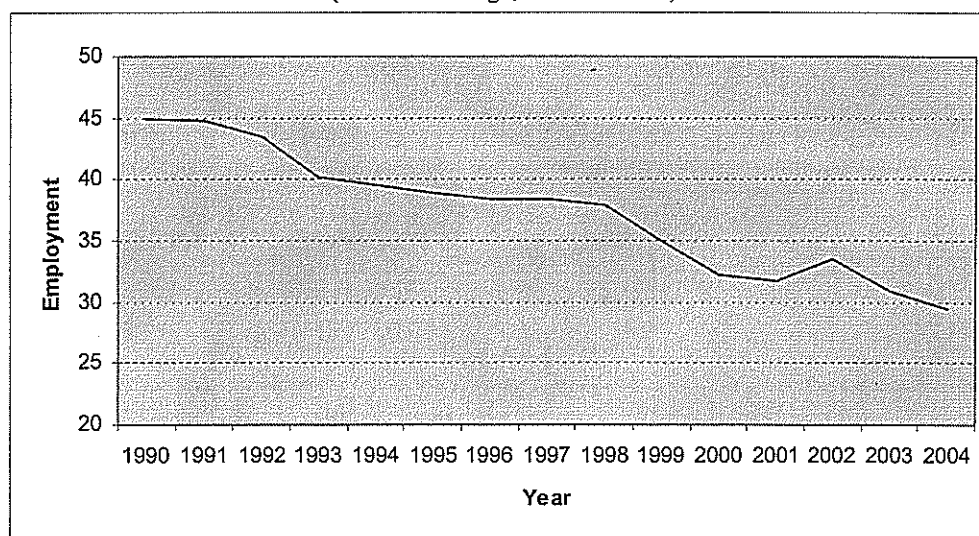
¹⁴ Two other tobacco product HTS-8 items benefited exclusively from the ATPA (HTS 2402.1030—Cigars, cheroots and cigarillos containing tobacco, each less than 15 cents and HTS 2402.1060—Cigars, cheroots and cigarillos containing tobacco, each valued 15 cents or over but less than 23 cents), but amounted to only \$48 thousand in 2003 (see Table 9).

¹⁵ See United State International Trade Commission, *The Impact of the Andean Trade Preference Act: Tenth Report* (Investigation No. 332-352; USITC Publication 3725; September 2004), p. 2-25.

¹⁶ The tobacco manufacturing industry group (NAICS 3122) encompasses the tobacco stemming and redrying industry (NAICS 31221) and tobacco product manufacturing industry (NAICS 31222).

¹⁷ The average annual hourly wage for tobacco and beverage manufacturing production workers was \$17.67 in 2001, \$17.73 in 2002, \$17.96 in 2003, and \$19.12 in 2004.

**U.S. Employment in Tobacco Manufacturing (NAICS 3122), 1990-2004
(annual average, in thousands)**



Although the tariff preference provided by the ATPA is substantial, U.S. imports from the ATPA beneficiaries account for only 3.9 percent of total U.S. tobacco products imports, and ATPA cigarettes account for less than one percent of U.S. apparent consumption. Thus, it is unlikely that the exclusive duty-free benefits of the ATPA program have had any measurable impact on U.S. employment in the tobacco industry group.

Nonferrous metals (NAICS 33141)

U.S. imports of nonferrous metals from the ATPA beneficiary countries in 2003 increased to \$1.5 billion (14.4 percent of industry imports from all sources) from their level of \$892.9 million in 2002 (see Table 3). ATPA duty-free imports of these items increased from \$255.3 million in 2002 to \$459.9 million in 2003 (4.4 percent of industry imports from all sources) (see Table 8). The nonferrous metals industry has accounted for the largest portion of ATPA duty-free imports of any industry since 2000. ATPA duty-free imports which benefited exclusively from the ATPA amounted to \$448.1 million and accounted for 97.4 percent of all ATPA duty-free industry imports in 2003.

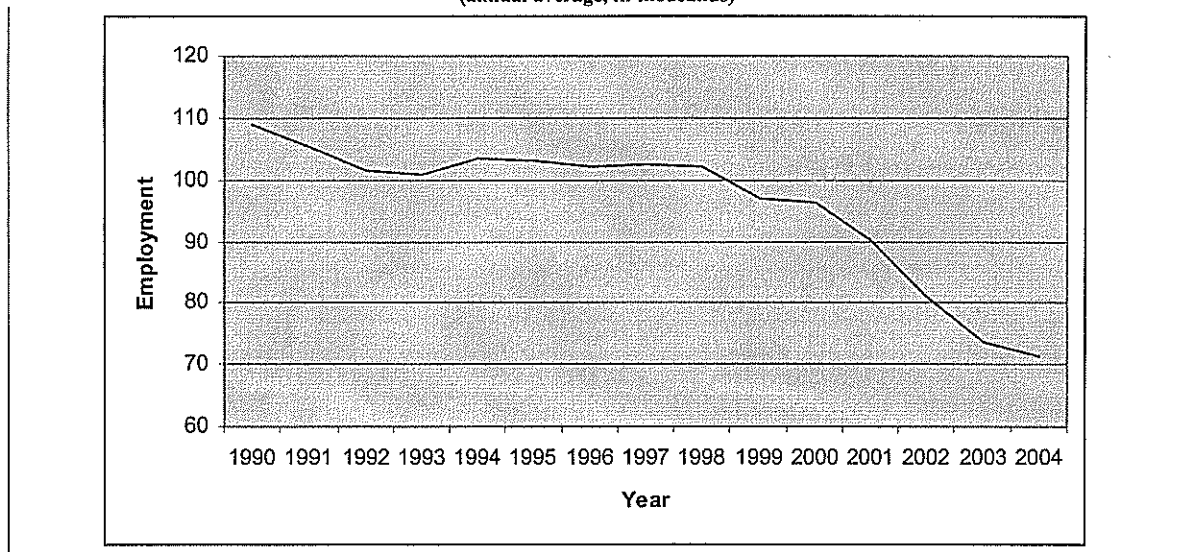
Nearly all (\$447.4 million) of the items benefiting exclusively from the ATPA were refined copper cathodes and sections of cathodes (HTS 7403.11.00) from Peru, which had lost its eligibility for GSP duty-free entry due to exceeding the program's competitive need limit in the prior year. This 8-digit HTS item had the largest amount of exclusive ATPA duty-free imports of any HTS category (as was the case in 2001 and 2002) and accounted for 30.6 percent of industry imports from all sources in 2003 (Chile accounted for 37.1 percent and Canada accounted for 26.7 percent). During the 2001-2002 lapse of the ATPA, 1.8 percent of all U.S.

imports of these items in 2001 and 14.4 percent in 2002 from Peru were subject to a one percent *ad valorem* NTR duty.¹⁸

According to the USITC, U.S. imports of refined copper cathodes from Peru account for about 7.3 percent of U.S. apparent consumption. The USITC estimates that less than one percent of domestic production may have been displaced by increased imports of copper cathodes due to the duty-free provisions of the ATPA.

The text chart below presents the trend in U.S. employment for the nonferrous metal (except aluminum) production and processing industry group (NAICS 3314), which includes the nonferrous metal (except aluminum) smelting and refining industry (NAICS 33141), for the years 1990 to 2004.¹⁹ Employment has declined sharply between 1990 and 1993 in this larger industry group, but has remained relatively level between 1994 and 1998, before declining again between 1999 and 2004. Employment in the industry group was 73.5 thousand workers in 2003 and 71.3 thousand workers in 2004. The wages of production workers in this industry group have increased each year since 2002—by 4.0 percent in 2002, by 5.3 percent in 2003, and by 4.3 percent in 2004.²⁰

U.S. Employment in Nonferrous Metal (excluding aluminum) Production and Processing (NAICS 3314), 1990-2004
(annual average, in thousands)



¹⁸ Two other HTS-8 items accounted for an insignificant portion of exclusive ATPA duty-free benefits (\$711 thousand) in 2003 (HTS 7901.1210—Zinc (other than alloy), unwrought, casting-grade zinc, containing at least 97.5 percent but less than 99.99 percent by weight of zinc and HTS 7403.1200—Refined copper, wire bars from Peru) (see Table 9).

¹⁹ The nonferrous metal (except aluminum) production and processing industry group (NAICS 3314) encompasses the nonferrous metal (except aluminum) smelting and refining industry (NAICS 33141), copper rolling, drawing, extruding, and alloying industry (NAICS 33142), and nonferrous metal (except copper and aluminum) rolling, drawing, extruding, and alloying industry (NAICS 33149).

²⁰ The average annual hourly wage for nonferrous metal (except aluminum) production and processing production workers was \$17.06 in 2001, \$17.75 in 2002, \$18.69 in 2003, and \$19.49 in 2004.

Although large increases in U.S. imports of refined copper cathodes from the ATPA beneficiary countries over the past several years may provide one explanation for domestic output declines, the tariff preference provided by the ATPA program (from a one percent *ad valorem* tariff) is very small and cannot reasonably account for the increase in these imports. It is unlikely that the relatively insignificant duty-free benefits provided by the ATPA are responsible for the increases in U.S. imports of this item.

CONCLUSIONS

Although a definitive evaluation of the domestic employment impact of the ATPA/ATPDEA cannot be made because the effects of the duty-free provisions on U.S. imports cannot be isolated from the effects of other trade preference programs such as the GSP, it is unlikely that the ATPA/ATPDEA has had a significant effect on overall U.S. employment. In addition, U.S. imports from the beneficiary countries have remained small, accounting for only 0.9 percent of U.S. imports from all sources in 2003.

Neither the dollar amount nor the rate of increase of U.S. imports from the beneficiary countries has been extraordinary or threatening. The long-term benefit to the beneficiary countries has been in the increased utilization of the duty-free benefits under the ATPA (especially for products not eligible for GSP duty-free treatment) and the inclusion of additional products (in late 2001 under the ATPDEA) that were previously excluded from the ATPA; nevertheless, the amounts entered duty-free have remained quite modest.

U.S. imports of products similar to those produced by three domestic industries received substantial or increasing exclusive ATPA duty-free benefits in 2003: nursery products, flowers, and seeds (fresh cut roses, standard carnations, and chrysanthemums); cigarettes (paper-wrapped cigarettes); and nonferrous metals (refined copper cathodes). These import industries were among the leading 20 import industries in terms of exclusive ATPA duty-free imports, but it is difficult to identify major adverse effects on U.S. employment in each of the U.S. industries that produced products similar to those in the three import product groups

Generally, the current level and composition of the beneficiary countries' exports to the United States do not appear to pose a threat to U.S. employment. As the Andean region continues to develop, it is anticipated that it will attract increasing levels of U.S. exports which will generate additional job opportunities in the United States. On the other hand, the duty-free benefits of the ATPA/ATPDEA offer an incentive for diversification of production and development of exports to the U.S. market. The implications of the recently passed ATPDEA will only become apparent over the next several years.

While the ATPA/ATPDEA offers beneficiary countries an incentive to diversify their export structure and take advantage of greater access to the U.S. market, the margin of these benefits has been eroded in recent years as the United States negotiated and implemented several comprehensive free trade agreements (with Israel in 1986, Canada in 1989, Canada and Mexico

in 1994, Jordan in 2001, Singapore and Chile in 2004, Australia in 2005, and Morocco which is not yet in force). In addition, the United States has granted unilateral trade preferences with no expiration date to the CBERA beneficiary countries and expanded GSP benefits to a number of developing sub-Saharan African nations that provide duty-free entry for many of the same items covered by the ATPA/ATPDEA. Finally, many U.S. trade barriers have been reduced for all NTR trading partners as the result of the conclusion and implementation of the WTO's Uruguay Round of multilateral trade negotiations.

Tables

Table 1: Total U.S. Imports from the ATPA Beneficiary Countries by NAICS-based Sector, 2000-2003

NAICS-based U.S. Import Sector	Value of U.S. Imports from the Beneficiary Countries (\$thous.)				2003 Percent of Total	
	2000	2001	2002	2003	U.S. Sector Imports from the World	U.S. Imports from the Beneficiary Countries
Total U.S. Imports from the Beneficiary Countries.....	11,117,225	9,568,661	9,611,482	11,639,464	0.9	100.0
11—Agriculture and Livestock Products.....	1,868,554	1,719,488	1,768,092	1,947,480	7.4	16.7
111—Agricultural Products.....	1,511,342	1,332,393	1,401,765	1,534,437	11.8	13.2
112—Livestock and Livestock Products.....	5,676	6,752	5,633	6,993	0.2	0.1
113—Forestry Products.....	758	579	439	936	0.1	(²)
114—Fish, Fresh, Chilled, or Frozen and Other Marine Products.....	350,777	379,765	360,254	405,114	4.8	3.5
21—Oil, Gas, Minerals and Ores.....	2,984,440	2,270,319	2,659,808	4,100,859	3.9	35.2
211—Oil and Gas.....	2,736,796	1,852,562	2,308,278	3,618,007	3.6	31.1
212—Minerals and Ores.....	247,643	417,757	351,529	482,853	12.5	4.2
31-33—Manufacturing.....	5,724,751	5,099,882	4,743,795	5,045,904	0.5	43.4
311—Food Manufacturing.....	360,276	377,862	431,435	491,776	2.1	4.2
312—Beverages and Tobacco Products.....	6,552	21,749	40,612	62,752	0.6	0.5
313—Textiles and Fabrics.....	31,317	17,152	16,523	16,932	0.2	0.2
314—Textile Mill Products.....	32,165	36,102	34,242	41,588	0.4	0.4
315—Apparel and Accessories.....	938,874	761,840	759,025	1,060,734	1.6	9.1
316—Leather and Allied Products.....	41,104	39,967	36,919	39,760	0.2	0.3
321—Wood Products.....	112,525	106,356	123,657	127,937	0.8	1.1
322—Paper.....	18,185	19,168	15,769	20,976	0.1	0.2
323—Printing, Publishing and Similar Products....	23,224	20,735	23,361	34,576	0.7	0.3
324—Petroleum and Coal Products.....	1,773,020	1,680,941	1,260,163	742,200	1.9	6.4
325—Chemicals.....	892,753	624,837	399,567	133,079	0.1	1.1
326—Plastics and Rubber Products.....	43,807	46,243	55,484	61,974	0.3	0.5
327—Nonmetallic Mineral Products.....	121,852	136,670	170,068	208,521	1.4	1.8
331—Primary Metal Manufacturing.....	1,073,086	838,837	976,680	1,628,291	4.8	14.0
332—Fabricated Metal Products.....	18,120	28,834	34,396	37,026	(²)	0.3
333—Machinery, Except Electrical.....	11,970	17,652	24,831	19,979	(²)	0.2
334—Computer and Electronic Products.....	10,985	12,848	8,649	8,664	(²)	0.1
335—Electrical Equipment, Appliances, and Components.....	16,200	23,299	22,798	23,253	0.1	0.2
336—Transportation Equipment.....	9,937	10,756	13,221	11,155	(²)	0.1
337—Furniture and Fixtures.....	34,409	38,701	37,049	42,696	0.2	0.4
339—Miscellaneous Manufactured Commodities...	254,392	239,332	259,345	232,032	0.4	2.0
51—Information.....	27	321	11	7	(²)	(²)
511—Publishing Industries (except Internet).....	27	321	11	7	(²)	(²)
91-99—Special Classification Provisions.....	539,453	478,650	439,778	545,213	0.9	4.7
91—Waste and Scrap.....	22,185	12,797	11,032	20,073	1.1	0.2
92—Used or Second-hand Merchandise.....	10,248	4,117	7,314	4,758	0.1	(²)
98—U.S. Goods Returned and Reimported Items...	140,781	152,803	132,711	182,346	0.5	1.6
99—Special Classification Provisions, not otherwise specified or included.....	366,239	308,933	288,721	338,036	1.9	2.9

(¹) Less than \$500; (²) Less than 0.05 percent.

Note: For the purposes of relating foreign trade statistics to U.S. industrial output and employment, the Bureau of the Census has mapped 10-digit HTS numbers used for U.S. exports and import statistics to their closest NAICS-based code. Some categories of traded items have no direct domestic counterpart and are classified in specially created NAICS-based 91000-99000 categories that have no direct domestic counterpart. For example, NAICS 99000—Special Classification Provisions, not otherwise specified or included, contains primarily imports and exports of low-value shipments not specified by kind, exposed film and prerecorded tapes, articles imported for repairs, returned goods, and articles donated to charity. The value of U.S. imports is the customs value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones).

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

Table 2: Total U.S. Exports to the ATPA Beneficiary Countries by NAICS-based Sector, 2000-2003

NAICS-based U.S. Export Sector	Value of U.S. Exports to the Beneficiary Countries (\$thous.)				2003 Percent of Total	
	2000	2001	2002	2003	U.S. Sector Exports to the World	U.S. Exports to the Beneficiary Countries
Total U.S. Exports to the Beneficiary Countries.....	6,295,089	6,363,334	6,463,762	6,525,695	1.0	100.0
11—Agriculture and Livestock Products.....	468,860	522,028	621,240	617,597	1.8	9.5
111—Agricultural Products.....	452,417	503,129	606,141	601,804	2.1	9.2
112—Livestock and Livestock Products.....	10,282	11,214	9,881	9,223	0.8	0.1
113—Forestry Products.....	3,370	3,607	3,180	2,618	0.2	(¹)
114—Fish, Fresh, Chilled, or Frozen and Other Marine Products.....	2,790	4,078	2,038	3,951	0.1	0.1
21—Oil, Gas, Minerals and Ores.....	24,100	18,282	30,245	15,640	0.3	0.2
211—Oil and Gas.....	8,443	1,856	17,266	74	(²)	(²)
212—Minerals and Ores.....	15,657	16,426	12,979	15,566	0.4	0.2
31-33—Manufacturing.....	5,512,276	5,537,073	5,489,919	5,577,670	1.0	85.5
311—Food Manufacturing.....	221,703	249,476	253,899	238,936	0.9	3.7
312—Beverages and Tobacco Products.....	9,015	9,305	8,216	5,271	0.1	0.1
313—Textiles and Fabrics.....	76,590	68,232	63,077	104,784	1.4	1.6
314—Textile Mill Products.....	31,393	23,521	20,671	20,308	1.1	0.3
315—Apparel and Accessories.....	94,899	43,498	34,042	43,123	0.9	0.7
316—Leather and Allied Products.....	8,806	11,558	12,282	9,987	0.5	0.2
321—Wood Products.....	11,654	5,406	4,185	5,623	0.1	0.1
322—Paper.....	281,975	252,474	256,566	257,751	1.8	4.0
323—Printing, Publishing and Similar Products....	29,094	27,469	27,408	22,918	0.5	0.4
324—Petroleum and Coal Products.....	92,842	130,748	154,551	259,877	2.8	4.0
325—Chemicals.....	1,331,438	1,273,796	1,365,049	1,465,511	1.7	22.5
326—Plastics and Rubber Products.....	135,661	130,959	117,577	104,074	0.7	1.6
327—Nonmetallic Mineral Products.....	46,851	48,912	45,093	47,889	0.8	0.7
331—Primary Metal Manufacturing.....	139,044	150,865	116,802	92,292	0.5	1.4
332—Fabricated Metal Products.....	160,220	126,599	138,210	147,824	0.8	2.3
333—Machinery, Except Electrical.....	1,198,439	1,304,819	1,139,344	1,174,613	1.7	18.0
334—Computer and Electronic Products.....	928,137	964,440	927,505	883,126	0.8	13.5
335—Electrical Equipment, Appliances, and Components.....	189,048	196,847	189,790	180,354	0.9	2.8
336—Transportation Equipment.....	371,147	353,085	450,254	335,713	0.3	5.1
337—Furniture and Fixtures.....	12,066	18,419	11,081	7,922	0.3	0.1
339—Miscellaneous Manufactured Commodities...	142,254	146,645	154,317	169,774	0.8	2.6
51—Information.....	(¹)	(¹)	610	1,372	0.4	(²)
511—Publishing Industries (except Internet).....	(¹)	(¹)	610	1,372	0.4	(²)
91-99—Special Classification Provisions.....	289,854	285,952	321,748	313,415	0.9	4.8
91—Waste and Scrap.....	19,455	12,999	15,764	25,734	0.4	0.4
92—Used or Second-hand Merchandise.....	18,670	32,996	71,398	48,064	2.6	0.7
99—Special Classification Provisions, not otherwise specified or included.....	251,729	239,957	234,586	239,617	1.0	3.7

(¹) Less than \$500.

(²) Less than 0.05 percent.

Note: The value of U.S. exports is the free alongside ship (FAS) value of domestic U.S. exports at the U.S. port of export.

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

Table 3: Total and Leading 5-Digit NAICS-based Industry U.S. Imports from the ATPA Beneficiary Countries, 2000-2003

(5-digit NAICS-based industries with more than \$100 million in U.S. imports from the ATPA countries in 2003, ranked by 2003 value)

5-Digit NAICS-based U.S. Import Industry	Value of U.S. Imports from the Beneficiary Countries (\$mil.)				2003 Percent of Total	
	2000	2001	2002	2003	U.S. Industry Imports from the World	U.S. Imports from the Beneficiary Countries
Total U.S. Imports from the Beneficiary Countries.....	11,117.2	9,568.7	9,611.5	11,639.5	0.9	100.0
<u>The leading NAICS-based Industries in 2003 were:</u>						
21111—Oil and Gas.....	2,736.8	1,852.6	2,308.3	3,618.0	3.6	31.1
33141—Nonferrous Metal (except aluminum) Smelting and Refining.....	983.5	767.8	892.9	1,519.0	14.4	13.1
11133—Noncitrus Fruits and Tree Nuts.....	998.7	828.3	911.0	941.1	15.6	8.1
32411—Petroleum Refinery Products.....	1,773.0	1,680.9	1,260.0	742.2	1.9	6.4
31522—Men's and Boys' Apparel.....	424.3	386.7	366.8	520.4	2.2	4.5
31523—Women's and Girls' Apparel.....	341.4	324.5	337.5	471.8	1.4	4.1
11142—Nursery Products, Flowers, Seeds, and Foliage.....	441.3	408.2	382.4	456.0	36.1	3.9
21211—Coal.....	201.4	329.5	284.1	442.1	56.0	3.8
11411—Fish, Fresh, Chilled or Frozen and Other Marine Products.....	350.8	379.8	360.3	405.1	4.8	3.5
99000—Special Classification Provisions.....	366.2	308.9	288.7	338.0	1.9	2.9
33991—Jewelry and Silverware.....	239.2	223.0	239.4	204.7	0.9	1.8
98000—U.S. Goods Returned and Reimported Items.....	140.8	152.8	132.7	182.3	0.5	1.6
31171—Seafood Products, Prepared, Canned and Packaged.....	94.2	89.5	143.4	156.8	10.6	1.4
111211—Vegetables and Melons.....	56.7	71.2	85.9	105.8	3.3	0.9

Note: The value of U.S. imports is the customs value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones).

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

Table 4: Total and Leading 5-Digit NAICS-based Industry U.S. Exports to the ATPA Beneficiary Countries, 2000-2003

(5-digit NAICS-based industries with more than \$100 million U.S. exports to the ATPA countries in 2003, ranked by 2003 value)

5-Digit NAICS-based U.S. Export Industry	Value of U.S. Exports to the Beneficiary Countries (\$mil.)				2003 Percent of Total	
	2000	2001	2002	2003	U.S. Industry Exports to the World	U.S. Exports to the Beneficiary Countries
Total U.S. Exports to the Beneficiary Countries.....	6,295.1	6,363.3	6,463.8	6,525.7	1.0	100.0
<u>The leading NAICS-based Industries in 2003 were:</u>						
32519—Other Basic Organic Chemicals.....	473.1	421.7	432.8	535.9	2.5	8.2
33411—Computer Equipment.....	423.9	406.3	372.0	365.8	1.3	5.6
33313—Mining and Oil and Gas Field Machinery.....	431.5	438.7	414.8	363.8	5.9	5.6
32521—Resin and Synthetic Rubbers.....	285.8	267.6	293.2	303.2	2.0	4.7
32411—Petroleum Refinery Products.....	92.2	130.5	154.0	259.1	2.8	4.0
99000—Special Classification Provisions.....	251.7	240.0	234.6	239.6	1.0	3.7
11114—Wheat.....	126.2	164.5	204.9	229.2	5.8	3.5
33422—Radio and Television Broadcasting and Wireless Communication Equipment.....	174.7	204.2	181.9	217.7	4.9	3.3
11115—Corn.....	198.6	189.4	230.4	200.7	4.0	3.1
33312—Construction Machinery.....	229.3	258.2	147.0	162.5	2.6	2.5
33641—Aerospace Products and Parts.....	222.7	148.9	265.5	162.5	0.3	2.5
33399—Other General Purpose Machinery.....	94.0	124.0	145.2	155.5	1.2	2.4
32212—Paper Mill Products.....	211.8	187.4	159.3	153.5	3.1	2.4
33451—Navigational, Measuring, Electromedical, and Control Instruments.....	128.5	143.1	132.9	108.3	0.8	1.7
11192—Cotton.....	71.9	81.6	86.7	107.2	3.8	1.6

Note: The value of U.S. exports is the free alongside ship (FAS) value of domestic U.S. exports at the U.S. port of export.

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

**Table 5: U.S. Imports from the ATPA/ATPDEA Beneficiary Countries by
U.S. Import Program, 2000-2003**

(thousands of dollars)

U.S. Import Program	2000	2001	2002	2003
<u>No Program Claimed</u>				
Customs Value.....	8,989,922	7,709,392	8,134,542	5,476,687
Dutiable Value.....	4,467,819	3,776,408	4,380,967	1,612,727
Calculated Duties.....	140,763	142,712	168,513	63,209
Average Rate of Duty.....	3.2%	3.8%	3.8%	3.9%
<u>ATPA</u>				
Customs Value.....	1,981,632	1,674,607	788,547	1,624,648
Dutiable Value.....	49,342	22,440	5,238	0
Calculated Duties.....	1,604	1,386	245	0
Average Rate of Duty.....	3.3%	6.2%	4.7%	0
<u>ATPDEA</u>				
Customs Value.....	0	0	212,269	4,211,384
Dutiable Value.....	0	0	0	0
Calculated Duties.....	0	0	0	0
Average Rate of Duty.....	0	0	0	0
<u>GSP</u>				
Customs Value.....	145,566	184,242	475,847	326,644
Dutiable Value.....	0	0	0	0
Calculated Duties.....	0	0	0	0
Average Rate of Duty.....	0	0	0	0
<u>Pharmaceuticals</u>				
Customs Value.....	45	300	178	0
Dutiable Value.....	0	0	0	0
Calculated Duties.....	0	0	0	0
Average Rate of Duty.....	0	0	0	0
<u>Civil Aircraft</u>				
Customs Value.....	60	120	100	101
Dutiable Value.....	0	0	0	0
Calculated Duties.....	0	0	0	0
Average Rate of Duty.....	0	0	0	0
<u>Total</u>				
Customs Value.....	11,117,225	9,568,661	9,611,482	11,639,464
Dutiable Value.....	4,517,161	3,798,848	4,598,474	1,612,727
Calculated Duties.....	142,367	144,098	169,498	63,209
Average Rate of Duty.....	3.2%	3.8%	3.7%	3.9%

Note: The following U.S. import programs are available to the ATPA countries:

ATPA: Reduced duty or duty-free under the Andean Trade Preference Act of 1991 (ATPA), as amended.

ATPDEA: Duty-free under the Andean Trade Promotion and Drug Eradication Act of 2002 (ATPDEA), as amended.

GSP: Duty-free under the Generalized System of Preferences (GSP). [Section 503(a)(1)(B) of the Trade Act of 1974, as amended]

Pharmaceuticals: Duty-free under the WTO Agreement on Trade in Pharmaceutical Products.

Civil Aircraft: Duty-free under the WTO Agreement on Trade in Civil Aircraft.

The customs value of U.S. imports is the value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones). Because of rounding, figures may not add to totals shown. The dutiable value represents the customs value of the foreign merchandise imported into the United States that is subject to duty. The dutiable value includes the U.S. content value of items entered under HTS 9208 provisions, which amounted to \$29,563 thousand in 2003. The calculated duty represents the estimated import duties collected. Estimated duties are calculated based on the applicable rates of duty as shown in the Harmonized Tariff Schedule of the United States Annotated for Statistical Reporting Purposes. Estimates of calculated duty do not necessarily reflect amounts of duty paid. The average rate of duty is computed as the ratio of calculated duties over the dutiable value, expressed as a percent. Because of rounding, figures may not add to total shown.

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

**Table 6: U.S. Imports from the ATPA/ATPDEA Beneficiary Countries by
U.S. Import Program and Country, 2003**

(thousands of dollars)

Beneficiary Country	No Program Claimed	ATPA	ATPDEA	.GSP	Civil Aircraft	Total
<u>Bolivia</u>						
Customs Value.....	81,985	63,334	31,119	8,499	0	184,937
Dutiable Value.....	5,467	0	0	0	0	5,467
Calculated Duties.....	574	0	0	0	0	574
Average Rate of Duty.....	10.5%	0	0	0	0	10.5%
<u>Colombia</u>						
Customs Value.....	3,278,277	613,377	2,295,315	159,186	4	6,346,159
Dutiable Value.....	1,147,053	0	0	0	0	1,147,053
Calculated Duties.....	39,195	0	0	0	0	39,195
Average Rate of Duty.....	3.4%	0	0	0	0	3.4%
<u>Ecuador</u>						
Customs Value.....	1,090,092	241,018	1,312,586	48,740	89	2,692,525
Dutiable Value.....	292,547	0	0	0	0	292,547
Calculated Duties.....	12,871	0	0	0	0	12,871
Average Rate of Duty.....	4.4%	0	0	0	0	4.4%
<u>Peru</u>						
Customs Value.....	1,026,332	706,919	572,363	110,220	8	2,415,843
Dutiable Value.....	167,661	0	0	0	0	167,661
Calculated Duties.....	10,569	0	0	0	0	10,569
Average Rate of Duty.....	6.3%	0	0	0	0	6.3%
<u>Total U.S. Imports from the Beneficiary Countries</u>						
Customs Value.....	5,476,687	1,624,648	4,211,384	326,644	101	11,639,464
Dutiable Value.....	1,612,727	0	0	0	0	1,612,727
Calculated Duties.....	63,209	0	0	0	0	63,209
Average Rate of Duty.....	3.9%	0	0	0	0	3.9%

Note: See the note to Table 5 for the definitions of the U.S. import programs. The customs value of U.S. imports is the value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones). Because of rounding, figures may not add to totals shown. The dutiable value represents the customs value of the foreign merchandise imported into the United States that is subject to duty. The dutiable value includes the U.S. content value of items entered under HTS 9208 provisions, which amounted to \$29,563 thousand in 2003. The calculated duty represents the estimated import duties collected. Estimated duties are calculated based on the applicable rates of duty as shown in the Harmonized Tariff Schedule of the United States Annotated for Statistical Reporting Purposes. Estimates of calculated duty do not necessarily reflect amounts of duty paid. The average rate of duty is computed as the ratio of calculated duties over the dutiable value, expressed as a percent. Because of rounding, figures may not add to total shown.

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

Table 7: U.S. Imports from the ATPA/ATPDEA Beneficiary Countries by U.S. Import Program and NAICS-based Sector, 2003

(thousands of dollars)

NAICS-based Sector	No Program Claimed	ATPA	ATPDEA	GSP	Civil Aircraft	Total
U.S. Imports from the Beneficiary Countries	5,476,687	1,624,648	4,211,384	326,644	101	11,639,464
11—Agriculture and Livestock Products	1,330,819	599,991	0	16,670	0	1,947,480
111—Agricultural Products.....	922,582	595,611	0	16,243	0	1,534,437
112—Livestock and Livestock Products.....	6,354	638	0	1	0	6,993
113—Forestry Products.....	815	0	0	121	0	936
114—Fish, Fresh, Chilled, or Frozen and Other Marine Products.....	401,067	3,741	0	305	0	405,114
21—Oil, Gas, Minerals and Ores	1,107,399	178	2,991,572	1,711	0	4,100,859
211—Oil and Gas.....	626,435	0	2,991,572	0	0	3,618,007
212—Minerals and Ores.....	480,964	178	0	1,711	0	482,853
31-33—Manufacturing	2,493,345	1,024,426	1,219,812	308,229	93	5,045,904
311—Food Manufacturing.....	230,029	146,892	28,236	86,620	0	491,776
312—Beverages and Tobacco Products.....	5,068	56,950	0	735	0	62,752
313—Textiles and Fabrics.....	14,068	217	0	2,647	0	16,932
314—Textile Mill Products.....	40,478	748	0	362	0	41,588
315—Apparel and Accessories.....	300,788	2,922	756,503	521	0	1,060,734
316—Leather and Allied Products.....	14,477	2,124	20,826	2,333	0	39,760
321—Wood Products.....	76,100	43,365	0	8,472	0	127,937
322—Paper.....	10,007	6,130	0	4,840	0	20,976
323—Printing, Publishing and Similar Prod	28,493	5,170	4	910	0	34,576
324—Petroleum and Coal Products.....	327,974	0	414,226	0	0	742,200
325—Chemicals.....	88,784	28,335	0	15,959	0	133,079
326—Plastics and Rubber Products.....	676	16,820	0	44,477	2	61,974
327—Nonmetallic Mineral Products.....	113,200	41,600	0	53,721	0	208,521
331—Primary Metal Manufacturing.....	1,082,666	512,739	0	32,798	88	1,628,291
332—Fabricated Metal Products.....	7,912	15,398	0	13,715	0	37,026
333—Machinery, Except Electrical.....	18,576	989	0	414	0	19,979
334—Computer and Electronic Products...	6,915	1,564	0	185	0	8,664
335—Electrical Equipment, Appliances, and Components.....	1,026	9,680	0	12,547	0	23,253
336—Transportation Equipment.....	7,136	2,747	0	1,268	4	11,155
337—Furniture and Fixtures.....	42,692	0	0	4	0	42,696
339—Miscellaneous Manufactured Commod	76,278	130,034	6	25,703	0	232,032
51—Information	7	0	0	0	0	7
511—Publishing Industries (except Internet)	7	0	0	0	0	7
91-99—Special Classification Provisions...	545,117	54	0	34	8	545,213
91—Waste and Scrap.....	20,073	0	0	0	0	20,073
92—Used or Second-hand Merchandise.....	4,758	0	0	0	0	4,758
98—U.S. Goods Returned and Reimported	182,338	0	0	0	8	182,346
99—Special Classification Provisions, not otherwise specified or included.....	337,947	54	0	34	0	338,036

Note: See the note to Table 5 for the definition of the U.S. import programs. The value of U.S. imports is the customs value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones). Because of rounding, figures may not add to totals shown.

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

Table 8: The Leading 20 ATPA Duty-Free U.S. Imports from the Beneficiary Countries by NAICS-based Industry, 2003

NAICS-based Industry	Value of ATPA Duty-Free U.S. Imports (\$thous.)			
	2000	2001	2002	2003
AGRICULTURE AND LIVESTOCK PRODUCTS				
<i>Agricultural Products</i>				
11121—Vegetables and Melons.....	52,688	59,525	61,542	96,675
11133—Noncitrus Fruits and Tree Nuts.....	23,898	21,562	14,743	41,213
11142—Nursery Products, Flowers, Seeds, and Foliage.....	439,433	382,544	172,875	451,159
MANUFACTURED PRODUCTS				
<i>Food Manufacturing</i>				
31131—Sugars*.....	22,566	33,074	7,388	38,864
31141—Frozen Foods.....	13,212	17,209	9,768	26,839
31142—Fruits and Vegetables.....	21,918	31,740	15,568	38,548
31171—Seafood Products, Prepared, Canned and Packaged...	80,225	29,442	4,377	18,917
<i>Beverages and Tobacco Products</i>				
31222—Tobacco Products.....	970	13,925	20,635	55,352
<i>Wood Products</i>				
32121—Veneer, Plywood, and Engineered Wood Products...	13,435	9,746	6,303	16,134
32191—Millwork*.....	10,592	9,066	6,226	9,239
32199—All Other Wood Products.....	13,801	13,031	6,631	17,797
<i>Chemicals</i>				
32521—Resin and Synthetic Fibers and Filaments*.....	12,554	6,824	847	12,176
<i>Plastics and Rubber Products</i>				
32619—Other Plastics Products*.....	33,465	28,819	8,938	11,818
<i>Nonmetallic Mineral Products</i>				
32711—Pottery, Ceramics and Plumbing Fixtures.....	5,138	10,069	3,774	11,066
32712—Clay and Refractory Building Materials.....	11,870	10,620	6,863	17,042
<i>Primary Metal Manufacturing</i>				
33111—Iron and Steel and Ferroalloy**.....	27,109	22,669	14,451	24,574
33131—Alumina and Aluminum and Processing.....	3,231	6,133	3,604	10,273
33141—Nonferrous Metal (except aluminum) Smelting and Refining.....	625,053	464,057	255,267	459,925
33142—Copper Rolling, Drawing, Extruding, and Alloying*	14,361	10,889	5,056	16,433
<i>Miscellaneous Manufactured Commodities</i>				
33991—Jewelry and Silverware.....	158,412	149,198	77,586	123,341

* = All constituent HTS tariff lines were also eligible for duty-free entry under the U.S. GSP program.

** = All constituent HTS tariff lines benefiting from duty-free entry became MFN/NTR duty-free in 2004.

Note: Excludes duty-free entries under the ATPDEA. The ATPA was not in effect from December 5, 2001 to October 31, 2002 and the reported ATPA duty-free values during that period may be understated; subsequently, the ATPA was renewed retroactively. The value of U.S. imports is the customs value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones).

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

Table 9: Leading NAICS-based Import Industries and Constituent HTS-8 Numbers Benefiting Exclusively from the ATPA, 2003

NAICS-based Industry and Constituent HTS-8 Items Benefiting Exclusively from the ATPA	Value of ATPA Duty-Free U.S. Imports (thousands of dollars)			
	2000	2001	2002	2003
AGRICULTURE AND LIVESTOCK PRODUCTS				
<i>Agricultural Products</i>				
11121—Vegetables and Melons, total ATPA duty-free.....	52,688	59,525	61,542	96,675
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>44,133</u>	<u>43,545</u>	<u>50,761</u>	<u>81,224</u>
0709.2090—Asparagus, not specified or identified elsewhere, fresh or chilled.....	33,412	28,261	31,589	60,498
0709.2010—Asparagus, fresh or chilled, not reduced in size, if entered September 15 to November 15, inclusive, and transported to the United States by air ¹	9,855	14,759	18,679	19,235
0704.9040—Kohlrabi, kale and similar edible brassicas not elsewhere specified or included, including sprouting broccoli, fresh or chilled.....	0	41	0	422
0708.9030—Pigeon peas, fresh or chilled, shelled or unshelled, if entered October 1 through the following June 30, inclusive ³	158	188	292	407
0708.2090—Beans not elsewhere specified or included, fresh or chilled, shelled or unshelled.....	40	122	60	308
0714.9040—Fresh or chilled arrowroot, salep, Jerusalem artichokes and similar roots and tubers not elsewhere specified or included, whether or not sliced or in the form of pellets.....	77	38	33	124
0709.9091—Vegetables, not elsewhere specified or included, fresh or chilled.....	0	0	6	97
0709.9045—Sweet corn, fresh or chilled.....	44	104	14	77
0708.9040—Leguminous vegetables not elsewhere specified or included, fresh or chilled, shelled or unshelled.....	354	0	46	32
0708.2010—Lima beans, fresh or chilled, shelled or unshelled, if entered November 1 through the following May 31, inclusive ¹	50	0	0	13
0706.9040—Salsify, celeriac, radishes and similar edible roots not elsewhere specified or included, fresh or chilled.....	143	32	42	11
11133—Noncitrus Fruits and Tree Nuts, total ATPA duty-free.....	23,898	21,562	14,743	41,213
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>3,362</u>	<u>3,766</u>	<u>6,971</u>	<u>15,851</u>
0804.3040—Pineapples, fresh or dried, not reduced in size, in crates or other packages.....	1,899	2,393	3,564	11,734
0806.1060—Grapes, fresh, if entered during the period July 1 through the following February 14, inclusive.....	290	834	3,330	3,663
0802.9098—Nuts not elsewhere specified or included, fresh or dried, shelled.....	214	232	16	188
0802.9010—Pecans, fresh or dried, in shell.....	782	185	17	130
0804.3060—Pineapples, fresh or dried, reduced in size.....	15	0	12	39
0711.2038—Olives, not pitted, not elsewhere specified or included.....	48	64	9	27
0806.1020—Grapes, fresh, if entered during the period February 15 through March 31, inclusive.....	104	41	0	22
0804.4000—Avocados, fresh or dried.....	4	0	13	20
0810.2010—Raspberries and loganberries, fresh, if entered during the period from September 1 through the following June 30, inclusive.....	0	0	0	10
0804.3020—Pineapples, fresh or dried, not reduced in size, in bulk.....	6	12	0	6

(continued)

NAICS-based Industry and Constituent HTS-8 Items Benefiting Exclusively from the ATPA	Value of ATPA Duty-Free U.S. Imports (thousands of dollars)			
	2000	2001	2002	2003
0804.2040—Figs, fresh or dried, whole, in units weighing more than 0.5 kg each.....	0	0	0	6
0809.4040—Plums, prunes and sloes, fresh, if entered during the period from June 1 through December 31, inclusive.....	0	5	10	6
11142—Nursery Products, Flowers, Seeds, and Foliage, total ATPA duty-free.....	439,433	382,544	172,875	451,159
HTS-8 numbers benefiting exclusively from the ATPA, total.....	311,900	271,947	116,049	302,671
0603.1060—Roses, fresh cut.....	192,420	180,283	69,765	204,473
0603.1070—Chrysanthemums, standard carnations, anthuriums and orchids, fresh cut ²	119,480	91,664	46,284	98,198
MANUFACTURED PRODUCTS				
<i>Food Manufacturing</i>				
31141—Frozen Foods, total ATPA duty-free.....	13,212	17,209	9,768	26,839
HTS-8 numbers benefiting exclusively from the ATPA, total.....	8,005	10,567	7,513	20,244
0710.8097—Vegetables not elsewhere specified or identified, uncooked or cooked by steaming or boiling water, frozen, reduced in size.....	4,788	6,846	5,313	16,126
0811.9080—Fruit, not elsewhere specified or identified, frozen, whether or not previously steamed or boiled.....	1,011	1,460	571	1,468
0710.2930—Pigeon peas, uncooked or cooked by steaming or boiling in water, frozen, if entered October 1 through the following June 30, inclusive ³	834	723	574	632
0710.4000—Sweet corn, uncooked or cooked by steaming or boiling in water, frozen.....	131	212	138	521
0710.9091—Mixtures of vegetables not elsewhere specified or included, uncooked or cooked by steaming or boiling in water, frozen.....	0	0	87	307
0710.2940—Leguminous vegetables not elsewhere specified or included, uncooked or cooked by steaming or boiling in water, frozen.....	275	353	160	299
2009.1100—Orange juice, frozen, unfermented and not containing added spirit.....	31	44	260	280
2004.9085—Vegetables and mixtures of vegetables, not elsewhere specified or included, prepared or preserved other than by vinegar or acetic acid, frozen, not preserved by sugar.....	0	0	285	186
0710.1000—Potatoes, uncooked or cooked by steaming or boiling in water, frozen.....	786	789	49	152
0811.9040—Papayas, frozen, in water or containing added sweetening.....	95	73	18	114
0710.8040—Tomatoes, uncooked or cooked by steaming or boiling water, frozen, if entered March 1 through July 14, inclusive, or September 1 through November 14, inclusive....	0	0	16	51
2009.4940—Pineapple juice, of a Brix value exceeding 20, concentrated (in degree of concentration greater than 3.5).....	0	0	0	37
0710.2237—Frozen beans not elsewhere specified or included, not reduced in size.....	23	0	8	32
2004.1040—Yellow (Solano) potatoes, prepared or preserved otherwise than by vinegar or acetic acid, frozen ^{1,2}	16	49	23	31
0710.8045—Tomatoes, uncooked or cooked by steaming or boiling water, frozen, if entered July 15 through August 31, inclusive, in any year.....	0	0	3	3
2009.3160—Citrus juice of any single citrus fruit (other than orange, grapefruit or lime), of a Brix value not exceeding 20, concentrated, unfermented.....	0	0	8	3
2004.1080—Potatoes (not Solano), prepared or preserved otherwise than by vinegar or acetic acid, frozen.....	15	18	0	2

(continued)

NAICS-based Industry and Constituent HTS-8 Items Benefiting Exclusively from the ATPA	Value of ATPA Duty-Free U.S. Imports (thousands of dollars)			
	2000	2001	2002	2003
31142—Fruits and Vegetables, total ATPA duty-free.....	21,918	31,740	15,568	38,548
HTS-8 numbers benefiting exclusively from the ATPA, total..	4,708	3,360	2,835	12,134
2005.6000—Asparagus, prepared or preserved otherwise than by vinegar or acetic acid, not frozen.....	1,240	623	1,116	5,286
2005.9080—Artichokes, prepared or preserved otherwise than by vinegar or acetic acid, not frozen.....	0	67	402	2,406
2003.1001—Mushrooms of genus Agaricus, prepared or preserved otherwise than by vinegar or acetic acid.....	0	0	662	2,086
2007.9965—Fruit pastes and purees, not elsewhere specified or identified, and nut pastes and purees, being cooked preparations.....	2,194	1,744	476	1,389
2005.9050—Pimientos, prepared or preserved otherwise than by vinegar or acetic acid, not frozen.....	91	176	67	141
0712.9030—Dried potatoes, whether or not cut or sliced but further prepared ¹	43	51	23	80
0712.9020—Dried olives, ripe.....	24	17	0	88
0813.4090—Fruit not elsewhere specified or included, dried, other than that of headings 0801 to 0806, and excluding mixtures.....	0	23	3	86
1106.3020—Flour, meal and powder of banana and plantain ² ..	14	341	4	66
2103.2040—Tomato sauces, not elsewhere specified or included.....	4	0	3	66
2003.9000—Mushrooms other than of the genus Agaricus, prepared or preserved otherwise than by vinegar or acetic acid	0	0	0	54
2005.7070—Olives (not green), in a saline solution, in airtight containers of glass or metal but not canned.....	4	0	15	52
2008.2000—Pineapples, otherwise prepared or preserved, not elsewhere specified or included.....	155	19	0	39
2002.9080—Tomatoes prepared or preserved otherwise than by vinegar or acetic acid, not elsewhere specified or included..	870	166	22	38
2005.5120—Black-eye cowpeas, shelled, prepared or preserved otherwise than by vinegar or acetic acid, not frozen.	0	4	0	38
2009.4140—Pineapple juice, of a Brix value not exceeding 20, concentrated (in degree of concentration greater than 3.5), unfermented.....	0	0	0	36
0813.5000—Mixtures of nuts or dried fruits of Chapter 8.....	0	20	0	34
2009.9040—Mixtures of fruit juices, or mixtures of vegetable and fruit juices, concentrated or not concentrated.....	63	11	17	30
2008.9210—Mixtures of fruit or edible parts of plants, in airtight containers excluding apricots, citrus, peaches or pears (including canned tropical fruit salad).....	0	0	0	26
2001.9060—Fruits, nuts, and other edible parts of plants, not elsewhere specified or included, prepared or preserved by vinegar or acetic acid.....	0	11	20	18
0712.9040—Dried garlic, whole, cut, sliced, broken or in powder, but not further prepared.....	0	3	0	16
2008.9290—Mixtures of fruit or other edible parts of plants, otherwise prepared or preserved, not elsewhere specified or included (excluding tropical fruit salad).....	0	0	0	12
2008.8000—Strawberries, otherwise prepared or preserved, not elsewhere specified or included.....	0	0	0	10
1105.2000—Flakes, granules and pellets, of potatoes.....	0	3	0	10
2008.3040—Oranges (other than peel or pulp), otherwise prepared or preserved, not elsewhere specified or included.....	0	0	0	5
0812.9040—Pineapples, provisionally preserved, but unsuitable in that state for immediate consumption.....	0	0	0	5
2005.7097—Olives, prepared or preserved otherwise than by vinegar, acetic acid or saline soln, not frozen, not elsewhere specified or included.....	0	72	2	5
0813.4040—Peaches, dried.....	0	0	0	3

(continued)

NAICS-based Industry and Constituent HTS-8 Items Benefiting Exclusively from the ATPA	Value of ATPA Duty-Free U.S. Imports (thousands of dollars)			
	2000	2001	2002	2003
2005.7050—Olives (not green), in a saline solution, canned, not pitted.....	6	9	0	3
2009.6900—Grape juice (including grape must), of a Brix value exceeding 30, unfermented.....	0	0	0	2
2005.7060—Olives (not green), in a saline solution, canned, pitted.....	0	0	3	2
2008.7010—Nectarines, otherwise prepared or preserved, not elsewhere specified or included.....	0	0	0	2
31171—Seafood Products, Prepared, Canned and Packaged, total ATPA duty-free.....	80,225	29,442	4,377	18,917
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>74,870</u>	<u>26,695</u>	<u>4,041</u>	<u>15,934</u>
1604.1440—Tunas and skipjack, not in air tight containers, not in oil, in bulk or in immediate containers.....	74,620	26,505	3,963	15,807
1604.1320—Sardines, not smoked, sardinella, brisling or sprats, neither skinned nor boned, in oil, in airtight containers.	209	172	57	106
1604.1330—Sardines, sardinella, brisling or sprats, skinned or boned, in oil, in airtight containers.....	41	18	21	21
<i>Beverages and Tobacco Products</i>				
31222—Tobacco Products, total ATPA duty-free.....	970	13,925	20,635	55,352
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>964</u>	<u>13,884</u>	<u>20,628</u>	<u>55,315</u>
2402.2080—Cigarettes containing tobacco but not containing clove, paper-wrapped.....	937	13,781	20,524	55,271
2402.1030—Cigars, cheroots and cigarillos containing tobacco, each valued less than 15 cents.....	27	56	104	37
2402.1060—Cigars, cheroots and cigarillos containing tobacco, each valued 15 cents or over but less than 23 cents..	0	47	0	11
<i>Wood Products</i>				
32121—Veneer, Plywood, and Engineered Wood Products, total ATPA duty-free.....	13,435	9,746	6,303	16,134
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>0</u>	<u>0</u>	<u>824</u>	<u>324</u>
4412.2946—Plywood not elsewhere specified or included, at least one hardwood outer ply not elsewhere specified or included, no particle board, surface covered other than clear or transparent ³	0	0	824	322
4412.9956—Plywood not elsewhere specified or included, softwood outer plies, no tropical hardwood ply, no particle board, surface covered other than clear or transparent.....	0	0	0	2
32199—All Other Wood Products, total ATPA duty-free..	13,801	13,031	6,631	17,797
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>47</u>
4421.1000—Wooden clothes hangers.....	0	0	0	36
4601.9990—Products not elsewhere specified or included of plaiting materials (not vegetable), bound together in parallel strands or woven, in sheet form, not elsewhere specified or included.....	0	0	0	8
4421.9085—Clothespins made of wood, other than spring- type.....	0	0	0	3
<i>Nonmetallic Mineral Products</i>				
32711—Pottery, Ceramics and Plumbing Fixtures, total ATPA duty free.....	5,138	10,069	3,774	11,066
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>742</u>	<u>1,447</u>	<u>340</u>	<u>457</u>
6911.1010—Porcelain or china hotel restaurant and nonhousehold table and kitchenware.....	142	227	57	194
6912.0045—Ceramic (other than porcelain or china) household table and kitchenware not in specific sets, cups over \$5.25/dozen, saucers over \$3/dozen, etc.....	38	92	19	176

(continued)

NAICS-based Industry and Constituent HTS-8 Items Benefiting Exclusively from the ATPA	Value of ATPA Duty-Free U.S. Imports (thousands of dollars)			
	2000	2001	2002	2003
6912.0039—Ceramic (other than porcelain or china) household table and kitchenware, in sets in which aggregate value of articles over \$38.....	531	1,098	264	72
6912.0020—Ceramic (other than porcelain or china) hotel, restaurant or nonhousehold tableware and kitchenware.....	0	0	0	7
6911.1058—Porcelain or china (other than bone china) household table and kitchenware not in specific sets, cups over \$29/dozen, saucers over \$18.75/dozen, bowls over \$33/dozen, etc.....	0	0	0	6
6911.1052—Porcelain or china (other than bone china) household table and kitchenware not in specific sets, cups over \$8 but not over \$29/dozen, saucers over \$5.25 but not over \$18.75/dozen, etc.....	31	30	0	2
32712—Clay and Refractory Building Materials, total ATPA duty-free.....	11,870	10,620	6,863	17,042
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>9,696</u>	<u>8,187</u>	<u>5,928</u>	<u>15,929</u>
6908.9000—Glazed ceramic flags and paving, hearth or wall tiles; glazed ceramic mosaic cubes and the like, not elsewhere specified or identified.....	8,392	7,209	5,323	14,284
6907.9000—Unglazed ceramic flags, paving, hearth or wall tiles, mosaic cubes and the like, not elsewhere specified or included.....	660	303	293	674
6908.1050—Glazed ceramic tiles, cubes and similar articles with largest area enclosable in square with sides under 7 cm, not elsewhere specified or included.....	562	552	261	672
6907.1000—Unglazed ceramic tiles, cubes and similar articles with largest area enclosable in square with sides under 7 cm, not elsewhere specified or included.....	82	123	51	299
<i>Primary Metal Manufacturing</i>				
33131—Alumina and Aluminum and Processing, total ATPA duty-free.....	3,231	6,133	3,604	10,273
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>85</u>	<u>503</u>	<u>657</u>	<u>2,183</u>
7604.2100—Aluminum alloy, hollow profiles.....	70	427	591	2,161
7614.9040—Aluminum, stranded wire, cables and the like (other than electrical conduct or with steel core), not electrically insulated, not fitted with fittings or articles.....	15	76	66	22
33141—Nonferrous Metal (except aluminum) Smelting and Refining, total ATPA duty-free.....	625,053	464,057	255,267	459,925
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>568,844</u>	<u>432,832</u>	<u>248,663</u>	<u>448,079</u>
7403.1100—Refined copper cathodes and sections of cathodes ¹	565,651	429,379	248,663	447,368
7901.1210—Zinc (other than alloy), unwrought, casting-grade zinc, containing at least 97.5% but less than 99.99% by weight of zinc.....	3,193	3,453	0	577
7403.1200—Refined copper, wire bars ¹	0	0	0	134
<i>Miscellaneous Manufactured Products</i>				
33991—Jewelry and Silverware, total ATPA duty-free....	158,412	149,198	77,586	123,341
<u>HTS-8 numbers benefiting exclusively from the ATPA, total..</u>	<u>18,565</u>	<u>9,065</u>	<u>8,657</u>	<u>10,702</u>
7113.1921—Gold rope necklaces and neck chains ¹	18,656	9,065	8,657	10,685
7114.1145—Sets of two or more knives or forks with silver handles or spoons and ladles of silver, whether or not clad or plated with precious metal.....	0	0	0	12

(continued)

NAICS-based Industry and Constituent HTS-8 Items Benefiting Exclusively from the ATPA	Value of ATPA Duty-Free U.S. Imports (thousands of dollars)			
	2000	2001	2002	2003
8215.9905—Base metal forks, with stainless steel handles containing nickel or over 10% by weight of manganese, not elsewhere specified or included.....	0	0	0	5

¹Includes only imports from Peru. Item is GSP-eligible, but imports from Peru exceeded the competitive need limit and thus were eligible for duty-free entry only under the ATPA.

²Includes only imports from Colombia. Item is GSP-eligible, but imports from Colombia exceeded the competitive need limit and thus were eligible for duty-free entry only under the ATPA.

³Includes only imports from Ecuador. Item is GSP-eligible, but imports from Ecuador exceeded the competitive need limit and thus were eligible for duty-free entry only under the ATPA.

Note: "0" indicates less than \$500 or zero; "total ATPA duty-free" for each NAICS-based industry also includes items eligible for duty-free entry under the GSP program. Also, excludes duty-free entries under the ATPDEA. Excludes all HTS-8 items that benefited exclusively under the ATPA in 2003 under NAICS 33111—Iron and Steel and Ferroalloy, which all became NTR duty-free in 2004 and five other leading ATPA duty-free NAICS-based industries in which all constituent HTS-8 numbers were also eligible for duty-free entry under the GSP program (NAICS 31131—Sugars; NAICS 32191—Millwork; NAICS 32521—Resin and Synthetic Rubbers; NAICS 32619—Other Plastics Products; and NAICS 33142—Copper Rolling, Drawing, Extruding, and Alloying). Duty-free benefits under the ATPA lapsed in December 2001 and then resumed in August 2002. The value of U.S. imports is the customs value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones).

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

Table 10: ATPDEA Duty-Free U.S. Imports by NAICS-based Industry and Constituent HTS-8 Numbers that Benefited from the ATPDEA, 2002 and 2003
(thousands of dollars)

NAICS-based Industry and HTS-8 Number	2002	2003
Total ATPDEA Duty-Free U.S. Imports from the Beneficiary Countries.....	212,269	4,211,384
21—Oil, Gas, Minerals and Ores.....	186,376	2,991,572
211—Oil and Gas.....	186,376	2,991,572
21111—Oil and Gas.....	186,376	2,991,572
2709.0020—Petroleum oils and oils from bituminous minerals, crude, testing 25 degrees A.P.I. or more.....	66,571	1,556,843
2709.0010—Petroleum oils and oils from bituminous minerals, crude, testing under 25 degrees A.P.I.....	119,804	1,434,729
31-33—Manufacturing.....	25,893	1,219,791
311—Food Manufacturing.....	0	28,236
31171—Seafood Products, Prepared, Canned and Packaged.....	0	28,236
1604.1430—Tunas and skipjack, not in oil, in airtight containers, not over 7 kg, not of U.S. possessions, over quota ¹	0	25,474
1604.1410—Tunas and skipjack, whole or in pieces, but not minced, in oil, in airtight containers ¹	0	2,762
315—Apparel and Accessories.....	65	756,503
31511—Hosiery and Socks.....	0	25,577
6115.9290—Stockings, socks, etc. nesoi (not surgical and not containing lace or net), knitted or crocheted, of cotton.....	0	13,000
6115.9390—Stocking, socks, etc. nesoi, knitted or crocheted, of synthetic fibers (not containing lace or net).....	0	7,079
6115.1100—Panty hose and tights, knitted or crocheted, of synthetic fibers, measuring per single yarn less than 67 decitex.....	0	3,045
6115.2090—Women’s full-length or knee-length hosiery, measuring per single yarn less than 67 decitex containing under 70% by weight of silk, knitted or crocheted.....	0	2,051
All other.....	0	402
31522—Men’s and Boys’ Apparel.....	0	366,892
6105.1000—Men’s and boys’ shirts, knitted or crocheted, of cotton....	0	115,382
6110.2020—Sweaters, pullovers and similar articles, knitted or crocheted, of cotton, nesoi.....	0	71,872
6203.4240—Men’s and boys’ trousers and shorts, not bibs, not knitted or crocheted, of cotton, not containing 15% or more by weight of down.....	0	50,922
6109.1000—T-shirts, singlets, tank tops and similar garments, knitted or crocheted, of cotton.....	0	34,555
6110.3030—Sweaters, pullovers and similar articles, knitted or crocheted, of manmade fibers, nesoi.....	0	13,971
6203.3190—Men’s and boys suit-type jackets and blazers, of wool or fine animal hair, not knitted or crocheted.....	0	10,018
All other.....	0	70,172
31523—Women’s and Girls’ Apparel.....	0	338,494
6110.2020—Sweaters, pullovers and similar articles, knitted or crocheted, of cotton, nesoi.....	0	130,390
6109.1000—T-shirts, singlets, tank tops and similar garments, knitted or crocheted, of cotton.....	0	50,004
6204.6240—Women’s and girls’ trousers, breeches and shorts, not knitted or crocheted, of cotton, nesoi.....	0	37,888

(continued)

NAICS-based Industry and HTS-8 Number	2002	2003
6106.1000—Women's and girls' blouses and shirts, knitted or crocheted, of cotton.....	0	29,743
6104.6220—Women's and girls' trousers, breeches and shorts, knitted or crocheted, of cotton.....	0	10,324
6112.4100—Women's and girls' knitted or crocheted swimwear of synthetic fibers.....	0	8,944
All other.....	0	71,201
<u>31529—Other Apparel.....</u>	<u>65</u>	<u>23,475</u>
6111.2060—Babies' garments and clothing accessories, knitted or crocheted, of cotton, nesoi.....	0	7,529
6111.2030—Babies' sweaters, pullovers, sweatshirts and similar articles, except those imported as parts of sets, knitted or crocheted, of cotton.....	0	4,388
6209.2030—Babies' trousers, breeches and shorts, except those imported as parts of sets, not knitted or crocheted, of cotton.....	0	3,060
6209.2050—Babies' garments and clothing accessories nesoi, of cotton, including sunsuits and similar apparel, sets and parts of sets, and diapers, not knitted or crocheted.....	0	2,011
6111.2020—Babies' T-shirts, singlets and similar garments, except those imported as parts of sets, of cotton.....	0	1,292
6111.2010—Babies' blouses and shirts, except those imported as parts of sets, knitted or crocheted, of cotton.....	0	1,160
All other.....	65	4,036
<u>31599—Apparel Accessories.....</u>	<u>0</u>	<u>2,065</u>
6214.2000—Shawls, scarves, mufflers, mantillas, veils and the like, not knitted or crocheted, of wool or fine animal hair.....	0	502
6505.9050—Hats and headgear, of manmade fibers, knitted or crocheted or made up from knitted or crocheted fabric, wholly or in part of braid.....	0	383
6116.9100—Gloves, mittens and mitts, knitted or crocheted, of wool or fine animal hair.....	0	284
6117.1010—Shawls, scarves, mufflers, mantillas, veils and the like, knitted or crocheted, of wool or fine animal hair.....	0	273
6505.9030—Hats and headgear, of wool, knitted or crocheted or made up from knitted or crocheted fabric.....	0	214
All other.....	0	409
316—Leather and Allied Products.....	2,229	20,826
<u>31621—Footwear.....</u>	<u>339</u>	<u>3,935</u>
6403.9990—Footwear with outer soles of rubber/plastics/composition leather and uppers of leather, not covering the ankle, for women/children/infants, valued over \$2.50/pair.....	193	1,998
6403.5990—Footwear with outer soles and uppers of leather, not covering the ankle, no welt, for persons other than men, youths and boys.....	41	423
6403.9960—Footwear with outer soles of rubber/plastics/composition leather and uppers of leather, not covering the ankle, no welt, for men, youths and boys, nesoi.....	35	293
6403.5960—Footwear with outer soles and uppers of leather, not covering the ankle, no welt, for men, youths and boys.....	7	277
6404.1935—Footwear with outer soles of rubber/plastics/composition leather and uppers of textile, nesoi, with open toes/heels or slip-on type, 10% or more by weight of rubber/plastic.....	0	184
6403.9190—Footwear with outer soles of rubber/plastics/composition leather and uppers of leather, covering the ankle, no welt, for persons other than men, youths and boys.....	(?)	176
All other.....	64	584
<u>31699—Other Leather Products.....</u>	<u>1,890</u>	<u>16,891</u>
4202.9100—Cases, bags and containers nesoi, with outer surface of leather, of composition leather or patent leather.....	1,061	5,879

(continued)

NAICS-based Industry and HTS-8 Number	2002	2003
4202.2160—Handbags, with or without shoulder strap or without handle, with outer surface of leather, composition leather or patent leather nesoi, not over \$20 each.....	308	3,804
4202.1100—Trunks, suitcases, vanity and all other cases, occupational luggage and like containers, surface of leather, composition or patent leather.....	295	3,103
4202.2190—Handbags, with or without shoulder strap or without handle, with outer surface of leather, composition leather or patent leather nesoi, over \$20 each.....	99	1,880
4202.2130—Handbags, with or without shoulder strap or without handle, with outer surface of reptile leather.....	0	1,307
4202.3160—Articles of a kind normally carried in the pocket or handbag, with outer surface of leather, composition or patent leather, nesoi.....	113	829
All other.....	13	89
324—Petroleum and Coal Products.....	23,593	414,226
<u>32411—Petroleum Refinery Products.....</u>	<u>23,593</u>	<u>414,226</u>
2710.1905—Distillate and residual fuel oil (including blends) derived from petroleum or oils from bituminous minerals, testing under 25 degrees A.P.I.....	7,263	236,458
2710.1125—Naphthas (except motor fuel/motor fuel blending stock) from petroleum oils and bituminous minerals (other than crude) or preparations 70% or more by weight from petroleum oils.....	9,722	174,970
2710.1915—Kerosene-type jet fuel from petroleum oils and oils of bituminous minerals (other than crude) or preparations 70% or more by weight from petroleum oils.....	0	2,184
2710.1910—Distillate and residual fuel oil (including blends) derived from petroleum oils or oil of bituminous minerals, testing 25 degrees A.P.I. or more.....	6,584	615
All other.....	24	0
339—Miscellaneous Manufactured Products.....	6	17
<u>33992—Sporting and Athletic Goods.....</u>	<u>6</u>	<u>17</u>
4202.9100—Cases, bags and containers nesoi, with outer surface of leather, of composition leather or patent leather.....	6	17
All Other³.....	0	4

¹Consists entirely of tunas in foil or flexible airtight containers (see HTS 9821.0101).

²Less than \$500.

³Includes reported entries under NAICS 323—Printing, Publishing and Similar Products of products that entered NTR duty-free.

Note: The abbreviation, nesoi, stands for “not elsewhere specified or included.” The ATPDEA duty-free provisions were in effect for only the last two months of 2002. The value of U.S. imports is the customs value (the appraised value of the merchandise, exclusive of import duties, freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the port of exportation) of U.S. imports for consumption (the amount that immediately enters U.S. consumption channels, but not bonded warehouses or Foreign Trade Zones). Because of rounding, figures may not add to totals shown.

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

Table 11: Nonagricultural U.S. Payroll Employment by Industry Sector and Subsectors, 1990-2004
(all employees in thousands, annual average)

Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
GOODS-PRODUCING	23,723.0	22,588.0	22,085.0	22,219.0	22,774.0	23,156.0	23,410.0	23,885.0	24,354.0	24,465.0	24,649.0	23,873.0	22,557.0	21,816.0	21,884.0
Natural resources and mining	785.0	739.0	699.0	665.0	641.0	637.0	654.0	654.0	645.0	599.0	599.0	606.0	583.0	572.0	591.0
Mining	680.1	630.5	609.8	584.9	576.5	568.1	566.4	571.3	564.7	517.4	520.2	522.5	512.2	502.7	523.2
Construction	5,263.0	4,780.0	4,699.0	4,778.0	5,095.0	5,274.0	5,536.0	5,813.0	6,149.0	6,540.0	6,787.0	6,826.0	6,716.0	6,735.0	6,964.0
Manufacturing	17,685.0	17,088.0	16,789.0	16,774.0	17,021.0	17,241.0	17,237.0	17,418.0	17,590.0	17,322.0	17,263.0	16,441.0	15,259.0	14,510.0	14,329.0
Durable goods	10,736.0	10,219.0	9,945.0	9,900.0	10,131.0	10,372.0	10,485.0	10,704.0	10,910.0	10,850.0	10,876.0	10,353.0	9,483.0	8,963.0	8,923.0
Wood products	540.6	496.5	501.9	524.1	590.6	573.7	582.8	609.2	620.3	620.3	613.0	574.1	554.9	537.6	548.4
Nonmetallic mineral products	529.4	494.7	497.3	491.1	505.3	513.1	517.3	525.7	535.3	540.9	544.5	516.0	494.2	504.8	504.8
Primary metals	989.6	956.1	930.3	918.4	930.4	941.7	939.3	938.8	941.5	925.0	921.8	970.9	909.4	477.4	465.9
Fabricated metal products	1,610.0	1,541.3	1,497.2	1,509.5	1,585.3	1,623.4	1,647.5	1,695.8	1,739.5	1,728.4	1,792.6	1,876.4	1,548.5	1,478.9	1,487.5
Machinery	1,407.8	1,345.8	1,309.1	1,328.8	1,379.2	1,440.2	1,466.8	1,493.7	1,511.9	1,496.1	1,454.7	1,388.3	1,229.5	1,149.4	1,141.5
Computer and electronic products	1,802.5	1,809.3	1,707.3	1,686.0	1,651.1	1,688.4	1,745.6	1,803.3	1,830.9	1,780.5	1,820.0	1,748.8	1,507.2	1,355.2	1,326.2
Electrical equipment and appliances	833.1	597.7	579.4	575.8	588.5	592.8	591.0	586.3	591.6	588.0	590.9	556.9	496.5	459.6	448.8
Transportation equipment	2,133.3	2,028.2	1,978.9	1,913.7	1,936.1	1,977.2	1,973.7	2,026.2	2,077.0	2,087.3	2,055.8	1,937.9	1,628.9	1,774.1	1,763.5
Furniture and related products	801.4	581.0	582.8	575.4	600.2	606.7	603.8	615.1	641.2	664.8	679.7	642.4	604.1	572.9	572.7
Miscellaneous manufacturing	690.4	686.8	692.5	707.4	713.8	714.5	715.6	723.1	731.7	729.0	733.0	714.5	688.3	683.3	655.5
Nondurable goods	9,959.0	9,849.0	9,854.0	9,873.0	9,890.0	9,899.0	9,722.0	9,716.0	9,650.0	9,492.0	9,388.0	9,107.0	8,775.0	8,547.0	8,406.0
Food manufacturing	1,507.3	1,515.2	1,518.3	1,534.6	1,539.2	1,560.0	1,562.0	1,557.9	1,554.9	1,549.8	1,553.1	1,551.2	1,525.7	1,517.5	1,497.4
Beverages and tobacco products	217.7	214.7	208.5	207.1	204.6	202.6	204.4	208.3	208.9	208.3	207.0	209.0	207.4	199.6	194.3
Textile mills	481.8	479.9	479.0	478.7	477.6	489.5	443.2	436.2	424.5	397.1	378.2	332.9	290.8	261.3	238.5
Textile product mills	209.3	189.4	202.0	207.3	218.8	219.0	216.3	217.0	217.1	217.3	216.3	205.7	194.6	179.3	177.7
Apparel	929.1	902.6	905.2	882.5	856.3	814.1	743.1	700.2	699.0	555.6	496.8	426.5	359.7	312.3	284.8
Leather and allied products	133.2	124.4	120.8	118.1	113.9	104.9	84.2	89.5	82.9	74.9	68.8	58.0	50.2	44.5	42.9
Paper and paper products	847.2	699.5	699.6	699.7	699.4	699.5	691.4	690.5	694.9	615.6	604.7	577.6	546.6	519.2	489.1
Printing and related support activities	808.6	792.3	760.2	785.2	802.2	817.3	815.8	821.1	827.9	814.6	808.8	768.4	706.6	680.5	665.0
Petroleum and coal products	152.8	154.8	152.3	148.2	144.0	140.4	137.3	136.0	134.5	127.8	123.2	121.1	118.1	114.3	112.8
Chemicals	1,035.7	1,024.1	1,028.9	1,024.9	1,004.7	987.9	984.5	986.8	982.6	982.5	980.4	959.0	927.5	906.1	887.0
Plastics and rubber products	825.9	803.2	819.0	849.0	869.4	915.1	920.1	934.1	942.8	948.3	952.2	897.4	848.0	815.4	806.6
SERVICE-PROVIDING	65,764.0	65,787.0	66,631.0	66,625.0	67,117.0	67,142.0	67,299.0	67,890.0	68,528.0	69,176.0	69,784.0	70,352.0	70,952.0	71,548.0	72,144.0
Trade, transportation, and utilities	22,666.0	22,281.0	22,125.0	22,378.0	23,129.0	23,834.0	24,299.0	24,700.0	25,166.0	25,771.0	26,225.0	25,983.0	25,497.0	25,297.0	25,107.0
Wholesale Trade	5,288.4	5,185.3	5,109.7	5,093.2	5,247.3	5,433.1	5,522.0	5,603.9	5,795.2	5,892.5	5,933.2	5,727.2	5,652.3	5,607.5	5,654.9
Retail Trade	13,182.3	12,896.4	12,827.9	13,020.5	13,499.8	13,896.7	14,142.5	14,368.9	14,609.3	14,970.1	15,279.8	15,239.6	15,025.1	14,917.3	15,034.7
Transportation and Warehousing	3,475.6	3,462.8	3,461.8	3,553.8	3,701.0	3,837.8	3,955.3	4,026.6	4,108.0	4,200.3	4,410.3	4,372.0	4,223.6	4,185.4	4,250.0
Utilities	740.0	738.1	726.0	710.7	699.3	686.2	699.6	690.8	613.4	608.5	601.3	599.4	586.2	577.0	570.2
Information	2,688.0	2,677.0	2,641.0	2,698.0	2,738.0	2,843.0	2,940.0	3,064.0	3,218.0	3,418.0	3,631.0	3,629.0	3,395.0	3,189.0	3,138.0
Financial activities	6,614.0	6,558.0	6,540.0	6,709.0	6,867.0	6,827.0	6,869.0	7,178.0	7,482.0	7,648.0	7,697.0	7,807.0	7,847.0	7,977.0	8,052.0
Professional and business services	10,848.0	10,714.0	10,970.0	11,495.0	12,174.0	12,844.0	13,492.0	14,395.0	15,147.0	15,957.0	16,866.0	16,476.0	15,976.0	15,987.0	16,414.0
Education and health services	10,894.0	11,506.0	11,891.0	12,303.0	12,807.0	13,288.0	13,693.0	14,097.0	14,446.0	14,798.0	15,108.0	15,645.0	16,199.0	16,588.0	16,954.0
Leisure and hospitality	9,288.0	9,256.0	9,437.0	9,792.0	10,100.0	10,501.0	10,777.0	11,018.0	11,232.0	11,453.0	11,696.0	12,039.0	12,178.0	12,479.0	12,479.0
Other services	4,261.0	4,249.0	4,240.0	4,350.0	4,428.0	4,572.0	4,690.0	4,825.0	4,976.0	5,097.0	5,168.0	5,258.0	5,372.0	5,401.0	5,431.0
Government	18,415.0	18,545.0	18,787.0	18,989.0	19,275.0	19,432.0	19,599.0	19,984.0	20,307.0	20,307.0	20,790.0	21,118.0	21,513.0	21,583.0	21,618.0
TOTAL NONFARM	109,487.0	108,374.0	108,726.0	110,844.0	114,291.0	117,298.0	119,708.0	122,776.0	125,930.0	128,993.0	131,785.0	131,826.0	130,341.0	129,990.0	131,480.0

Source: Payroll Employment Establishment Survey, U.S. Department of Labor, Bureau of Labor Statistics