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Shifts in U.S. Merchandise Trade 2003

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This report was prepared principally by the Office of Industries

Project Team

Heather Sykes, *Project Leader*
heather.sykes@usitc.gov
(202) 205-3436

Judith-Anne Webster, *Assistant Project Leader*

Primary Reviewers

Joanna Bonarriva, *Office of Industries*
Nannette Christ, *Office of Economics*

with assistance from:

Diane Bennett, Judith Bryant, Joanne Guth, Sharon Greenfield, Thomas Jennings, Magda Kornis,
Diane Manifold, Monica Reed, Wanda Tolson, Janice Wayne, and authors from the
Office of Industries as noted throughout the report

Peg MacKnight, *Office of Operations*

Office of Publishing

Office of Information Services:

Mara Alexander, Barbara Bobbitt, Harold Brown, Barbara Bryan, Lita David-Harris,
Kenneth R. Kozel, Darlene Smith, and Peggy Verdine

under the direction of
David Lundy, *Chief*

Industrial Minerals and Nonferrous Metals Branch

Larry Brookhart, *Chief*
Minerals, Metals, Machinery, and Miscellaneous Manufactures Division

UNITED STATES INTERNATIONAL TRADE COMMISSION'S
Shifts in U.S. Merchandise Trade 2003

Shifts in U.S. Merchandise Trade 2003 is the most recent of this series of reports, issued annually in July, that responds to Congressional interest in providing a systematic means of examining and reporting on the significance of major trade shifts, by product and with leading U.S. trade partners.

A major part of this report is a series of online web-pages that are maintained by the Commission. These web pages can be accessed through www.usitc.gov/tradeshifts/default.htm.

Shifts in U.S. Merchandise Trade 2003 includes:

- An analysis of U.S. merchandise trade performance

Sector shifts:

- Agricultural Products
- Forest Products
- Chemicals and Related Products
- Energy-Related Products
- Textiles, Apparel, and Footwear
- Minerals and Metals
- Machinery
- Transportation Equipment
- Electronic Products
- Miscellaneous Manufactures

Country shifts:

- Canada
- China
- European Union
- Japan
- Mexico

- FAQs

For questions or comments on this information, please contact Heather Sykes, project leader, at (202) 205-3436 or heather.sykes@usitc.gov.

U.S. Merchandise Trade Performance

Linda White
(202) 205-3427
linda.white@usitc.gov

During 2003, U.S. total merchandise trade (exports plus imports) increased by \$117 billion (by about 7 percent) to \$1.9 trillion, after decreasing for 2 consecutive years. U.S. total merchandise trade represented 73 percent of total U.S. combined trade (exports plus imports of merchandise and services)¹ and 17 percent of nominal U.S. gross domestic product. Although exports and imports rose, the U.S. merchandise trade deficit expanded from \$525.2 billion in 2002, to \$598.7 billion in 2003, as imports increased more than export growth.²

Economic activity improved for the United States and many of its trading partners in 2003, which contributed to increased U.S. exports and imports.³ U.S. economic growth in the first few months of 2003 was constrained, however, by vestiges of 2002, such as corporate governance scandals, capital overhang,⁴ and uncertainties associated with the war in Iraq. During the spring, household spending started to rebound as military action in Iraq became decisive and equity markets rallied. However, businesses remained cautious as capital investment remained weak and private payroll employment continued to decline. About midway through the year, the Federal Reserve—concerned by the continued slow pace of economic activity and further reduction in the rate of inflation from an already low level—cut the federal funds rate to 1 percent.⁵ The Jobs and Growth Tax Relief Reconciliation Act (JGTRRA), signed into law earlier in the year, also became effective and contributed to economic recovery by boosting disposable personal income through accelerated tax reductions originally scheduled to become effective during

¹ Total U.S. combined trade increased by \$153 billion (6 percent) during 2003 to \$2.6 trillion, according to statistics of the U.S. Department of Commerce (USDOC).

² The causes and implications of trade deficits have been a subject of much debate. Articles that discuss this issue include U.S. International Trade Commission, *The Impact of Trade Agreements* (Inv. No. TA-2111-1), USITC publication 3621, Aug. 2003; *The Federal Reserve Bank of Chicago-Detroit FedPoints*, “The Upside of Trade Deficits,” Sept.-Oct. 2000, found at <http://www.chicagofed.org/publications/index.cfm>; *The U.S. Trade Deficit: Causes, Consequences, and Recommendations for Action*, Washington, DC: U.S. Trade Deficit Review Commission, Nov. 14, 2000; Pingfan Hong, “Global Implications of the U.S. Trade Deficit Adjustment,” UN/DESA Discussion Paper No. 17, Feb. 2001 and Stefan Papaioannou; Daniel T. Griswold, “The U.S. Trade Deficit and Jobs: The Real Story,” Center for Trade Policy Studies Free Trade Bulletin No. 3, Cato Institute, Feb. 2003; and Robert E. Scott, “Fast Track to Lost Jobs: Trade Deficits and Manufacturing Decline are the Legacy of NAFTA and the WTO,” Economic Policy Institute Briefing Paper, found at <http://www.epinet.org/briefingpapers/118/bp118.pdf>, retrieved May 13, 2004.

³ Information on the economic background for U.S. merchandise trade performance in 2003 was principally derived from USDOC, BEA, *Survey of Current Business*, Mar. 2004, pp. D-2 to D-7; Council of Economic Advisors, *Economic Report of the President*, together with the *Annual Report of the Council of Economic Advisors*, Feb. 2004, pp. 17-103; Federal Reserve Board of Governors, *Monetary Policy Report to the Congress*, Feb. 11, 2004; and OECD, “General Assessment of the Macroeconomic Situation,” and “United States,” *OECD Economic Outlook* (Paris: OECD, Dec. 2003), pp. 1-42.

⁴ Capital overhang is related to capital investment, and refers to the amount of equipment firms have on hand that exceeds the amount of equipment needed for profitable use. See Office of the President, *Economic Report of the President*, (Washington D.C.: GPO, Feb. 2004), p. 35.

⁵ Federal Reserve Board, *Monetary Policy Report to the Congress*, Sec. 1: Monetary Policy and the Economic Outlook, Feb. 11, 2004, p. 1.

2004-2008.⁶ JGTRRA also improved the investment environment for businesses by increasing the immediate deduction amount from \$25,000 to \$100,000 for small business investments.⁷ For all businesses, JGTRRA increased the first-year bonus depreciation deduction from 30 percent to 50 percent for investments placed in service between May 5, 2003 and January 1, 2005.⁸ By year end, economic growth had accelerated and posted an estimated 3.1-percent increase in real gross domestic product.⁹

According to the Federal Reserve Board, aggregate consumer spending was an important source of support for economic growth, facilitated by lower interest rates and higher disposable income, which was enhanced by the midyear tax relief. As in the previous year, low interest rates continued to stimulate household spending on durable goods and mortgage refinancing, with the extra equity used to support other purchases. Motor vehicle consumption remained strong, sustained by low interest rates and incentive packages offered by manufacturers throughout the year.¹⁰ Furniture and household equipment also recorded increased sales, likely induced by the growth in home sales.¹¹

As the overall economy showed signs of gaining momentum, many businesses began to accelerate purchases of information processing equipment and software.¹² Spending on defense also contributed to increased economic activity.¹³ The combination of sustained efforts by businesses to control production costs over the past several years and growing demand in the last half of 2003 reportedly generated increased productivity, higher profits, and improved cash flow,¹⁴ which likely improved the environment for new investments. Further, additional impetus supporting increased investment spending was attributable to continued low interest rates, improved equity values, and the enhanced partial-expensing tax provision of the tax relief act.¹⁵ The U.S. dollar weakened against the currencies of many U.S. trading partners that experienced economic growth during 2003, and this contributed to an improving position of U.S. merchandise in the world market.

⁶ Most people started receiving tax savings benefits shortly after the effective date as employers generally reduced the amount of taxes withheld from their employee's paychecks, reflecting lower taxes and larger standard deductions for married couples. Also, the Internal Revenue Service paid in advance the increased Child Tax Credit based on the child tax credit claim filed in 2002 tax returns. See "New Law's Tax Cuts Mean Extra Cash Now," The News Room, Internal Revenue Service, found at <http://www.irs.ustreas.gov/newsroom/article/0%2C%2Cid=109816...>, retrieved May 6, 2004.

⁷ U.S. Department of Treasury, Office of Public Affairs, "Tax Provisions of the Jobs and Growth Tax Relief Reconciliation Act of 2003," found at <http://www.ustreas.gov/press/releases/js408.htm>, retrieved May 6, 2004.

⁸ Ibid.

⁹ U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Mar. 2004, p. D-2.

¹⁰ During 2002-03, U.S. personal consumption expenditures on motor vehicles and parts increased by \$18.2 billion (4 percent) to \$441.5 billion. See U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Mar. 2004, p. D-11.

¹¹ Investments in single family homes increased by \$22.4 billion (9-percent) to \$269.3 billion in 2003. See U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Mar. 2004, p. D-40.

¹² Investments in information processing equipment and software increased by \$63.4 billion (14 percent) to \$522.7 billion in 2003. See U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Mar. 2004, p. D-40.

¹³ In 2003, real defense expenditures on durable and nondurable goods rose by an estimated \$1.6 billion (almost 5-percent) to \$37 billion. See U.S. Department of Commerce, Bureau of Economic Analysis, *Survey of Current Business*, Mar. 2004, p. D-29.

¹⁴ The Federal Reserve Board, *Monetary Policy Report to the Congress*, Sec. 2, "Economic and Financial Developments in 2003 and Early 2004," pp. 6-7.

¹⁵ Ibid.

U.S. TRADE BY INDUSTRY/COMMODITY GROUPS AND SECTORS

U.S. Trade Balance

During 1999-2003, expansion of the U.S. merchandise trade deficit reflected significant shifts in exports and imports of key industry/commodity sectors (see table US-1).¹⁶ Most major sectors registered trade deficits each year during this period. The exception was agricultural products, which recorded a trade surplus in each of the past 5 years. The surplus in 2003 was supported by increased exports of oilseeds and cotton to China. Chemical and related products also registered a trade surplus in 1999, but shifted to a deficit in 2000, which has since expanded seven-fold. A major contributing factor in 2003 was the continued increase of imported medicinal chemicals from Ireland and other Western European countries by U.S. owned multinational chemical companies. Energy-related products, however, recorded the largest deficit during the 5-year period, which more than doubled since 1999 largely owing to the sizeable expansion in 2003, as higher priced crude petroleum and natural gas dominated increased imports. The deficit in the electronic products sector expanded by nearly 50 percent during the past 5 years. Competitively priced telecommunication apparatus, medical goods, and television equipment imports were the major contributors to the 2003 expansion. The other sectors followed suit, although by smaller amounts, sustaining the overall 1999-2003 expansionary trend in the U.S. merchandise trade deficit to \$598.7 billion.

U.S. Exports

During 1999-2003, U.S. exports for several merchandise industry sectors fluctuated upward for an overall increase of \$9.2 billion (1 percent) to \$651.4 billion, but not before dropping to a low of \$629.6 billion in 2002 (see table US-1). Although multiple industry groups contributed to the 2003 increase, semiconductors and integrated circuits, medicinal chemicals, and motor vehicles were the top three, together accounting for \$10.9 billion or half of the net export growth that year. The 5-year export trend for semiconductors and integrated circuits (part of the electronic products sector) recorded a decrease of \$903 million (3 percent) to \$35.7 billion in 2003 (table US-2). The downward trend for semiconductor exports was reversed in 2003 by the significant \$4-billion increase, benefitting from a relatively strong global recovery of its two largest end markets, computers and telecommunications equipment. Medicinal chemicals (part of the chemical sector), recorded annual export increases in each of the past 5 years for an overall growth of \$8.8 billion (64 percent) to \$22.5 billion in 2003. A combination of growing demand from aging populations, higher drug prices, and globalization of the industry contributed to the continued increases. Motor vehicles (part of the transportation equipment sector) recorded an overall 5-year export growth of \$7.3 billion (33 percent) to reach \$29.4 billion. In 2003 alone, motor vehicle exports grew by \$3.2 billion as U.S. manufactured Japanese-brand luxury vehicles increased their Canadian market share. Further analysis of these and other major (\$1.5 billion plus) 2003 export increases (see table US-2) are provided in corresponding industry/commodity sector overviews.

The most significant decrease in U.S. exports was recorded by the aircraft, spacecraft, and related equipment industry (part of the transportation equipment sector), which dropped by almost \$10 billion (21 percent) during the past five years to \$37.8 billion (see table US-2). The 2003 decrease of \$3.6 billion was primarily owing to reduced global demand for new large civil aircraft, as airlines of the world incurred both financial problems and reduced passenger traffic. Telephone and telegraph apparatus (part of the electronic products sector) was the other major export decrease in 2003, resulting in an overall 5-year drop of \$6.7 billion (38 percent) to \$10.9 billion. Contributing factors to the 2003 decrease included competitive cellular phone prices in Asian markets and reduced network investments as several major export markets completed infrastructure projects.

¹⁶ The exception was in 2001 when the trade deficit narrowed before expanding again the following year.

U.S. Imports

During 1999-2003, U.S. imports for all merchandise industry sectors recorded an overall increase of \$232.7 billion (23 percent) to about \$1.3 trillion, of which \$95.3 billion occurred in the last year (see table US-1). Although a number of industry groups recorded major (\$1.5 billion and greater) growth in imports in 2003, crude petroleum, natural gas and components, and medicinal chemicals accounted for 40 percent of the net import increase (see table US-2). Imports for each of these three industry groups more than doubled during the 5-year period.

Contributing factors to the 2003 rise in crude petroleum imports, up by \$18.8 billion (34 percent) to \$73.5 billion, included higher world prices, increased U.S. demand, and reduced domestic production. Imports of natural gas and components increased by \$10.3 billion (55 percent) to \$28.9 billion in 2003, reflecting higher prices. Lastly, imports of medicinal chemicals increased by \$8.6 billion (21 percent) to \$49.3 billion in 2003 as multinational pharmaceutical companies continued to outsource manufacturing to the United Kingdom, Germany, and Ireland.

The most significant decreases (down by \$1.5 billion and greater) in 2003 imports were recorded by aircraft engines and gas turbines (part of the transportation equipment sector) and steel mill products (part of the minerals and metals sector) (see table US-2). Both industry groups also showed a decreasing trend during 1999-2003, with aircraft engines and gas turbines down by \$2.2 billion (20 percent) to \$8.8 billion and steel mill products down by \$1.7 billion (14 percent) to \$10.5 billion. The 2003 decrease of \$2.2 billion in aircraft engines and gas turbines reflected the decline in U.S. production of large civil aircraft. Contributing factors to the \$1.7-billion decrease in imported steel mill products included tariffs and tariff-rate quotas imposed by the President on imports of certain steel products, a 1-percent reduction in U.S. demand, and the higher value of the euro relative to the U.S. dollar, which made imported EU steel mill products less competitive in the U.S. market.

Table US-1

U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major industry/commodity sectors, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. exports of domestic merchandise:							
Agricultural products	55,569	59,112	60,109	58,345	64,706	6,361	10.9
Forest products	24,070	26,434	23,743	22,825	23,566	740	3.2
Chemicals and related products	81,240	92,433	91,274	91,702	102,330	10,628	11.6
Energy-related products	11,957	15,529	15,073	14,431	16,639	2,208	15.3
Textiles and apparel	18,723	20,353	18,118	17,298	17,033	-265	-1.5
Footwear	693	664	638	520	495	-25	-4.8
Minerals and metals	39,890	47,280	43,507	39,924	42,980	3,056	7.7
Machinery	67,201	79,508	69,552	63,262	63,462	200	0.3
Transportation equipment	145,716	143,393	144,325	144,655	142,948	-1,707	-1.2
Electronic products	162,146	188,989	160,610	140,428	140,838	411	0.3
Miscellaneous manufactures	15,270	16,872	16,428	15,004	14,859	-146	-1.0
Special provisions	19,714	21,721	22,644	21,205	21,570	365	1.7
Total	642,189	712,287	666,021	629,599	651,424	21,825	3.5
U.S. imports of merchandise for consumption:							
Agricultural products	49,469	52,159	52,599	55,591	60,899	5,307	9.5
Forest products	35,798	38,195	36,678	37,048	38,769	1,721	4.6
Chemicals and related products	80,172	95,295	98,564	106,924	123,922	16,999	15.9
Energy-related products	69,473	122,650	114,226	109,800	147,183	37,382	34.0
Textiles and apparel	71,269	80,909	79,946	81,585	87,241	5,655	6.9
Footwear	14,074	14,856	15,249	15,379	15,560	180	1.2
Minerals and metals	81,717	95,015	83,847	85,616	89,204	3,588	4.2
Machinery	79,244	89,407	84,867	85,181	93,138	7,957	9.3
Transportation equipment	203,560	223,242	221,907	227,147	232,212	5,065	2.2
Electronic products	228,469	277,854	229,571	229,245	238,833	9,588	4.2
Miscellaneous manufactures	60,312	67,322	66,575	72,129	74,765	2,636	3.7
Special provisions	43,879	48,436	48,605	49,165	48,372	-793	-1.6
Total	1,017,435	1,205,339	1,132,635	1,154,811	1,250,097	95,286	8.3
U.S. merchandise trade balance:							
Agricultural products	6,100	6,953	7,511	2,754	3,807	1,053	38.2
Forest products	-11,727	-11,761	-12,935	-14,223	-15,204	-980	-6.9
Chemicals and related products	1,068	-2,862	-7,290	-15,222	-21,592	-6,371	-41.9
Energy-related products	-57,516	-107,121	-99,153	-95,369	-130,544	-35,175	-36.9
Textiles and apparel	-52,547	-60,555	-61,828	-64,288	-70,208	-5,920	-9.2
Footwear	-13,380	-14,192	-14,611	-14,860	-15,065	-205	-1.4
Minerals and metals	-41,827	-47,735	-40,341	-45,692	-46,224	-532	-1.2
Machinery	-12,043	-9,899	-15,315	-21,919	-29,676	-7,757	-35.4
Transportation equipment	-57,843	-79,849	-77,583	-82,492	-89,264	-6,772	-8.2
Electronic products	-66,324	-88,865	-68,962	-88,817	-97,994	-9,177	-10.3
Miscellaneous manufactures	-45,042	-50,450	-50,147	-57,124	-59,906	-2,782	-4.9
Special provisions	-24,165	-26,715	-25,961	-27,960	-26,802	1,158	4.1
Total	-375,246	-493,052	-466,614	-525,212	-598,673	-73,461	-14.0

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.-Calculations based on unrounded data.

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

Table US-2
Leading changes in U.S. exports and imports of all sectors, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. EXPORTS:							
Increases:							
Semiconductors and integrated circuits (ET033)	36,615	44,828	33,455	31,738	35,712	3,975	12.5
Medicinal chemicals (CH025)	13,701	15,772	18,169	18,742	22,527	3,785	20.2
Motor vehicles (ET009)	22,116	22,865	22,651	26,209	29,379	3,170	12.1
Decreases:							
Aircraft, spacecraft, and related equipment (ET013)	47,762	39,696	42,535	41,447	37,835	-3,612	-8.7
Telephone and telegraph apparatus (ET017)	17,717	20,147	16,506	12,952	10,946	-2,007	-15.5
All other	504,276	568,978	532,705	498,511	515,025	16,514	3.3
TOTAL	642,189	712,287	666,021	629,599	651,424	21,825	3.5
U.S. IMPORTS:							
Increases:							
Crude petroleum (CH004)	31,642	56,546	49,673	54,704	73,527	18,823	34.4
Natural gas and components (CH006)	11,042	19,157	23,054	18,609	28,885	10,276	55.2
Medicinal chemicals (CH025)	23,782	29,112	33,956	40,699	49,284	8,586	21.1
Decreases:							
Aircraft engines and gas turbines (ET001)	10,328	10,939	13,548	10,993	8,834	-2,159	-19.6
Steel mill products (MM025)	12,749	15,026	11,630	12,203	10,499	-1,704	-14.0
All other	927,892	1,074,560	1,000,774	1,017,604	1,079,067	61,464	6.0
TOTAL	1,017,435	1,205,339	1,132,635	1,154,811	1,250,097	95,286	8.3

Note.-Calculations based on unrounded data.

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

U.S. BILATERAL/MULTILATERAL TRADE

Significant Bilateral/Multilateral Shifts

The expansion of the U.S. merchandise trade deficit during 2003 also reflected significant shifts with certain key trade partners. Table US-3 shows U.S. bilateral merchandise trade with its 10 largest partners (ranked by total trade) and U.S. multilateral merchandise trade with selected country groups during 2003. The U.S. trade deficit showed mixed movement with its five major partners—Canada, China, the European Union (EU), Japan, and Mexico.¹⁷ During 1999-2003, the U.S. trade deficit with Japan shifted from being the largest with any trade partner to the third-largest behind China and Canada. A major contributing factor to this trend was a decrease in U.S. imports from Japan of motor vehicles as transplant assembly production increased in the United States. In contrast to the reduced 5-year trade deficit with Japan, the U.S. deficit with the other major trade partners expanded. For a second consecutive year, the deficit with China recorded the largest expansion, this time up by \$20.7 billion to \$124.9 billion in 2003, the highest level in the 5-year period. A major contributing factor to the increasing trade deficit with China is increased production by foreign manufacturers in China. More detailed analysis of these and other trade shifts with the five major U.S. trade partners is provided in the corresponding country overviews.

¹⁷ In recent years, these countries consistently appeared as the top five U.S. partners in terms of total trade, although it should also be noted that the United States may not be a top trading partner for these countries. The 15-member countries of the EU are considered together as a single U.S. trade partner, although no individual EU country was consistently ranked among the top five U.S. trade partners from year to year.

Table US-3

All merchandise sectors: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U. S. exports of domestic merchandise:							
Canada	145,731	155,601	144,621	142,543	148,749	6,206	4.4
Mexico	81,381	100,442	90,537	86,076	83,108	-2,968	-3.4
China	12,585	15,335	17,959	20,553	26,707	6,154	29.9
Japan	54,310	60,751	53,546	48,273	48,862	589	1.2
Germany	25,151	27,403	28,068	24,870	26,806	1,936	7.8
United Kingdom	35,815	38,148	37,097	30,243	30,556	313	1.0
Korea	22,038	26,302	20,900	21,151	22,525	1,374	6.5
Taiwan	17,640	22,404	16,626	16,786	16,111	-676	-4.0
France	17,654	18,921	18,626	17,522	15,683	-1,839	-10.5
Malaysia	8,558	10,123	8,555	9,457	10,124	668	7.1
All Other	221,326	236,858	229,487	212,125	222,194	10,069	4.7
Total	642,189	712,287	666,021	629,599	651,424	21,825	3.5
EU-15	142,029	152,652	147,327	132,563	138,138	5,575	4.2
OPEC	19,397	18,234	18,934	17,664	16,308	-1,356	-7.7
Latin America	133,944	156,292	145,252	134,284	131,236	-3,048	-2.3
CBERA	19,030	20,728	20,117	20,702	22,184	1,481	7.2
Asia	159,371	185,282	165,879	160,628	172,329	11,701	7.3
Sub-Saharan Africa	5,332	5,563	6,750	5,892	6,665	773	13.1
Central and Eastern Europe	2,650	2,743	2,888	2,575	3,190	615	23.9
U. S. imports of merchandise for consumption:							
Canada	198,242	229,060	216,836	210,518	224,016	13,498	6.4
Mexico	109,018	134,734	130,509	134,121	137,199	3,078	2.3
China	81,522	99,581	102,069	124,796	151,620	26,824	21.5
Japan	130,951	145,742	126,139	121,262	118,485	-2,777	-2.3
Germany	55,386	58,349	58,939	60,985	66,532	5,547	9.1
United Kingdom	38,773	42,843	41,118	40,429	42,455	2,026	5.0
Korea	31,152	39,829	34,917	35,284	36,930	1,646	4.7
Taiwan	35,057	40,384	33,262	32,054	31,490	-565	-1.8
France	25,400	29,435	30,024	28,232	28,896	664	2.4
Malaysia	21,391	25,447	22,228	23,953	25,321	1,367	5.7
All Other	290,541	359,936	336,594	343,176	387,153	43,977	12.8
Total	1,017,435	1,205,339	1,132,635	1,154,811	1,250,097	95,286	8.3
EU-15	194,409	218,375	218,911	223,732	242,210	18,479	8.3
OPEC	38,892	62,934	55,728	50,649	65,300	14,651	28.9
Latin America	165,686	206,087	196,096	202,149	215,298	13,149	6.5
CBERA	19,365	22,161	20,679	21,255	24,500	3,245	15.3
Asia	382,342	443,490	399,750	419,909	449,094	29,185	7.0
Sub-Saharan Africa	13,750	22,213	21,060	18,208	25,470	7,262	39.9
Central and Eastern Europe	4,803	6,385	6,696	6,822	8,344	1,522	22.3

See footnote(s) at end of table.

Table US-3--*Continued*

All merchandise sectors: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. merchandise trade balance:							
Canada	-52,511	-73,459	-72,215	-67,975	-75,267	-7,293	-10.7
Mexico	-27,637	-34,292	-39,971	-48,045	-54,091	-6,046	-12.6
China	-68,937	-84,245	-84,110	-104,243	-124,913	-20,671	-19.8
Japan	-76,641	-84,991	-72,593	-72,989	-69,623	3,367	4.6
Germany	-30,235	-30,946	-30,871	-36,115	-39,726	-3,611	-10.0
United Kingdom	-2,958	-4,695	-4,021	-10,186	-11,899	-1,713	-16.8
Korea	-9,115	-13,526	-14,018	-14,133	-14,405	-272	-1.9
Taiwan	-17,417	-17,980	-16,636	-15,268	-15,379	-111	-0.7
France	-7,747	-10,514	-11,398	-10,710	-13,213	-2,503	-23.4
Malaysia	-12,833	-15,325	-13,673	-14,497	-15,197	-700	-4.8
All Other	-69,215	-123,078	-107,107	-131,052	-164,959	-33,908	-25.9
Total	-375,246	-493,052	-466,614	-525,212	-598,673	-73,461	-14.0
EU-15	-52,380	-65,723	-71,584	-91,169	-104,072	-12,903	-14.2
OPEC	-19,495	-44,699	-36,794	-32,985	-48,992	-16,007	-48.5
Latin America	-31,742	-49,795	-50,844	-67,865	-84,061	-16,197	-23.9
CBERA	-335	-1,433	-562	-552	-2,316	-1,764	-319.3
Asia	-222,971	-258,208	-233,871	-259,281	-276,765	-17,484	-6.7
Sub-Saharan Africa	-8,418	-16,649	-14,310	-12,316	-18,806	-6,489	-52.7
Central and Eastern Europe	-2,154	-3,642	-3,808	-4,247	-5,154	-907	-21.3

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Agricultural Products

Alfred L. Dennis, Coordinator
(202) 205-3316
alfred.dennis@usitc.gov

Change in 2003 from 2002:

U.S. trade surplus: Increased by \$1.1 billion (38 percent) to \$3.8 billion
U.S. exports: Increased by \$6.4 billion (11 percent) to \$64.7 billion
U.S. imports: Increased by \$5.3 billion (10 percent) to \$60.9 billion

Increased exports to China of oilseeds and cotton accounted for most of the increase in the 2003 U.S. trade surplus in agricultural products. Increased Chinese demand and high world prices accounted for this trade shift.¹ With almost one-half of the increased U.S. exports going to China, it became the fourth-leading destination for U.S. agricultural product exports in 2003, ahead of Korea. The three leading markets for U.S. agricultural exports were Japan, Canada, and Mexico; exports to these countries rose 4 percent, 8 percent, and 9 percent, respectively, during 2002-03 (see table AG-1).

Total U.S. exports of oilseeds increased 41 percent in 2003 to \$8.1 billion, the largest absolute shift in trade in agricultural products (see table AG-2). Chinese demand for oilseeds, particularly for soybean meal which is used as an animal feed, has increased as rising incomes in China have led to increased consumption of higher-valued foods such as pork and chicken relative to lower-priced food staples such as rice. High world prices, driven in part by increased Chinese demand and in part by lower production in key exporting countries such as the United States, resulted in much higher prices for feed products such as soybeans (see Oilseeds). Total U.S. exports of cotton, not carded or combed, increased by 59 percent to \$3.2 billion. China's booming textile production and exports have led to increased demand for raw materials for the textile industry including cotton, which contributed to significantly higher world prices in 2003. China imported 25 percent of world cotton exports in 2003 and accounted for 32 percent of world consumption.²

Cattle and beef exports increased 19 percent in 2003 as Japanese imports from the United States rebounded in 2003 after falling substantially in 2002 over fears of Bovine Spongiform Encephalopathy (BSE).³ The discovery of BSE in Japan in 2001 led to a severe fall in Japanese consumption,⁴ but the lack of a subsequent epidemic of BSE led to resumption of beef consumption by 2003. The discovery of BSE in a single cow of Canadian origin in the United States in late 2003 was not enough to affect Japanese imports for full-year 2003. However, the Government of Japan imposed a quarantine on imports from the United States in December 2003.

¹ Peoples Republic of China, Oilseeds and Products Annual: Part 1 of 2 - Analysis 2004, United States Department of Agriculture, Foreign Agricultural Service (USDA/FAS) GAIN Report CH4007, Mar. 1, 2004.

² Cotton and Wool Outlook, USDA/Economic Research Service, CWS-04b, Mar. 11, 2004.

³ Japan Livestock and Products, BSE Confirmed in Japan—First Case Outside EU 2001, USDA/FAS GAIN Report JA1089, Sept. 27, 2001.

⁴ Japan Livestock and Products Semi-Annual 2002, USDA/FAS GAIN Report JA2008, Mar. 1, 2002.

Table AG-1

Agricultural products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. exports of domestic merchandise:							
Canada	7,608	8,209	8,694	9,121	9,805	684	7.5
Mexico	5,850	6,772	7,645	7,534	8,176	643	8.5
Japan	11,984	12,573	11,342	10,416	10,845	429	4.1
China	965	1,895	2,101	2,128	5,129	3,001	141.0
Korea	2,763	2,978	3,085	3,085	3,307	222	7.2
Netherlands	1,618	1,526	1,420	1,262	1,215	-47	-3.7
France	437	411	450	477	505	27	5.7
Italy	586	682	719	666	673	6	1.0
Australia	394	413	378	407	670	263	64.6
Thailand	445	531	606	634	700	66	10.4
All other	22,918	23,122	23,670	22,615	23,681	1,066	4.7
Total	55,569	59,112	60,109	58,345	64,706	6,361	10.9
EU-15	7,508	7,177	7,290	6,963	7,280	318	4.6
OPEC	2,449	2,705	2,880	2,658	2,933	275	10.3
Latin America	10,436	11,079	12,119	12,133	13,052	920	7.6
CBERA	2,605	2,511	2,687	2,630	2,688	58	2.2
Asia	22,135	24,346	23,912	22,636	26,484	3,848	17.0
Sub-Saharan Africa	728	769	657	933	1,100	167	17.9
Central and Eastern Europe	272	231	263	227	231	5	2.0
U.S. imports of merchandise for consumption:							
Canada	10,349	11,189	12,373	12,953	12,975	21	0.2
Mexico	5,631	6,033	6,157	6,378	7,220	842	13.2
Japan	482	487	441	461	482	21	4.6
China	1,191	1,396	1,489	1,896	2,470	574	30.2
Korea	184	210	230	254	266	12	4.8
Netherlands	1,443	1,642	1,714	1,876	2,023	148	7.9
France	2,176	2,068	2,014	2,260	2,614	354	15.7
Italy	1,756	1,939	1,933	2,150	2,401	251	11.7
Australia	1,364	1,690	1,847	1,980	2,212	232	11.7
Thailand	2,117	2,356	2,155	1,914	2,121	207	10.8
All other	22,776	23,150	22,245	23,468	26,114	2,646	11.3
Total	49,469	52,159	52,599	55,591	60,899	5,307	9.5
EU-15	9,930	10,341	10,316	11,187	12,506	1,319	11.8
OPEC	1,282	1,268	1,147	1,187	1,345	159	13.4
Latin America	15,727	16,028	15,441	16,101	18,041	1,940	12.1
CBERA	3,189	3,481	3,218	3,294	3,531	237	7.2
Asia	8,010	8,662	8,303	8,818	10,164	1,346	15.3
Sub-Saharan Africa	833	875	836	912	1,138	226	24.8
Central and Eastern Europe	254	263	329	391	428	37	9.6

See footnote(s) at end of table.

Table AG-1--Continued

Agricultural products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. merchandise trade balance:							
Canada	-2,740	-2,980	-3,679	-3,833	-3,170	663	17.3
Mexico	219	739	1,488	1,155	956	-199	-17.2
Japan	11,502	12,087	10,901	9,955	10,362	408	4.1
China	-226	499	612	232	2,659	2,428	1,047.4
Korea	2,579	2,768	2,855	2,831	3,041	210	7.4
Netherlands	176	-115	-294	-614	-808	-195	-31.7
France	-1,739	-1,658	-1,565	-1,782	-2,109	-327	-18.3
Italy	-1,169	-1,257	-1,214	-1,484	-1,728	-244	-16.5
Australia	-970	-1,278	-1,468	-1,573	-1,543	30	1.9
Thailand	-1,671	-1,824	-1,549	-1,280	-1,420	-140	-11.0
All other	142	-27	1,425	-853	-2,433	-1,580	-185.2
Total	6,100	6,953	7,511	2,754	3,807	1,053	38.2
EU-15	-2,422	-3,164	-3,027	-4,224	-5,225	-1,002	-23.7
OPEC	1,168	1,437	1,732	1,471	1,588	116	7.9
Latin America	-5,292	-4,950	-3,322	-3,968	-4,989	-1,021	-25.7
CBERA	-584	-970	-530	-664	-843	-180	-27.1
Asia	14,125	15,684	15,610	13,818	16,320	2,502	18.1
Sub-Saharan Africa	-105	-106	-179	21	-38	-60	(2)
Central and Eastern Europe	17	-31	-65	-164	-197	-33	-20.1

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²Not meaningful for purposes of comparison.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table AG-2
Leading changes in U.S. exports and imports of agricultural products, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
			Million dollars				
U.S. EXPORTS:							
Increases:							
Oilseeds (AG032)	4,694	5,419	5,642	5,790	8,153	2,363	40.8
Cotton, not carded or combed (AG049)	968	1,883	2,164	2,015	3,203	1,189	59.0
Cattle and beef (AG002)	3,290	3,859	3,335	2,952	3,501	549	18.6
Decreases:							
Cigarettes (AG045)	3,232	3,308	2,118	1,463	1,403	-60	-4.1
All other	43,385	44,644	46,850	46,125	48,446	2,321	5.0
TOTAL	55,569	59,112	60,109	58,345	64,706	6,361	10.9
U.S. IMPORTS:							
Increases:							
Cocoa, chocolate, and confectionery (AG037)	2,238	2,178	2,301	2,662	3,535	873	32.8
Shellfish (AG009)	5,072	6,007	5,908	5,910	6,492	582	9.9
Wine and certain other fermented beverages (AG041)	2,210	2,259	2,316	2,740	3,307	567	20.7
Fresh, chilled, or frozen vegetables (AG018)	2,207	2,320	2,628	2,758	3,250	491	17.8
Distilled spirits (AG042)	2,383	2,727	2,848	3,111	3,453	342	11.0
Decreases:							
Cattle and beef (AG002)	2,983	3,443	4,062	4,038	3,302	-737	-18.2
All other	32,377	33,225	32,537	34,372	37,561	3,189	9.3
TOTAL	49,469	52,159	52,599	55,591	60,899	5,307	9.5

Note.-Calculations based on unrounded data.

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

U.S. overall imports of agricultural products increased 10 percent from 2002 to 2003 to \$60.9 billion. The largest absolute increase was from Mexico, the second-largest supplier of agricultural products to the United States; shipments from Mexico increased 13 percent to \$7.2 billion. Imports from Canada, the largest supplier, increased by less than 1 percent to about \$13.0 billion. The largest percentage increase in U.S. imports was from China, up 30 percent.

U.S. imports of cocoa, chocolate, and confectionery products increased 33 percent in 2003 (see table AG-2). Much of the increase was a result of sharply higher prices (as cocoa production declined) following a civil war in the Cote D'Ivoire, the world's largest producer. Further fighting in the cocoa-producing areas led to panic buying by commodity traders. The higher prices in 2003 reversed several years of low world prices.⁵ U.S. imports of shellfish increased 10 percent in 2003 to \$6.5 billion, while imports of wine increased 21 percent. Much of the wine imports came from Australia and resulted from both sustained increases in Australian production and in medium-to high-value wine consumption in the United States. Wine consumption in the United States has increased in recent years owing to taste changes of an aging population and higher disposable incomes, as well as increased dining out in restaurants where wine is served.⁶ Comparable trends accounted for the increase in shellfish consumption in the United States. U.S. vegetable imports rose 18 percent to \$3.3 billion, while U.S. distilled spirit imports rose 11 percent to \$3.5 billion in 2003. U.S. per capita consumption of fresh vegetables has steadily increased each year and imports of fresh vegetables have increased 8 percent since 1980 as imports' share of consumption has risen from about 5 to about 11 percent. Imports have increased in part because U.S. consumers desire year-round sources of fresh vegetables as transportation and handling of vegetables have improved, and in part because of the comparative advantages of producing labor-intensive products such as vegetables in low-wage countries.⁷

⁵ Nigeria Cocoa Annual 2003, USDA/FAS GAIN Report #NI3012, May 5, 2003.

⁶ World Wine Situation and Outlook, USDA/FAS Horticultural and Tropical Products Division, Mar. 2003.

⁷ Marketing Fresh Fruit and Vegetable Imports in the United States: Status, Challenges and Opportunities, Sandra Cuellar Research/Extension Associate Dept. Of Applied Economics and Management, Cornell University, Mar. 2003.

COMMODITY ANALYSIS OF OILSEEDS⁸

Change in 2003 from 2002:

U.S. trade surplus: Increased by \$2.3 billion (42 percent) to \$7.9 billion

U.S. exports: Increased by \$2.4 billion (41 percent) to \$8.2 billion

U.S. imports: Increased by \$17 million (9 percent) to \$208 million

The sharp increase in U.S. oilseed exports in 2003 was responsible for the rising trade surplus of \$2.3 billion; imports rose slightly (by \$17 million) to \$208 million. Oilseeds are the second-largest agricultural industry/commodity group in terms of exports, generating the largest trade surplus recorded in the agricultural sector.⁹ U.S. exports of soybeans accounted for 97 percent of total oilseed exports in 2003; remaining products were primarily sunflower-seed, cottonseed, and canola seed.

A substantially higher price for U.S. oilseed exports in 2003 and a slightly higher volume led to record U.S. exports of oilseeds of \$8.2 billion, an increase of 41 percent. Several factors contributed to this development. Smaller crops harvested in the United States in back-to-back marketing years, 2002-03 and 2003-04, reduced the supply of soybeans, but domestic and foreign demand remained strong despite rising prices.¹⁰ Drought and disease conditions lowered U.S. crop yields in 2003 and the volume of domestic production of soybeans decreased slightly as the area planted was largely unchanged.¹¹ The 2003 soybean crop was 11 percent below the crop in 2002, the smallest since 1996.¹²

The volume of U.S. soybean exports rose 14 percent to 31 million metric tons (MMT) in 2003, and soybean prices rose 25 percent to \$256 per metric ton (\$6.96 per bushel) during the year. The price of U.S. soybeans at the U.S. Gulf (f.o.b. vessel) rose steadily during 2003 from \$6.14 per bushel in January to nearly \$8.00 a bushel in December as higher prices reflected the lower volume of domestic crop available and strong domestic and foreign demand.¹³ U.S. soybean farmers likely received an average \$7.60 per bushel for 2003-04, the highest price in 20 years.¹⁴

About 80 percent of the \$8.2 billion of U.S. exports of soybeans in 2003 went to the 5 leading markets—China, the EU, Mexico, Japan, and Taiwan. China has become the leading U.S. and world import market for soybeans, purchasing nearly \$3 billion of U.S. soybeans in 2003, more than twice U.S. exports to the second leading market, the EU.¹⁵ Moreover, a weaker U.S. dollar partly offset the rise in

⁸ This industry/commodity group includes raw, unprocessed soybeans, sunflower-seed, flaxseed, cottonseed, canola (rape) seed, and other miscellaneous oilseeds found in chapter 12 of the HTS.

⁹ Oilseeds has historically been among the leading export sectors across agriculture and manufactured goods.

¹⁰ The crop-year begins September 1.

¹¹ The soybean crop yield fell from 39.6 bushels per acre in 2001-02 to 38.0 bushels in 2002-03, and then to 33.4 bushels in 2003-04, while the acreage planted was 74 million acres each year since 2000. Economic Research Service (ERS), U.S. Dept. of Agriculture (USDA), *Oil Crops Outlook Situation and Outlook Yearbook*, Oct. 2003, p. 3, and tables 2 and 3 (available at <http://www.ers.usda.gov/publications/so/view.asp?f=field/ocs-bb>)

¹² Soybeans accounted for 93 percent of the value of domestic oilseed production in 2002-03; other leading oilseed crops were cottonseed, sunflower seed, canola seed, and flaxseed, according to USDA, ERS, *Oil Crops Outlook Yearbook*.

¹³ U.S. soybean price, f.o.b. vessel, U.S. Gulf ports, table 24, source: USDA, *Agricultural Outlook Statistical Indicators*, table 24, found at <http://www.ers.usda.gov/publications/agoutlook/aotables/>, retrieved Mar. 3, 2004.

¹⁴ Average (median) price for 2003-04, World Outlook Board, USDA, *World Agricultural Supply and Demand Estimates*, Apr. 2004, p. 13, found at <http://usda.mannlib.cornell.edu/>, and USDA, ERS, *Oil Crops Outlook*, Apr. 9, 2004.

¹⁵ The index of 100 is for the real exchange rate in 2000; a lower index means the dollar is devaluing. USDA, ERS, "Indexes of Real Trade-Weighted Dollar Exchange Rates", *Agricultural Outlook Statistical Indicators*, table 26, found at <http://www.ers.usda.gov/publications/agoutlook/aotables/>, retrieved Mar. 3, 2004.

the price of soybeans and raised the competitiveness of U.S. soybeans. The trade weighted real exchange rate for U.S. soybeans fell 13 percent from an average index of 102.9 in 2002 to 90 in October 2003.¹⁶

China imported 23 MMT of soybeans, one-third of total world exports of soybeans in 2003-04.¹⁷ Chinese imports of soybeans doubled from 10 MMT in 2001-02 to 21 MMT in 2002-03, and then rose another 10 percent to 23 MMT in 2003-04.¹⁸ China's increased imports of soybeans accounted for all of the 13 MMT increase in world imports of soybeans during these 3 years.

Most leading U.S. markets, except China, purchased the same or a lower volume of soybeans from the United States in 2003. The EU, the second-leading market, purchased 4.3 MMT of soybeans in 2003, 26 percent less than in 2002, although the value of its purchases of U.S. soybeans was flat at \$1.1 billion. The EU is the second-leading world market for soybeans, and its imports from all countries remained unchanged at about 18 MMT annually during 2002-03.¹⁹ Similarly, Japan and Taiwan, the fourth- and fifth-leading markets, registered fewer purchases of soybeans (on a volume basis).

The third-leading U.S. market, Mexico, increased its imports of U.S. soybeans by about 8 percent to 4.2 MM in 2003 over the 3.9 MMT of soybean imported from the United States in 2002. The value of Mexican imports of U.S. soybeans reached nearly \$1 billion in 2003, a 22-percent increase over the prior year. An expanding poultry and livestock industry in Mexico that requires more protein meal has continued to support more imports of soybeans.²⁰

John Reeder
(202) 205-3319
john.reeder@usitc.gov

¹⁷ USDA, FAS, *Oilseeds*, table 5.

¹⁸ In 1997-98, 6 years prior, China imported only 3 MMT of soybeans from all countries, but buoyant demand for poultry, pork, and vegetable oil have fueled this dramatic import increase. See USDA, FAS, "China Importing Record Levels of Soybeans," *Oilseeds: World Markets and Trade*, Oct. 2003, p. 1, found at http://www.fas.usda.gov/dlp/oilseeds_arc.html, retrieved Mar. 3, 2004.

¹⁹ USDA, Foreign Agriculture Service (FAS), *Oilseeds: World Markets and Trade*, Jan. 2004, table 5, projection for 2003-04; found at http://www.fas.usda.gov/dlp/oilseeds_arc.html, retrieved Mar. 3, 2004.

²⁰ See FAS, USDA, *Mexico: Oilseeds and Products Annual 2003*, GAIN Report MX3045, Apr. 16, 2003, p.3; found at http://www.fas.usda.gov/scripts/w/attacherep/attache_lout.asp, retrieved Mar. 3, 2004.

Table AG-3

Agricultural products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
AG001	Certain miscellaneous animals and meats:							
	Exports	1,127	1,440	1,631	1,460	1,778	318	21.8
	Imports	1,429	1,592	1,509	1,510	1,683	173	11.4
	Trade balance	-302	-152	122	-50	96	146	(³)
AG002	Cattle and beef:							
	Exports	3,290	3,859	3,335	2,952	3,501	549	18.6
	Imports	2,983	3,443	4,062	4,038	3,302	-737	-18.2
	Trade balance	308	416	-727	-1,086	200	1,285	(³)
AG003	Swine and pork:							
	Exports	1,021	1,267	1,364	1,286	1,330	44	3.4
	Imports	723	996	1,129	1,026	1,143	117	11.4
	Trade balance	298	271	235	260	187	-73	-28.0
AG004	Sheep and meat of sheep:							
	Exports	25	23	25	26	17	-9	-34.3
	Imports	179	206	238	275	339	63	23.0
	Trade balance	-155	-183	-213	-249	-321	-72	-29.0
AG005	Poultry:							
	Exports	1,878	2,055	2,376	1,817	2,022	205	11.3
	Imports	57	71	97	111	126	14	12.7
	Trade balance	1,821	1,984	2,279	1,705	1,896	191	11.2
AG006	Fresh or frozen fish:							
	Exports	1,634	1,705	2,016	1,947	2,008	60	3.1
	Imports	2,945	3,103	2,958	3,158	3,354	196	6.2
	Trade balance	-1,310	-1,398	-943	-1,211	-1,346	-135	-11.2
AG007	Canned fish:							
	Exports	222	170	202	181	185	3	1.9
	Imports	611	538	568	664	777	113	17.0
	Trade balance	-389	-369	-367	-482	-592	-110	-22.7
AG008	Cured and other fish:							
	Exports	166	168	193	159	161	2	1.0
	Imports	277	294	298	300	307	7	2.2
	Trade balance	-111	-126	-104	-141	-146	-5	-3.6
AG009	Shellfish:							
	Exports	752	799	708	737	761	23	3.2
	Imports	5,072	6,007	5,908	5,910	6,492	582	9.9
	Trade balance	-4,319	-5,208	-5,200	-5,172	-5,731	-559	-10.8
AG010	Dairy produce:							
	Exports	591	664	723	618	679	60	9.8
	Imports	1,387	1,474	1,574	1,488	1,654	166	11.2
	Trade balance	-796	-810	-851	-870	-976	-106	-12.2
AG011	Eggs:							
	Exports	155	159	162	155	164	9	5.7
	Imports	20	18	20	28	22	-6	-20.9
	Trade balance	134	141	142	127	142	15	11.6

See footnote(s) at end of table.

Table AG-3--Continued

Agricultural products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
AG012	Sugar and other sweeteners:							
	Exports	357	350	391	365	391	26	7.1
	Imports	879	805	843	961	1,035	74	7.7
	Trade balance	-522	-455	-451	-596	-645	-48	-8.1
AG012A	Sugar:							
	Exports	70	64	90	74	61	-13	-17.4
	Imports	639	551	547	569	592	23	4.1
	Trade balance	-569	-488	-457	-495	-531	-36	-7.3
AG012B	High fructose corn sweetener:							
	Exports	103	101	83	63	76	13	20.8
	Imports	34	32	39	34	42	8	22.6
	Trade balance	69	70	44	29	34	5	18.6
AG013	Animal feeds:							
	Exports	3,621	4,061	4,508	4,189	4,207	18	0.4
	Imports	604	641	626	670	705	35	5.2
	Trade balance	3,017	3,419	3,881	3,518	3,502	-16	-0.5
AG014	Live plants:							
	Exports	144	132	116	113	128	15	13.1
	Imports	428	460	495	503	539	37	7.3
	Trade balance	-285	-329	-379	-389	-411	-22	-5.6
AG015	Seeds:							
	Exports	812	783	768	892	859	-33	-3.7
	Imports	485	501	436	431	452	21	4.8
	Trade balance	327	282	332	461	407	-54	-11.7
AG016	Cut flowers:							
	Exports	41	40	39	36	33	-3	-7.7
	Imports	592	611	565	541	611	70	12.9
	Trade balance	-550	-572	-526	-505	-578	-72	-14.3
AG017	Miscellaneous vegetable substances:							
	Exports	453	485	505	476	510	35	7.3
	Imports	839	790	794	760	880	120	15.7
	Trade balance	-386	-305	-288	-284	-369	-85	-29.9
AG018	Fresh, chilled, or frozen vegetables:							
	Exports	1,198	1,346	1,304	1,353	1,408	55	4.1
	Imports	2,207	2,320	2,628	2,758	3,250	491	17.8
	Trade balance	-1,009	-973	-1,324	-1,405	-1,842	-436	-31.0
AG019	Prepared or preserved vegetables, mushrooms, and olives:							
	Exports	1,535	1,451	1,387	1,365	1,326	-39	-2.9
	Imports	1,384	1,408	1,493	1,574	1,779	206	13.1
	Trade balance	150	43	-106	-209	-453	-245	-117.2
AG020	Edible nuts:							
	Exports	1,212	1,361	1,309	1,542	1,785	243	15.8
	Imports	794	808	670	701	775	75	10.7
	Trade balance	418	553	639	841	1,010	168	20.0

See footnote(s) at end of table.

Table AG-3--Continued

Agricultural products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
AG021	Tropical fruit:							
	Exports	64	57	49	46	54	8	17.7
	Imports	1,574	1,548	1,616	1,705	1,754	49	2.9
	Trade balance	-1,510	-1,490	-1,567	-1,659	-1,700	-41	-2.5
AG022	Citrus fruit:							
	Exports	498	635	613	636	679	43	6.7
	Imports	331	311	308	325	437	112	34.4
	Trade balance	167	324	305	311	242	-69	-22.2
AG023	Deciduous fruit:							
	Exports	743	797	832	788	810	23	2.9
	Imports	268	247	270	294	306	12	4.2
	Trade balance	475	551	562	494	504	10	2.1
AG024	Other fresh fruit:							
	Exports	562	638	674	708	775	67	9.5
	Imports	1,031	1,024	1,065	1,183	1,200	17	1.4
	Trade balance	-469	-386	-392	-476	-425	50	10.6
AG025	Dried fruit other than tropical:							
	Exports	379	342	349	338	366	29	8.5
	Imports	78	63	63	90	133	43	48.0
	Trade balance	301	279	285	248	234	-14	-5.8
AG026	Frozen fruit:							
	Exports	89	86	80	80	81	1	0.8
	Imports	125	122	117	152	202	50	33.1
	Trade balance	-37	-36	-37	-72	-122	-50	-69.1
AG027	Prepared or preserved fruit:							
	Exports	180	190	195	184	203	18	10.0
	Imports	576	547	559	622	688	66	10.7
	Trade balance	-396	-356	-364	-437	-485	-48	-10.9
AG028	Coffee and tea:							
	Exports	284	298	314	297	348	50	16.9
	Imports	3,114	2,921	1,915	1,942	2,228	286	14.7
	Trade balance	-2,830	-2,623	-1,601	-1,645	-1,880	-235	-14.3
AG029	Spices:							
	Exports	72	80	76	70	76	7	9.6
	Imports	530	552	517	549	682	133	24.2
	Trade balance	-458	-472	-441	-480	-606	-126	-26.4
AG030	Cereals:							
	Exports	10,128	9,467	9,397	9,929	10,429	500	5.0
	Imports	730	660	761	735	646	-89	-12.1
	Trade balance	9,399	8,808	8,636	9,194	9,784	589	6.4
AG031	Milled grains, malts, and starches:							
	Exports	439	402	446	594	599	6	1.0
	Imports	261	304	305	379	441	62	16.3
	Trade balance	178	98	142	215	159	-56	-26.1
AG032	Oilseeds:							
	Exports	4,694	5,419	5,642	5,790	8,153	2,363	40.8
	Imports	238	231	203	191	208	17	9.1
	Trade balance	4,457	5,188	5,439	5,599	7,945	2,345	41.9

See footnote(s) at end of table.

Table AG-3--Continued

Agricultural products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
AG033	Animal or vegetable fats and oils:							
	Exports	1,947	1,450	1,405	1,917	1,986	69	3.6
	Imports	1,348	1,311	1,128	1,285	1,491	206	16.1
	Trade balance	599	139	277	632	495	-137	-21.7
AG034	Pasta, cereals, and other bakery goods:							
	Exports	1,044	1,092	1,153	1,184	1,287	103	8.7
	Imports	1,637	1,755	1,902	2,191	2,501	309	14.1
	Trade balance	-593	-662	-748	-1,008	-1,214	-206	-20.4
AG035	Sauces, condiments, and soups:							
	Exports	587	641	737	761	813	52	6.8
	Imports	457	502	576	670	663	-7	-1.1
	Trade balance	130	139	161	91	150	59	64.9
AG036	Infant formulas, malt extracts, and other edible preparations:							
	Exports	2,412	2,401	2,729	2,582	2,546	-36	-1.4
	Imports	556	556	659	795	920	125	15.7
	Trade balance	1,856	1,845	2,070	1,787	1,626	-161	-9.0
AG037	Cocoa, chocolate, and confectionery:							
	Exports	697	851	997	817	914	98	12.0
	Imports	2,238	2,178	2,301	2,662	3,535	873	32.8
	Trade balance	-1,540	-1,328	-1,304	-1,846	-2,621	-775	-42.0
AG038	Fruit and vegetable juices:							
	Exports	748	713	665	682	674	-8	-1.2
	Imports	796	767	661	675	793	118	17.5
	Trade balance	-48	-53	5	7	-119	-126	(³)
AG039	Nonalcoholic beverages, excluding fruit and vegetable juices:							
	Exports	328	312	312	334	397	63	18.8
	Imports	625	683	745	823	966	143	17.4
	Trade balance	-298	-371	-434	-489	-569	-80	-16.4
AG040	Malt beverages:							
	Exports	201	169	191	171	172	2	0.9
	Imports	1,881	2,166	2,333	2,566	2,664	99	3.8
	Trade balance	-1,680	-1,996	-2,142	-2,395	-2,492	-97	-4.1
AG041	Wine and certain other fermented beverages:							
	Exports	541	551	531	541	634	93	17.1
	Imports	2,210	2,259	2,316	2,740	3,307	567	20.7
	Trade balance	-1,669	-1,708	-1,785	-2,199	-2,673	-474	-21.6
AG042	Distilled spirits:							
	Exports	480	483	534	555	592	37	6.7
	Imports	2,383	2,727	2,848	3,111	3,453	342	11.0
	Trade balance	-1,902	-2,244	-2,313	-2,556	-2,861	-305	-11.9
AG043	Unmanufactured tobacco:							
	Exports	1,294	1,222	1,268	1,050	1,035	-14	-1.4
	Imports	711	628	680	716	757	41	5.8
	Trade balance	583	594	588	334	278	-56	-16.7

See footnote(s) at end of table.

Table AG-3--Continued

Agricultural products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

							Change, 2003 from 2002	
USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Absolute	Percent
Million dollars								
AG044	Cigars and certain other manufactured tobacco:							
	Exports	651	709	616	485	442	-42	-8.7
	Imports	301	290	285	299	307	7	2.5
	Trade balance	350	419	331	185	135	-50	-26.8
AG045	Cigarettes:							
	Exports	3,232	3,308	2,118	1,463	1,403	-60	-4.1
	Imports	112	212	189	230	234	5	2.0
	Trade balance	3,120	3,096	1,930	1,234	1,169	-65	-5.3
AG046	Hides, skins, and leather:							
	Exports	1,850	2,330	2,650	2,390	2,492	102	4.2
	Imports	1,052	1,167	1,032	935	817	-117	-12.6
	Trade balance	798	1,163	1,617	1,456	1,675	219	15.0
AG047	Furskins:							
	Exports	141	158	173	173	158	-15	-8.7
	Imports	73	87	96	87	87	(⁴)	0.3
	Trade balance	67	70	77	85	70	-15	-17.8
AG048	Wool and other animal hair:							
	Exports	22	19	11	26	29	3	11.6
	Imports	70	74	57	42	38	-4	-8.5
	Trade balance	-48	-55	-46	-16	-10	6	40.5
AG049	Cotton, not carded or combed:							
	Exports	968	1,883	2,164	2,015	3,203	1,189	59.0
	Imports	136	21	4	20	26	6	29.9
	Trade balance	832	1,862	2,160	1,995	3,177	1,183	59.3
AG050	Ethyl alcohol for nonbeverage purposes:							
	Exports	58	91	125	71	103	32	44.5
	Imports	130	162	178	170	191	21	12.2
	Trade balance	-73	-70	-53	-99	-88	11	11.2

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Not meaningful for purposes of comparison.⁴Less than \$500,000.

Note.—Calculations based on unrounded data.

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

Table AG-4

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG002	Cattle and beef:						
	Number of establishments	1,100,098	1,080,969	1,053,284	1,035,970	1,019,046	-1.6
	Employees (thousands)	1,172.0	1,150.0	1,127.0	1,109.0	1,092.0	-1.5
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	45,278	48,632	50,152	48,762	58,485	19.9
	U.S. exports (million dollars)	3,290	3,859	3,335	2,952	3,501	18.6
	U.S. imports (million dollars)	2,983	3,443	4,062	4,038	3,302	-18.2
	Apparent U.S. consumption (million dollars)	44,970	48,216	50,879	49,848	58,285	16.9
	Trade balance (million dollars)	308	416	-727	-1,086	200	(²)
	Ratio of imports to consumption (percent)	6.6	7.1	8.0	8.1	5.7	-29.6
	Ratio of exports to production (percent)	7.3	7.9	6.6	6.1	6.0	-1.6
AG003	Swine and pork:						
	Number of establishments	101,800	89,438	83,920	78,359	73,214	-6.6
	Employees (thousands)	219.0	204.0	199.0	202.0	207.0	2.5
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	19,085	21,673	22,545	19,802	21,422	8.2
	U.S. exports (million dollars)	1,021	1,267	1,364	1,286	1,330	3.4
	U.S. imports (million dollars)	723	996	1,129	1,026	1,143	11.4
	Apparent U.S. consumption (million dollars)	18,787	21,402	22,310	19,542	21,235	8.7
	Trade balance (million dollars)	298	271	235	260	187	-28.0
	Ratio of imports to consumption (percent)	3.8	4.7	5.1	5.3	5.4	1.9
	Ratio of exports to production (percent)	5.3	5.8	6.1	6.5	6.2	-4.6
AG004	Sheep and meat of sheep:						
	Number of establishments	67,940	67,820	65,658	64,695	64,033	-1.0
	Employees (thousands)	68.0	68.0	66.0	65.0	64.0	-1.5
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	423	420	341	337	377	11.9
	U.S. exports (million dollars)	25	23	25	26	17	-34.3
	U.S. imports (million dollars)	179	206	238	275	339	23.0
	Apparent U.S. consumption (million dollars)	578	603	554	586	698	19.2
	Trade balance (million dollars)	-155	-183	-213	-249	-321	-29.0
	Ratio of imports to consumption (percent)	31.1	34.2	42.9	47.0	48.5	3.2
	Ratio of exports to shipments (percent)	5.9	5.6	7.2	7.8	4.6	-41.0

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG005	Poultry:						
	Number of establishments	430	420	417	415	410	-1.2
	Employees (thousands)	180.0	175.0	170.0	170.0	168.0	-1.2
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. production (million dollars)	17,300	17,400	17,600	17,700	17,900	1.1
	U.S. exports (million dollars)	1,878	2,055	2,376	1,817	2,022	11.3
	U.S. imports (million dollars)	57	71	97	111	126	12.7
	Apparent U.S. consumption (million dollars)	15,479	15,416	15,321	15,995	16,004	(⁴)
	Trade balance (million dollars)	1,821	1,984	2,279	1,705	1,896	11.2
	Ratio of imports to consumption (percent)	0.4	0.5	0.6	0.7	0.8	14.3
	Ratio of exports to production (percent)	10.9	11.8	13.5	10.3	11.3	9.7
AG006	Fresh or frozen fish:						
	Number of establishments	1,400	1,450	1,380	1,400	1,400	0.0
	Employees (thousands)	40.0	41.0	39.0	40.0	40.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. shipments (million dollars)	5,051	5,550	6,257	5,560	5,600	0.7
	U.S. exports (million dollars)	1,634	1,705	2,016	1,947	2,008	3.1
	U.S. imports (million dollars)	2,945	3,103	2,958	3,158	3,354	6.2
	Apparent U.S. consumption (million dollars)	6,361	6,948	7,200	6,771	6,946	2.6
	Trade balance (million dollars)	-1,310	-1,398	-943	-1,211	-1,346	-11.2
	Ratio of imports to consumption (percent)	46.3	44.7	41.1	46.6	48.3	3.6
	Ratio of exports to shipments (percent)	32.4	30.7	32.2	35.0	35.9	2.6
AG007	Canned fish:						
	Number of establishments	36	34	30	30	30	0.0
	Employees (thousands)	7.0	6.0	5.0	5.0	5.0	0.0
	Capacity utilization (percent)	65	75	75	75	80	6.7
	U.S. shipments (million dollars)	1,527	1,334	969	1,016	1,200	18.1
	U.S. exports (million dollars)	222	170	202	181	185	1.9
	U.S. imports (million dollars)	611	538	568	664	777	17.0
	Apparent U.S. consumption (million dollars)	1,916	1,703	1,336	1,498	1,792	19.6
	Trade balance (million dollars)	-389	-369	-367	-482	-592	-22.7
	Ratio of imports to consumption (percent)	31.9	31.6	42.5	44.3	43.3	-2.3
	Ratio of exports to shipments (percent)	14.5	12.7	20.8	17.8	15.4	-13.5

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG008	Cured and other fish:						
	Number of establishments	114	120	120	120	120	0.0
	Employees (thousands)	9.0	10.0	10.0	10.0	10.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. shipments (million dollars)	300	300	184	143	150	4.9
	U.S. exports (million dollars)	166	168	193	159	161	1.0
	U.S. imports (million dollars)	277	294	298	300	307	2.2
	Apparent U.S. consumption (million dollars)	411	426	288	284	296	4.3
	Trade balance (million dollars)	-111	-126	-104	-141	-146	-3.6
	Ratio of imports to consumption (percent)	67.4	69.0	^{\$} 103.2	^{\$} 105.7	^{\$} 103.6	-2.0
	Ratio of exports to shipments (percent)	55.4	56.0	^{\$} 105.1	^{\$} 111.3	^{\$} 107.1	-3.8
AG009	Shellfish:						
	Number of establishments	700	700	715	690	690	0.0
	Employees (thousands)	60.0	59.0	60.0	56.0	56.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	2,200	2,058	1,853	1,839	1,750	-4.8
	U.S. exports (million dollars)	752	799	708	737	761	3.2
	U.S. imports (million dollars)	5,072	6,007	5,908	5,910	6,492	9.9
	Apparent U.S. consumption (million dollars)	6,519	7,266	7,053	7,011	7,481	6.7
	Trade balance (million dollars)	-4,319	-5,208	-5,200	-5,172	-5,731	-10.8
	Ratio of imports to consumption (percent)	77.8	82.7	83.8	84.3	86.8	3.0
	Ratio of exports to production (percent)	34.2	38.8	38.2	40.1	43.5	8.5
AG010	Dairy produce:						
	Number of establishments	130,000	125,000	124,000	122,000	121,000	-0.8
	Employees (thousands)	620.0	610.0	600.0	590.0	580.0	-1.7
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. production (million dollars)	63,000	64,000	66,000	67,000	69,000	3.0
	U.S. exports (million dollars)	591	664	723	618	679	9.8
	U.S. imports (million dollars)	1,387	1,474	1,574	1,488	1,654	11.2
	Apparent U.S. consumption (million dollars)	63,796	64,810	66,851	67,870	69,976	3.1
	Trade balance (million dollars)	-796	-810	-851	-870	-976	-12.2
	Ratio of imports to consumption (percent)	2.2	2.3	2.4	2.2	2.4	9.1
	Ratio of exports to production (percent)	0.9	1.0	1.1	0.9	1.0	11.1

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG011	Eggs:						
	Number of establishments	65	64	64	64	62	-3.1
	Employees (thousands)	8.0	8.0	8.0	8.0	7.0	-12.5
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. production (million dollars)	6,700	6,800	6,850	6,900	6,950	0.7
	U.S. exports (million dollars)	155	159	162	155	164	5.7
	U.S. imports (million dollars)	20	18	20	28	22	-20.9
	Apparent U.S. consumption (million dollars)	6,566	6,659	6,708	6,773	6,808	0.5
	Trade balance (million dollars)	134	141	142	127	142	11.6
	Ratio of imports to consumption (percent)	0.3	0.3	0.3	0.4	0.3	-25.0
	Ratio of exports to production (percent)	2.3	2.3	2.4	2.3	2.4	4.3
AG012A	Sugar:						
	Number of establishments	70	70	70	70	70	0.0
	Employees (thousands)	17.0	17.0	17.0	17.0	15.0	-11.8
	Capacity utilization (percent)	90	92	92	92	92	0.0
	U.S. production (million dollars)	3,696	3,328	3,583	3,600	3,498	-2.8
	U.S. exports (million dollars)	70	64	90	74	61	-17.4
	U.S. imports (million dollars)	639	551	547	569	592	4.1
	Apparent U.S. consumption (million dollars)	4,265	3,816	4,040	4,095	4,029	-1.6
	Trade balance (million dollars)	-569	-488	-457	-495	-531	-7.3
	Ratio of imports to consumption (percent)	15.0	14.4	13.6	13.9	14.7	5.8
	Ratio of exports to production (percent)	1.9	1.9	2.5	2.1	1.7	-19.0
AG012B	High fructose corn sweetener:						
	Number of establishments	23	22	22	22	30	36.4
	Employees (thousands)	11.0	11.0	11.0	11.0	9.0	-18.2
	Capacity utilization (percent)	81	81	80	80	80	0.0
	U.S. production (million dollars)	2,558	2,743	3,055	3,200	3,000	-6.3
	U.S. exports (million dollars)	103	101	83	63	76	20.8
	U.S. imports (million dollars)	34	32	39	34	42	22.6
	Apparent U.S. consumption (million dollars)	2,489	2,673	3,011	3,171	2,966	-6.5
	Trade balance (million dollars)	69	70	44	29	34	18.6
	Ratio of imports to consumption (percent)	1.4	1.2	1.3	1.1	1.4	27.3
	Ratio of exports to production (percent)	4.0	3.7	2.7	2.0	2.5	25.0

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG013	Animal feeds:						
	Number of establishments	1,800	1,800	1,800	1,790	1,790	0.0
	Employees (thousands)	56.0	56.0	56.0	54.0	54.0	0.0
	Capacity utilization (percent)	79	79	79	80	80	0.0
	U.S. shipments (million dollars)	36,500	37,000	37,370	39,612	39,700	(⁴)
	U.S. exports (million dollars)	3,621	4,061	4,508	4,189	4,207	(⁴)
	U.S. imports (million dollars)	604	641	626	670	705	5.2
	Apparent U.S. consumption (million dollars)	33,483	33,581	33,489	36,094	36,198	(⁴)
	Trade balance (million dollars)	3,017	3,419	3,881	3,518	3,502	-0.5
	Ratio of imports to consumption (percent)	1.8	1.9	1.9	1.9	1.9	0.0
	Ratio of exports to shipments (percent)	9.9	11.0	12.1	10.6	10.6	0.0
AG014	Live plants:						
	Number of establishments	30,000	30,000	30,000	30,000	29,500	-1.7
	Employees (thousands)	139.0	140.0	140.0	140.0	145.0	3.6
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	12,175	12,800	13,440	13,571	13,840	2.0
	U.S. exports (million dollars)	144	132	116	113	128	13.1
	U.S. imports (million dollars)	428	460	495	503	539	7.3
	Apparent U.S. consumption (million dollars)	12,460	13,129	13,819	13,960	14,251	2.1
	Trade balance (million dollars)	-285	-329	-379	-389	-411	-5.6
	Ratio of imports to consumption (percent)	3.4	3.5	3.6	3.6	3.8	5.6
	Ratio of exports to shipments (percent)	1.2	1.0	0.9	0.8	0.9	12.5
AG015	Seeds:						
	Number of establishments	12,561	12,500	12,500	12,500	12,500	0.0
	Employees (thousands)	(³)	(³)	(³)	(³)	(³)	(³)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. exports (million dollars)	812	783	768	892	859	-3.7
	U.S. imports (million dollars)	485	501	436	431	452	4.8
	Apparent U.S. consumption (million dollars)	(³)	(³)	(³)	(³)	(³)	(³)
	Trade balance (million dollars)	327	282	332	461	407	-11.7
	Ratio of imports to consumption (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	Ratio of exports to production (percent)	(³)	(³)	(³)	(³)	(³)	(³)

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG016	Cut flowers:						
	Number of establishments	2,200	2,000	1,800	1,800	1,700	-5.6
	Employees (thousands)	32.0	30.0	26.0	26.0	25.0	-3.8
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	451	460	455	460	446	-3.0
	U.S. exports (million dollars)	41	40	39	36	33	-7.7
	U.S. imports (million dollars)	592	611	565	541	611	12.9
	Apparent U.S. consumption (million dollars)	1,001	1,032	981	965	1,024	6.1
	Trade balance (million dollars)	-550	-572	-526	-505	-578	-14.3
	Ratio of imports to consumption (percent)	59.1	59.2	57.6	56.1	59.7	6.4
	Ratio of exports to shipments (percent)	9.2	8.6	8.7	7.9	7.5	-5.1
AG017	Miscellaneous vegetable substances:						
	Number of establishments	9,000	9,000	9,000	9,000	9,000	0.0
	Employees (thousands)	(³)	(³)	(³)	(³)	(³)	(³)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	900	900	900	900	900	0.0
	U.S. exports (million dollars)	453	485	505	476	510	7.3
	U.S. imports (million dollars)	839	790	794	760	880	15.7
	Apparent U.S. consumption (million dollars)	1,286	1,205	1,188	1,184	1,269	7.2
	Trade balance (million dollars)	-386	-305	-288	-284	-369	-29.9
	Ratio of imports to consumption (percent)	65.3	65.5	66.8	64.2	69.3	7.9
	Ratio of exports to production (percent)	50.4	53.9	56.1	52.9	56.7	7.2
AG018	Fresh, chilled, or frozen vegetables:						
	Number of establishments	31,000	30,000	30,100	29,500	29,450	-0.2
	Employees (thousands)	40.0	39.0	40.0	39.0	39.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	4,300	4,450	4,500	4,600	4,550	-1.1
	U.S. exports (million dollars)	1,198	1,346	1,304	1,353	1,408	4.1
	U.S. imports (million dollars)	2,207	2,320	2,628	2,758	3,250	17.8
	Apparent U.S. consumption (million dollars)	5,309	5,423	5,824	6,005	6,392	6.4
	Trade balance (million dollars)	-1,009	-973	-1,324	-1,405	-1,842	-31.0
	Ratio of imports to consumption (percent)	41.6	42.8	45.1	45.9	50.8	10.7
	Ratio of exports to production (percent)	27.9	30.3	29.0	29.4	30.9	5.1

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG019	Prepared or preserved vegetables, mushrooms, and olives:						
	Number of establishments	1,600	1,550	1,500	1,600	1,550	-3.1
	Employees (thousands)	4.0	4.0	4.0	5.0	4.0	-20.0
	Capacity utilization (percent)	89	88	87	85	86	1.2
	U.S. production (million dollars)	8,400	8,450	8,200	8,300	8,350	0.6
	U.S. exports (million dollars)	1,535	1,451	1,387	1,365	1,326	-2.9
	U.S. imports (million dollars)	1,384	1,408	1,493	1,574	1,779	13.1
	Apparent U.S. consumption (million dollars)	8,250	8,407	8,306	8,509	8,803	3.5
	Trade balance (million dollars)	150	43	-106	-209	-453	-117.2
	Ratio of imports to consumption (percent)	16.8	16.7	18.0	18.5	20.2	9.2
	Ratio of exports to production (percent)	18.3	17.2	16.9	16.4	15.9	-3.0
AG020	Edible nuts:						
	Number of establishments	37,000	37,000	37,000	37,000	37,000	0.0
	Employees (thousands)	380.0	380.0	380.0	380.0	380.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	2,404	2,326	2,606	2,506	2,604	3.9
	U.S. exports (million dollars)	1,212	1,361	1,309	1,542	1,785	15.8
	U.S. imports (million dollars)	794	808	670	701	775	10.7
	Apparent U.S. consumption (million dollars)	1,986	1,773	1,967	1,665	1,594	-4.2
	Trade balance (million dollars)	418	553	639	841	1,010	20.0
	Ratio of imports to consumption (percent)	40.0	45.6	34.1	42.1	48.6	15.4
	Ratio of exports to shipments (percent)	50.4	58.5	50.2	61.5	68.5	11.4
AG021	Tropical fruit:						
	Number of establishments	8,500	8,500	8,500	8,500	8,500	0.0
	Employees (thousands)	20.0	20.0	20.0	20.0	20.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(³)	(³)
	U.S. production (million dollars)	498	545	496	534	569	6.6
	U.S. exports (million dollars)	64	57	49	46	54	17.7
	U.S. imports (million dollars)	1,574	1,548	1,616	1,705	1,754	2.9
	Apparent U.S. consumption (million dollars)	2,008	2,035	2,063	2,193	2,269	3.5
	Trade balance (million dollars)	-1,510	-1,490	-1,567	-1,659	-1,700	-2.5
	Ratio of imports to consumption (percent)	78.4	76.0	78.3	77.7	77.3	-0.5
	Ratio of exports to production (percent)	12.8	10.5	9.8	8.6	9.5	10.5

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG022	Citrus fruit:						
	Number of establishments	17,450	17,450	17,300	17,200	16,900	-1.7
	Employees (thousands)	91.0	91.0	90.0	90.0	89.0	-1.1
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	2,500	2,640	2,262	2,605	2,297	-11.8
	U.S. exports (million dollars)	498	635	613	636	679	6.7
	U.S. imports (million dollars)	331	311	308	325	437	34.4
	Apparent U.S. consumption (million dollars)	2,333	2,316	1,957	2,294	2,055	-10.4
	Trade balance (million dollars)	167	324	305	311	242	-22.2
	Ratio of imports to consumption (percent)	14.2	13.4	15.8	14.2	21.3	50.0
	Ratio of exports to production (percent)	19.9	24.1	27.1	24.4	29.6	21.3
AG023	Deciduous fruit:						
	Number of establishments	81,000	81,000	81,000	81,000	81,000	0.0
	Employees (thousands)	155.0	155.0	155.0	155.0	155.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	2,058	2,101	2,134	2,723	2,340	-14.1
	U.S. exports (million dollars)	743	797	832	788	810	2.9
	U.S. imports (million dollars)	268	247	270	294	306	4.2
	Apparent U.S. consumption (million dollars)	1,583	1,550	1,572	2,229	1,836	-17.6
	Trade balance (million dollars)	475	551	562	494	504	2.1
	Ratio of imports to consumption (percent)	16.9	15.9	17.2	13.2	16.7	26.5
	Ratio of exports to shipments (percent)	36.1	38.0	39.0	28.9	34.6	19.7
AG024	Other fresh fruit:						
	Number of establishments	55,000	55,000	55,000	55,000	55,000	0.0
	Employees (thousands)	115.0	115.0	115.0	115.0	115.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	2,383	2,199	2,521	3,018	2,749	-8.9
	U.S. exports (million dollars)	562	638	674	708	775	9.5
	U.S. imports (million dollars)	1,031	1,024	1,065	1,183	1,200	1.4
	Apparent U.S. consumption (million dollars)	2,852	2,585	2,913	3,494	3,174	-9.1
	Trade balance (million dollars)	-469	-386	-392	-476	-425	10.6
	Ratio of imports to consumption (percent)	36.1	39.6	36.6	33.9	37.8	11.5
	Ratio of exports to shipments (percent)	23.6	29.0	26.7	23.5	28.2	20.0

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG025	Dried fruit other than tropical:						
	Number of establishments	40	40	40	40	40	0.0
	Employees (thousands)	9.0	9.0	9.0	9.0	9.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(¹)	(¹)
	U.S. shipments (million dollars)	1,149	1,166	799	960	869	-9.5
	U.S. exports (million dollars)	379	342	349	338	366	8.5
	U.S. imports (million dollars)	78	63	63	90	133	48.0
	Apparent U.S. consumption (million dollars)	848	887	514	712	635	-10.8
	Trade balance (million dollars)	301	279	285	248	234	-5.8
	Ratio of imports to consumption (percent)	9.2	7.1	12.3	12.6	20.9	65.9
	Ratio of exports to shipments (percent)	33.0	29.4	43.6	35.2	42.1	19.6
AG026	Frozen fruit:						
	Number of establishments	40	40	40	40	40	0.0
	Employees (thousands)	6.0	6.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. shipments (million dollars)	701	669	692	775	629	-18.8
	U.S. exports (million dollars)	89	86	80	80	81	0.8
	U.S. imports (million dollars)	125	122	117	152	202	33.1
	Apparent U.S. consumption (million dollars)	738	705	729	847	751	-11.4
	Trade balance (million dollars)	-37	-36	-37	-72	-122	-69.1
	Ratio of imports to consumption (percent)	17.0	17.3	16.0	17.9	26.9	50.3
	Ratio of exports to shipments (percent)	12.7	12.8	11.6	10.3	12.8	24.3
AG027	Prepared or preserved fruit:						
	Number of establishments	200	200	200	200	200	0.0
	Employees (thousands)	20.0	20.0	20.0	20.0	20.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. shipments (million dollars)	4,499	4,724	4,960	5,209	4,391	-15.7
	U.S. exports (million dollars)	180	190	195	184	203	10.0
	U.S. imports (million dollars)	576	547	559	622	688	10.7
	Apparent U.S. consumption (million dollars)	4,895	5,080	5,324	5,646	4,876	-13.6
	Trade balance (million dollars)	-396	-356	-364	-437	-485	-10.9
	Ratio of imports to consumption (percent)	11.8	10.8	10.5	11.0	14.1	28.2
	Ratio of exports to shipments (percent)	4.0	4.0	3.9	3.5	4.6	31.4

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG028	Coffee and tea:						
	Number of establishments	247	247	247	247	247	0.0
	Employees (thousands)	12.0	12.0	12.0	12.0	12.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. shipments (million dollars)	7,116	6,300	4,855	4,855	4,862	(⁴)
	U.S. exports (million dollars)	284	298	314	297	348	16.9
	U.S. imports (million dollars)	3,114	2,921	1,915	1,942	2,228	14.7
	Apparent U.S. consumption (million dollars)	9,946	8,923	6,456	6,500	6,742	3.7
	Trade balance (million dollars)	-2,830	-2,623	-1,601	-1,645	-1,880	-14.3
	Ratio of imports to consumption (percent)	31.3	32.7	29.7	29.9	33.0	10.4
	Ratio of exports to shipments (percent)	4.0	4.7	6.5	6.1	7.1	16.4
AG029	Spices:						
	Number of establishments	274	274	274	274	274	0.0
	Employees (thousands)	13.0	13.0	13.0	13.0	13.0	0.0
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. shipments (million dollars)	1,765	1,800	1,836	1,731	1,731	0.0
	U.S. exports (million dollars)	72	80	76	70	76	9.6
	U.S. imports (million dollars)	530	552	517	549	682	24.2
	Apparent U.S. consumption (million dollars)	2,223	2,272	2,277	2,211	2,337	5.7
	Trade balance (million dollars)	-458	-472	-441	-480	-606	-26.4
	Ratio of imports to consumption (percent)	23.8	24.3	22.7	24.8	29.2	17.7
	Ratio of exports to shipments (percent)	4.1	4.4	4.1	4.0	4.4	10.0
AG030	Cereals:						
	Number of establishments	282,000	265,000	250,000	235,000	220,000	-6.4
	Employees (thousands)	(³)	(³)	(³)	(³)	(³)	(³)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	28,770	25,760	26,900	26,800	29,250	9.1
	U.S. exports (million dollars)	10,128	9,467	9,397	9,929	10,429	5.0
	U.S. imports (million dollars)	730	660	761	735	646	-12.1
	Apparent U.S. consumption (million dollars)	19,371	16,952	18,264	17,606	19,466	10.6
	Trade balance (million dollars)	9,399	8,808	8,636	9,194	9,784	6.4
	Ratio of imports to consumption (percent)	3.8	3.9	4.2	4.2	3.3	-21.4
	Ratio of exports to production (percent)	35.2	36.8	34.9	37.1	35.7	-3.8

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG031	Milled grains, malts, and starches:						
	Number of establishments	515	515	500	500	490	-2.0
	Employees (thousands)	21.0	21.0	20.0	20.0	18.0	-10.0
	Capacity utilization (percent)	77	78	85	87	85	-2.3
	U.S. shipments (million dollars)	12,753	12,500	12,125	12,125	12,000	-1.0
	U.S. exports (million dollars)	439	402	446	594	599	1.0
	U.S. imports (million dollars)	261	304	305	379	441	16.3
	Apparent U.S. consumption (million dollars)	12,575	12,402	11,983	11,910	11,841	-0.6
	Trade balance (million dollars)	178	98	142	215	159	-26.1
	Ratio of imports to consumption (percent)	2.1	2.5	2.5	3.2	3.7	15.6
	Ratio of exports to shipments (percent)	3.4	3.2	3.7	4.9	5.0	2.0
AG032	Oilseeds:						
	Number of establishments	282,000	265,000	250,000	235,000	220,000	-6.4
	Employees (thousands)	(³)	(³)	(³)	(³)	(³)	(³)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	14,900	13,300	13,600	13,800	16,400	18.8
	U.S. exports (million dollars)	4,694	5,419	5,642	5,790	8,153	40.8
	U.S. imports (million dollars)	238	231	203	191	208	9.1
	Apparent U.S. consumption (million dollars)	10,443	8,112	8,161	8,201	8,455	3.1
	Trade balance (million dollars)	4,457	5,188	5,439	5,599	7,945	41.9
	Ratio of imports to consumption (percent)	2.3	2.8	2.5	2.3	2.5	8.7
	Ratio of exports to production (percent)	31.5	40.7	41.5	42.0	49.7	18.3
AG033	Animal or vegetable fats and oils:						
	Number of establishments	510	506	502	500	500	0.0
	Employees (thousands)	29.0	27.0	28.0	28.0	28.0	0.0
	Capacity utilization (percent)	84	87	90	90	88	-2.2
	U.S. shipments (million dollars)	8,430	7,400	7,000	8,600	9,900	15.1
	U.S. exports (million dollars)	1,947	1,450	1,405	1,917	1,986	3.6
	U.S. imports (million dollars)	1,348	1,311	1,128	1,285	1,491	16.1
	Apparent U.S. consumption (million dollars)	7,831	7,261	6,723	7,968	9,405	18.0
	Trade balance (million dollars)	599	139	277	632	495	-21.7
	Ratio of imports to consumption (percent)	17.2	18.1	16.8	16.1	15.9	-1.2
	Ratio of exports to shipments (percent)	23.1	19.6	20.1	22.3	20.1	-9.9

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG034	Pasta, cereals, and other bakery goods:						
	Number of establishments	4,450	4,450	4,450	4,425	4,425	0.0
	Employees (thousands)	297.0	303.0	310.0	303.0	303.0	0.0
	Capacity utilization (percent)	72	70	73	75	73	-2.7
	U.S. shipments (million dollars)	62,731	64,751	66,837	68,174	68,174	0.0
	U.S. exports (million dollars)	1,044	1,092	1,153	1,184	1,287	8.7
	U.S. imports (million dollars)	1,637	1,755	1,902	2,191	2,501	14.1
	Apparent U.S. consumption (million dollars)	63,324	65,413	67,585	69,182	69,388	(⁴)
	Trade balance (million dollars)	-593	-662	-748	-1,008	-1,214	-20.4
	Ratio of imports to consumption (percent)	2.6	2.7	2.8	3.2	3.6	12.5
	Ratio of exports to shipments (percent)	1.7	1.7	1.7	1.7	1.9	11.8
AG035	Sauces, condiments, and soups:						
	Number of establishments	255	255	255	255	255	0.0
	Employees (thousands)	30.0	30.0	30.0	30.0	30.0	0.0
	Capacity utilization (percent)	68	60	65	70	60	-14.3
	U.S. shipments (million dollars)	15,828	16,065	16,390	17,210	16,065	-6.7
	U.S. exports (million dollars)	587	641	737	761	813	6.8
	U.S. imports (million dollars)	457	502	576	670	663	-1.1
	Apparent U.S. consumption (million dollars)	15,698	15,926	16,229	17,119	15,915	-7.0
	Trade balance (million dollars)	130	139	161	91	150	64.9
	Ratio of imports to consumption (percent)	2.9	3.2	3.5	3.9	4.2	7.7
	Ratio of exports to shipments (percent)	3.7	4.0	4.5	4.4	5.1	15.9
AG036	Infant formulas, malt extracts, and other edible preparations:						
	Number of establishments	1,400	1,400	1,400	1,400	1,400	0.0
	Employees (thousands)	105.0	105.0	105.0	105.0	100.0	-4.8
	Capacity utilization (percent)	72	70	75	75	75	0.0
	U.S. shipments (million dollars)	33,675	34,685	36,419	37,147	39,004	5.0
	U.S. exports (million dollars)	2,412	2,401	2,729	2,582	2,546	-1.4
	U.S. imports (million dollars)	556	556	659	795	920	15.7
	Apparent U.S. consumption (million dollars)	31,819	32,840	34,349	35,360	37,378	5.7
	Trade balance (million dollars)	1,856	1,845	2,070	1,787	1,626	-9.0
	Ratio of imports to consumption (percent)	1.7	1.7	1.9	2.2	2.5	13.6
	Ratio of exports to shipments (percent)	7.2	6.9	7.5	6.9	6.5	-5.8

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG037	Cocoa, chocolate, and confectionery:						
	Number of establishments	1,200	1,300	1,300	1,350	1,300	-3.7
	Employees (thousands)	80.0	90.0	90.0	90.0	68.0	-24.4
	Capacity utilization (percent)	85	87	87	87	87	0.0
	U.S. shipments (million dollars)	14,000	16,000	16,000	16,500	17,200	4.2
	U.S. exports (million dollars)	697	851	997	817	914	12.0
	U.S. imports (million dollars)	2,238	2,178	2,301	2,662	3,535	32.8
	Apparent U.S. consumption (million dollars)	15,540	17,328	17,304	18,346	19,821	8.0
	Trade balance (million dollars)	-1,540	-1,328	-1,304	-1,846	-2,621	-42.0
	Ratio of imports to consumption (percent)	14.4	12.6	13.3	14.5	17.8	22.8
	Ratio of exports to shipments (percent)	5.0	5.3	6.2	4.9	5.3	8.2
AG038	Fruit and vegetable juices:						
	Number of establishments	95	94	92	90	89	-1.1
	Employees (thousands)	145.0	144.0	140.0	140.0	138.0	-1.4
	Capacity utilization (percent)	83	83	83	83	83	0.0
	U.S. shipments (million dollars)	2,900	3,100	3,000	3,000	2,900	-3.3
	U.S. exports (million dollars)	748	713	665	682	674	-1.2
	U.S. imports (million dollars)	796	767	661	675	793	17.5
	Apparent U.S. consumption (million dollars)	2,948	3,153	2,995	2,993	3,019	0.9
	Trade balance (million dollars)	-48	-53	5	7	-119	(²)
	Ratio of imports to consumption (percent)	27.0	24.3	22.1	22.5	26.3	16.9
	Ratio of exports to shipments (percent)	25.8	23.0	22.2	22.7	23.2	2.2
AG039	Nonalcoholic beverages, excluding fruit and vegetable juices:						
	Number of establishments	3,200	3,200	3,200	3,200	3,200	0.0
	Employees (thousands)	110.0	110.0	110.0	110.0	110.0	0.0
	Capacity utilization (percent)	67	67	67	67	67	0.0
	U.S. shipments (million dollars)	62,000	63,000	65,000	70,370	73,000	3.7
	U.S. exports (million dollars)	328	312	312	334	397	18.8
	U.S. imports (million dollars)	625	683	745	823	966	17.4
	Apparent U.S. consumption (million dollars)	62,298	63,371	65,434	70,859	73,569	3.8
	Trade balance (million dollars)	-298	-371	-434	-489	-569	-16.4
	Ratio of imports to consumption (percent)	1.0	1.1	1.1	1.2	1.3	8.3
	Ratio of exports to shipments (percent)	0.5	0.5	0.5	0.5	0.5	0.0

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG040	Malt beverages:						
	Number of establishments	529	529	529	529	529	0.0
	Employees (thousands)	30.0	31.0	33.0	33.0	31.0	-6.1
	Capacity utilization (percent)	80	79	80	80	80	0.0
	U.S. shipments (million dollars)	16,907	16,544	16,925	16,925	16,925	0.0
	U.S. exports (million dollars)	201	169	191	171	172	0.9
	U.S. imports (million dollars)	1,881	2,166	2,333	2,566	2,664	3.8
	Apparent U.S. consumption (million dollars)	18,587	18,540	19,067	19,320	19,417	0.5
	Trade balance (million dollars)	-1,680	-1,996	-2,142	-2,395	-2,492	-4.1
	Ratio of imports to consumption (percent)	10.1	11.7	12.2	13.3	13.7	3.0
	Ratio of exports to shipments (percent)	1.2	1.0	1.1	1.0	1.0	0.0
AG041	Wine and certain other fermented beverages:						
	Number of establishments	2,000	2,646	2,646	2,646	2,646	0.0
	Employees (thousands)	21.0	22.0	23.0	24.0	24.0	0.0
	Capacity utilization (percent)	79	80	82	82	82	0.0
	U.S. shipments (million dollars)	6,618	7,208	7,854	7,854	8,100	3.1
	U.S. exports (million dollars)	541	551	531	541	634	17.1
	U.S. imports (million dollars)	2,210	2,259	2,316	2,740	3,307	20.7
	Apparent U.S. consumption (million dollars)	8,287	8,916	9,639	10,053	10,773	7.2
	Trade balance (million dollars)	-1,669	-1,708	-1,785	-2,199	-2,673	-21.6
	Ratio of imports to consumption (percent)	26.7	25.3	24.0	27.3	30.7	12.5
	Ratio of exports to shipments (percent)	8.2	7.6	6.8	6.9	7.8	13.0
AG042	Distilled spirits:						
	Number of establishments	57	57	57	57	57	0.0
	Employees (thousands)	6.0	6.0	8.0	8.0	8.0	0.0
	Capacity utilization (percent)	63	63	68	68	75	10.3
	U.S. shipments (million dollars)	3,063	3,860	3,929	3,929	4,050	3.1
	U.S. exports (million dollars)	480	483	534	555	592	6.7
	U.S. imports (million dollars)	2,383	2,727	2,848	3,111	3,453	11.0
	Apparent U.S. consumption (million dollars)	4,965	6,104	6,242	6,485	6,911	6.6
	Trade balance (million dollars)	-1,902	-2,244	-2,313	-2,556	-2,861	-11.9
	Ratio of imports to consumption (percent)	48.0	44.7	45.6	48.0	50.0	4.2
	Ratio of exports to shipments (percent)	15.7	12.5	13.6	14.1	14.6	3.5

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG043	Unmanufactured tobacco:						
	Number of establishments	21	21	20	20	20	0.0
	Employees (thousands)	4.0	4.0	4.0	4.0	4.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	2,370	2,122	2,187	2,300	2,186	-5.0
	U.S. exports (million dollars)	1,294	1,222	1,268	1,050	1,035	-1.4
	U.S. imports (million dollars)	711	628	680	716	757	5.8
	Apparent U.S. consumption (million dollars)	1,787	1,528	1,599	1,966	1,908	-3.0
	Trade balance (million dollars)	583	594	588	334	278	-16.7
	Ratio of imports to consumption (percent)	39.8	41.1	42.5	36.4	39.7	9.1
	Ratio of exports to production (percent)	54.6	57.6	58.0	45.6	47.4	3.9
AG044	Cigars and certain other manufactured tobacco:						
	Number of establishments	57	57	57	57	57	0.0
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	75	74	73	72	72	0.0
	U.S. shipments (million dollars)	1,235	1,193	1,100	1,010	1,010	0.0
	U.S. exports (million dollars)	651	709	616	485	442	-8.7
	U.S. imports (million dollars)	301	290	285	299	307	2.5
	Apparent U.S. consumption (million dollars)	885	774	769	825	875	6.0
	Trade balance (million dollars)	350	419	331	185	135	-26.8
	Ratio of imports to consumption (percent)	34.0	37.5	37.1	36.3	35.1	-3.3
	Ratio of exports to shipments (percent)	52.7	59.4	56.0	48.0	43.8	-8.8
AG045	Cigarettes:						
	Number of establishments	10	10	10	10	10	0.0
	Employees (thousands)	18.0	18.0	18.0	18.0	18.0	0.0
	Capacity utilization (percent)	71	70	71	70	70	0.0
	U.S. shipments (million dollars)	39,686	39,686	42,787	45,696	46,000	0.7
	U.S. exports (million dollars)	3,232	3,308	2,118	1,463	1,403	-4.1
	U.S. imports (million dollars)	112	212	189	230	234	2.0
	Apparent U.S. consumption (million dollars)	36,566	36,590	40,857	44,462	44,831	0.8
	Trade balance (million dollars)	3,120	3,096	1,930	1,234	1,169	-5.3
	Ratio of imports to consumption (percent)	0.3	0.6	0.5	0.5	0.5	0.0
	Ratio of exports to shipments (percent)	8.1	8.3	5.0	3.2	3.0	-6.3

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG046	Hides, skins, and leather:						
	Number of establishments	1,220	1,220	1,220	1,220	1,220	0.0
	Employees (thousands)	18.0	17.0	16.0	16.0	16.0	0.0
	Capacity utilization (percent)	⁽³⁾	⁽³⁾	⁽³⁾	⁽³⁾	⁽³⁾	⁽³⁾
	U.S. shipments (million dollars)	5,228	5,253	5,255	5,085	4,886	-3.9
	U.S. exports (million dollars)	1,850	2,330	2,650	2,390	2,492	4.2
	U.S. imports (million dollars)	1,052	1,167	1,032	935	817	-12.6
	Apparent U.S. consumption (million dollars)	4,430	4,090	3,638	3,629	3,211	-11.5
	Trade balance (million dollars)	798	1,163	1,617	1,456	1,675	15.0
	Ratio of imports to consumption (percent)	23.7	28.5	28.4	25.8	25.4	-1.6
	Ratio of exports to shipments (percent)	35.4	44.4	50.4	47.0	51.0	8.5
AG047	Furskins:						
	Number of establishments	398	350	325	318	308	-3.1
	Employees (thousands)	2.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	⁽¹⁾	⁽¹⁾	⁽¹⁾	⁽¹⁾	⁽¹⁾	⁽¹⁾
	U.S. shipments (million dollars)	157	151	166	128	165	28.9
	U.S. exports (million dollars)	141	158	173	173	158	-8.7
	U.S. imports (million dollars)	73	87	96	87	87	⁽⁴⁾
	Apparent U.S. consumption (million dollars)	90	81	89	43	95	122.6
	Trade balance (million dollars)	67	70	77	85	70	-17.8
	Ratio of imports to consumption (percent)	81.6	⁵ 108.1	⁵ 107.7	⁵ 204.6	92.2	-54.9
	Ratio of exports to shipments (percent)	89.5	⁵ 104.4	⁵ 104.1	⁵ 134.8	95.5	-29.2
AG048	Wool and other animal hair:						
	Number of establishments	67,940	67,800	65,658	64,695	64,033	-1.0
	Employees (thousands)	⁽³⁾	⁽³⁾	⁽³⁾	⁽³⁾	⁽³⁾	⁽³⁾
	Capacity utilization (percent)	⁽¹⁾	⁽¹⁾	⁽¹⁾	⁽¹⁾	⁽¹⁾	⁽¹⁾
	U.S. production (million dollars)	28	26	20	25	31	24.0
	U.S. exports (million dollars)	22	19	11	26	29	11.6
	U.S. imports (million dollars)	70	74	57	42	38	-8.5
	Apparent U.S. consumption (million dollars)	76	81	66	41	41	-1.2
	Trade balance (million dollars)	-48	-55	-46	-16	-10	40.5
	Ratio of imports to consumption (percent)	92.5	90.9	86.3	⁵ 101.4	93.9	-7.4
	Ratio of exports to production (percent)	79.8	71.8	54.7	⁵ 102.3	92.1	-10.0

See footnote(s) at end of table.

Table AG-4—Continued

Agricultural products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG049	Cotton, not carded or combed:						
	Number of establishments	30,114	30,000	30,000	30,000	30,000	0.0
	Employees (thousands)	166.0	160.0	160.0	160.0	160.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	3,810	4,260	3,384	4,678	4,110	-12.1
	U.S. exports (million dollars)	968	1,883	2,164	2,015	3,203	59.0
	U.S. imports (million dollars)	136	21	4	20	26	29.9
	Apparent U.S. consumption (million dollars)	2,978	2,398	1,224	2,683	933	-65.2
	Trade balance (million dollars)	832	1,862	2,160	1,995	3,177	59.3
	Ratio of imports to consumption (percent)	4.6	0.9	0.3	0.7	2.8	300.0
	Ratio of exports to production (percent)	25.4	44.2	64.0	43.1	77.9	80.7
AG050	Ethyl alcohol for nonbeverage purposes:						
	Number of establishments	57	62	61	60	76	26.7
	Employees (thousands)	7.0	8.0	8.0	8.0	8.0	0.0
	Capacity utilization (percent)	78	87	75	79	79	0.0
	U.S. production (million dollars)	2,000	2,000	1,742	2,000	2,824	41.2
	U.S. exports (million dollars)	58	91	125	71	103	44.5
	U.S. imports (million dollars)	130	162	178	170	191	12.2
	Apparent U.S. consumption (million dollars)	2,073	2,070	1,795	2,099	2,912	38.7
	Trade balance (million dollars)	-73	-70	-53	-99	-88	11.2
	Ratio of imports to consumption (percent)	6.3	7.8	9.9	8.1	6.6	-18.5
	Ratio of exports to production (percent)	2.9	4.6	7.2	3.6	3.7	2.8

¹Capacity utilization could not be meaningfully calculated for this industry.²Not meaningful.³Not available.⁴Less than 0.05 percent.⁵Inventory changes, for which data are not available, likely account for ratios that exceed 100 percent.

Note.—Calculations based on unrounded data.

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

Forest Products

Fred Forstall, Coordinator
(202) 205-3443
alfred.forstall@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$980 million (7 percent) to \$15.2 billion

U.S. exports: Increased by \$740 million (3 percent) to \$23.6 billion

U.S. imports: Increased by \$1.7 billion (5 percent) to \$38.8 billion

The U.S. trade deficit in forest products increased between 2002 and 2003, primarily as a result of increased imports of wood veneer and wood panels (see table FP-1). Product groups with the largest increases in imports were wood veneer and wood panels; wood pulp and waste paper; and moldings, millwork, and joinery (see table FP-2). The continued strength of the U.S. housing market (both housing starts and residential repair and remodeling) in 2003 generated increased imports of wood panels, moldings, millwork, and joinery. Increased prices for structural panels (particularly oriented strand board) resulted from tight supplies in combination with strong demand¹ and led to a significant increase in the value of U.S. imports of wood veneer and wood panels during the period.² The value of wood pulp and waste paper imports increased as the impact of higher prices for wood pulp exceeded the impact of declining import quantity. The product group showing the largest decrease in imports was lumber. During 2002-03, the value of U.S. lumber imports decreased 10 percent, and the quantity increased 1 percent, which reflected the long-term trend.³ In spite of the continued strength of the U.S. housing market, oversupply in the U.S. lumber market continued to reflect strong domestic production, weak offshore export markets, and increased imports.⁴

The product groups with the largest increases in exports were wood pulp and waste paper and paperboard (see table FP-2). The increase in the value of wood pulp and waste paper exports reflected a large increase in exports of waste paper (22 percent by quantity),⁵ which offset a small decrease in exports of wood pulp. U.S. exports of waste paper have expanded in recent years primarily as a result of the large domestic supply of waste paper and increased recycling efforts.⁶ The increase in the value of

¹ The strong U.S. housing market was the most significant factor impacting demand for structural panels in 2003. Other factors included Hurricane Isabel, which hit the U.S. east coast, and U.S. Government purchases for rebuilding in Iraq. However, the impact of U.S. Government purchases was less significant than was widely reported, accounting for less than 1 percent of average monthly production. "APA forecast sees structural wood panel production flat in 2004," found at

http://www.paperloop.com/db_area/archive/pponews/2004/wk03_22_2004/125.html, retrieved May 11, 2004.

² "Historic panel market run set off by reduced supply," *Random Lengths Yardstick*, Vol. 13, No. 7, July 2003, pp. 1-2.

³ During 1999 to 2003, the value of U.S. lumber imports decreased steadily (- 3 percent compound annual growth rate or CAGR) while the quantity of U.S. lumber imports increased steadily (3 percent CAGR).

⁴ *Wood Markets*, Aug. 2002 (Vol. 7, No. 6), p. 1.

⁵ U.S. exports of waste paper increased at an average compound annual growth rate (CAGR) of 14 percent (by quantity) during 1999 to 2003.

⁶ U.S. International Trade Commission, *Industry & Trade Summary Wood Pulp and Waste Paper*, USITC publication 3490, 2002, p. 6.

Table FP-1

Forest products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
Canada	7,231	7,858	7,462	7,502	7,960	457	6.1
China	637	787	820	1,058	1,314	256	24.1
Mexico	3,091	3,628	3,282	3,056	3,217	161	5.3
Japan	2,847	3,004	2,497	2,017	1,887	-130	-6.4
United Kingdom	1,090	1,276	1,143	1,047	1,014	-33	-3.1
Brazil	274	260	223	204	190	-15	-7.2
Germany	740	790	671	558	565	6	1.1
Korea	724	808	561	659	699	40	6.1
Italy	614	737	636	627	674	47	7.5
Finland	21	18	18	21	22	(2)	1.9
All other	6,803	7,268	6,430	6,075	6,025	-50	-0.8
Total	24,070	26,434	23,743	22,825	23,566	740	3.2
EU-15	4,272	4,834	4,240	3,852	3,921	70	1.8
OPEC	510	625	516	465	418	-47	-10.2
Latin America	5,178	5,769	5,170	4,769	4,844	75	1.6
CBERA	1,070	1,088	985	945	906	-39	-4.1
Asia	5,998	6,537	5,570	5,473	5,571	97	1.8
Sub-Saharan Africa	155	159	148	120	135	15	12.8
Central and Eastern Europe	66	69	79	77	88	11	14.5
U.S. imports of merchandise for consumption:							
Canada	23,829	24,782	23,449	22,311	22,640	329	1.5
China	1,526	1,967	2,168	2,749	3,362	612	22.3
Mexico	1,044	1,055	999	1,038	1,075	38	3.6
Japan	610	652	542	600	610	10	1.6
United Kingdom	807	875	805	729	751	22	3.0
Brazil	972	1,145	1,145	1,288	1,569	281	21.9
Germany	760	893	906	1,031	1,057	26	2.5
Korea	295	394	348	404	467	63	15.6
Italy	409	447	403	392	396	4	1.0
Finland	669	741	718	773	948	174	22.6
All other	4,876	5,244	5,195	5,733	5,895	162	2.8
Total	35,798	38,195	36,678	37,048	38,769	1,721	4.6
EU-15	3,955	4,504	4,371	4,778	5,109	331	6.9
OPEC	755	696	610	547	537	-10	-1.8
Latin America	2,774	2,936	2,933	3,268	3,680	411	12.6
CBERA	107	102	113	124	123	(2)	-0.3
Asia	4,488	5,085	4,960	5,662	6,317	655	11.6
Sub-Saharan Africa	110	141	119	121	139	19	15.4
Central and Eastern Europe	23	36	57	56	61	5	9.4

See footnote(s) at end of table.

Table FP-1--Continued

Forest products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
						Million dollars	
U.S. merchandise trade balance:							
Canada	-16,599	-16,924	-15,987	-14,809	-14,680	129	0.9
China	-890	-1,180	-1,348	-1,691	-2,048	-357	-21.1
Mexico	2,046	2,573	2,283	2,018	2,142	123	6.1
Japan	2,237	2,352	1,955	1,417	1,278	-139	-9.8
United Kingdom	283	401	338	318	263	-55	-17.3
Brazil	-698	-884	-922	-1,083	-1,380	-296	-27.3
Germany	-20	-104	-235	-473	-493	-20	-4.1
Korea	429	413	212	255	232	-23	-9.0
Italy	205	290	233	235	278	43	18.2
Finland	-648	-723	-699	-752	-926	-174	-23.1
All other	1,927	2,024	1,235	342	130	-211	-61.8
Total	-11,727	-11,761	-12,935	-14,223	-15,204	-980	-6.9
EU-15	316	331	-132	-926	-1,188	-262	-28.3
OPEC	-245	-71	-94	-82	-120	-37	-45.1
Latin America	2,404	2,833	2,236	1,500	1,164	-336	-22.4
CBERA	963	986	872	821	783	-38	-4.7
Asia	1,510	1,452	610	-189	-747	-558	-296.0
Sub-Saharan Africa	45	18	28	-1	-4	-3	-329.8
Central and Eastern Europe	43	33	22	21	27	6	27.7

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²Less than \$500,000.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table FP-2
Leading changes in U.S. exports and imports of forest products, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. EXPORTS:							
Increases:							
Wood pulp and wastepaper (AG059)	3,540	4,619	3,711	3,853	4,112	259	6.7
Paperboard (AG061A)	3,328	3,621	3,165	3,538	3,723	185	5.2
Printed matter (AG066)	4,195	4,306	4,353	4,006	4,160	154	3.9
Decreases:							
Tissue and tissue products (AG061B)	1,005	1,119	1,283	1,211	1,094	-117	-9.6
All other	12,002	12,768	11,231	10,217	10,476	258	2.5
TOTAL	24,070	26,434	23,743	22,825	23,566	740	3.2
U.S. IMPORTS:							
Increases:							
Wood veneer and wood panels (AG054)	3,574	3,471	3,280	3,730	4,938	1,208	32.4
Wood pulp and wastepaper (AG059)	2,604	3,388	2,650	2,371	2,603	232	9.8
Moldings, millwork, and joinery (AG053)	2,521	2,518	2,521	2,866	3,057	192	6.7
Decreases:							
Lumber (AG052)	7,820	7,071	6,854	6,647	6,007	-640	-9.6
All other	19,278	21,747	21,373	21,435	22,164	729	3.4
TOTAL	35,798	38,195	36,678	37,048	38,769	1,721	4.6

Note.-Calculations based on unrounded data.

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

U.S. exports of paperboard was primarily owing to higher prices in 2003 than in 2002 resulting from capacity reductions by U.S. paperboard manufacturers.⁷ Conversely, the decline in U.S. exports of tissue and tissue products (the group with the largest decline in export value) was primarily owing to lower prices in 2003 than in 2002 resulting from weak demand for away-from-home tissue products and capacity expansions.⁸ The decline in U.S. exports of tissue and tissue products was 10 percent by value but only 1 percent by quantity.

Canada remained the largest sector trading partner, accounting for 49 percent of total U.S. sector trade in 2003. Although the United States had trade surpluses in forest products with half of the top 10 trade partners (Mexico, Japan, the United Kingdom, Korea, and Italy), all surpluses combined were far smaller than the U.S. deficit with Canada. China overtook Mexico to become the second-largest sector trading partner, accounting for 8 percent of total trade in forest products. In 2003, the Mexican share of U.S. forest products trade remained at 7 percent, and Japan accounted for 4 percent.

In 2003, Canada accounted for 58 percent of U.S. sector imports. U.S. trade in forest products with Canada increased by \$786 million in 2003 over the previous year. Canada has significant forest resources and a well-developed forest products industry. Its industry generally has capacity in excess of domestic requirements and is in close proximity to U.S. markets. Lumber, wood panels, and newsprint were the top three product groups ranked by value of U.S. imports, but Canada supplies significant amounts in many other product groups. U.S. imports of lumber and oriented strand board from Canada benefitted from the strong U.S. housing market. The rapid development of the forest products industry in China is reflected in the growth of sector trade between China and the United States, which increased 23 percent during 2002-03.⁹ Top product groups for U.S. imports from China in 2003 were printed matter, miscellaneous paper products, and moldings, millwork, and joinery. The U.S. trade deficit with Brazil (third-largest behind Canada and China in 2003) has grown steadily in recent years. The expanding forest industry in Brazil enjoys a natural advantage, resulting from the combination of fast-growing tree species and favorable growing conditions. That advantage was initially manifest in the production of wood pulp and subsequently in the production of structural wood panels and millwork.

In 2003, Canada was the largest market for U.S. forest products, accounting for 34 percent of all U.S. exports. The U.S. industry supplies significant amounts of paperboard to many countries including Canada, China, Mexico, and Japan. Because their supplies of wood fiber are limited, the paper industries in China and Japan are based primarily on recycled fiber, making both countries principal markets for U.S. waste paper. In 2003, China alone accounted for 43 percent (by quantity) of U.S. waste paper exports. In addition to the exports of paperboard noted above, brisk trade in paper packaging with Mexico resulted from the increased demand for packaging products created by industries in the Maquiladora zone. In 2003, Canada, China, Mexico, and Japan were the principle markets for U.S. lumber, and Japan remained the largest U.S. export market for logs and rough wood products. The preference to import logs rather than finished lumber is rooted in the unique character of traditional Japanese construction methods. However, during 2002-03, the U.S. trade surplus with Japan continued to decline¹⁰ owing to increased competition in the Japanese market for forest products.

⁷ "U.S. kraft linerboard drops \$20/ton; box business continues 4-year fall," *Pulp & Paper*, Vol. 78, No. 1, Jan. 2004, p. 9.

⁸ "Rising... costs will burden tissue mills this year," *Pulp & Paper*, Vol. 78, No. 2, Feb. 2004, p. 7.

⁹ The annual increase in 2003 was very close to the latest 5-year trend. From 1999 to 2003, forest products trade between the United States and China increased at an average compound annual growth rate of 21 percent.

¹⁰ During 1999 to 2003, the U.S. trade surplus with Japan has declined at an average CAGR of 13 percent.

Table FP-3

Forest products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
AG051	Logs and rough wood products:							
	Exports	1,885	1,941	1,622	1,490	1,468	-22	-1.5
	Imports	495	576	582	582	577	-5	-0.9
	Trade balance	1,390	1,365	1,039	907	891	-17	-1.8
AG052	Lumber:							
	Exports	2,184	2,210	1,781	1,720	1,725	5	0.3
	Imports	7,820	7,071	6,854	6,647	6,007	-640	-9.6
	Trade balance	-5,636	-4,860	-5,073	-4,927	-4,282	646	13.1
AG053	Moldings, millwork, and joinery:							
	Exports	545	553	467	443	495	52	11.7
	Imports	2,521	2,518	2,521	2,866	3,057	192	6.7
	Trade balance	-1,976	-1,966	-2,054	-2,423	-2,563	-140	-5.8
AG054	Wood veneer and wood panels:							
	Exports	958	1,029	889	928	905	-24	-2.5
	Imports	3,574	3,471	3,280	3,730	4,938	1,208	32.4
	Trade balance	-2,615	-2,443	-2,391	-2,801	-4,033	-1,231	-44.0
AG055	Wooden containers:							
	Exports	172	197	150	135	154	20	14.5
	Imports	471	565	555	612	605	-7	-1.1
	Trade balance	-299	-369	-405	-477	-451	26	5.5
AG056	Tools and tool handles of wood:							
	Exports	44	53	37	42	50	8	20.3
	Imports	120	136	130	131	139	8	6.4
	Trade balance	-75	-82	-93	-89	-89	(³)	0.1
AG057	Miscellaneous articles of wood:							
	Exports	187	193	175	167	167	(³)	-0.1
	Imports	1,007	1,111	1,041	1,152	1,236	84	7.3
	Trade balance	-821	-918	-866	-985	-1,069	-84	-8.5
AG058	Cork and rattan:							
	Exports	90	86	53	61	65	4	6.9
	Imports	450	485	522	570	616	46	8.0
	Trade balance	-359	-399	-469	-509	-551	-42	-8.2
AG059	Wood pulp and wastepaper:							
	Exports	3,540	4,619	3,711	3,853	4,112	259	6.7
	Imports	2,604	3,388	2,650	2,371	2,603	232	9.8
	Trade balance	936	1,231	1,061	1,482	1,509	27	1.8
AG060	Paper boxes and bags:							
	Exports	1,416	1,500	1,445	1,315	1,348	32	2.5
	Imports	802	940	1,011	1,121	1,231	110	9.8
	Trade balance	615	561	435	195	117	-77	-39.8
AG061	Industrial papers and paperboards:							
	Exports	5,170	5,659	5,403	5,228	5,312	83	1.6
	Imports	2,797	3,157	3,276	3,464	3,492	28	0.8
	Trade balance	2,373	2,503	2,127	1,764	1,819	55	3.1
AG061 A	Paperboard:							
	Exports	3,328	3,621	3,165	3,538	3,723	185	5.2
	Imports	1,468	1,662	1,591	1,829	1,731	-98	-5.3
	Trade balance	1,860	1,959	1,574	1,709	1,992	283	16.6

See footnote(s) at end of table.

Table FP-3--Continued

Forest products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
AG061B	Tissue and tissue products:							
	Exports	1,005	1,119	1,283	1,211	1,094	-117	-9.6
	Imports	768	906	1,082	1,237	1,283	46	3.7
	Trade balance	237	214	201	-26	-188	-162	-628.0
AG061C	Industrial paper:							
	Exports	837	919	954	480	494	14	3.0
	Imports	561	589	602	398	479	80	20.1
	Trade balance	277	330	352	81	15	-66	-81.0
AG062	Newsprint:							
	Exports	423	492	409	330	325	-6	-1.7
	Imports	3,517	3,789	3,597	3,039	2,991	-48	-1.6
	Trade balance	-3,094	-3,297	-3,188	-2,709	-2,667	42	1.6
AG063	Printing and writing papers:							
	Exports	1,338	1,522	1,308	620	625	5	0.8
	Imports	4,337	4,977	4,761	4,372	4,549	177	4.1
	Trade balance	-3,000	-3,455	-3,453	-3,752	-3,924	-172	-4.6
AG064	Certain specialty papers:							
	Exports	641	689	618	1,056	1,114	58	5.5
	Imports	971	1,138	1,067	909	1,046	137	15.1
	Trade balance	-330	-449	-449	147	68	-79	-53.6
AG065	Miscellaneous paper products:							
	Exports	1,281	1,385	1,322	1,431	1,541	110	7.7
	Imports	1,150	1,385	1,295	1,740	1,779	40	2.3
	Trade balance	131	(³)	26	-309	-238	71	22.9
AG066	Printed matter:							
	Exports	4,195	4,306	4,353	4,006	4,160	154	3.9
	Imports	3,161	3,489	3,536	3,742	3,901	158	4.2
	Trade balance	1,034	817	817	263	259	-4	-1.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Less than \$500,000.

Note.—Calculations based on unrounded data.

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

Table FP-4

Forest products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG051	Logs and rough wood products:						
	Number of establishments	13,800	13,500	13,500	13,500	13,500	0.0
	Employees (thousands)	85.0	83.0	84.0	84.0	84.0	0.0
	Capacity utilization (percent)	92	95	93	93	93	0.0
	U.S. shipments (million dollars)	48,600	51,200	44,500	45,600	49,400	8.3
	U.S. exports (million dollars)	1,885	1,941	1,622	1,490	1,468	-1.5
	U.S. imports (million dollars)	495	576	582	582	577	-0.9
	Apparent U.S. consumption (million dollars)	47,210	49,835	43,461	44,693	48,509	8.5
	Trade balance (million dollars)	1,390	1,365	1,039	907	891	-1.8
	Ratio of imports to consumption (percent)	1.0	1.2	1.3	1.3	1.2	-7.7
	Ratio of exports to shipments (percent)	3.9	3.8	3.6	3.3	3.0	-9.1
AG052	Lumber:						
	Number of establishments	5,300	5,200	5,000	5,000	5,000	0.0
	Employees (thousands)	118.0	117.0	116.0	116.0	115.0	-0.9
	Capacity utilization (percent)	92	92	89	89	89	0.0
	U.S. shipments (million dollars)	24,700	23,400	21,500	22,100	21,800	-1.4
	U.S. exports (million dollars)	2,184	2,210	1,781	1,720	1,725	(')
	U.S. imports (million dollars)	7,820	7,071	6,854	6,647	6,007	-9.6
	Apparent U.S. consumption (million dollars)	30,336	28,260	26,573	27,027	26,082	-3.5
	Trade balance (million dollars)	-5,636	-4,860	-5,073	-4,927	-4,282	13.1
	Ratio of imports to consumption (percent)	25.8	25.0	25.8	24.6	23.0	-6.5
	Ratio of exports to shipments (percent)	8.8	9.4	8.3	7.8	7.9	1.3
AG053	Moldings, millwork, and joinery:						
	Number of establishments	5,300	5,200	5,200	5,200	5,200	0.0
	Employees (thousands)	154.0	154.0	162.0	167.0	167.0	0.0
	Capacity utilization (percent)	87	90	90	90	90	0.0
	U.S. shipments (million dollars)	20,100	21,000	21,000	22,600	23,600	4.4
	U.S. exports (million dollars)	545	553	467	443	495	11.7
	U.S. imports (million dollars)	2,521	2,518	2,521	2,866	3,057	6.7
	Apparent U.S. consumption (million dollars)	22,076	22,966	23,054	25,023	26,163	4.6
	Trade balance (million dollars)	-1,976	-1,966	-2,054	-2,423	-2,563	-5.8
	Ratio of imports to consumption (percent)	11.4	11.0	10.9	11.5	11.7	1.7
	Ratio of exports to shipments (percent)	2.7	2.6	2.2	2.0	2.1	5.0

See footnote(s) at end of table.

Table FP-4—Continued

Forest products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG054	Wood veneer and wood panels:						
	Number of establishments	810	800	780	780	780	0.0
	Employees (thousands)	72.0	76.0	74.0	74.0	74.0	0.0
	Capacity utilization (percent)	82	83	85	85	85	0.0
	U.S. production (million dollars)	14,800	14,200	12,500	13,600	13,500	-0.7
	U.S. exports (million dollars)	958	1,029	889	928	905	-2.5
	U.S. imports (million dollars)	3,574	3,471	3,280	3,730	4,938	32.4
	Apparent U.S. consumption (million dollars)	17,415	16,643	14,891	16,401	17,533	6.9
	Trade balance (million dollars)	-2,615	-2,443	-2,391	-2,801	-4,033	-44.0
	Ratio of imports to consumption (percent)	20.5	20.9	22.0	22.7	28.2	24.2
	Ratio of exports to production (percent)	6.5	7.2	7.1	6.8	6.7	-1.5
AG055	Wooden containers:						
	Number of establishments	2,800	2,800	2,800	2,800	2,800	0.0
	Employees (thousands)	50.0	51.0	51.0	50.0	50.0	0.0
	Capacity utilization (percent)	82	85	85	85	85	0.0
	U.S. production (million dollars)	4,700	5,000	5,200	4,800	4,800	0.0
	U.S. exports (million dollars)	172	197	150	135	154	14.5
	U.S. imports (million dollars)	471	565	555	612	605	-1.1
	Apparent U.S. consumption (million dollars)	4,999	5,369	5,605	5,277	5,251	-0.5
	Trade balance (million dollars)	-299	-369	-405	-477	-451	5.5
	Ratio of imports to consumption (percent)	9.4	10.5	9.9	11.6	11.5	-0.9
	Ratio of exports to production (percent)	3.7	3.9	2.9	2.8	3.2	14.3
AG056	Tools and tool handles of wood:						
	Number of establishments	125	120	110	110	110	0.0
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	78	75	75	75	75	0.0
	U.S. production (million dollars)	188	192	177	188	190	1.1
	U.S. exports (million dollars)	44	53	37	42	50	20.3
	U.S. imports (million dollars)	120	136	130	131	139	6.4
	Apparent U.S. consumption (million dollars)	263	274	270	277	279	0.7
	Trade balance (million dollars)	-75	-82	-93	-89	-89	(')
	Ratio of imports to consumption (percent)	45.4	49.4	48.1	47.3	49.9	5.5
	Ratio of exports to production (percent)	23.5	27.8	20.8	22.2	26.4	18.9

See footnote(s) at end of table.

Table FP-4—Continued

Forest products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG058	Cork and rattan:						
	Number of establishments	30	30	30	30	30	0.0
	Employees (thousands)	2.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	80	80	80	80	80	0.0
	U.S. production (million dollars)	110	115	120	120	120	0.0
	U.S. exports (million dollars)	90	86	53	61	65	6.9
	U.S. imports (million dollars)	450	485	522	570	616	8.0
	Apparent U.S. consumption (million dollars)	469	514	589	629	671	6.6
	Trade balance (million dollars)	-359	-399	-469	-509	-551	-8.2
	Ratio of imports to consumption (percent)	95.8	94.3	88.7	90.6	91.9	1.4
	Ratio of exports to production (percent)	82.0	74.5	44.4	51.0	54.5	6.9
AG059	Wood pulp and wastepaper:						
	Number of establishments	68	68	67	66	65	-1.5
	Employees (thousands)	(²)	(²)	(²)	(²)	(²)	(²)
	Capacity utilization (percent)	84	84	78	81	82	1.2
	U.S. production (million dollars)	7,900	9,300	7,300	7,800	8,300	6.4
	U.S. exports (million dollars)	3,540	4,619	3,711	3,853	4,112	6.7
	U.S. imports (million dollars)	2,604	3,388	2,650	2,371	2,603	9.8
	Apparent U.S. consumption (million dollars)	6,964	8,069	6,239	6,318	6,791	7.5
	Trade balance (million dollars)	936	1,231	1,061	1,482	1,509	1.8
	Ratio of imports to consumption (percent)	37.4	42.0	42.5	37.5	38.3	2.1
	Ratio of exports to production (percent)	44.8	49.7	50.8	49.4	49.5	(¹)
AG060	Paper boxes and bags:						
	Number of establishments	3,013	3,029	3,045	3,062	3,079	0.6
	Employees (thousands)	228.0	230.0	232.0	234.0	237.0	1.3
	Capacity utilization (percent)	(³)	(³)	(³)	(³)	(³)	(³)
	U.S. production (million dollars)	43,600	47,700	45,700	48,300	49,700	2.9
	U.S. exports (million dollars)	1,416	1,500	1,445	1,315	1,348	2.5
	U.S. imports (million dollars)	802	940	1,011	1,121	1,231	9.8
	Apparent U.S. consumption (million dollars)	42,985	47,139	45,265	48,105	49,583	3.1
	Trade balance (million dollars)	615	561	435	195	117	-39.8
	Ratio of imports to consumption (percent)	1.9	2.0	2.2	2.3	2.5	8.7
	Ratio of exports to production (percent)	3.2	3.1	3.2	2.7	2.7	0.0

See footnote(s) at end of table.

Table FP-4—Continued

Forest products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG061A	Paperboard:						
	Number of establishments	216	212	206	203	200	-1.5
	Employees (thousands)	51.0	51.0	49.0	48.0	48.0	0.0
	Capacity utilization (percent)	96	90	86	87	85	-2.3
	U.S. production (million dollars)	25,500	25,600	23,200	24,400	24,700	1.2
	U.S. exports (million dollars)	3,328	3,621	3,165	3,538	3,723	5.2
	U.S. imports (million dollars)	1,468	1,662	1,591	1,829	1,731	-5.3
	Apparent U.S. consumption (million dollars)	23,640	23,641	21,626	22,691	22,708	(¹)
	Trade balance (million dollars)	1,860	1,959	1,574	1,709	1,992	16.6
	Ratio of imports to consumption (percent)	6.2	7.0	7.4	8.1	7.6	-6.2
	Ratio of exports to production (percent)	13.0	14.1	13.6	14.5	15.1	4.1
AG061B	Tissue and tissue products:						
	Number of establishments	81	84	82	82	84	2.4
	Employees (thousands)	(²)	(²)	(²)	(²)	(²)	(²)
	Capacity utilization (percent)	96	93	91	90	92	2.2
	U.S. production (million dollars)	14,600	14,500	14,900	14,100	13,100	-7.1
	U.S. exports (million dollars)	1,005	1,119	1,283	1,211	1,094	-9.6
	U.S. imports (million dollars)	768	906	1,082	1,237	1,283	3.7
	Apparent U.S. consumption (million dollars)	14,363	14,286	14,699	14,126	13,288	-5.9
	Trade balance (million dollars)	237	214	201	-26	-188	-628.0
	Ratio of imports to consumption (percent)	5.4	6.3	7.4	8.8	9.7	10.2
	Ratio of exports to production (percent)	6.9	7.7	8.6	8.6	8.4	-2.3
AG061C	Industrial paper:						
	Number of establishments	75	73	71	70	69	-1.4
	Employees (thousands)	(²)	(²)	(²)	(²)	(²)	(²)
	Capacity utilization (percent)	90	84	85	82	81	-1.2
	U.S. production (million dollars)	5,300	5,300	5,200	5,000	5,200	4.0
	U.S. exports (million dollars)	837	919	954	480	494	3.0
	U.S. imports (million dollars)	561	589	602	398	479	20.1
	Apparent U.S. consumption (million dollars)	5,023	4,970	4,848	4,919	5,185	5.4
	Trade balance (million dollars)	277	330	352	81	15	-81.0
	Ratio of imports to consumption (percent)	11.2	11.9	12.4	8.1	9.2	13.6
	Ratio of exports to production (percent)	15.8	17.3	18.4	9.6	9.5	-1.0

See footnote(s) at end of table.

Table FP-4—Continued

Forest products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG062	Newsprint:						
	Number of establishments	24	24	24	20	19	-5.0
	Employees (thousands)	11.0	10.0	10.0	8.0	7.0	-12.5
	Capacity utilization (percent)	97	97	91	84	85	1.2
	U.S. shipments (million dollars)	3,316	3,495	3,209	2,440	2,473	1.4
	U.S. exports (million dollars)	423	492	409	330	325	-1.7
	U.S. imports (million dollars)	3,517	3,789	3,597	3,039	2,991	-1.6
	Apparent U.S. consumption (million dollars)	6,410	6,792	6,397	5,149	5,140	-0.2
	Trade balance (million dollars)	-3,094	-3,297	-3,188	-2,709	-2,667	1.6
	Ratio of imports to consumption (percent)	54.9	55.8	56.2	59.0	58.2	-1.4
	Ratio of exports to shipments (percent)	12.8	14.1	12.7	13.5	13.1	-3.0
AG063	Printing and writing papers:						
	Number of establishments	120	115	115	105	100	-4.8
	Employees (thousands)	(²)	(²)	(²)	(²)	(²)	(²)
	Capacity utilization (percent)	(²)	(²)	(²)	(²)	(²)	(²)
	U.S. shipments (million dollars)	23,379	24,267	21,511	21,600	20,900	-3.2
	U.S. exports (million dollars)	1,338	1,522	1,308	620	625	0.8
	U.S. imports (million dollars)	4,337	4,977	4,761	4,372	4,549	4.1
	Apparent U.S. consumption (million dollars)	26,379	27,722	24,964	25,352	24,824	-2.1
	Trade balance (million dollars)	-3,000	-3,455	-3,453	-3,752	-3,924	-4.6
	Ratio of imports to consumption (percent)	16.4	18.0	19.1	17.2	18.3	6.4
	Ratio of exports to shipments (percent)	5.7	6.3	6.1	2.9	3.0	3.4
AG064	Certain specialty papers:						
	Number of establishments	(²)	(²)	(²)	(²)	(²)	(²)
	Employees (thousands)	(²)	(²)	(²)	(²)	(²)	(²)
	Capacity utilization (percent)	(²)	(²)	(²)	(²)	(²)	(²)
	U.S. shipments (million dollars)	5,300	5,564	5,600	5,700	5,900	3.5
	U.S. exports (million dollars)	641	689	618	1,056	1,114	5.5
	U.S. imports (million dollars)	971	1,138	1,067	909	1,046	15.1
	Apparent U.S. consumption (million dollars)	5,630	6,013	6,049	5,553	5,832	5.0
	Trade balance (million dollars)	-330	-449	-449	147	68	-53.6
	Ratio of imports to consumption (percent)	17.2	18.9	17.6	16.4	17.9	9.1
	Ratio of exports to shipments (percent)	12.1	12.4	11.0	18.5	18.9	2.2

See footnote(s) at end of table.

Table FP-4—*Continued*

Forest products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
AG066	Printed matter:						
	Number of establishments	62,000	62,000	62,000	60,000	60,000	0.0
	Employees (thousands)	1,500.0	1,500.0	1,500.0	1,400.0	1,400.0	0.0
	Capacity utilization (percent)	76	75	71	69	(²)	(²)
	U.S. shipments (million dollars)	229,000	240,000	243,000	246,000	254,000	3.3
	U.S. exports (million dollars)	4,195	4,306	4,353	4,006	4,160	3.9
	U.S. imports (million dollars)	3,161	3,489	3,536	3,742	3,901	4.2
	Apparent U.S. consumption (million dollars)	227,966	239,183	242,183	245,737	253,741	3.3
	Trade balance (million dollars)	1,034	817	817	263	259	-1.6
	Ratio of imports to consumption (percent)	1.4	1.5	1.5	1.5	1.5	0.0
	Ratio of exports to shipments (percent)	1.8	1.8	1.8	1.6	1.6	0.0

¹Less than 0.05 percent.²Not available.³Capacity utilization could not be meaningfully calculated for this industry.

Note.—Calculations based on unrounded data.

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

Chemicals and Related Products

Stephen Wanser, Coordinator
(202) 205-3363
stephen.wanser@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$6.4 billion (42 percent) to \$21.6 billion
U.S. exports: Increased by \$10.6 billion (12 percent) to \$102.3 billion
U.S. imports: Increased by \$17.0 billion (16 percent) to \$123.9 billion

During 2002-03, the U.S. trade deficit in chemicals and related products increased primarily because of the sustained increase in medicinal chemical imports.¹ Although the United States registered a \$1.1-billion surplus in this sector in 1999, the U.S. trade surplus decreased to become a deficit in 2000 and the deficit increased annually thereafter. Increased imports of pharmaceuticals from Ireland and other Western European countries accounted for a large portion of the rise in total U.S. imports (see table CH-1). However, U.S. exports of chemicals and related products increased significantly in 2003, compared with 2002. This increase was a factor in slowing the rate of the increasing deficit in chemicals and related products.

The U.S. chemical industry is an integral part of the world chemical industry; many multinational chemical companies are U.S.-owned firms, producing chemicals and related compounds from various feed stocks in plants throughout the world.² As such, U.S.-owned firms are affected by global events both on the demand and the supply side.³ Over 50 percent of the products manufactured by the chemical industry are used in other manufacturing industries. In 2001, when U.S. and world manufacturing sectors entered an economic downturn, the demand for chemicals declined substantially and the industry's global growth halved by December 2001. During this period, end users relied on their chemical inventories. The world industrial economy remained stagnant through 2002. During 2001-02, the chemical industry was further adversely affected by volatile energy and feed stock prices throughout the world, political unrest in areas such as the Middle East, and the appreciation of the U.S. dollar. Fuel and feed stock (e.g., natural gas) costs rose in the United States during the period, thereby reducing the competitive position of U.S. firms (see Energy-Related Products).⁴ In 2003, business confidence grew, industrial production

¹ Medicinal chemicals include pharmaceutical active ingredients and formulated products. Structural factors that contribute to the expanding U.S. trade deficit in pharmaceuticals include low cost, production capacity in Europe meeting required standards for pharmaceutical products as the industry allocates its limited resources among R&D, marketing, and manufacturing. As the pharmaceutical industry has become more competitive in recent years, the industry has, at times, contracted (entered into joint ventures) with selected fine chemical (chemical intermediaries) companies to make some of their active ingredients. For added detail on the market dynamics of producing pharmaceuticals, see the link on the corresponding sector page.

² Similarly, many large foreign chemical companies have production facilities in the United States and elsewhere in North America.

³ T. Kevin Swift, Martha Moore, and Emily Myers, Economics & Statistics Department, American Chemistry Council, "The Business of Chemistry in the USA, Performance and Outlook," Nov. 2003; and "Forecast 2004: Tough Conditions Start to Ease," *Chemical Week*, Jan. 7-14, 2004, p. 17.

⁴ Ian Young, "Producers Grapple with Market Volatility," *Chemical Week*, Sept. 24, 2003, p. 35.

Table CH-1

Chemicals and related products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U. S. exports of domestic merchandise:							
Canada	18,783	20,327	19,692	20,115	21,516	1,401	7.0
Ireland	755	1,252	1,120	1,270	1,391	121	9.5
Mexico	10,731	13,105	12,266	12,444	13,300	856	6.9
Japan	5,575	6,267	6,105	5,762	6,176	414	7.2
United Kingdom	3,566	4,355	5,806	5,179	5,089	-89	-1.7
Germany	2,947	2,977	3,059	2,886	3,769	883	30.6
China	2,149	2,430	2,315	3,069	3,816	747	24.3
France	2,509	2,852	3,032	3,185	3,488	303	9.5
Belgium	3,732	4,640	4,547	5,240	6,856	1,616	30.8
Netherlands	3,717	3,896	3,812	4,127	5,219	1,091	26.4
All other	26,776	30,334	29,520	28,425	31,710	3,285	11.6
Total	81,240	92,433	91,274	91,702	102,330	10,628	11.6
EU-15	20,336	23,166	24,711	25,058	29,275	4,217	16.8
OPEC	1,711	1,994	2,091	1,761	1,621	-139	-7.9
Latin America	18,634	22,175	21,664	20,713	21,913	1,200	5.8
CBERA	1,821	2,025	2,176	2,188	2,225	37	1.7
Asia	17,704	20,251	18,651	19,754	22,490	2,737	13.9
Sub-Saharan Africa	610	710	780	699	717	17	2.5
Central and Eastern Europe	243	287	304	278	333	54	19.6
U. S. imports of merchandise for consumption:							
Canada	13,708	15,858	16,398	16,673	18,440	1,767	10.6
Ireland	6,326	11,452	13,355	16,282	19,117	2,836	17.4
Mexico	3,124	3,473	3,388	3,637	3,779	142	3.9
Japan	8,869	9,563	8,601	9,099	10,121	1,022	11.2
United Kingdom	6,834	7,223	7,466	8,195	9,450	1,256	15.3
Germany	8,267	7,377	7,662	8,892	9,497	605	6.8
China	4,242	4,942	5,333	6,262	7,438	1,175	18.8
France	3,576	4,070	4,883	5,119	6,338	1,219	23.8
Belgium	1,889	1,670	2,090	2,054	1,895	-159	-7.7
Netherlands	1,306	1,492	1,541	1,523	1,681	159	10.4
All other	22,030	28,174	27,847	29,188	36,165	6,977	23.9
Total	80,172	95,295	98,564	106,924	123,922	16,999	15.9
EU-15	33,537	39,410	42,784	48,700	56,408	7,708	15.8
OPEC	3,245	5,590	4,742	5,024	6,944	1,920	38.2
Latin America	6,613	8,326	7,778	7,904	8,917	1,014	12.8
CBERA	892	1,286	1,312	1,109	1,724	615	55.4
Asia	18,815	21,341	20,777	22,768	26,810	4,042	17.8
Sub-Saharan Africa	849	1,454	660	448	598	150	33.5
Central and Eastern Europe	340	791	1,167	1,199	1,385	186	15.5

See footnote(s) at end of table.

Table CH-1--*Continued*Chemicals and related products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<hr/> <i>Million dollars</i> <hr/>							
U.S. merchandise trade balance:							
Canada	5,075	4,469	3,294	3,442	3,076	-366	-10.6
Ireland	-5,571	-10,201	-12,235	-15,012	-17,727	-2,715	-18.1
Mexico	7,607	9,632	8,878	8,807	9,521	714	8.1
Japan	-3,294	-3,296	-2,496	-3,337	-3,945	-608	-18.2
United Kingdom	-3,268	-2,868	-1,660	-3,016	-4,361	-1,345	-44.6
Germany	-5,321	-4,401	-4,603	-6,007	-5,728	278	4.6
China	-2,093	-2,512	-3,017	-3,193	-3,622	-429	-13.4
France	-1,067	-1,218	-1,851	-1,934	-2,850	-916	-47.4
Belgium	1,843	2,970	2,457	3,186	4,961	1,774	55.7
Netherlands	2,411	2,403	2,271	2,605	3,537	933	35.8
All other	4,746	2,159	1,672	-763	-4,455	-3,692	-483.9
<hr/>							
Total	1,068	-2,862	-7,290	-15,222	-21,592	-6,371	-41.9
EU-15	-13,201	-16,244	-18,073	-23,642	-27,133	-3,491	-14.8
OPEC	-1,535	-3,596	-2,651	-3,263	-5,322	-2,059	-63.1
Latin America	12,021	13,849	13,886	12,809	12,996	187	1.5
CBERA	929	738	864	1,079	501	-578	-53.6
Asia	-1,111	-1,090	-2,126	-3,015	-4,320	-1,305	-43.3
Sub-Saharan Africa	-239	-744	120	251	118	-133	-52.9
Central and Eastern Europe	-97	-504	-863	-921	-1,052	-132	-14.3

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table CH-2
Leading changes in U.S. exports and imports of chemicals and related products, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. EXPORTS:							
Increases:							
Medicinal chemicals (CH025)	13,701	15,772	18,169	18,742	22,527	3,785	20.2
Certain organic chemicals (CH012)	6,796	8,257	7,774	7,668	8,857	1,189	15.5
Organic specialty chemicals (CH011)	5,507	5,980	5,678	5,050	6,004	954	18.9
Decreases:							
Photographic chemicals and preparations (CH022) ...	433	507	413	522	475	-47	-9.0
All other	54,802	61,917	59,242	59,720	64,466	4,747	7.9
TOTAL	81,240	92,433	91,274	91,702	102,330	10,628	11.6
U.S. IMPORTS:							
Increases:							
Medicinal chemicals (CH025)	23,782	29,112	33,956	40,699	49,284	8,586	21.1
Miscellaneous plastic products (CH041)	10,937	12,307	12,376	13,459	14,979	1,520	11.3
Fertilizers (CH016)	2,486	3,224	3,478	3,043	4,395	1,352	44.4
Decreases:							
Organic specialty chemicals (CH011)	6,145	6,610	6,962	6,781	6,675	-106	-1.6
All other	36,822	44,042	41,792	42,942	48,588	5,647	13.1
TOTAL	80,172	95,295	98,564	106,924	123,922	16,999	15.9

Note.-Calculations based on unrounded data.

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

increased, and downstream users started to replenish their inventories, thus leading to increased world chemical production, imports, and exports.⁵

In 2003, the major U.S. trading partners in chemicals and related products were Canada, Mexico, Ireland, and Japan. Canada and Mexico were the two largest markets for U.S. exports of these products, while Ireland, Canada, and Japan were the largest sources of U.S. imports (see table CH-1). The growth in Irish imports has resulted in part from continued investment in manufacturing facilities in pharmaceuticals and other high tech industries. The Industrial Development Agency of Ireland (IDA) has identified 6 new pharmaceutical facilities, including a \$1 billion expansion project by Wyeth Labs, and a 7 million British pound (\$11.2 million) investment by Glaxo SmithKline.⁶

U.S. trade with Mexico consisted mainly of primary olefins and aromatics imported from Mexico, while higher valued chemical products were exported back to Mexico. Canada has consistently exported commodity chemicals (derived from natural gas) to many countries, including the United States, while importing higher valued chemical products. During 2002-03, the United States imported almost \$1.4 billion of fertilizers from Canada, most derived from natural gas.

In 2003, U.S. exports of pharmaceuticals, certain organic chemicals and organic specialty chemicals exhibited the largest increases. The rise in U.S. exports of pharmaceuticals was owing, in part, to intracompany sales by multinational firms. Increased exports in other chemical sectors was owing to the lower valued dollar exchange rate, which boosted U.S. exports. The growth in exports occurred in 30 industry/commodity groups, while only 6 industry/commodity groups exhibited relatively modest declines in exports.

The increase in trade in 2003 was also shown in U.S. chemical imports, with 30 industry/commodity groups increasing, while only 4 industry/commodity groups declined. The largest increases in U.S. imports were medicinal chemicals (discussed below), miscellaneous plastic products, and fertilizers, while the largest declines were in organic specialty chemicals (see table CH-2).

U.S. imports of fertilizers increased 44 percent in 2003 over 2002, with anhydrous ammonia accounting for almost half of the increase. The average ammonia price increased from \$137 per short ton in 2002 to \$245 per short ton in 2003⁷ owing to an increase in natural gas prices, high ocean freight rates, and increased world demand for nitrogen (a component of ammonia).⁸ By quantity, U.S. imports of ammonia increased from 5.7 million metric tons in 2002 to 7.0 million metric tons in 2003, replacing U.S. production that was curtailed in the beginning of the year.⁹

⁵ Swift, Moore, and Myers, "The Business of Chemistry in the USA, Performance and Outlook," Nov. 2003, p. 16.

⁶ Van Amum, Patricia, "U.S. Faces Rising Pharmaceutical Trade Deficit."

⁷ Based on statistics of the U.S. Geological Survey.

⁸ U.S. industry representative, communication with USITC staff, Apr. 26, 2004.

⁹ U.S. Geological Survey, communication with USITC staff, Apr. 26, 2004.

COMMODITY ANALYSIS OF MEDICINAL CHEMICALS

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$4.8 billion (22 percent) to \$26.8 billion

U.S. exports: Increased by \$3.8 billion (20 percent) to \$22.5 billion

U.S. imports: Increased by \$8.6 billion (21 percent) to \$49.3 billion

The U.S. trade deficit in pharmaceuticals increased in 2003, with Western Europe (especially Ireland) continuing to be the major source of U.S. imports of pharmaceuticals.¹⁰ In general, global trade of pharmaceuticals has increased since January 1, 1995, following the elimination of duties on most medicinal chemicals under the Uruguay Round Agreement. The United States, the United Kingdom, Germany, Ireland, Japan, and several other large pharmaceutical-producing countries participated in this agreement. As the world pharmaceutical industry is dominated by multinational corporations, there is substantial intracompany trade.

Outsourcing in the pharmaceutical industry is a factor in trade. The production of bulk active ingredients and chemical intermediates used in the production of drugs is often produced in highly specialized processes in a limited number of facilities.¹¹ Pharmaceutical companies, rather than dedicating their equipment to making product, will contract their production needs to independent specialty producers throughout the world. Their product requirements can range from relatively small to large quantities, and the contract producers can manufacture these chemicals in a timely manner.¹²

In 2003, some new and innovative medicines were introduced in the United States and many other developed countries. Such products command high sales prices, which may also account for the increase in the value of total U.S. exports of pharmaceuticals. In total, 86 new medicines were introduced in 2003, including 21 new drugs, 14 biologics, and 51 additional new medicines. Among these were six new cancer drugs and seven new medicines for genetic disorders.¹³

U.S. imports

U.S. imports of pharmaceuticals increased by \$8.6 billion (21 percent) to \$49.3 billion in 2003. U.S. imports from Ireland, the United Kingdom, and Germany (the three largest U.S. suppliers by value, in 2003), increased 14 percent (to \$16.2 billion), by 18 percent (to \$6.4 billion), and by 2 percent (to \$4.3 billion), respectively. These three countries accounted for 55 percent of total U.S. imports of pharmaceutical products.

The United Kingdom and Germany have benefitted from the trend toward outsourcing in the pharmaceutical industry and have become larger suppliers to the U.S. market over the past several years. These countries are attractive sites for contract manufacturing because of the large number of prominent multinational pharmaceutical companies (as well as large research-oriented chemical firms) active in these two countries and their reputations for well-trained organic chemists.

During the past decade, Ireland has also been a growing source of pharmaceutical imports owing, in part, to a national tax policy favorable to research-oriented corporations, with the most significant growth in high technology areas such as pharmaceuticals. It has been reported that 17 of the 20 leading

¹⁰ The absolute size of the deficit in pharmaceuticals is sufficiently large that it is a major contributor to the U.S. trade deficit in chemicals and related products.

¹¹ With increasing returns to scale, only a few facilities are needed to perform certain specialized processes.

¹² Stephen C. Stinson, "Custom Chemicals," *Chemical & Engineering News*, Jan. 19, 1999, pp. 49-52.

¹³ "New Drug Approvals in 2003," PhRMA press release, Jan. 2004.

multinational drug companies worldwide have established manufacturing facilities in Ireland.¹⁴ Because production costs are low, Ireland's pharmaceuticals and related products are highly price competitive in the U.S. market.¹⁵ During 1999-2003, U.S. imports of pharmaceuticals from Ireland increased from \$5.2 billion to \$16.2 billion, owing, in part, to intracompany trade.¹⁶

U.S. exports

U.S. exports of pharmaceuticals increased by \$3.8 billion (20 percent) to \$22.5 billion during 2002-03. The top-three markets for U.S. pharmaceuticals (by value) were Canada, the Netherlands, and the United Kingdom. Overall, the combination of higher drug prices, increasing demand by aging populations, and industry globalization has led to the continued rise in U.S. exports.

Stephen Wanser
(202) 205-3363
stephen.wanser@usitc.gov

¹⁴ According to the Industrial Development Agency of Ireland (IDA), "over 120 overseas companies employ 15,000 people and export \$12 billion annually, making Ireland one of the largest exporters of pharmaceuticals and fine chemicals in the world," found at <http://www.corporateinformation.com/iesector>, retrieved Mar. 20, 2002.

¹⁵ The replacement value of the investment by the pharmaceutical sector in Ireland is estimated at 40 billion Euros. Investment in fine chemical plants producing bulk active materials has been followed by new investments in finished product pharmaceutical operations. Forty finished pharmaceutical plants are now in operation. Found at http://www.idaireland.com/industry/pharmaceutical_industry.asp, retrieved Mar. 25, 2004.

¹⁶ To further place this increase in perspective, as a percent of total U.S. pharmaceutical imports, Germany's share decreased from 14 percent in 1995 to 7 percent in 2003, and the United Kingdom's share decreased from 19 percent to 13 percent, while Ireland's share increased from 7 percent to 33 percent.

Table CH-3

Chemicals and related products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002		
							Absolute	Percent	
		Million dollars							
CH007	Major primary olefins:								
	Exports	181	299	120	245	217	-28	-11.4	
	Imports	1,798	3,552	2,913	3,397	4,144	747	22.0	
	Trade balance	-1,617	-3,253	-2,793	-3,152	-3,927	-775	-24.6	
CH008	Other olefins:								
	Exports	208	264	311	260	343	84	32.2	
	Imports	91	156	143	113	127	14	12.1	
	Trade balance	117	108	168	147	217	70	47.7	
CH009	Primary aromatics:								
	Exports	91	105	122	148	368	220	148.9	
	Imports	815	1,563	1,122	1,159	1,450	291	25.1	
	Trade balance	-724	-1,459	-1,000	-1,011	-1,082	-71	-7.0	
CH010	Organic commodity chemicals:								
	Exports	1,474	2,146	1,494	2,010	2,692	682	33.9	
	Imports	778	1,201	1,021	1,111	1,319	208	18.7	
	Trade balance	696	946	474	898	1,373	474	52.8	
CH011	Organic specialty chemicals:								
	Exports	5,507	5,980	5,678	5,050	6,004	954	18.9	
	Imports	6,145	6,610	6,962	6,781	6,675	-106	-1.6	
	Trade balance	-638	-630	-1,285	-1,731	-671	1,060	61.2	
CH012	Certain organic chemicals:								
	Exports	6,796	8,257	7,774	7,668	8,857	1,189	15.5	
	Imports	3,899	5,049	5,148	4,699	4,878	179	3.8	
	Trade balance	2,897	3,207	2,626	2,969	3,979	1,010	34.0	
CH013	Miscellaneous inorganic chemicals:								
	Exports	4,357	5,218	4,940	4,820	4,903	83	1.7	
	Imports	4,632	5,431	5,195	4,948	5,038	89	1.8	
	Trade balance	-275	-212	-255	-128	-135	-7	-5.2	
CH014	Inorganic acids:								
	Exports	204	246	242	214	219	5	2.4	
	Imports	238	251	252	246	229	-17	-6.8	
	Trade balance	-34	-5	-9	-32	-10	22	68.9	
CH015	Chlor-alkali chemicals:								
	Exports	781	862	1,054	851	897	46	5.4	
	Imports	126	162	219	166	206	40	24.1	
	Trade balance	655	700	835	685	691	6	0.9	
CH016	Fertilizers:								
	Exports	3,036	2,388	2,183	2,184	2,429	245	11.2	
	Imports	2,486	3,224	3,478	3,043	4,395	1,352	44.4	
	Trade balance	550	-836	-1,295	-859	-1,966	-1,107	-129.0	
CH017	Paints, inks, and related items, and certain components thereof:								
	Exports	3,327	3,802	3,546	3,614	3,918	304	8.4	
	Imports	1,959	2,119	2,090	1,996	2,078	82	4.1	
	Trade balance	1,368	1,683	1,455	1,618	1,840	222	13.7	
CH018	Synthetic organic pigments:								
	Exports	360	373	329	331	332	1	0.4	
	Imports	404	358	301	319	333	15	4.6	
	Trade balance	-43	16	29	12	-1	-13	(³)	

See footnote(s) at end of table.

Table CH-3--Continued

Chemicals and related products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
					Million dollars			
CH019	Synthetic dyes and azoic couplers:							
	Exports	404	436	361	249	226	-23	-9.4
	Imports	527	481	378	393	395	3	0.7
	Trade balance	-123	-45	-16	-143	-169	-26	-18.1
CH020	Synthetic tanning agents:							
	Exports	13	18	17	18	32	14	76.4
	Imports	7	7	5	7	8	2	28.7
	Trade balance	6	11	12	12	24	12	102.7
CH021	Natural tanning and dyeing materials:							
	Exports	21	24	26	27	26	-1	-3.7
	Imports	71	73	65	54	63	9	15.9
	Trade balance	-50	-49	-40	-27	-36	-10	-35.9
CH022	Photographic chemicals and preparations:							
	Exports	433	507	413	522	475	-47	-9.0
	Imports	564	555	479	435	382	-53	-12.2
	Trade balance	-131	-48	-66	87	93	6	6.9
CH023	Pesticide products and formulations:							
	Exports	2,212	2,038	2,166	2,028	2,316	288	14.2
	Imports	1,217	1,117	1,318	1,185	1,419	233	19.7
	Trade balance	995	921	848	842	897	55	6.5
CH024	Adhesives and glues:							
	Exports	502	602	565	588	600	12	2.1
	Imports	181	194	176	206	251	45	21.9
	Trade balance	321	408	388	382	349	-33	-8.6
CH025	Medicinal chemicals:							
	Exports	13,701	15,772	18,169	18,742	22,527	3,785	20.2
	Imports	23,782	29,112	33,956	40,699	49,284	8,586	21.1
	Trade balance	-10,081	-13,340	-15,788	-21,957	-26,757	-4,800	-21.9
CH026	Essential oils and other flavoring materials:							
	Exports	948	1,034	1,109	1,211	1,389	178	14.7
	Imports	754	775	736	786	1,754	968	123.1
	Trade balance	194	258	373	425	-365	-790	(³)
CH027	Perfumes, cosmetics, and toiletries:							
	Exports	2,578	2,851	3,187	3,160	3,435	275	8.7
	Imports	1,864	2,192	2,443	2,716	3,111	395	14.5
	Trade balance	714	659	744	444	324	-119	-26.9
CH028	Soaps, detergents, and surface-active agents:							
	Exports	2,138	2,331	2,223	2,282	2,524	242	10.6
	Imports	948	1,050	1,115	1,273	1,369	95	7.5
	Trade balance	1,190	1,280	1,107	1,009	1,156	147	14.6
CH029	Miscellaneous chemicals and specialties:							
	Exports	2,557	2,756	2,862	2,901	3,149	248	8.5
	Imports	1,860	2,020	1,856	1,957	2,150	193	9.9
	Trade balance	697	735	1,006	944	999	55	5.8
CH030	Explosives, propellant powders, and related items:							
	Exports	264	314	254	286	385	100	34.9
	Imports	267	265	285	302	353	50	16.5
	Trade balance	-3	49	-31	-17	33	50	(³)

See footnote(s) at end of table.

Table CH-3--Continued

Chemicals and related products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
CH031	Polyethylene resins in primary forms:							
	Exports	2,249	2,688	2,416	2,590	2,817	227	8.8
	Imports	1,329	1,650	1,735	1,651	2,158	507	30.7
	Trade balance	920	1,038	681	938	658	-280	-29.9
CH032	Polypropylene resins in primary forms:							
	Exports	863	1,131	1,100	1,188	1,416	228	19.2
	Imports	232	251	219	259	298	39	15.1
	Trade balance	630	880	881	929	1,118	189	20.4
CH033	Polyvinyl chloride resins in primary forms:							
	Exports	626	716	1,004	781	837	56	7.2
	Imports	235	331	332	247	287	40	16.1
	Trade balance	391	385	672	534	550	16	3.0
CH034	Styrene polymers in primary forms:							
	Exports	753	848	731	752	783	31	4.1
	Imports	427	572	579	580	628	48	8.2
	Trade balance	326	276	152	172	155	-16	-9.6
CH035	Saturated polyester resins:							
	Exports	566	629	798	712	814	101	14.2
	Imports	448	522	502	537	656	119	22.1
	Trade balance	118	107	296	175	158	-18	-10.0
CH036	Other plastics in primary forms:							
	Exports	6,323	7,305	6,766	7,189	7,694	505	7.0
	Imports	2,455	2,786	2,649	2,823	3,022	199	7.0
	Trade balance	3,868	4,519	4,117	4,366	4,673	306	7.0
CH037	Styrene-butadiene rubber in primary forms:							
	Exports	309	344	297	273	324	52	19.0
	Imports	173	232	258	232	231	(⁴)	-0.2
	Trade balance	137	112	39	41	93	52	128.6
CH038	Other synthetic rubber:							
	Exports	1,079	1,317	1,328	1,361	1,478	117	8.6
	Imports	697	778	734	725	741	16	2.2
	Trade balance	382	539	594	636	737	100	15.8
CH039	Pneumatic tires and tubes (new):							
	Exports	2,366	2,414	2,282	2,233	2,212	-21	-0.9
	Imports	4,559	4,700	4,146	4,694	5,170	476	10.1
	Trade balance	-2,193	-2,286	-1,864	-2,460	-2,957	-497	-20.2
CH040	Other tires:							
	Exports	111	89	96	94	98	4	3.9
	Imports	129	137	122	123	137	14	11.4
	Trade balance	-18	-48	-26	-29	-39	-10	-36.1
CH041	Miscellaneous plastic products:							
	Exports	11,729	13,804	12,561	12,567	13,041	473	3.8
	Imports	10,937	12,307	12,376	13,459	14,979	1,520	11.3
	Trade balance	792	1,497	185	-892	-1,938	-1,047	-117.4
CH042	Miscellaneous rubber products:							
	Exports	2,068	2,419	2,645	2,437	2,400	-37	-1.5
	Imports	2,328	2,567	2,549	2,752	3,040	288	10.5
	Trade balance	-259	-148	96	-315	-641	-326	-103.3

See footnote(s) at end of table.

Table CH-3--*Continued*Chemicals and related products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
		Million dollars						
CH043	Gelatin:							
	Exports	63	66	74	75	92	17	22.7
	Imports	107	103	94	96	115	19	20.0
	Trade balance	-44	-37	-20	-21	-23	-2	-10.6
CH044	Natural rubber:							
	Exports	41	39	34	40	59	19	48.7
	Imports	704	842	613	751	1,047	296	39.4
	Trade balance	-664	-803	-579	-712	-988	-277	-38.9

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Not meaningful for purposes of comparison.⁴Less than \$500,000.

Note.—Calculations based on unrounded data.

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

Table CH-4

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH007	Major primary olefins:						
	Number of establishments	37	37	37	37	37	0.0
	Employees (thousands)	5.0	5.0	5.0	5.0	5.0	0.0
	Capacity utilization (percent)	98	97	92	95	95	0.0
	U.S. shipments (million dollars)	17,000	18,500	17,500	19,000	19,500	2.6
	U.S. exports (million dollars)	181	299	120	245	217	-11.4
	U.S. imports (million dollars)	1,798	3,552	2,913	3,397	4,144	22.0
	Apparent U.S. consumption (million dollars)	18,617	21,753	20,293	22,152	23,427	5.8
	Trade balance (million dollars)	-1,617	-3,253	-2,793	-3,152	-3,927	-24.6
	Ratio of imports to consumption (percent)	9.7	16.3	14.4	15.3	17.7	15.7
	Ratio of exports to shipments (percent)	1.1	1.6	0.7	1.3	1.1	-15.4
CH008	Other olefins:						
	Number of establishments	23	23	23	23	23	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	98	97	95	97	97	0.0
	U.S. shipments (million dollars)	1,350	1,500	1,500	1,650	1,800	9.1
	U.S. exports (million dollars)	208	264	311	260	343	32.2
	U.S. imports (million dollars)	91	156	143	113	127	12.1
	Apparent U.S. consumption (million dollars)	1,233	1,392	1,332	1,503	1,583	5.3
	Trade balance (million dollars)	117	108	168	147	217	47.7
	Ratio of imports to consumption (percent)	7.4	11.2	10.7	7.5	8.0	6.7
	Ratio of exports to shipments (percent)	15.4	17.6	20.7	15.7	19.1	21.7
CH009	Primary aromatics:						
	Number of establishments	31	31	31	31	31	0.0
	Employees (thousands)	2.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	80	85	85	85	85	0.0
	U.S. shipments (million dollars)	4,250	5,300	4,900	5,000	5,300	6.0
	U.S. exports (million dollars)	91	105	122	148	368	148.9
	U.S. imports (million dollars)	815	1,563	1,122	1,159	1,450	25.1
	Apparent U.S. consumption (million dollars)	4,974	6,759	5,900	6,011	6,382	6.2
	Trade balance (million dollars)	-724	-1,459	-1,000	-1,011	-1,082	-7.0
	Ratio of imports to consumption (percent)	16.4	23.1	19.0	19.3	22.7	17.6
	Ratio of exports to shipments (percent)	2.1	2.0	2.5	3.0	6.9	130.0

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH014	Inorganic acids:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	(¹)	2,276	1,852	(¹)	(¹)	(¹)
	U.S. exports (million dollars)	204	246	242	214	219	2.4
	U.S. imports (million dollars)	238	251	252	246	229	-6.8
	Apparent U.S. consumption (million dollars)	(¹)	2,281	1,861	(¹)	(¹)	(¹)
	Trade balance (million dollars)	-34	-5	-9	-32	-10	68.9
	Ratio of imports to consumption (percent)	(¹)	11.0	13.5	(¹)	(¹)	(¹)
	Ratio of exports to shipments (percent)	(¹)	10.8	13.1	(¹)	(¹)	(¹)
CH015	Chlor-alkali chemicals:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,015	3,396	3,210	(¹)	(¹)	(¹)
	U.S. exports (million dollars)	781	862	1,054	851	897	5.4
	U.S. imports (million dollars)	126	162	219	166	206	24.1
	Apparent U.S. consumption (million dollars)	2,360	2,696	2,375	(¹)	(¹)	(¹)
	Trade balance (million dollars)	655	700	835	685	691	0.9
	Ratio of imports to consumption (percent)	5.3	6.0	9.2	(¹)	(¹)	(¹)
	Ratio of exports to shipments (percent)	25.9	25.4	32.8	(¹)	(¹)	(¹)
CH016	Fertilizers:						
	Number of establishments	350	350	350	350	350	0.0
	Employees (thousands)	23.0	22.0	22.0	22.0	22.0	0.0
	Capacity utilization (percent)	90	78	76	82	82	0.0
	U.S. shipments (million dollars)	8,000	7,500	7,000	7,500	8,000	6.7
	U.S. exports (million dollars)	3,036	2,388	2,183	2,184	2,429	11.2
	U.S. imports (million dollars)	2,486	3,224	3,478	3,043	4,395	44.4
	Apparent U.S. consumption (million dollars)	7,450	8,336	8,295	8,359	9,966	19.2
	Trade balance (million dollars)	550	-836	-1,295	-859	-1,966	-129.0
	Ratio of imports to consumption (percent)	33.4	38.7	41.9	36.4	44.1	21.2
	Ratio of exports to shipments (percent)	37.9	31.8	31.2	29.1	30.4	4.5

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH017	Paints, inks, and related items, and certain components thereof:						
	Number of establishments	1,490	1,475	1,470	1,450	1,445	-0.3
	Employees (thousands)	15.0	16.0	16.0	15.0	16.0	6.7
	Capacity utilization (percent)	85	88	85	85	86	1.2
	U.S. shipments (million dollars)	24,000	25,000	25,600	26,000	2,660	-89.8
	U.S. exports (million dollars)	3,327	3,802	3,546	3,614	3,918	8.4
	U.S. imports (million dollars)	1,959	2,119	2,090	1,996	2,078	4.1
	Apparent U.S. consumption (million dollars)	22,632	23,317	24,145	24,382	820	-96.6
	Trade balance (million dollars)	1,368	1,683	1,455	1,618	1,840	13.7
	Ratio of imports to consumption (percent)	8.7	9.1	8.7	8.2	² 253.5	2,991.5
	Ratio of exports to shipments (percent)	13.9	15.2	13.9	13.9	² 147.3	959.7
CH018	Synthetic organic pigments:						
	Number of establishments	32	32	32	32	32	0.0
	Employees (thousands)	6.0	6.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	85	85	80	80	75	-6.3
	U.S. shipments (million dollars)	1,050	1,100	1,100	1,110	1,100	-0.9
	U.S. exports (million dollars)	360	373	329	331	332	(³)
	U.S. imports (million dollars)	404	358	301	319	333	4.6
	Apparent U.S. consumption (million dollars)	1,093	1,084	1,071	1,098	1,101	(³)
	Trade balance (million dollars)	-43	16	29	12	-1	(⁴)
	Ratio of imports to consumption (percent)	36.9	33.0	28.1	29.0	30.3	4.5
	Ratio of exports to shipments (percent)	34.3	33.9	29.9	29.8	30.2	1.3
CH019	Synthetic dyes and azoic couplers:						
	Number of establishments	32	32	32	32	32	0.0
	Employees (thousands)	8.0	8.0	8.0	8.0	8.0	0.0
	Capacity utilization (percent)	85	85	80	80	75	-6.3
	U.S. shipments (million dollars)	1,230	1,320	1,320	1,320	1,320	0.0
	U.S. exports (million dollars)	404	436	361	249	226	-9.4
	U.S. imports (million dollars)	527	481	378	393	395	0.7
	Apparent U.S. consumption (million dollars)	1,353	1,365	1,336	1,463	1,489	1.8
	Trade balance (million dollars)	-123	-45	-16	-143	-169	-18.1
	Ratio of imports to consumption (percent)	38.9	35.3	28.3	26.8	26.5	-1.1
	Ratio of exports to shipments (percent)	32.8	33.0	27.4	18.9	17.1	-9.5

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH020	Synthetic tanning agents:						
	Number of establishments	5	5	5	5	5	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	85	85	80	80	75	-6.3
	U.S. shipments (million dollars)	22	24	24	24	24	0.0
	U.S. exports (million dollars)	13	18	17	18	32	76.4
	U.S. imports (million dollars)	7	7	5	7	8	28.7
	Apparent U.S. consumption (million dollars)	16	13	12	12	0	-100.0
	Trade balance (million dollars)	6	11	12	12	24	102.7
	Ratio of imports to consumption (percent)	45.3	55.5	41.4	53.6	-402,507.7	1,000.0
	Ratio of exports to shipments (percent)	60.4	76.3	70.2	76.5	² 135.0	76.5
CH021	Natural tanning and dyeing materials:						
	Number of establishments	10	10	10	10	10	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	85	85	80	80	75	-6.3
	U.S. shipments (million dollars)	30	30	30	30	30	0.0
	U.S. exports (million dollars)	21	24	26	27	26	-3.7
	U.S. imports (million dollars)	71	73	65	54	63	15.9
	Apparent U.S. consumption (million dollars)	80	79	70	57	66	17.0
	Trade balance (million dollars)	-50	-49	-40	-27	-36	-35.9
	Ratio of imports to consumption (percent)	88.6	91.9	93.9	95.4	94.6	-0.8
	Ratio of exports to shipments (percent)	69.7	78.6	85.8	91.3	88.0	-3.6
CH022	Photographic chemicals and preparations:						
	Number of establishments	5	5	5	5	5	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	85	85	80	80	75	-6.3
	U.S. shipments (million dollars)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. exports (million dollars)	433	507	413	522	475	-9.0
	U.S. imports (million dollars)	564	555	479	435	382	-12.2
	Apparent U.S. consumption (million dollars)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Trade balance (million dollars)	-131	-48	-66	87	93	6.9
	Ratio of imports to consumption (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Ratio of exports to shipments (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH023	Pesticide products and formulations:						
	Number of establishments	55	55	55	55	23	-58.2
	Employees (thousands)	14.0	14.0	14.0	14.0	1.0	-92.9
	Capacity utilization (percent)	85	85	85	85	97	14.1
	U.S. shipments (million dollars)	10,260	9,790	9,350	9,350	1,800	-80.7
	U.S. exports (million dollars)	2,212	2,038	2,166	2,028	2,316	14.2
	U.S. imports (million dollars)	1,217	1,117	1,318	1,185	1,419	19.7
	Apparent U.S. consumption (million dollars)	9,265	8,869	8,502	8,508	903	-89.4
	Trade balance (million dollars)	995	921	848	842	897	6.5
	Ratio of imports to consumption (percent)	13.1	12.6	15.5	13.9	² 157.1	1,030.2
	Ratio of exports to shipments (percent)	21.6	20.8	23.2	21.7	² 128.7	493.1
CH024	Adhesives and glues:						
	Number of establishments	500	500	500	500	500	0.0
	Employees (thousands)	13.0	13.0	13.0	13.0	13.0	0.0
	Capacity utilization (percent)	85	85	85	80	80	0.0
	U.S. shipments (million dollars)	5,000	5,100	5,200	5,000	5,000	0.0
	U.S. exports (million dollars)	502	602	565	588	600	2.1
	U.S. imports (million dollars)	181	194	176	206	251	21.9
	Apparent U.S. consumption (million dollars)	4,679	4,692	4,812	4,618	4,651	0.7
	Trade balance (million dollars)	321	408	388	382	349	-8.6
	Ratio of imports to consumption (percent)	3.9	4.1	3.7	4.5	5.4	20.0
	Ratio of exports to shipments (percent)	10.0	11.8	10.9	11.8	12.0	1.7
CH025	Medicinal chemicals:						
	Number of establishments	718	718	718	715	715	0.0
	Employees (thousands)	208.0	208.0	208.0	208.0	208.0	0.0
	Capacity utilization (percent)	85	85	85	85	75	-11.8
	U.S. shipments (million dollars)	91,800	105,600	107,000	107,000	107,010	0.0
	U.S. exports (million dollars)	13,701	15,772	18,169	18,742	22,527	20.2
	U.S. imports (million dollars)	23,782	29,112	33,956	40,699	49,284	21.1
	Apparent U.S. consumption (million dollars)	101,881	118,940	122,788	128,957	133,767	3.7
	Trade balance (million dollars)	-10,081	-13,340	-15,788	-21,957	-26,757	-21.9
	Ratio of imports to consumption (percent)	23.3	24.5	27.7	31.6	36.8	16.5
	Ratio of exports to shipments (percent)	14.9	14.9	17.0	17.5	21.1	20.6

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH026	Essential oils and other flavoring materials:						
	Number of establishments	53	53	53	53	53	0.0
	Employees (thousands)	51.0	50.0	50.0	50.0	50.0	0.0
	Capacity utilization (percent)	82	82	82	82	82	0.0
	U.S. shipments (million dollars)	3,400	3,500	3,500	3,700	3,900	5.4
	U.S. exports (million dollars)	948	1,034	1,109	1,211	1,389	14.7
	U.S. imports (million dollars)	754	775	736	786	1,754	123.1
	Apparent U.S. consumption (million dollars)	3,206	3,242	3,127	3,275	4,265	30.2
	Trade balance (million dollars)	194	258	373	425	-365	(⁴)
	Ratio of imports to consumption (percent)	23.5	23.9	23.5	24.0	41.1	71.3
	Ratio of exports to shipments (percent)	27.9	29.5	31.7	32.7	35.6	8.9
CH027	Perfumes, cosmetics, and toiletries:						
	Number of establishments	650	650	650	650	650	0.0
	Employees (thousands)	59.0	60.0	59.0	60.0	62.0	3.3
	Capacity utilization (percent)	88	87	87	87	88	1.1
	U.S. shipments (million dollars)	21,500	23,000	23,300	23,000	24,000	4.3
	U.S. exports (million dollars)	2,578	2,851	3,187	3,160	3,435	8.7
	U.S. imports (million dollars)	1,864	2,192	2,443	2,716	3,111	14.5
	Apparent U.S. consumption (million dollars)	20,786	22,341	22,556	22,556	23,676	5.0
	Trade balance (million dollars)	714	659	744	444	324	-26.9
	Ratio of imports to consumption (percent)	9.0	9.8	10.8	12.0	13.1	9.2
	Ratio of exports to shipments (percent)	12.0	12.4	13.7	13.7	14.3	4.4
CH028	Soaps, detergents, and surface-active agents:						
	Number of establishments	950	950	950	950	950	0.0
	Employees (thousands)	52.0	52.0	52.0	52.0	52.0	0.0
	Capacity utilization (percent)	88	87	87	87	85	-2.3
	U.S. shipments (million dollars)	17,700	18,500	19,500	19,800	21,000	6.1
	U.S. exports (million dollars)	2,138	2,331	2,223	2,282	2,524	10.6
	U.S. imports (million dollars)	948	1,050	1,115	1,273	1,369	7.5
	Apparent U.S. consumption (million dollars)	16,510	17,220	18,393	18,791	19,844	5.6
	Trade balance (million dollars)	1,190	1,280	1,107	1,009	1,156	14.6
	Ratio of imports to consumption (percent)	5.7	6.1	6.1	6.8	6.9	1.5
	Ratio of exports to shipments (percent)	12.1	12.6	11.4	11.5	12.0	4.3

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH030	Explosives, propellant powders, and related items:						
	Number of establishments	125	122	120	118	115	-2.5
	Employees (thousands)	13.0	13.0	13.0	13.0	13.0	0.0
	Capacity utilization (percent)	87	85	84	85	85	0.0
	U.S. shipments (million dollars)	2,000	2,080	2,110	2,200	2,285	3.9
	U.S. exports (million dollars)	264	314	254	286	385	34.9
	U.S. imports (million dollars)	267	265	285	302	353	16.5
	Apparent U.S. consumption (million dollars)	2,003	2,031	2,141	2,217	2,252	1.6
	Trade balance (million dollars)	-3	49	-31	-17	33	(⁴)
	Ratio of imports to consumption (percent)	13.3	13.0	13.3	13.6	15.7	15.4
	Ratio of exports to shipments (percent)	13.2	15.1	12.0	13.0	16.9	30.0
CH031	Polyethylene resins in primary forms:						
	Number of establishments	45	46	46	46	46	0.0
	Employees (thousands)	22.0	22.0	22.0	22.0	22.0	0.0
	Capacity utilization (percent)	89	88	83	87	85	-2.3
	U.S. shipments (million dollars)	9,400	10,500	9,100	9,000	10,500	16.7
	U.S. exports (million dollars)	2,249	2,688	2,416	2,590	2,817	8.8
	U.S. imports (million dollars)	1,329	1,650	1,735	1,651	2,158	30.7
	Apparent U.S. consumption (million dollars)	8,480	9,462	8,419	8,062	9,842	22.1
	Trade balance (million dollars)	920	1,038	681	938	658	-29.9
	Ratio of imports to consumption (percent)	15.7	17.4	20.6	20.5	21.9	6.8
	Ratio of exports to shipments (percent)	23.9	25.6	26.6	28.8	26.8	-6.9
CH032	Polypropylene resins in primary forms:						
	Number of establishments	26	27	28	28	28	0.0
	Employees (thousands)	6.0	6.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	91	88	84	93	95	2.2
	U.S. shipments (million dollars)	4,400	4,500	4,000	4,500	4,700	4.4
	U.S. exports (million dollars)	863	1,131	1,100	1,188	1,416	19.2
	U.S. imports (million dollars)	232	251	219	259	298	15.1
	Apparent U.S. consumption (million dollars)	3,770	3,620	3,119	3,571	3,582	(³)
	Trade balance (million dollars)	630	880	881	929	1,118	20.4
	Ratio of imports to consumption (percent)	6.2	6.9	7.0	7.2	8.3	15.3
	Ratio of exports to shipments (percent)	19.6	25.1	27.5	26.4	30.1	14.0

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH033	Polyvinyl chloride resins in primary forms:						
	Number of establishments	28	28	28	27	27	0.0
	Employees (thousands)	8.0	8.0	8.0	7.0	7.0	0.0
	Capacity utilization (percent)	95	84	81	91	87	-4.4
	U.S. shipments (million dollars)	3,700	4,200	3,500	4,000	3,800	-5.0
	U.S. exports (million dollars)	626	716	1,004	781	837	7.2
	U.S. imports (million dollars)	235	331	332	247	287	16.1
	Apparent U.S. consumption (million dollars)	3,309	3,815	2,828	3,466	3,250	-6.2
	Trade balance (million dollars)	391	385	672	534	550	3.0
	Ratio of imports to consumption (percent)	7.1	8.7	11.7	7.1	8.8	23.9
	Ratio of exports to shipments (percent)	16.9	17.1	28.7	19.5	22.0	12.8
CH034	Styrene polymers in primary forms:						
	Number of establishments	69	69	70	71	71	0.0
	Employees (thousands)	11.0	11.0	11.0	12.0	12.0	0.0
	Capacity utilization (percent)	89	94	80	82	80	-2.4
	U.S. shipments (million dollars)	5,500	5,900	5,200	5,700	5,500	-3.5
	U.S. exports (million dollars)	753	848	731	752	783	4.1
	U.S. imports (million dollars)	427	572	579	580	628	8.2
	Apparent U.S. consumption (million dollars)	5,174	5,624	5,048	5,528	5,345	-3.3
	Trade balance (million dollars)	326	276	152	172	155	-9.6
	Ratio of imports to consumption (percent)	8.2	10.2	11.5	10.5	11.7	11.4
	Ratio of exports to shipments (percent)	13.7	14.4	14.0	13.2	14.2	7.6
CH035	Saturated polyester resins:						
	Number of establishments	52	52	52	54	55	1.9
	Employees (thousands)	6.0	6.0	6.0	7.0	7.0	0.0
	Capacity utilization (percent)	82	85	85	85	85	0.0
	U.S. shipments (million dollars)	4,800	5,500	5,200	5,500	5,800	5.5
	U.S. exports (million dollars)	566	629	798	712	814	14.2
	U.S. imports (million dollars)	448	522	502	537	656	22.1
	Apparent U.S. consumption (million dollars)	4,682	5,393	4,904	5,325	5,642	6.0
	Trade balance (million dollars)	118	107	296	175	158	-10.0
	Ratio of imports to consumption (percent)	9.6	9.7	10.2	10.1	11.6	14.9
	Ratio of exports to shipments (percent)	11.8	11.4	15.3	13.0	14.0	7.7

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH037	Styrene-butadiene rubber in primary forms:						
	Number of establishments	11	11	11	11	11	0.0
	Employees (thousands)	5.0	5.0	5.0	5.0	5.0	0.0
	Capacity utilization (percent)	88	88	90	92	92	0.0
	U.S. shipments (million dollars)	1,390	1,460	1,430	1,490	1,490	0.0
	U.S. exports (million dollars)	309	344	297	273	324	19.0
	U.S. imports (million dollars)	173	232	258	232	231	-0.2
	Apparent U.S. consumption (million dollars)	1,253	1,348	1,391	1,449	1,397	-3.6
	Trade balance (million dollars)	137	112	39	41	93	128.6
	Ratio of imports to consumption (percent)	13.8	17.2	18.6	16.0	16.6	3.8
	Ratio of exports to shipments (percent)	22.2	23.6	20.8	18.3	21.8	19.1
CH038	Other synthetic rubber:						
	Number of establishments	34	34	34	34	(¹)	(¹)
	Employees (thousands)	11.0	11.0	11.0	11.0	(¹)	(¹)
	Capacity utilization (percent)	82	83	83	83	(¹)	(¹)
	U.S. production (million dollars)	4,180	4,380	4,290	4,300	(¹)	(¹)
	U.S. exports (million dollars)	1,079	1,317	1,328	1,361	1,478	8.6
	U.S. imports (million dollars)	697	778	734	725	741	2.2
	Apparent U.S. consumption (million dollars)	3,798	3,841	3,696	3,664	(¹)	(¹)
	Trade balance (million dollars)	382	539	594	636	737	15.8
	Ratio of imports to consumption (percent)	18.4	20.2	19.9	19.8	(¹)	(¹)
	Ratio of exports to production (percent)	25.8	30.1	31.0	31.7	(¹)	(¹)
CH039	Pneumatic tires and tubes (new):						
	Number of establishments	42	42	42	42	42	0.0
	Employees (thousands)	64.0	66.0	63.0	64.0	64.0	0.0
	Capacity utilization (percent)	92	93	90	90	90	0.0
	U.S. shipments (million dollars)	13,950	14,600	13,400	13,500	13,500	0.0
	U.S. exports (million dollars)	2,366	2,414	2,282	2,233	2,212	-0.9
	U.S. imports (million dollars)	4,559	4,700	4,146	4,694	5,170	10.1
	Apparent U.S. consumption (million dollars)	16,143	16,886	15,264	15,960	16,457	3.1
	Trade balance (million dollars)	-2,193	-2,286	-1,864	-2,460	-2,957	-20.2
	Ratio of imports to consumption (percent)	28.2	27.8	27.2	29.4	31.4	6.8
	Ratio of exports to shipments (percent)	17.0	16.5	17.0	16.5	16.4	-0.6

See footnote(s) at end of table.

Table CH-4—Continued

Chemicals and related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH040	Other tires:						
	Number of establishments	1,400	1,400	1,400	1,400	1,400	0.0
	Employees (thousands)	8.0	8.0	8.0	8.0	8.0	0.0
	Capacity utilization (percent)	90	90	90	90	90	0.0
	U.S. shipments (million dollars)	990	1,000	1,100	1,100	1,100	0.0
	U.S. exports (million dollars)	111	89	96	94	98	3.9
	U.S. imports (million dollars)	129	137	122	123	137	11.4
	Apparent U.S. consumption (million dollars)	1,008	1,048	1,126	1,129	1,139	0.9
	Trade balance (million dollars)	-18	-48	-26	-29	-39	-36.1
	Ratio of imports to consumption (percent)	12.8	13.1	10.8	10.9	12.0	10.1
	Ratio of exports to shipments (percent)	11.2	8.9	8.8	8.6	8.9	3.5
CH044	Natural rubber:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. exports (million dollars)	41	39	34	40	59	48.7
	U.S. imports (million dollars)	704	842	613	751	1,047	39.4
	Apparent U.S. consumption (million dollars)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Trade balance (million dollars)	-664	-803	-579	-712	-988	-38.9
	Ratio of imports to consumption (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Ratio of exports to shipments (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)

¹Not available.²Inventory changes, for which data are not available, likely account for ratios that exceed 100 percent.³Less than 0.05 percent.⁴Not meaningful.

Note.—Calculations based on unrounded data.

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

Energy-Related Products

Cynthia B. Foreso, Coordinator
(202) 205-3348
cynthia.foreso@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$35.2 billion (37 percent) to \$130.5 billion

U.S. exports: Increased by \$2.2 billion (15 percent) to \$16.6 billion

U.S. imports: Increased by \$37.3 billion (34 percent) to \$147.2 billion

Historically, the United States has been the world's largest consumer of energy products and has maintained a trade deficit in the energy sector. In 2003, the overall U.S. trade deficit in energy-related products increased by 37 percent primarily because of the rise in prices for crude petroleum and natural gas (see table EP-1). World prices for crude petroleum fluctuated from \$15.56 per barrel in 1999 to \$27.48 per barrel in 2003. During the same period, U.S. natural gas prices increased from a low of \$2.19 per thousand cubic feet to a record 30-year high of \$5.09 per thousand cubic feet. During 1999-2003, the trade deficit in this sector more than doubled.

The energy-related products with the largest year-to-year shifts (see table EP-2), in terms of value, included increased U.S. exports of electricity, crude petroleum, and natural gas; and increased imports of natural gas, crude petroleum, coal, and petroleum products.¹ Analyses of these shifts for crude petroleum, petroleum products, and natural gas are presented later in this chapter.

The value of U.S. exports of electricity increased in 2003 as a direct result of the increase in the price of natural gas, which is the primary fuel (fossil or renewable) used to generate electricity (see Natural Gas and Components). Fossil fuels account for an average of 75 percent of total U.S. electricity generation. The cost of fossil fuels at electric-generating plants increased from an average \$1.52 per million Btu in 2002 to \$2.50 per million Btu in 2003; as a result, retail prices for electricity to industrial and residential consumers increased. The United States and Canada, which are each other's only significant trading partner for electricity, share a sophisticated system of interconnected grids used to transmit electricity across the border with trade between the two countries dependent on which side of the grid is operating at any particular time. The quantity of U.S. imports of electricity declined from 36 billion kilowatthours in 2002 to 28 billion kilowatthours in 2003, whereas U.S. exports rose from 13 billion kilowatthours in 2002 to 24 billion kilowatthours in 2003. Although there is some negligible, sporadic trade with Mexico, there is no synchronized interconnecting grid in the border region.

U.S. exports of coal increased from 39.6 million short tons in 2002 to 43.6 million short tons in 2003.² U.S. imports of coal, which accounted for only 2 percent of U.S. consumption in 2003, increased 58 percent from 16.9 million short tons in 2002 to 26.9 million short tons in 2003. Nearly all of this increase was Indonesian coal shipped to the west coast of the United States.³

¹ The value of U.S. imports of nuclear materials increased 35 percent in 2003 from 2002 levels; however, these imports are actually uranium imported for enrichment and subsequently reexported.

² The United States accounts for the largest share of the world's recoverable coal reserves (25 percent) and is a major world exporter of coal.

³ Derived from official statistics of the U.S. Department of Energy and U.S. Department of Energy, Energy Information Administration, *Short-Term Energy Outlook*, 2003 and 2004 reports.

Table EP-1

Energy-related products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U. S. exports of domestic merchandise:							
Canada	2,370	2,896	3,862	2,889	4,296	1,408	48.7
Mexico	2,311	4,342	3,296	3,274	2,897	-376	-11.5
Saudi Arabia	33	42	37	34	38	4	10.9
Venezuela	79	149	111	121	184	63	52.1
Nigeria	26	17	24	37	22	-15	-39.9
United Kingdom	257	257	278	201	206	4	2.2
Angola	1	1	1	3	3	(2)	8.9
Russia	10	142	216	231	125	-105	-45.6
Algeria	14	14	16	19	23	4	19.4
Iraq	0	0	0	0	(2)	(2)	(3)
All other	6,856	7,669	7,231	7,622	8,843	1,221	16.0
Total	11,957	15,529	15,073	14,431	16,639	2,208	15.3
EU-15	1,912	2,072	2,146	1,731	1,714	-17	-1.0
OPEC	245	309	273	300	384	84	28.0
Latin America	3,746	6,422	5,161	5,290	6,159	869	16.4
CBERA	704	1,178	1,026	1,213	2,271	1,059	87.3
Asia	3,096	3,083	2,793	3,305	3,348	43	1.3
Sub-Saharan Africa	150	158	149	193	166	-27	-14.0
Central and Eastern Europe	42	70	40	30	50	20	67.6
U. S. imports of merchandise for consumption:							
Canada	17,766	31,860	34,598	29,903	41,579	11,676	39.0
Mexico	6,280	11,356	9,103	11,567	14,792	3,225	27.9
Saudi Arabia	6,679	12,478	10,625	10,264	14,538	4,274	41.6
Venezuela	8,480	14,863	12,030	11,798	13,791	1,993	16.9
Nigeria	3,720	8,706	8,627	5,773	10,028	4,255	73.7
United Kingdom	2,278	3,919	3,298	4,399	5,436	1,037	23.6
Angola	2,320	3,321	2,769	3,204	4,137	932	29.1
Russia	1,056	1,725	1,746	2,591	3,932	1,341	51.8
Algeria	1,559	2,317	2,030	1,827	3,365	1,538	84.2
Iraq	2,721	4,148	3,735	2,748	3,297	549	20.0
All other	16,616	27,956	25,665	25,726	32,288	6,562	25.5
Total	69,473	122,650	114,226	109,800	147,183	37,382	34.0
EU-15	4,444	8,338	7,614	8,778	11,453	2,674	30.5
OPEC	24,856	45,389	39,424	34,506	47,416	12,910	37.4
Latin America	20,816	35,997	29,945	32,598	41,240	8,642	26.5
CBERA	1,479	3,117	2,689	2,900	4,600	1,700	58.6
Asia	2,055	3,021	2,720	2,284	2,611	327	14.3
Sub-Saharan Africa	8,001	15,016	14,271	11,713	17,674	5,962	50.9
Central and Eastern Europe	44	5	131	201	168	-33	-16.4

See footnote(s) at end of table.

Table EP-1--Continued

Energy-related products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. merchandise trade balance:							
Canada	-15,396	-28,964	-30,736	-27,014	-37,283	-10,268	-38.0
Mexico	-3,970	-7,014	-5,807	-8,294	-11,894	-3,601	-43.4
Saudi Arabia	-6,646	-12,436	-10,588	-10,230	-14,500	-4,270	-41.7
Venezuela	-8,401	-14,714	-11,919	-11,677	-13,607	-1,930	-16.5
Nigeria	-3,694	-8,690	-8,603	-5,736	-10,006	-4,270	-74.4
United Kingdom	-2,021	-3,662	-3,020	-4,197	-5,230	-1,033	-24.6
Angola	-2,318	-3,320	-2,767	-3,201	-4,133	-932	-29.1
Russia	-1,046	-1,583	-1,531	-2,360	-3,806	-1,446	-61.3
Algeria	-1,544	-2,303	-2,014	-1,808	-3,342	-1,535	-84.9
Iraq	-2,721	-4,148	-3,735	-2,748	-3,297	-549	-20.0
All other	-9,760	-20,287	-18,434	-18,103	-23,445	-5,341	-29.5
Total	-57,516	-107,121	-99,153	-95,369	-130,544	-35,175	-36.9
EU-15	-2,532	-6,266	-5,468	-7,048	-9,738	-2,691	-38.2
OPEC	-24,611	-45,080	-39,152	-34,206	-47,033	-12,826	-37.5
Latin America	-17,070	-29,575	-24,784	-27,308	-35,081	-7,773	-28.5
CBERA	-775	-1,939	-1,664	-1,687	-2,328	-642	-38.0
Asia	1,041	62	73	1,022	737	-285	-27.8
Sub-Saharan Africa	-7,850	-14,859	-14,122	-11,520	-17,508	-5,989	-52.0
Central and Eastern Europe	-2	65	-91	-171	-118	53	31.0

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²Less than \$500,000.

³Not meaningful for purposes of comparison.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table EP-2
Leading changes in U.S. exports and imports of energy-related products, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. EXPORTS:							
Increases:							
Petroleum products (CH005)	6,599	9,562	8,936	8,662	9,783	1,121	12.9
Electrical energy (CH001)	206	398	1,258	304	716	412	135.9
Natural gas and components (CH006)	759	1,286	1,109	1,675	2,074	399	23.8
Coal, coke, and related chemical products (CH003)	2,671	2,718	2,354	2,188	2,360	171	7.8
Crude petroleum (CH004)	772	444	177	92	155	63	69.0
Nuclear materials (CH002)	950	1,121	1,239	1,510	1,551	42	2.8
TOTAL	11,957	15,529	15,073	14,431	16,639	2,208	15.3
U.S. IMPORTS:							
Increases:							
Crude petroleum (CH004)	31,642	56,546	49,673	54,704	73,527	18,823	34.4
Natural gas and components (CH006)	11,042	19,157	23,054	18,609	28,885	10,276	55.2
Petroleum products (CH005)	22,079	39,787	34,372	30,594	37,280	6,687	21.9
Nuclear materials (CH002)	1,636	1,989	2,036	2,144	2,892	748	34.9
Coal, coke, and related chemical products (CH003)	1,741	2,460	2,411	2,589	3,217	628	24.2
Electrical energy (CH001)	1,334	2,711	2,681	1,160	1,382	221	19.1
TOTAL	69,473	122,650	114,226	109,800	147,183	37,382	34.0

Note.-Calculations based on unrounded data.

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

COMMODITY ANALYSIS

Crude Petroleum

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$18.8 billion (34 percent) to \$73.4 billion

U.S. exports: Increased by \$63 million (69 percent) to \$155 million

U.S. imports: Increased by \$18.8 billion (34 percent) to \$73.5 billion

The U.S. trade deficit in crude petroleum increased 34 percent from 2002 to 2003, primarily because of the price of crude petroleum, which rose from \$22.51 per barrel in 2002 to \$27.48 per barrel in 2003. World prices for crude petroleum increased as a result of a combination of factors, including increased demand coupled with tight supplies (resulting in lower U.S. inventories), the threat of escalating global terrorism, and reduced production by OPEC.⁴ The quantity of crude petroleum exports increased from 9,000 barrels per day (b/d) in 2002 to 12,000 b/d in 2003.⁵ Historically, Canada, which accounted for 99.9 percent of the total quantity of U.S. crude petroleum exports in 2003, has been the only consistent market for these exports.

U.S. imports

U.S. imports of crude petroleum rose from 9.1 million b/d in 2002 to 9.6 million b/d in 2003, or by 5 percent. In terms of quantity, Saudi Arabia, Canada, Mexico, Venezuela, and Nigeria were the leading sources of U.S. imports of crude petroleum in 2003. OPEC, which accounts for nearly 70 percent of world reserves and 40 percent of world production of crude petroleum, was again the largest regional supplier to the U.S. market, accounting for 47 percent of total U.S. imports of crude petroleum. U.S. imports of crude petroleum continued to account for over 60 percent of domestic consumption as demand for crude petroleum increased and U.S. production continued to decline.

Cynthia B. Foreso
(202) 205-3348
cynthia.foreso@usitc.gov

⁴ U.S. Department of Energy, Energy Information Administration, *Short-Term Energy Outlook*, 2003 and 2004 reports.

⁵ U.S. exports of crude petroleum have been prohibited since 1973, except as approved by the U.S. Government. Exports to Canada are part of a commercial exchange agreement between refiners in the United States and Canada under the approval of the Secretary of the Department of Energy. In May 1996, the President determined that allowing exports of Alaskan North Slope (ANS) crude was in the national interest, thus ending the 23-year ban on ANS crude exports. However, the President can impose new export restrictions in the event of severe crude petroleum supply shortages.

Petroleum Products

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$5.6 billion (25 percent) to \$27.5 billion

U.S. exports: Increased by \$1.1 billion (13 percent) to \$9.8 billion

U.S. imports: Increased by \$6.7 billion (22 percent) to \$37.3 billion

The U.S. trade deficit in petroleum products increased 25 percent in 2003 from 2002 levels primarily as a result of the increase in the average per barrel price for crude petroleum on the world market (see Crude Petroleum). The United States is a major world producer and consumer of petroleum products, with both production and consumption increasing by about 2 percent in 2003 from 2002 levels. In terms of quantity, U.S. exports of petroleum products are minimal, accounting for less than 5 percent of total U.S. production and less than 6 percent of total world exports of petroleum products. The quantity of U.S. exports of petroleum products, primarily distillate and residual fuel oils to Mexico and Canada, increased only 1 percent.

U.S. imports

While the value of U.S. imports of petroleum products in 2003 increased 22 percent from 2002 levels, the quantity of these imports remained relatively stable at 1.4 million b/d. U.S. imports of petroleum products, on average, account for less than 10 percent of domestic consumption. The primary sources of U.S. imports of petroleum products in 2003 continued to be Canada, Saudi Arabia, and Venezuela. The quantity of U.S. imports of gasoline increased by about 3 percent as demand remained strong despite a nearly 14 cents per gallon increase in U.S. retail prices from 2002 to 2003. The quantity of U.S. imports of distillate and residual fuel oils, used primarily as heating and bunker fuels, increased about 20 percent in 2003, as higher natural gas prices coupled with a colder winter encouraged some fuel switching.⁶

Cynthia B. Foreso
(202) 205-3348
cynthia.foreso@usitc.gov

⁶ U.S. Department of Energy, Energy Information Administration, *Energy Supply Monthly*, *Natural Gas Monthly* and *Short-Term Energy Outlook*, 2003 and 2004 reports.

Natural Gas and Components

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$9.9 billion (58 percent) to \$26.8 billion

U.S. exports: Increased by \$399 million (24 percent) to \$2.1 billion

U.S. imports: Increased by \$10.3 billion (55 percent) to \$28.9 billion

The trade deficit for natural gas and components increased primarily because of the rise in the price of pipeline natural gas, which accounted for 64 percent of sector imports in 2003. The price increase is attributable to increased demand for natural gas for heating purposes beyond expected levels during January-March 2003, which forced suppliers to import additional gas from Canada at higher spot market prices.⁷ In addition, an effort to replenish diminished supplies during the normally lax summer months preserved a higher than normal price level. Finally, the long-term contract prices for natural gas are directly linked to, and can rise or fall with, prices for certain petroleum products (primarily distillate and residual fuel oils). As a result, rising crude petroleum prices contributed to the increased price for natural gas (see Crude Petroleum).

Although U.S. trade in pipeline natural gas is limited to Canada and Mexico, higher natural gas prices in 2003 accentuated the difference between imports and exports; the actual volumes traded changed only slightly. Although the value of the trade deficit for pipeline natural gas increased by \$6.1 billion from 2002 to 2003, the deficit, in terms of volume, declined more than 4 percent.

Exports of natural gas and components account for a minimal share of U.S. production, about 2 to 3 percent, and are generally shipped to Canada. Exports of natural gas and components increased 24 percent, from \$1.7 billion in 2002 to \$2.1 billion in 2003.

U.S. imports

Imports of natural gas and components increased 55 percent to \$28.9 billion in 2003. Canada accounted for 69 percent of U.S. imports of the products in this sector and more than 99 percent of pipeline natural gas imports. The value of these U.S. imports from Canada increased nearly 60 percent, reaching \$18.2 billion in 2003, whereas the volume of imports declined approximately 2 percent, from 110 billion cubic meters in 2002 to 108 billion cubic meters in 2003.

Eric Land
(202) 205-3349
eric.land@usitc.gov

⁷ U.S. Department of Energy, Energy Information Administration, *Energy Supply Monthly*, *Natural Gas Monthly* and *Short-Term Energy Outlook*, 2003 and 2004 reports.

Table EP-3

Energy-related products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002		
							Absolute	Percent	
		Million dollars							
CH001	Electrical energy:								
	Exports	206	398	1,258	304	716	412	135.9	
	Imports	1,334	2,711	2,681	1,160	1,382	221	19.1	
	Trade balance	-1,127	-2,313	-1,423	-857	-666	191	22.3	
CH002	Nuclear materials:								
	Exports	950	1,121	1,239	1,510	1,551	42	2.8	
	Imports	1,636	1,989	2,036	2,144	2,892	748	34.9	
	Trade balance	-686	-868	-797	-635	-1,341	-706	-111.2	
CH003	Coal, coke, and related chemical products:								
	Exports	2,671	2,718	2,354	2,188	2,360	171	7.8	
	Imports	1,741	2,460	2,411	2,589	3,217	628	24.2	
	Trade balance	930	257	-57	-401	-857	-456	-113.8	
CH004	Crude petroleum:								
	Exports	772	444	177	92	155	63	69.0	
	Imports	31,642	56,546	49,673	54,704	73,527	18,823	34.4	
	Trade balance	-30,870	-56,103	-49,496	-54,612	-73,372	-18,760	-34.4	
CH005	Petroleum products:								
	Exports	6,599	9,562	8,936	8,662	9,783	1,121	12.9	
	Imports	22,079	39,787	34,372	30,594	37,280	6,687	21.9	
	Trade balance	-15,480	-30,224	-25,436	-21,931	-27,497	-5,566	-25.4	
CH006	Natural gas and components:								
	Exports	759	1,286	1,109	1,675	2,074	399	23.8	
	Imports	11,042	19,157	23,054	18,609	28,885	10,276	55.2	
	Trade balance	-10,282	-17,870	-21,944	-16,934	-26,811	-9,877	-58.3	

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes

Note.—Calculations based on unrounded data.

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

Table EP-4

Energy-related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH001	Electrical energy:						
	Number of establishments	3,225	3,225	3,225	3,225	3,225	0.0
	Employees (thousands)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Capacity utilization (percent)	100	100	100	100	100	0.0
	U.S. shipments (million dollars)	219,460	218,610	220,824	229,664	340,400	48.2
	U.S. exports (million dollars)	206	398	1,258	304	716	135.9
	U.S. imports (million dollars)	1,334	2,711	2,681	1,160	1,382	19.1
	Apparent U.S. consumption (million dollars)	220,587	220,923	222,247	230,521	341,066	48.0
	Trade balance (million dollars)	-1,127	-2,313	-1,423	-857	-666	22.3
	Ratio of imports to consumption (percent)	0.6	1.2	1.2	0.5	0.4	-20.0
	Ratio of exports to shipments (percent)	0.1	0.2	0.6	0.1	0.2	100.0
CH003	Coal, coke, and related chemical products:						
	Number of establishments	520	520	520	520	520	0.0
	Employees (thousands)	150.0	150.0	150.0	150.0	150.0	0.0
	Capacity utilization (percent)	90	90	90	90	90	0.0
	U.S. shipments (million dollars)	32,965	32,606	34,320	38,496	36,582	-5.0
	U.S. exports (million dollars)	2,671	2,718	2,354	2,188	2,360	7.8
	U.S. imports (million dollars)	1,741	2,460	2,411	2,589	3,217	24.2
	Apparent U.S. consumption (million dollars)	32,035	32,349	34,377	38,897	37,439	-3.7
	Trade balance (million dollars)	930	257	-57	-401	-857	-113.8
	Ratio of imports to consumption (percent)	5.4	7.6	7.0	6.7	8.6	28.4
	Ratio of exports to shipments (percent)	8.1	8.3	6.9	5.7	6.5	14.0
CH004	Crude petroleum:						
	Number of establishments	18,000	18,000	18,000	18,000	18,000	0.0
	Employees (thousands)	204.0	204.0	204.0	204.0	204.0	0.0
	Capacity utilization (percent)	100	100	100	100	100	0.0
	U.S. shipments (million dollars)	34,602	57,499	46,960	55,203	57,550	4.3
	U.S. exports (million dollars)	772	444	177	92	155	69.0
	U.S. imports (million dollars)	31,642	56,546	49,673	54,704	73,527	34.4
	Apparent U.S. consumption (million dollars)	65,472	113,602	96,456	109,815	130,922	19.2
	Trade balance (million dollars)	-30,870	-56,103	-49,496	-54,612	-73,372	-34.4
	Ratio of imports to consumption (percent)	48.3	49.8	51.5	49.8	56.2	12.9
	Ratio of exports to shipments (percent)	2.2	0.8	0.4	0.2	0.3	50.0

See footnote(s) at end of table.

Table EP-4—Continued

Energy-related products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH005	Petroleum products:						
	Number of establishments	190	190	190	190	190	0.0
	Employees (thousands)	75.0	75.0	75.0	75.0	75.0	0.0
	Capacity utilization (percent)	90	90	90	90	90	0.0
	U.S. shipments (million dollars)	113,231	213,475	140,162	193,710	200,475	3.5
	U.S. exports (million dollars)	6,599	9,562	8,936	8,662	9,783	12.9
	U.S. imports (million dollars)	22,079	39,787	34,372	30,594	37,280	21.9
	Apparent U.S. consumption (million dollars)	128,711	243,699	165,598	215,641	227,972	5.7
	Trade balance (million dollars)	-15,480	-30,224	-25,436	-21,931	-27,497	-25.4
	Ratio of imports to consumption (percent)	17.2	16.3	20.8	14.2	16.4	15.5
	Ratio of exports to shipments (percent)	5.8	4.5	6.4	4.5	4.9	8.9
CH006	Natural gas and components:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	200.0	200.0	200.0	200.0	205.0	2.5
	Capacity utilization (percent)	80	80	80	80	80	0.0
	U.S. shipments (million dollars)	69,000	120,000	150,000	115,000	165,000	43.5
	U.S. exports (million dollars)	759	1,286	1,109	1,675	2,074	23.8
	U.S. imports (million dollars)	11,042	19,157	23,054	18,609	28,885	55.2
	Apparent U.S. consumption (million dollars)	79,282	137,870	171,944	131,934	191,811	45.4
	Trade balance (million dollars)	-10,282	-17,870	-21,944	-16,934	-26,811	-58.3
	Ratio of imports to consumption (percent)	13.9	13.9	13.4	14.1	15.1	7.1
	Ratio of exports to shipments (percent)	1.1	1.1	0.7	1.5	1.3	-13.3

¹Not available.

Note.—Calculations based on unrounded data.

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

Textiles, Apparel, and Footwear

Kimberlie Freund, Coordinator
(202) 708-5402
kimberlie.freund@usitc.gov

Change in 2003 from 2002 for textiles and apparel:¹

U.S. trade deficit: Increased by \$5.9 billion (9 percent) to \$70.2 billion

U.S. exports: Decreased by \$265 million (1 percent) \$17.0 billion

U.S. imports: Increased by \$5.7 billion (7 percent) to \$87.2 billion

The U.S. trade deficit in textiles and apparel widened by 9 percent in 2003, up from a 4-percent increase in 2002, as U.S. imports rose and U.S. exports continued to fall (see table TX-1). U.S. production of sector goods declined significantly in 2003, by 11 percent for textiles and by 18 percent for apparel.² A large part of the increase in imports occurred in goods for which quotas were removed in 2002 (see table TX-2).³ Apparel accounted for 78 percent of the sector imports in 2003.

The widening of the trade deficit in textiles and apparel in 2003 largely stemmed from growing imports from Asia, particularly China and Vietnam. The trade deficit with Asia widened by \$4.6 billion to \$47.4 billion, as the \$4.7 billion increase in U.S. imports from the region far exceeded the \$80 million gain in U.S. exports to the region. Imports from China rose by 22 percent in 2003 to \$15.4 billion, making China the largest supplier by far with 17.7 percent of sector imports, up from 15.4 percent in 2002. The growth in China's shipments was concentrated in goods for which China became eligible for quota elimination in 2002 --namely, knit fabrics, brassieres, textile luggage, babies' apparel, and robes and dressing gowns. U.S. retailers and apparel companies view China as a desirable textile and apparel supplier because of China's low production costs, its ability to make almost any type of textile product or garment at any quality level, and its abundant labor force.⁴ In December 2003, the United States reinstated import quotas on certain of these products from China under the textile safeguard provision of China's WTO Accession Agreement.⁵

¹ Footwear is treated separately in this chapter.

² Board of Governors of the Federal Reserve System, *Federal Reserve Bulletin - Winter 2004*, "Rates of Change in Industrial Production, Market and Industry Group Summary: 1999-2003," found at <http://www.federalreserve.gov>, retrieved Mar. 16, 2004.

³ Imports will likely continue to grow following elimination of all remaining quotas on sector goods from World Trade Organization (WTO) countries on January 1, 2005, as required by the WTO Agreement on Textiles and Clothing (ATC).

⁴ For additional information on China's textile and apparel industry, see *Textiles and Apparel: Assessment of the Competitiveness of Certain Foreign Suppliers to the U.S. Market*, (Inv. No. 332-448), USITC publication 3671, Jan. 2004.

⁵ On December 24, 2003, the United States requested consultations with China and established quotas on imports from China for three groups of products (knit fabrics, robes and dressing gowns, and brassieres) that had experienced significant import growth since the removal of quotas at the end of 2001. Information on the safeguard actions is available in three notices of the Committee for the Implementation of Textile Agreements (CITA), published in the *Federal Register* of Dec. 29, 2003 (68 F.R. 74944-74949).

Table TX-1

Textiles and apparel: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
						Million dollars	
U.S. exports of domestic merchandise:							
China	166	221	261	339	405	65	19.2
Mexico	5,550	6,155	5,232	4,939	4,696	-243	-4.9
Canada	3,545	3,646	3,344	3,193	3,121	-72	-2.3
Hong Kong	295	332	313	324	313	-10	-3.1
Honduras	1,233	1,475	1,409	1,523	1,522	-1	-0.1
India	36	46	39	44	54	10	21.5
Dominican Rep	1,259	1,395	1,290	1,293	1,263	-30	-2.3
Korea	180	202	170	184	207	22	12.1
Italy	163	145	128	120	120	-1	-0.5
Thailand	40	43	41	46	71	25	54.8
All other	6,256	6,694	5,891	5,291	5,262	-30	-0.6
Total	18,723	20,353	18,118	17,298	17,033	-265	-1.5
EU-15	1,836	1,924	1,698	1,520	1,473	-46	-3.0
OPEC	312	261	269	222	202	-20	-9.0
Latin America	10,607	12,003	10,536	10,077	9,803	-273	-2.7
CBERA	4,389	5,125	4,783	4,761	4,688	-73	-1.5
Asia	1,845	2,030	1,819	1,883	1,963	80	4.3
Sub-Saharan Africa	146	136	131	124	131	6	5.0
Central and Eastern Europe	62	43	46	40	38	-2	-5.1
U.S. imports of merchandise for consumption:							
China	9,234	10,710	11,124	12,602	15,426	2,823	22.4
Mexico	9,413	10,580	9,941	9,649	9,015	-634	-6.6
Canada	3,640	3,945	3,791	3,859	3,788	-72	-1.9
Hong Kong	4,559	4,804	4,491	4,081	3,863	-218	-5.3
Honduras	2,205	2,423	2,443	2,509	2,578	68	2.7
India	2,666	3,161	3,038	3,382	3,668	286	8.5
Dominican Rep	2,388	2,478	2,337	2,242	2,210	-32	-1.4
Korea	3,189	3,479	3,316	3,287	2,986	-301	-9.2
Italy	2,314	2,484	2,420	2,380	2,526	147	6.2
Thailand	2,096	2,513	2,524	2,495	2,513	18	0.7
All other	29,565	34,332	34,521	35,099	38,668	3,570	10.2
Total	71,269	80,909	79,946	81,585	87,241	5,655	6.9
EU-15	5,019	5,360	5,190	5,163	5,391	228	4.4
OPEC	2,526	3,153	3,251	2,981	3,016	35	1.2
Latin America	19,439	21,654	20,841	20,639	20,553	-86	-0.4
CBERA	8,999	9,817	9,728	9,711	9,865	154	1.6
Asia	38,102	43,544	43,218	44,666	49,371	4,705	10.5
Sub-Saharan Africa	622	789	998	1,136	1,552	416	36.6
Central and Eastern Europe	438	511	541	515	562	47	9.1

See footnote(s) at end of table.

Table TX-1--Continued

Textiles and apparel: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

						Change, 2003 from 2002	
Item	1999	2000	2001	2002	2003	Absolute	Percent
	Million dollars						
U.S. merchandise trade balance:							
China	-9,068	-10,489	-10,863	-12,263	-15,021	-2,758	-22.5
Mexico	-3,863	-4,426	-4,709	-4,710	-4,319	391	8.3
Canada	-96	-299	-446	-666	-666	-1	-0.1
Hong Kong	-4,264	-4,472	-4,178	-3,757	-3,549	208	5.5
Honduras	-971	-948	-1,034	-986	-1,056	-69	-7.0
India	-2,630	-3,115	-3,000	-3,337	-3,614	-277	-8.3
Dominican Rep	-1,129	-1,082	-1,047	-950	-948	2	0.2
Korea	-3,009	-3,276	-3,146	-3,103	-2,780	323	10.4
Italy	-2,152	-2,339	-2,292	-2,259	-2,407	-147	-6.5
Thailand	-2,057	-2,470	-2,484	-2,449	-2,442	7	0.3
All other	-23,309	-27,639	-28,630	-29,807	-33,407	-3,599	-12.1
Total	-52,547	-60,555	-61,828	-64,288	-70,208	-5,920	-9.2
EU-15	-3,183	-3,436	-3,491	-3,644	-3,918	-274	-7.5
OPEC	-2,214	-2,892	-2,982	-2,759	-2,814	-55	-2.0
Latin America	-8,832	-9,651	-10,305	-10,563	-10,750	-187	-1.8
CBERA	-4,610	-4,692	-4,946	-4,950	-5,176	-227	-4.6
Asia	-36,257	-41,515	-41,399	-42,783	-47,408	-4,625	-10.8
Sub-Saharan Africa	-476	-653	-867	-1,012	-1,421	-409	-40.5
Central and Eastern Europe	-376	-468	-495	-474	-523	-49	-10.3

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table TX-2
Leading changes in U.S. exports and imports of textiles and apparel, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. EXPORTS:							
Increases:							
Fibers and yarns, except raw cotton and raw wool (CH045)	2,830	3,126	2,640	2,656	2,872	216	8.1
Fabrics (CH046)	5,170	6,067	6,162	6,485	6,641	156	2.4
Decreases:							
Apparel (CH049)	7,964	8,177	6,537	5,491	4,965	-525	-9.6
Home furnishings (CH048)	398	418	403	363	339	-24	-6.6
Carpets and rugs (CH047)	772	791	711	684	681	-3	-0.5
All other	1,589	1,774	1,666	1,619	1,534	-85	-5.2
TOTAL	18,723	20,353	18,118	17,298	17,033	-265	-1.5
U.S. IMPORTS:							
Increases:							
Apparel (CH049)	56,565	64,402	63,995	63,927	68,274	4,347	6.8
Home furnishings (CH048)	2,652	3,215	3,332	4,226	5,021	795	18.8
Miscellaneous textile products (CH050)	2,696	3,005	3,198	3,340	3,754	414	12.4
Decreases:							
Men's and boys' trousers (CH049C)	6,381	7,321	6,980	6,973	7,459	486	7.0
Other wearing apparel (CH049S)	2,833	3,539	3,433	3,287	3,630	343	10.4
Fabrics (CH046)	5,563	6,052	5,466	5,922	5,854	-67	-1.1
All other	-5,420	-6,626	-6,459	-6,089	-6,751	-663	10.9
TOTAL	71,269	80,909	79,946	81,585	87,241	5,655	6.9

Note.-Calculations based on unrounded data.

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

Vietnam has emerged as a major supplier of apparel since the United States granted it normal trade relations (NTR) status in December 2001.⁶ Apparel imports from Vietnam totaled \$2.4 billion in 2003, up from \$905 million in 2002 and from less than \$50 million in earlier years. Imports of sector goods from Vietnam were subject to quotas for the first time, effective May 1, 2003. The quotas limited imports of numerous textile and apparel products from Vietnam and prevented even greater increases in imports of these items in 2003.⁷

In terms of industry/commodity groups, U.S. imports of apparel increased by \$4.3 billion to \$68.3 billion, reflecting a continued trend by retailers and apparel companies to increasingly source apparel from low-cost offshore providers, rather than manufacture or source the products domestically. An increase in consumer spending on apparel of 2 percent also spurred demand for imports in 2003.⁸ The increase in consumer spending was attributable to a number of factors, including growth in the economy, a rebound in the stock markets, and new fashion trends, such as dressier styles, which have encouraged consumer spending.⁹ Growth in apparel imports occurred not only in categories of products that were removed from quota in 2002, but also in categories of products that were still subject to quota for many major suppliers. Import growth for these constrained products occurred largely from countries that benefit from quota-free access to the U.S. market through preferential trade programs, such as the United States-Caribbean Basin Trade and Partnership Act (CBTPA).

U.S. imports of home furnishings grew by \$795 million to \$5.0 billion in 2003. Growth in imports of home furnishings products was concentrated in items that were removed from quota in 2002, including bedspreads and other furnishings, kitchen and bath linens and towels, and curtains.

U.S. exports of textiles and apparel declined for the third consecutive year during 2002-03, by 1 percent, to \$17.0 billion, their lowest level since 1996. The decline in 2003 largely reflected smaller shipments to the major foreign markets for the U.S. textile and apparel sector--namely, NAFTA signatories Mexico and Canada, and beneficiary countries under the Caribbean Basin Economic Recovery Act (CBERA). The NAFTA and CBERA countries together accounted for 73 percent of U.S. exports of sector goods by value in 2003. Exports of apparel, which consisted mostly of cut apparel pieces, declined by \$525 million to \$5.0 billion in 2003. Instead, U.S. firms are exporting lower value-added inputs for apparel, particularly knit fabrics, which grew by \$309 million to \$1.4 billion in 2003.

The United States posted a decline in textile and apparel trade with its NAFTA partners Canada and especially Mexico in 2003. U.S. firms have reduced their apparel sourcing from Mexico, leading to a decline in U.S. exports of textile inputs to Mexico for use in production of apparel for export to the United States. Imports of apparel from Mexico have declined since 2000, and this decline was partly attributable, at least initially, to NAFTA restrictions on the use of duty drawback, which went into effect in 2001.¹⁰ The decline in textile and apparel trade with Mexico also reflected greater competition from

⁶ NTR status means that imports of goods from Vietnam are now subject to much lower rates of duty.

⁷ The bilateral textile agreement with Vietnam was initialed on April 25, 2003, and signed on July 17, 2003. See *Federal Register* notices of the Committee for the Implementation of Textile Agreements, "Establishment of Import Limits . . .," May 16, 2003 (68 F.R. 26575), and "Establishment of an Export Visa Arrangement . . .," July 30, 2003 (68 F.R. 44748).

⁸ Data on consumer spending are from the U.S. Department of Commerce, Bureau of Economic Analysis, "Table 2.4.5U - Personal Consumption Expenditures by Type of Product," Mar. 2, 2004, available at <http://www.bea.gov>.

⁹ Standard & Poors, "Apparel & Footwear: Current Environment," Mar. 4, 2004, found at <http://www.netadvantage.standardsandpoor.com>, retrieved on Mar. 10, 2004; and Emerging Textiles, "Global Textile Market Could Be Boosted By the Rebound In U.S. Apparel Sales," Apr. 13, 2004, found at <http://www.emergingtextiles.com>, retrieved on Apr. 14, 2004.

¹⁰ NAFTA had permitted duty drawback, or the refund of duties paid on imports of certain apparel components that were not required to originate in a NAFTA country (e.g., nonvisible interlinings and other trimmings). Stephen Lamar, Senior Vice President, American Apparel & Footwear Association, Arlington, VA, interview by Commission (continued...)

CBERA countries benefitting from new U.S. trade preferences for the region (see below) and from lower cost countries in Asia, particularly China, following quota elimination for certain sector goods in 2002.

The textile and apparel trade deficit with CBERA countries widened by \$227 million (5 percent), as imports from the region rose by \$154 million (2 percent) and exports to the region fell by \$73 million (2 percent). The pattern of U.S.-CBERA textile and apparel trade has changed since implementation of the CBTPA in October 2000. Prior to that time, in order for imports of most apparel made in CBERA countries to qualify for both reduced duties under HTS heading 9802.00.80 and preferential quotas under the special access program, the fabrics used in the production of the goods had to be made and cut into garment parts in the United States.¹¹ Following implementation of CBTPA, which grants duty-free and quota-free entry to qualifying apparel assembled from fabrics made in the United States of U.S.-made yarns, uncut fabrics may now be shipped to CBERA countries for both cutting and assembly into qualifying apparel. In addition, CBTPA grants duty-free entry to limited quantities of knit apparel made in CBERA countries from fabrics knitted in the countries, provided that the fabrics are made of U.S. yarns. As such, yarns and uncut fabrics have replaced higher valued-added cut garment parts in trade with CBERA countries.

The textile and apparel trade deficit with sub-Saharan African (SSA) countries rose by \$409 million (41 percent) in 2003, reflecting substantial growth in apparel imports under the African Growth and Opportunity Act (AGOA), which grants duty-free and quota-free treatment to imports of qualifying textile and apparel articles from SSA countries. AGOA permits lesser developed SSA countries (all eligible SSA countries except Gabon, Mauritius, Seychelles, and South Africa) with apparel visas to use third-country (e.g., Asian) fabrics in their production of apparel for export to the United States and still qualify for AGOA preferences.

¹⁰ (...continued)
staff, Feb. 10, 2004.

¹¹ Under heading 9802.00.80 of the Harmonized Tariff Schedule of the United States, U.S. importers receive a partial duty exemption for articles assembled abroad in whole or in part of U.S. components. In general, the duty is assessed only on the value added abroad (mainly the cost of sewing the parts together). The fabric for making the apparel parts can be of either U.S. or foreign origin as long as the fabric is cut to shape in the United States, exported ready for assembly, and not advanced in value abroad except by assembly and incidental operations. The special access program provided CBERA countries, in addition to the reduced duties, virtually unlimited market access for apparel assembled there from fabrics wholly made and cut in the United States (known as "807A" trade).

Change in 2003 from 2002 for footwear:

U.S. trade deficit: Increased by \$205 million (1 percent) to \$15.1 billion

U.S. exports: Decreased by \$25 million (5 percent) to \$495 million

U.S. imports: Increased by \$180 million (1 percent) to \$15.6 billion

The U.S. trade deficit in footwear widened in 2003, primarily because of a continued increase in imports, which account for more than 90 percent of the U.S. footwear market (see table TX-3). The remainder of the U.S. footwear market is supplied by the domestic footwear industry, which comprises primarily niche product manufacturers that compete on the basis of nonprice factors such as specialized types of footwear (e.g., sizes/widths and hand-sewn items), quality, exclusive channels of distribution at retail, rapid responsiveness, and brand-names.¹² Consumer spending on footwear in 2003 rose 3 percent over 2002 to \$50.6 billion.¹³ The average price of footwear continued to decline, as lower priced casual shoes accounted for a greater share of consumer purchases.¹⁴ Leading footwear companies like Nike Inc. and Reebok International Ltd. focused on expanding internationally and diversifying further into apparel and sporting goods. U.S. producers' footwear shipments in 2003 fell by an estimated \$780 million from 2002 to \$2.7 billion.¹⁵

China is the largest source of footwear imports, accounting for 68 percent of the imports by value in 2003. China's dominance in the U.S. market can likely be attributed to its price competitiveness, owing to low wages and an established production infrastructure. Footwear imports from China rose by \$305 million (3 percent). Imports of footwear from Vietnam have increased significantly since the United States granted the country NTR status in December 2001, rising by \$101 million to \$325 million in 2003.

¹² Peter T. Mangione, President, Footwear Distributors and Retailers of America, written submission to the Commission, Jan. 22, 2004.

¹³ U.S. Department of Commerce, Bureau of Economic Analysis, available at <http://www.bea.gov>.

¹⁴ Yogeesh Wagle, "Apparel & Footwear," *Standard & Poor's*, Mar. 4, 2004, found at <http://www.netadvantage.standardandpoors.com>, retrieved Mar. 10, 2004.

¹⁵ Data are estimated by the Commission based on data from the U.S. Census Bureau, *Current Industrial Reports, Footwear Production: 2002*, issued June 2003.

Table TX-3

Footwear: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
China	41	43	46	35	36	2	4.6
Italy	5	4	5	5	6	1	30.1
Brazil	2	1	1	1	2	(2)	20.1
Indonesia	14	14	13	15	12	(3)	-22.0
Mexico	94	114	123	95	90	(5)	-5.7
Vietnam	30	27	19	18	23	5	27.6
Thailand	5	7	5	4	5	1	37.8
Spain	4	3	5	6	6	(2)	-3.7
Dominican Rep	57	54	51	30	27	(3)	-7.8
Canada	85	72	70	65	57	(8)	-12.7
All other	357	324	300	246	231	(15)	-6.1
Total	693	664	638	520	495	(25)	-4.8
EU-15	82	65	67	57	59	2	4.1
OPEC	30	34	37	35	26	(9)	-25.9
Latin America	216	234	246	196	177	(19)	-9.8
CBERA	98	94	97	75	67	(8)	-10.7
Asia	263	253	218	164	158	(6)	-3.9
Sub-Saharan Africa	17	14	10	13	15	3	20.1
Central and Eastern Europe	2	1	3	2	4	2	96.2
U.S. imports of merchandise for consumption:							
China	8,438	9,206	9,767	10,242	10,546	305	3.0
Italy	1,185	1,259	1,261	1,182	1,241	59	5.0
Brazil	960	1,149	1,162	1,080	1,040	(40)	-3.7
Indonesia	751	731	725	731	570	(161)	-22.1
Mexico	354	351	312	279	275	(3)	-1.2
Vietnam	146	125	132	224	325	101	44.9
Thailand	325	329	315	278	285	7	2.6
Spain	327	325	273	269	235	(34)	-12.8
Dominican Rep	237	181	193	140	138	(1)	-0.9
Canada	89	76	79	68	64	(4)	-5.3
All other	1,261	1,123	1,031	887	840	(47)	-5.3
Total	14,074	14,856	15,249	15,379	15,560	180	1.2
EU-15	2,038	2,044	1,951	1,826	1,764	(62)	-3.4
OPEC	752	732	725	731	570	(161)	-22.1
Latin America	1,593	1,709	1,693	1,516	1,475	(41)	-2.7
CBERA	259	196	206	148	149	1	0.4
Asia	10,142	10,841	11,330	11,797	12,046	249	2.1
Sub-Saharan Africa	3	1	1	1	1	(2)	-7.1
Central and Eastern Europe	148	135	145	126	159	32	25.7

See footnote(s) at end of table.

Table TX-3--Continued

Footwear: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

						Change, 2003 from 2002	
Item	1999	2000	2001	2002	2003	Absolute	Percent
	Million dollars						
U.S. merchandise trade balance:							
China	-8,397	-9,163	-9,721	-10,207	-10,510	-303	-3.0
Italy	-1,180	-1,255	-1,256	-1,178	-1,235	-58	-4.9
Brazil	-958	-1,148	-1,160	-1,078	-1,038	40	3.7
Indonesia	-738	-717	-712	-716	-558	158	22.1
Mexico	-260	-237	-189	-183	-185	-2	-1.1
Vietnam	-116	-97	-113	-206	-302	-96	-46.4
Thailand	-320	-322	-311	-274	-280	-6	-2.1
Spain	-323	-322	-268	-263	-229	34	13.0
Dominican Rep	-180	-127	-142	-110	-111	-1	-0.9
Canada	-5	-4	-9	-3	-8	-5	-140.9
All other	-903	-799	-731	-641	-609	32	5.1
Total	-13,380	-14,192	-14,611	-14,860	-15,065	-205	-1.4
EU-15	-1,956	-1,978	-1,883	-1,769	-1,705	65	3.7
OPEC	-722	-698	-688	-696	-544	152	21.9
Latin America	-1,377	-1,474	-1,447	-1,320	-1,298	22	1.7
CBERA	-161	-102	-109	-73	-81	-9	-12.0
Asia	-9,879	-10,588	-11,113	-11,632	-11,888	-255	-2.2
Sub-Saharan Africa	13	13	9	11	14	2	21.7
Central and Eastern Europe	-146	-134	-142	-124	-155	-31	-24.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²Less than \$500,000.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table TX-4

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
CH045	Fibers and yarns, except raw cotton and raw wool:							
	Exports	2,830	3,126	2,640	2,656	2,872	216	8.1
	Imports	2,547	2,771	2,545	2,641	2,676	36	1.3
	Trade balance	282	355	95	16	196	181	1,159.7
CH046	Fabrics:							
	Exports	5,170	6,067	6,162	6,485	6,641	156	2.4
	Imports	5,563	6,052	5,466	5,922	5,854	-67	-1.1
	Trade balance	-393	15	696	563	786	223	39.7
CH046A	Broadwoven fabrics:							
	Exports	2,475	3,100	2,997	3,003	2,575	-428	-14.3
	Imports	3,418	3,622	3,058	3,243	3,036	-206	-6.4
	Trade balance	-943	-521	-61	-240	-462	-222	-92.6
CH046B	Knit fabrics:							
	Exports	621	787	918	1,082	1,392	309	28.6
	Imports	926	1,004	1,014	1,080	1,026	-54	-5.0
	Trade balance	-305	-217	-96	3	365	363	14,479.1
CH046C	Specialty fabrics:							
	Exports	503	481	465	572	489	-84	-14.6
	Imports	322	374	346	383	410	27	7.0
	Trade balance	180	107	119	190	79	-111	-58.4
CH046D	Coated and other fabrics:							
	Exports	906	912	1,003	995	1,154	158	15.9
	Imports	522	591	570	679	743	64	9.4
	Trade balance	384	322	433	316	411	95	30.0
CH046E	Glass fiber fabrics:							
	Exports	78	99	84	87	118	31	35.5
	Imports	89	100	104	105	96	-9	-8.2
	Trade balance	-11	-1	-20	-18	21	39	(³)
CH046F	Other fabrics:							
	Exports	588	688	696	744	914	170	22.8
	Imports	285	362	374	432	543	111	25.6
	Trade balance	302	326	322	312	371	59	18.9
CH047	Carpets and rugs:							
	Exports	772	791	711	684	681	-3	-0.5
	Imports	1,248	1,464	1,410	1,531	1,662	131	8.6
	Trade balance	-475	-674	-699	-846	-981	-134	-15.9
CH048	Home furnishings:							
	Exports	398	418	403	363	339	-24	-6.6
	Imports	2,652	3,215	3,332	4,226	5,021	795	18.8
	Trade balance	-2,254	-2,797	-2,929	-3,863	-4,682	-819	-21.2
CH048A	Blankets:							
	Exports	36	36	34	32	29	-4	-11.0
	Imports	149	214	230	353	391	38	10.6
	Trade balance	-113	-178	-196	-321	-362	-41	-12.8
CH048B	Pillowcases and sheets:							
	Exports	111	94	90	76	78	1	1.8
	Imports	658	723	765	903	1,046	144	15.9
	Trade balance	-547	-629	-675	-826	-968	-142	-17.2

See footnote(s) at end of table.

Table TX-4--Continued

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
CH048C	Table/kitchen linens and towels:							
	Exports	108	113	109	93	85	-8	-8.7
	Imports	891	1,039	1,080	1,236	1,418	182	14.7
	Trade balance	-783	-926	-970	-1,143	-1,333	-190	-16.6
CH048D	Curtains:							
	Exports	38	40	35	39	30	-9	-22.5
	Imports	267	361	397	576	725	148	25.8
	Trade balance	-230	-321	-362	-537	-695	-157	-29.2
CH048E	Bedspreads and other furnishing articles:							
	Exports	27	45	43	41	43	2	4.2
	Imports	376	547	515	735	1,001	266	36.2
	Trade balance	-350	-502	-472	-694	-958	-264	-38.1
CH048F	Pillows, cushions, and sleeping bags:							
	Exports	78	90	91	81	74	-7	-8.3
	Imports	307	326	340	417	437	20	4.8
	Trade balance	-228	-237	-250	-336	-363	-27	-8.0
CH048G	Tapestries and other wall hangings:							
	Exports	1	1	1	1	1	(⁴)	3.3
	Imports	4	5	5	6	4	-3	-42.8
	Trade balance	-3	-4	-4	-5	-2	3	52.1
CH049	Apparel:							
	Exports	7,964	8,177	6,537	5,491	4,965	-525	-9.6
	Imports	56,565	64,402	63,995	63,927	68,274	4,347	6.8
	Trade balance	-48,601	-56,225	-57,458	-58,436	-63,308	-4,872	-8.3
CH049A	Men's and boys' suits and sports coats:							
	Exports	61	82	66	46	39	-7	-15.7
	Imports	1,157	1,196	1,026	974	1,143	169	17.3
	Trade balance	-1,095	-1,114	-960	-928	-1,104	-176	-19.0
CH049B	Men's and boys' coats and jackets:							
	Exports	120	114	99	92	91	-1	-1.2
	Imports	1,739	1,976	1,992	1,876	2,001	125	6.6
	Trade balance	-1,619	-1,862	-1,893	-1,784	-1,910	-126	-7.0
CH049C	Men's and boys' trousers:							
	Exports	1,056	997	728	625	573	-52	-8.3
	Imports	6,381	7,321	6,980	6,973	7,459	486	7.0
	Trade balance	-5,325	-6,324	-6,252	-6,348	-6,887	-538	-8.5
CH049D	Women's and girls' trousers:							
	Exports	595	587	454	357	287	-70	-19.6
	Imports	6,241	7,419	7,668	7,996	8,923	927	11.6
	Trade balance	-5,646	-6,832	-7,214	-7,639	-8,636	-997	-13.1
CH049E	Shirts and blouses:							
	Exports	1,848	2,052	1,533	1,219	1,097	-122	-10.0
	Imports	18,213	20,159	19,676	19,765	21,285	1,520	7.7
	Trade balance	-16,365	-18,107	-18,143	-18,546	-20,188	-1,642	-8.9
CH049F	Sweaters:							
	Exports	29	37	36	38	32	-6	-16.1
	Imports	2,033	2,506	2,933	2,959	2,729	-230	-7.8
	Trade balance	-2,005	-2,469	-2,897	-2,921	-2,697	224	7.7

See footnote(s) at end of table.

Table TX-4--Continued

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
CH049G	Women's and girls' suits, skirts, and coats:							
	Exports	239	249	211	154	136	-18	-11.8
	Imports	3,870	4,304	4,417	4,235	4,803	568	13.4
	Trade balance	-3,631	-4,055	-4,206	-4,081	-4,667	-587	-14.4
CH049H	Women's and girls' dresses:							
	Exports	102	106	81	62	59	-3	-4.4
	Imports	1,800	1,889	1,675	1,470	1,550	79	5.4
	Trade balance	-1,699	-1,783	-1,594	-1,409	-1,491	-82	-5.8
CH049I	Robes, nightwear, and underwear:							
	Exports	923	1,028	906	744	715	-29	-3.9
	Imports	4,601	4,842	4,796	4,961	5,044	83	1.7
	Trade balance	-3,678	-3,814	-3,889	-4,218	-4,329	-111	-2.6
CH049J	Hosiery:							
	Exports	445	423	362	344	339	-5	-1.5
	Imports	847	950	923	1,031	1,091	59	5.8
	Trade balance	-402	-527	-560	-687	-751	-64	-9.4
CH049K	Body-supporting garments:							
	Exports	543	445	330	385	289	-97	-25.1
	Imports	1,370	1,439	1,434	1,648	1,579	-70	-4.2
	Trade balance	-828	-993	-1,104	-1,263	-1,290	-27	-2.1
CH049L	Neckwear, handkerchiefs, and scarves:							
	Exports	38	40	28	24	23	-1	-5.9
	Imports	428	510	457	432	494	62	14.3
	Trade balance	-390	-470	-429	-408	-471	-63	-15.4
CH049M	Gloves, including gloves for sports:							
	Exports	180	185	181	122	109	-13	-10.5
	Imports	1,991	2,076	2,119	2,176	2,386	210	9.6
	Trade balance	-1,811	-1,891	-1,938	-2,054	-2,277	-222	-10.8
CH049N	Headwear:							
	Exports	92	107	116	91	89	-2	-1.9
	Imports	1,063	1,245	1,288	1,279	1,358	79	6.2
	Trade balance	-971	-1,138	-1,172	-1,188	-1,269	-81	-6.8
CH049O	Leather apparel and accessories:							
	Exports	90	94	100	95	92	-3	-2.9
	Imports	1,275	2,028	2,121	1,869	1,743	-126	-6.8
	Trade balance	-1,185	-1,934	-2,021	-1,775	-1,651	123	7.0
CH049P	Fur apparel and other fur articles:							
	Exports	54	48	34	25	19	-5	-21.0
	Imports	151	241	264	245	285	40	16.4
	Trade balance	-97	-193	-230	-220	-265	-45	-20.5
CH049Q	Rubber, plastic, and coated-fabric apparel:							
	Exports	83	102	123	99	95	-5	-4.6
	Imports	251	390	381	349	371	22	6.4
	Trade balance	-168	-288	-258	-250	-276	-27	-10.8
CH049R	Nonwoven apparel:							
	Exports	48	42	52	47	37	-10	-21.1
	Imports	320	373	411	401	401	(⁴)	(⁵)
	Trade balance	-271	-330	-360	-353	-364	-10	-2.9

See footnote(s) at end of table.

Table TX-4--Continued

Textiles, apparel, and footwear : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
		Million dollars						
CH049S	Other wearing apparel:							
	Exports	1,417	1,437	1,095	922	845	-77	-8.3
	Imports	2,833	3,539	3,433	3,287	3,630	343	10.4
	Trade balance	-1,416	-2,102	-2,338	-2,366	-2,785	-420	-17.7
CH050	Miscellaneous textile products:							
	Exports	1,589	1,774	1,666	1,619	1,534	-85	-5.2
	Imports	2,696	3,005	3,198	3,340	3,754	414	12.4
	Trade balance	-1,106	-1,231	-1,532	-1,721	-2,220	-499	-29.0
CH051	Footwear:							
	Exports	693	664	638	520	495	-25	-4.8
	Imports	14,074	14,856	15,249	15,379	15,560	180	1.2
	Trade balance	-13,380	-14,192	-14,611	-14,860	-15,065	-205	-1.4

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes.³Not meaningful for purposes of comparison.⁴Less than \$500,000.⁵Less than 0.05 percent.

Note.—Calculations based on unrounded data.

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

Table TX-5

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH045	Fibers and yarns, except raw cotton and raw wool:						
	Number of establishments	871	904	900	896	891	-0.6
	Employees (thousands)	166.0	162.0	150.0	140.0	133.0	-5.0
	Capacity utilization (percent)	69	77	75	69	64	-7.2
	U.S. shipments (million dollars)	23,540	22,630	21,675	20,801	19,969	-4.0
	U.S. exports (million dollars)	2,830	3,126	2,640	2,656	2,872	8.1
	U.S. imports (million dollars)	2,547	2,771	2,545	2,641	2,676	1.3
	Apparent U.S. consumption (million dollars)	23,258	22,275	21,580	20,785	19,773	-4.9
	Trade balance (million dollars)	282	355	95	16	196	1,159.7
	Ratio of imports to consumption (percent)	11.0	12.4	11.8	12.7	13.5	6.3
	Ratio of exports to shipments (percent)	12.0	13.8	12.2	12.8	14.4	12.5
CH046	Fabrics:						
	Number of establishments	3,716	3,589	3,595	3,128	2,799	-10.5
	Employees (thousands)	314.0	297.0	262.0	228.0	204.0	-10.5
	Capacity utilization (percent)	79	76	71	67	(¹)	(¹)
	U.S. shipments (million dollars)	38,894	37,478	32,385	30,600	28,050	-8.3
	U.S. exports (million dollars)	5,170	6,067	6,162	6,485	6,641	2.4
	U.S. imports (million dollars)	5,563	6,052	5,466	5,922	5,854	-1.1
	Apparent U.S. consumption (million dollars)	39,287	37,463	31,689	30,037	27,264	-9.2
	Trade balance (million dollars)	-393	15	696	563	786	39.7
	Ratio of imports to consumption (percent)	14.2	16.2	17.2	19.7	21.5	9.1
	Ratio of exports to shipments (percent)	13.3	16.2	19.0	21.2	23.7	11.8
CH047	Carpets and rugs:						
	Number of establishments	478	441	437	437	397	-9.2
	Employees (thousands)	56.0	57.0	55.0	55.0	50.0	-9.1
	Capacity utilization (percent)	83	79	77	75	(¹)	(¹)
	U.S. shipments (million dollars)	11,690	11,983	12,176	12,176	12,480	2.5
	U.S. exports (million dollars)	772	791	711	684	681	-0.5
	U.S. imports (million dollars)	1,248	1,464	1,410	1,531	1,662	8.6
	Apparent U.S. consumption (million dollars)	12,165	12,657	12,875	13,022	13,461	3.4
	Trade balance (million dollars)	-475	-674	-699	-846	-981	-15.9
	Ratio of imports to consumption (percent)	10.3	11.6	11.0	11.8	12.3	4.2
	Ratio of exports to shipments (percent)	6.6	6.6	5.8	5.6	5.5	-1.8

See footnote(s) at end of table.

Table TX-5—Continued

Textiles, apparel, and footwear sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
CH048	Home furnishings:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	75.0	73.0	66.0	60.0	57.0	-5.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	9,433	9,688	9,134	9,800	10,000	2.0
	U.S. exports (million dollars)	398	418	403	363	339	-6.6
	U.S. imports (million dollars)	2,652	3,215	3,332	4,226	5,021	18.8
	Apparent U.S. consumption (million dollars)	11,687	12,485	12,063	13,663	14,682	7.5
	Trade balance (million dollars)	-2,254	-2,797	-2,929	-3,863	-4,682	-21.2
	Ratio of imports to consumption (percent)	22.7	25.7	27.6	30.9	34.2	10.7
	Ratio of exports to shipments (percent)	4.2	4.3	4.4	3.7	3.4	-8.1
CH049	Apparel:						
	Number of establishments	16,721	16,505	15,478	14,182	13,736	-3.1
	Employees (thousands)	578.0	520.0	426.0	354.0	321.0	-9.3
	Capacity utilization (percent)	77	75	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	62,305	60,339	54,598	46,954	41,789	-11.0
	U.S. exports (million dollars)	7,964	8,177	6,537	5,491	4,965	-9.6
	U.S. imports (million dollars)	56,565	64,402	63,995	63,927	68,274	6.8
	Apparent U.S. consumption (million dollars)	110,906	116,564	112,056	105,390	105,097	-0.3
	Trade balance (million dollars)	-48,601	-56,225	-57,458	-58,436	-63,308	-8.3
	Ratio of imports to consumption (percent)	51.0	55.3	57.1	60.7	65.0	7.1
	Ratio of exports to shipments (percent)	12.8	13.6	12.0	11.7	11.9	1.7
CH051	Footwear:						
	Number of establishments	400	389	381	364	339	-6.9
	Employees (thousands)	35.0	31.0	26.0	21.0	20.0	-4.8
	Capacity utilization (percent)	67	64	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,797	3,760	3,511	3,498	2,718	-22.3
	U.S. exports (million dollars)	693	664	638	520	495	-4.8
	U.S. imports (million dollars)	14,074	14,856	15,249	15,379	15,560	1.2
	Apparent U.S. consumption (million dollars)	17,177	17,952	18,122	18,358	17,783	-3.1
	Trade balance (million dollars)	-13,380	-14,192	-14,611	-14,860	-15,065	-1.4
	Ratio of imports to consumption (percent)	81.9	82.8	84.1	83.8	87.5	4.4
	Ratio of exports to shipments (percent)	18.3	17.6	18.2	14.9	18.2	22.1

¹Not available.

Note.—Calculations based on unrounded data.

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

Minerals and Metals

Christopher B. Mapes, Coordinator
(202) 205-3034
christopher.mapes@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$532 million (1 percent) to \$46.2 billion

U.S. exports: Increased by \$3.1 billion (8 percent) to \$43.0 billion

U.S. imports: Increased by \$3.6 billion (4 percent) to \$89.2 billion

There was a relatively small change in the U.S. trade deficit for the minerals and metals sector, although both imports and exports increased substantially in 2003 (see table MM-1). The increase in trade values was largely owing to the rebound of world prices for metals and semifabricated metal products; accelerating materials consumption in China was a significant factor in rising prices. The largest contribution to the sector deficit was trade in natural and synthetic gemstones, with exports declining and imports increasing for a net \$1.7 billion trade deficit increase. However, the sector deficit was largely moderated by a 7-percent trade deficit reduction (\$945 million) in unrefined and refined gold and a 35-percent (\$712 million) trade deficit reduction in steel mill products (see table MM-2).¹

Overall, most metal commodities experienced significant price increases in 2003, primarily in the latter half of the year, largely owing to increased consumption following the production declines of the past few years. These price increases were major contributors to the 5.3-percent (\$6.6 billion) increase in the total value of minerals and metals trade, reversing the trend of the past 2 years when metal prices were at cyclical lows. Both import and export values increased for refined and unrefined copper forms and related articles, as the spot price of refined copper rose 50 percent during the year.² Worldwide inventory stocks of refined copper fell to their lowest levels since the late 1980s as the result of increased consumption, primarily in China, coupled with the cumulative effects of worldwide production rationalization during the past seven years and production interruptions in Indonesia (mine forced to shut down) and Chile (owing to labor issues) in 2003. Several other nonferrous metals experienced similar average annual price increases. These products included nickel (up 39 percent, to \$4.29 per pound) and molybdenum (up 40 percent, to \$11.57 per pound), which both feed the increasing steel demands of China and the United States.³ Gold continued its recent price rise (up 13 percent, to \$350 per ounce), as the weakening dollar sustained a gold demand surge.

The turnaround in metal prices caused many miners, refiners, and manufacturers to begin to increase production at facilities that had been idled during the price lows of the past several years. Exports of many mine products, such as ores and concentrates (notably copper, iron, silver, and precious-metals), and semirefined products, such as unrefined copper anodes, declined as domestic refining capacity was redeployed in response to rising metal prices. Thus, refined product exports increased for

¹ For additional information, see Natural and Synthetic Gemstones and Steel Mill Products.

² The London Metal Exchange (LME) Grade A Cash price, available at http://www.lme.co.uk/dataprices_historical.asp, rose from a low of \$0.70 per pound on Jan. 2, 2003, to a high of \$1.05 per pound on Dec. 31, 2003.

³ Varied *Mineral Commodity Summaries*, U.S. Geological Survey (USGS), available at <http://minerals.usgs.gov/minerals/pubs/commodity>.

Table MM-1

Minerals and metals: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
Canada	13,578	15,421	13,262	13,447	13,820	373	2.8
Mexico	6,528	8,210	6,956	6,671	6,454	-217	-3.3
China	713	1,333	1,497	1,539	2,636	1,097	71.3
Israel	225	573	732	677	231	-445	-65.8
Japan	1,890	2,344	1,919	1,590	1,654	64	4.1
United Kingdom	3,079	3,347	3,039	2,622	3,112	490	18.7
Germany	1,194	1,380	1,440	1,196	1,338	141	11.8
India	195	223	242	206	235	29	14.1
Taiwan	590	702	594	647	758	111	17.2
Switzerland	2,787	3,753	3,549	2,179	3,007	828	38.0
All other	9,112	9,995	10,278	9,149	9,733	584	6.4
Total	39,890	47,280	43,507	39,924	42,980	3,056	7.7
EU-15	7,135	8,015	8,171	6,951	7,589	637	9.2
OPEC	728	751	805	754	687	-67	-8.9
Latin America	8,619	10,368	9,030	8,394	8,233	-162	-1.9
CBERA	708	770	777	749	846	98	13.0
Asia	5,783	7,596	7,177	6,622	8,346	1,724	26.0
Sub-Saharan Africa	222	219	250	265	269	3	1.3
Central and Eastern Europe	87	133	159	121	115	-6	-4.9
U.S. imports of merchandise for consumption:							
Canada	17,285	19,215	16,916	17,797	18,003	206	1.2
Mexico	5,997	6,767	6,528	7,013	7,116	103	1.5
China	5,520	6,947	7,250	8,656	10,054	1,398	16.2
Israel	4,588	5,693	5,412	6,073	6,365	293	4.8
Japan	5,159	5,339	4,634	4,123	4,036	-87	-2.1
United Kingdom	2,584	3,086	2,946	2,174	2,190	16	0.7
Germany	3,444	3,998	3,724	3,438	3,654	216	6.3
India	3,103	3,644	2,770	3,799	3,730	-69	-1.8
Taiwan	3,264	3,629	2,950	3,003	3,058	55	1.8
Switzerland	992	1,013	937	564	670	106	18.8
All other	29,780	35,684	29,781	28,977	30,329	1,351	4.7
Total	81,717	95,015	83,847	85,616	89,204	3,588	4.2
EU-15	16,248	18,827	17,101	15,589	16,239	650	4.2
OPEC	1,306	1,422	1,259	1,311	1,282	-29	-2.2
Latin America	11,629	13,361	12,111	13,261	14,277	1,016	7.7
CBERA	536	628	552	657	689	33	5.0
Asia	21,447	24,558	21,771	23,501	24,657	1,156	4.9
Sub-Saharan Africa	2,637	3,201	3,082	2,705	2,995	290	10.7
Central and Eastern Europe	693	878	676	780	729	-51	-6.6

See footnote(s) at end of table.

Table MM-1--Continued

Minerals and metals: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. merchandise trade balance:							
Canada	-3,708	-3,795	-3,654	-4,350	-4,183	167	3.8
Mexico	531	1,443	428	-342	-661	-320	-93.6
China	-4,807	-5,614	-5,754	-7,117	-7,418	-301	-4.2
Israel	-4,363	-5,121	-4,680	-5,396	-6,134	-738	-13.7
Japan	-3,270	-2,995	-2,716	-2,534	-2,382	152	6.0
United Kingdom	495	261	94	448	922	474	105.7
Germany	-2,250	-2,618	-2,284	-2,242	-2,317	-75	-3.3
India	-2,909	-3,421	-2,528	-3,592	-3,494	98	2.7
Taiwan	-2,675	-2,927	-2,355	-2,356	-2,300	56	2.4
Switzerland	1,795	2,740	2,612	1,616	2,338	722	44.7
All other	-20,667	-25,689	-19,503	-19,828	-20,596	-767	-3.9
Total	-41,827	-47,735	-40,341	-45,692	-46,224	-532	-1.2
EU-15	-9,113	-10,812	-8,930	-8,637	-8,650	-12	-0.1
OPEC	-578	-670	-453	-558	-596	-38	-6.9
Latin America	-3,010	-2,993	-3,081	-4,866	-6,044	-1,178	-24.2
CBERA	172	142	225	92	157	65	70.6
Asia	-15,663	-16,962	-14,594	-16,879	-16,311	568	3.4
Sub-Saharan Africa	-2,416	-2,982	-2,832	-2,440	-2,727	-287	-11.8
Central and Eastern Europe	-606	-744	-517	-660	-614	45	6.9

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table MM-2
Leading changes in U.S. exports and imports of minerals and metals, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002		
						Absolute	Percent	
<hr/>								
	Million dollars							
<hr/>								
U.S. EXPORTS:								
Increases:								
Unrefined and refined gold (MM020A)	4,795	5,099	4,186	2,639	4,130	1,491	56.5	
Steel mill products (MM025)	4,291	4,911	4,756	4,533	5,525	992	21.9	
Iron and steel waste and scrap (MM023)	750	1,030	1,151	1,307	1,960	653	49.9	
Copper and related articles (MM036)	1,668	3,109	1,852	1,744	2,086	342	19.6	
Molybdenum ores and concentrates (MM007A)	129	104	110	112	194	82	72.6	
Lead ores and concentrates (MM005A)	41	54	106	117	144	27	23.0	
Decreases:								
Natural and synthetic gemstones (MM019)	447	1,466	1,840	1,331	469	-863	-64.8	
Primary and secondary aluminum (MM037A)	613	636	466	431	376	-55	-12.7	
Precious metal ores and concentrates (MM008)	40	34	85	68	32	-36	-53.3	
All other	27,116	30,836	28,956	27,641	28,064	424	1.5	
<hr/>								
TOTAL	39,890	47,280	43,507	39,924	42,980	3,056	7.7	
<hr/>								
U.S. IMPORTS:								
Increases:								
Natural and synthetic gemstones (MM019)	11,021	13,234	11,577	13,063	13,854	792	6.1	
Unrefined and refined gold (MM020A)	2,519	2,262	1,700	2,143	2,689	546	25.5	
Cement, stone, and related products (MM009)	4,103	4,408	4,407	4,611	4,945	334	7.2	
Decreases:								
Steel mill products (MM025)	12,749	15,026	11,630	12,203	10,499	-1,704	-14.0	
All other	51,325	60,085	54,534	53,596	57,216	3,620	6.8	
<hr/>								
TOTAL	81,717	95,015	83,847	85,616	89,204	3,588	4.2	

Note.-Calculations based on unrounded data.

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

some metals (e.g., refined copper product exports increased 20 percent) owing to increased refining production. Conversely, mine product exports increased in those industries for which the United States is the dominant producer (notably molybdenum and lead ores and concentrates; refined and unrefined gold; and multiple other minor metals), as mining and processing facilities increased production beyond domestic downstream capacities in response to the rising metal prices.⁴ In contrast, aluminum production declined largely because of high electricity costs and the resulting industry contraction;⁵ this led to a decline in aluminum exports, continuing a trend that began in 2000.

The generation of waste and scrap metal increased with the general improvement in the U.S. economy and the manufacturing sector. The domestic refining of secondary materials continued to decline. Secondary exports also increased (e.g., iron and steel waste and scrap, up 50 percent in value; and copper, up 31 percent in value, with a 35-percent increase in volume),⁶ largely to China⁷ and other Asian destinations⁸ as higher prices were offered by overseas secondary refiners.⁹

Both exports to and imports from China recorded the largest bilateral increases, both in terms of absolute value and percentage gains (see table MM-1). A 71-percent increase (\$1.1 billion) in exports to China enabled it to become the fifth-largest importer of U.S. mineral and metal products, behind both NAFTA partners, the United Kingdom, and Switzerland. U.S. sector exports to China have risen almost threefold in the past 5 years. A large portion of U.S. exports to China is refined and unrefined metal and metal-bearing scrap, nonferrous and ferrous, which feeds China's double-digit metal-consumption growth rate and burgeoning manufacturing sector.¹⁰ U.S. sector imports from China have increased 82 percent since 1999, and increased 16 percent (\$1.4 billion) in 2003, solidifying China as the second-leading sectoral supplier to the U.S. market, only behind Canada. Imports were largely in the form of various value-added household products such as miscellaneous base metal products (largely for household

⁴ Varied *Mineral Commodity Summaries*, U.S. Geological Survey (USGS), available at <http://minerals.usgs.gov/minerals/pubs/commodity>.

⁵ For a discussion of the competitive challenges of the U.S. refined aluminum industry, see Judith-Anne Webster, "U.S. Primary Aluminum: Power Costs and Market Conditions Could Cause Long-term Restructuring," *Industry Trade and Technology Review*, Dec. 2001; and "Key Performance Indicators" for aluminum in subsequent publications..

⁶ The last domestic secondary smelter and refinery shut down in 2001. For a discussion of the competitive challenges of the U.S. refined copper industry, see Christopher B. Mapes, "Major Contraction of the Domestic Refined Copper Industry," *Industry Trade and Technology Review*, Dec. 2002.

⁷ China now consumes over 65 percent of U.S. copper scrap exports and purchases 10 times the copper and brass from the United States of all other nations combined. See Joseph McCann, "U.S. Copper Exports Rise in Tandem With Prices," AMM.com, found at <http://www.amm.com/index2.htm>, retrieved Apr. 20, 2004.

⁸ During 2002-03, U.S. exports of iron and steel waste and scrap have been largely to China (approximately 34 to 35 percent, by value) and Korea (approximately 18 percent, by value). During the same period, while exports increased, NAFTA partners received declining percentages of iron and steel waste and scrap: exports to Canada declined from 12 to 8 percent and exports to Mexico declined from 11 to 9 percent. Multiple countries received much of the increased scrap exports in 2003, to include (in order of decreasing value): Finland, Thailand, Malaysia, Turkey, and Spain.

⁹ In addition, the depreciating dollar made U.S. waste and scrap less expensive in foreign markets and the large manufacturing growth in China and other Asian countries, coupled with low production costs, enabled premium prices to be offered. In the case of many nonferrous secondary refiners, industry restructuring and closures as a consequence of regulations and high energy costs resulted in less domestic consumption (see Webster, "U.S. Primary Aluminum: Power Costs and Market Conditions Could Cause Long-term Restructuring" and Mapes, "Major Contraction of the Domestic Refined Copper Industry").

¹⁰ See, e.g., Tom Balcerek, New Math: Take Away '201' and What's Left is China, AMM.com, Dec. 12, 2003, retrieved at <http://www.amm.com/index2.htm> Mar. 23, 2004; *Non-Ferr Metals/Mining: Global Metals and Mining Commodity Price Review - Global*, Merrill Lynch Metals/Mining Group, subscriber email dated Mar. 28, 2004; and Art Miele, senior vice president-marketing, in Phelps Dodge Corp.'s *Webcast of Its Management Presentations to Investment Community*, Mar. 23, 2004, retrieved Mar. 23, 2004.

appliances, up 23 percent to \$2.3 billion), cooking and kitchenware (up 15 percent to \$1.1 billion), and ceramic household articles (up 6 percent to \$987 million).

Natural and synthetic gemstones recorded a 65-percent decline in export volume and value, largely in cut diamonds. The trade deficit increase continued the general trend of the recent past, where economic recovery in the U.S. market exceeded most other diamond-consuming countries, thus stifling diamond exports (see Natural and Synthetic Gemstones).

The steel mill products trade deficit declined owing to a decrease in imports and an increase in exports. Import volumes declined largely owing to U.S. import relief measures, and export volumes rose largely because of increased demand in China (up sevenfold in value) to supply the massive infrastructure projects in the fast-growing Chinese economy. The depreciating U.S. dollar relative to the euro also stifled imports from and accelerated exports to the EU, with Italy accounting for the largest (a fivefold) increase in U.S. exports to the EU (see Steel Mill Products).

The increased trade surplus in unrefined and refined gold¹¹ was owing to the increased quantities of exports (up 34 percent, to 358 metric tons) as compared with imports (up 14 percent, to 90 metric tons). The rising prices (up 17 percent)¹² sparked production and accentuated the surplus value. Exports were predominantly in the forms of bullion and doré, largely to Switzerland and the United Kingdom.¹³ Included among the 2003 U.S. exports of refined gold were an estimated 59.8 metric tons of earmarked bullion (held for confidential foreign private accounts) that were released by the U.S. Federal Reserve Bank of New York.¹⁴ Imports rose \$546 million (26 percent) to \$2.6 billion. The top U.S. import source for gold has been Canada during the past 5 years, although 2003 imports from Canada declined by \$74 million (5 percent) to account for \$1.4 billion (52 percent) of all gold imported by the United States from all sources. Imports (primarily of bullion and doré) from the top Latin American countries (Colombia, Peru, Brazil, Mexico, and Chile) are primarily attributed to significant U.S. foreign direct investment in the mining industries of these countries.¹⁵

¹¹ Unrefined and refined gold includes several unwrought forms: unrefined doré from the initial smelting of gold ores and concentrates; and refined cast bars of bullion, grains of various sizes, and other forms other than powder.

¹² The London final (p.m.) fix averaged \$363.51 per troy ounce in 2003, up from \$309.97 per troy ounce for the previous year. Earle B. Amey, "Gold in December 2003," *Mineral Industry Surveys*, U.S. Geological Survey (USGS), Mar. 2004, p. 4.

¹³ Both countries are, as is the United States, major refining, fabricating, trading, marketing, and banking centers for all precious metals.

¹⁴ In its custodial role, the U.S. Federal Reserve Bank stores private gold for foreign central banks that allow for private accounts. Amey, "Gold," *Mineral Commodity Summaries*, USGS, Jan. 2004, p. 73.

¹⁵ See e.g., Amey, "Gold in {various months} 2003," *Mineral Industry Surveys*, USGS, various months, 2003-04.

COMMODITY ANALYSIS

Natural and Synthetic Gemstones

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$1.7 billion (14 percent) to \$13.4 billion

U.S. exports: Decreased by \$863 million (65 percent) to \$469 million

U.S. imports: Increased by \$792 million (6 percent) to \$13.9 billion

The expanded U.S. trade deficit for natural and synthetic gemstones during 2002-03 was principally the result of fewer and lower-valued diamond exports¹⁶ in conjunction with higher-valued imported diamonds (see tables MM-3 and MM-4).¹⁷ The 2003 downturn in U.S. diamond exports for the second consecutive year reflected relatively weaker global markets compared with that of the United States,¹⁸ and strong domestic consumption of large, fine quality cut stones typically manufactured by U.S. cutters which are in high demand by U.S. consumers. Although the U.S. consumer confidence index was down by 17 points to 79.6, other economic indicators that usually correlate with a strong U.S. diamond market were favorable to increased diamond demand, including real GDP, up 3 percent to \$10.4 trillion; real disposable personal income, up 4 percent to \$8.2 trillion; and the average prime rate of interest, down a little more than half a percentage point to almost 4.1 percent.

During the past 5 years (1999-2003), the U.S. trade deficit for natural and synthetic gemstones has expanded by \$2.8 billion as a result of higher valued diamond imports.¹⁹ The exception occurred during 2000-2001 when diamond imports dropped for the first time in 10 years, causing the deficit to recede by \$2 billion to \$9.7 billion before resuming an expansionary trend.²⁰

Top U.S. diamond export markets have varied from year-to-year depending on global economic conditions, stone preferences, and product availability. In 2003, Hong Kong, Canada, and Israel were the top U.S. export markets, together accounting for \$144 million (43 percent), a decrease of \$470 million (77 percent) from 2002. In addition to trading diamonds, all three countries manufacture quality diamond jewelry. Switzerland, famous for high quality diamond-laced watches, and Belgium, also a manufacturer of quality diamond jewelry as well as a long-established diamond trading center,²¹ also have been among the top three U.S. diamond markets in previous years. Major U.S. export markets for other gemstone products included Hong Kong as the dominant market for natural colored gemstones,

¹⁶ Cut diamonds were the dominant export items, registering a decrease of \$828 million (71 percent) to almost \$335 million during 2002-03; the quantity decreased by 854,170 carats (55 percent) to 699,038 carats; and the trade weighted average unit export value decreased by \$270 (36 percent) to \$479 per carat.

¹⁷ The import value of cut diamonds (the dominant import items) increased by \$660 million (6 percent) to \$12.2 billion during 2002-03. At the same time, the quantity decreased by 829,874 carats (4 percent), thereby increasing the trade weighted average unit import value by almost \$60 (10 percent) to \$636 per carat.

¹⁸ "General Assessment of the Macroeconomic Situation, Overview: A Firming But Uneven Recovery," *OECD Economic Outlook*, No. 74, Preliminary Edition, (Nov. 2003), pp. 7-8.

¹⁹ From 1999 to 2003, cut diamonds accounted for 83 to 88 percent of total natural and synthetic gemstone imports by value. During the same period, the overall value of cut diamond imports increased by \$3 billion (33 percent), the overall quantity decreased by about 41,000 carats (less than 0.5 percent) and the trade weighted average unit import value of cut diamonds increased by \$158 (33 percent).

²⁰ The primary cause for decreased imports during 2000-2001 was uncertainty in the market following the September 11 terrorist acts on the United States. Although the value of imported cut diamonds dropped throughout 2001, the rate of decrease during September-December was greater— recording a decrease of \$598 million compared to a \$623-million decrease in the first 8 months of 2001.

²¹ More than half of the world's diamond supply is reportedly traded through Belgium. See Sayre Priddy, "A Tale of Two Cities: Antwerp and New York," *Rapaport News*, Dec. 9, 2003, found at <http://www.diamonds.net/news/newsitem.asp?num=8929&type=all>, retrieved Mar. 4, 2004.

accounting for \$15 million (20 percent) of exports in 2003, down by \$3 million (19 percent). Japan and Hong Kong together received \$8 million (67 percent) of pearl exports, up by \$3 million (56 percent);²² and Mexico, Japan, and Germany together received \$21 million (49 percent) of synthetic gemstones, up by \$4 million (21 percent).

Since the United States is the world's largest consumer market for diamonds but has little natural resources of its own, imports supply much of the demand.²³ In 2003, the relative strength of the U.S. economy, higher global diamond prices,²⁴ and the limited supply of larger, better quality diamonds²⁵ desired by U.S. consumers have caused upward price pressures with many in the industry reporting fewer sales transactions but higher value than in 2002.²⁶

As in previous years, Israel, Belgium, and India—the world's major diamond cutting and trading centers—continued to account for most U.S. diamond imports by value. These countries together represented \$11.3 billion (87 percent) of imported diamonds in 2003, an increase of \$581 million (5 percent) from 2002. Sources of other gemstone products included Thailand and India as the dominant suppliers of natural colored gemstones, together accounting for \$273 million (44 percent) of imports in 2003, up by nearly \$1 million (1 percent); Japan supplied \$85 million (33 percent) of pearl imports, down by \$18 million (18 percent); and Germany, China, and Switzerland together supplied \$31 million (68 percent) of synthetic products, up by \$3 million (11 percent).

Also in the past year, the United States implemented the Kimberley Process regulations effective July 30, 2003,²⁷ to help block the trade of conflict diamonds by regulating the legitimate movement of natural rough diamonds through the international market.²⁸ These regulations are not designed to impact the volume of trade, but rather to make the process more transparent. The U.S. regulations prohibit shipments of rough diamonds between the United States and countries that do not participate in the Kimberly Process Certification Scheme (KPCS), and permit shipments between the United States and KPCS-participating countries if they are controlled in accordance with the standards, practices, and procedures of the KPCS.²⁹ These regulations are administered by the U.S. Department of Treasury's Office of Foreign Assets Control (OFAC) and enforced by the U.S. Customs Service.³⁰ The U.S. Department of State maintains a website with a direct link to the Kimberley Process, an international

²² Although pearl exports to Japan (the global pearl trading center) and Hong Kong increased in 2003, overall pearl exports decreased (table MM-3).

²³ The United States reportedly accounts for half of the world's retail diamond jewelry sales. See Sayre Priddy, "A Tale of Two Cities: Antwerp and New York," *Rapaport News*, Dec. 9, 2003.

²⁴ Likely in anticipation of a strong market, De Beers raised rough diamond prices 10 percent on average in 2003 compared with 2002. See Saul Singer, "De Beers' 2003 Diamond Sales Up Seven Percent," *Rapaport News*, Feb. 5, 2004, found at <http://www.diamonds.net/news/newsitem.asp?num=9167&type=all>, retrieved Feb. 24, 2004.

²⁵ Large, better quality mined diamonds are more rare than are the smaller, lower quality stones. Also see "Holiday Sales: Party Like It's 1999," Section on Diamonds and Gemstones, *Jewelers' Circular Keystone (JCK)*, Feb. 2004, p. 26.

²⁶ Deborah Yonick, "Jewelers Optimistic for New Year," *Rapaport News*, Feb. 6, 2004, found at <http://www.diamonds.net/news/newsitem.asp?num=9182&type=all>, retrieved Feb. 24, 2004.

²⁷ U.S. Department of Treasury, Office of Foreign Assets Control, *Diamond Trading, What You Need to Know About U.S. Sanctions*, p. 1., found at <http://www.treas.gov/offices/eotffc/ofac/sanctions/tl1diam.pdf>, retrieved Mar. 15, 2004.

²⁸ The term "conflict diamonds" refers to diamonds obtained for the purpose of financing armed conflict. See U.S. Congress, *Clean Diamond Trade Act*, 108th Cong., 1st sess., H.R. 1584, found at <http://www.state.gov/e/eb>, retrieved Mar. 15, 2004.

²⁹ U.S. Department of Treasury, Office of Foreign Assets Control, *Diamond Trading*, p. 1.

³⁰ In support of the Kimberley Process, effective Jan. 1, 2003, the World Trade Organization (WTO) granted a waiver to the WTO Agreement thereby approving of measures consistent with the KPCS to regulate the international trade of rough diamonds. See World Trade Organization, "Waiver Concerning Kimberley Process Certification Scheme For Rough Diamonds," *Rapaport News*, Mar. 27, 2003, found at <http://www.diamonds.net/news/newsitem.asp?num=7902&type=all>, retrieved Mar. 15, 2004.

diamond industry organization which provides a list of participating countries, and contact information for the U.S. Kimberley Process Authority, which is responsible for issuing rough diamond export certificates.

In addition to the U.S. KPCS regulations, the World Diamond Council industry organization announced the U.S. chapter's intentions to participate in a voluntary international self-regulation program, which uses warranties to state the legitimacy of the diamonds with respect to the KPCS. Warranties are to be issued by suppliers of rough, as well as polished diamonds, and diamond-containing jewelry.³¹ The World Diamond Council also provides a detailed explanation of the KPCS: *Essential Guide to Implementing the Kimberley Process*.³²

Linda White
(202) 205-3427
linda.white@usitc.gov

Table MM-3
U.S. exports of natural and synthetic gemstones, 1999-2003

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
————— <i>Million dollars</i> —————							
Diamonds	312	1,289	1,707	1,189	338	-851	-72
Natural color gemstones	61	79	71	79	77	-2	-3
Pearls	10	22	23	27	12	-16	-59
Synthetics and reconstructed	63	75	39	36	42	6	17
Total	447	1,466	1,840	1,331	469	-863	-65

Note.—Calculations based on unrounded data.

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

Table MM-4
U.S. imports of natural and synthetic gemstones, 1999-2003

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
————— <i>Million dollars</i> —————							
Diamonds	9,901	12,060	10,625	12,088	12,931	843	7
Natural color gemstones	667	711	572	629	617	-11	-2
Pearls	385	391	321	301	260	-40	-13
Synthetics and reconstructed	68	71	58	45	45	0	0
Total	11,021	13,234	11,577	13,063	13,854	792	6

Note.—Calculations based on unrounded data.

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

³¹ World Diamond Council, "U.S. to Complete KP Implementation by End of July," Rapaport News, July 29, 2003, found at <http://www.diamonds.net/news/newsitem.asp?num=8306&type=all>, retrieved Mar. 4, 2004.

³² World Diamond Council, *Essential Guide to Implementing the Kimberley Process*, found at <http://www.worlddiamondcouncil.org>, retrieved Mar. 4, 2004.

Steel Mill Products³³

Change in 2003 from 2002:

U.S. trade deficit: Decreased by \$2.7 billion (35 percent) to \$5.0 billion

U.S. exports: Increased by \$992 million (22 percent) to \$5.5 billion

U.S. imports: Decreased by \$1.7 billion (14 percent) to \$10.5 billion

The decline in the steel mill products trade deficit in 2003 was attributable to a large decrease in imports and a significant increase in exports, as U.S. import relief (safeguard) measures increased the price for certain imports from certain sources and an increase in the value of the euro resulted in certain EU steel products becoming more expensive in the U.S. market.³⁴ Rising exports reflected high demand in China and the decline in the value of the U.S. dollar relative to certain other currencies. Most of the decline in the steel mill products deficit in 2003 was attributable to shifts in trade with the EU, Canada, China, Brazil, Japan, and Korea. U.S. production returned to more historical levels in 2003 as formerly bankrupt steel firms resumed operations under new ownership during the third and fourth quarters of 2002, following lowered shipments owing to shut-downs in 2002.

U.S. exports

U.S. exports of steel mill products rose by \$992 million to over \$5.5 billion. Strong economic growth in China and its demand for steel resulted in a surge of exports from the United States to China, which rose by \$377 million, or by 727 percent over 2002. In late 2002 and through 2003, prices for steel mill products in China were higher than prices in most other countries, thus making the Chinese market attractive to global exporters. With the return to operation of idled U.S. steel production capacity, U.S. exports to Canada rose to more normal levels in 2003 as compared with weak exports to Canada in 2002. Further, the overall increase in U.S. production in 2003 along with other factors, such as rising demand in China and advantageous U.S. dollar exchange rates with other nations, allowed for increased U.S. exports. For example, U.S. exports to the EU benefitted from the lower value of the U.S. dollar relative to the euro. Much of the increase in exports to the EU were to Italy. Changes in U.S. exports of steel mill products during 2002-03 occurred principally in carbon and alloy steel flat products (see table MM-5).

U.S. imports

U.S. imports of steel mill products declined by \$1.7 billion, or by 14 percent between 2002 and 2003. This decline was owing to the declining value of the U.S. dollar resulting in foreign steel imports becoming more costly, import relief measures, and a restructuring of the U.S. steel industry that allowed the industry to become more price competitive with imports.³⁵ On March 5, 2002, pursuant to section 203 of the Trade Act of 1974 (19 U.S.C. 2253), the President imposed import relief (safeguard measures)³⁶ in

³³ This industry/commodity group includes steel products produced in steel mills and includes flat steel products, tubular steel products, bar, rod, and wire, as well as certain stainless steel products.

³⁴ American Iron and Steel Institute, "Steel Imports in 2003 Down; Higher Prices in Other Markets Cited," press release, Jan. 27, 2004, found at http://www.steel.org/news/pr/2004/pr040127_imp.htm, retrieved Mar. 31, 2004.

³⁵ Ibid.

³⁶ The Commission conducted a global safeguard action investigation on certain steel products during 2001 and sent its report to the President in December 2001. See USITC, Steel, Inv. No. TA-201-73, USITC publication 3479, Dec. 2001. The Commission made an affirmative determination with regard to certain carbon and alloy steel, including (1) slabs, (2) plate, (3) hot-rolled steel, (4) cold-rolled steel, (5) coated steel, (6) hot bar, (7) cold bar, (8) rebar, (9) welded tubular products other than oil-country tubular goods (OCTG), and (10) fittings; and stainless steel (11) bar and (12) rod. It was equally divided in its determination with regard to (1) carbon and alloy steel tin mill

(continued...)

the form of tariffs and tariff-rate quotas on imports of certain steel products for a period of 3 years and 1 day, effective March 20, 2002.³⁷ Relief was imposed on imports from the EU, Japan, Korea, Brazil, China, Russia, and a number of other steel exporters. Imports from Canada, Mexico, and a large number of developing countries were excluded from these relief measures. Shortly after receiving a midcourse monitoring report,³⁸ the President terminated the measures, effective December 5, 2003.³⁹ Approximately \$1.1 billion, or 65 percent, of the decline in imports was of steel mill products covered by the U.S. import relief measures.⁴⁰ Imports from the EU of steel mill products covered by the relief measures declined by \$288.5 million; similar imports from Russia, Korea, Japan, and Taiwan fell by \$275.7 million, \$192.9 million, \$179.6 million, and \$66.1 million, respectively. From 2002 to 2003, the euro appreciated 28 percent, from \$0.88 per U.S. dollar in January 2002 to \$1.23 in December 2003, resulting in significantly more expensive steel imports from the EU and reducing demand for EU steel in the U.S. market. During 2002-2003, U.S. apparent consumption of finished steel mill products declined by 1 percent.⁴¹ Changes in U.S. imports of steel mill products during 2002-03 occurred principally in carbon and alloy steel flat products, semifinished steel (i.e., ingots, blooms, slabs, etc.), and bars, rods, and light shapes (see table MM-6).

Dennis Fravel
(202) 205-3404
dennis.fravel@usitc.gov

³⁶ (...continued)

products, (2) tool steel, (3) stainless steel wire, and (4) stainless steel fitting. It made a negative determination with regard to certain carbon and alloy steel, including (1) grain-oriented electrical steel, (2) ingots, (3) rails, (4) wire, (5) rope, (6) nails, (7) shapes, (8) fabricated structural units, (9) seamless tubular products other than OCTG, (10) seamless OCTG, and (11) welded OCTG; and stainless steel (12) slabs/ingots, (13) plate, (14) cloth, (15) rope, (16) seamless tubular products, and (17) welded tubular products.

³⁷ Presidential Proclamation 7529, *To Facilitate Positive Adjustment to Competition From Imports of Certain Steel Products*, 67 FR 10553, Mar. 7, 2002, and Presidential Memorandum of March 5, 2002, *Action Under Section 203 of the Trade Act of 1974 Concerning Certain Steel Products*, 76 FR 10593, Mar. 7, 2002. Steel products covered by this relief were slabs, plate, hot-rolled steel, cold-rolled steel, corrosion-resistant and other coated steel, tin mill products, hot-rolled bar and light shapes, cold-finished bar, rebar, welded tubular products other than oil country tubular goods, fittings, stainless steel bar and light-shapes, stainless steel rod, and stainless steel wire.

³⁸ USITC, *Steel: Monitoring Developments in the Domestic Industry* (Inv. No. TA-204-9) and *Steel-Consuming Industries: Competitive Conditions With Respect to Steel Safeguard Measures* (Inv. No. 332-452, USITC publication 3632, Sept. 2003).

³⁹ Presidential Proclamation 7741, *To provide for the Termination of Action Taken With Regard to Imports of Certain Steel Products*, 68 FR 68483-68484, Dec. 8, 2003.

⁴⁰ Fittings for tubular products that were covered by the import relief measures are excluded from the steel mill grouping.

⁴¹ American Iron and Steel Institute, statistical data, *Apparent Supply of Steel Mill Products 2003*, Dec. 2003.

Table MM-5
U.S. exports of steel mill products, 1999-2003

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
————— Million dollars —————							
Ingots, blooms, billets, and slabs of carbon and alloy steels	70	82	70	56	121	66	121
Plates, sheets, and strips of carbon and alloy steels	1,647	2,087	1,926	1,799	2,476	677	38
Bars, rods, and light shapes of carbon and alloy steels	384	432	409	415	479	64	15
Angles, shapes, and sections of carbon and alloy steels	210	235	197	154	217	64	41
Wire of carbon and alloy steels	222	181	180	159	172	13	8
Ingots, blooms, billets, and slabs of stainless steel	33	38	37	59	27	-32	-54
Plates, sheets, and strips of stainless steels	357	441	403	410	575	165	40
Bars, rods, and light shapes of stainless steels	73	88	94	82	89	6	7
Angles, shapes, and sections of stainless steels	6	8	7	6	5	-1	-16
Wire of stainless steels	38	61	71	67	52	-15	-22
Rails and accessories of carbon and alloy steels	61	78	77	73	67	-6	-9
Pipes and tubs of carbon and alloy steels	978	932	1,015	1,016	977	-39	-4
Pipes and tubes of stainless steels	123	148	141	118	148	30	25
Tools steels	89	100	128	118	119	0	(¹)
Total	4,291	4,911	4,756	4,533	5,525	992	22

¹ Less than 0.5 percent.

Note.—Calculations based on unrounded data.

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

Table MM-6
U.S. imports of steel mill products, 1999-2003

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
————— Million dollars —————							
Ingots, blooms, billets, and slabs of carbon and alloy steels	1,402	1,705	1,056	1,601	1,078	-523	-33
Plates, sheets, and strips of carbon and alloy steels	4,814	5,150	3,422	3,860	3,028	-832	-22
Bars, rods, and light shapes of carbon and alloy steels	1,882	2,077	1,886	1,928	1,669	-259	-13
Angles, shapes, and sections of carbon and alloy steels	505	777	421	338	286	-52	-15
Wire of carbon and alloy steels	502	496	449	467	463	-5	-1
Ingots, blooms, billets, and slabs of stainless steel	315	428	299	306	242	-64	-21
Plates, sheets, and strips of stainless steels	700	868	512	553	624	72	13
Bars, rods, and light shapes of stainless steels	306	437	351	284	215	-70	-25
Angles, shapes, and sections of stainless steels	16	24	14	12	9	-3	-29
Wire of stainless steels	82	108	98	92	96	4	4
Rails and accessories of carbon and alloy steels	208	190	154	167	163	-3	-2
Pipes and tubs of carbon and alloy steels	1,540	2,221	2,434	2,136	2,098	-38	-2
Pipes and tubes of stainless steels	261	319	338	274	309	35	13
Tools steels	214	225	196	184	220	36	20
Total	12,749	15,026	11,630	12,203	10,499	-1,704	-14

Note.—Calculations based on unrounded data.

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

Table MM-7

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM001	Clays and related mineral products:							
	Exports	952	1,040	973	941	986	46	4.9
	Imports	168	195	179	158	180	22	13.9
	Trade balance	783	845	794	782	806	24	3.0
MM002	Fluorspar and miscellaneous mineral substances:							
	Exports	74	71	51	39	30	-8	-21.6
	Imports	146	145	159	147	147	(³)	-0.2
	Trade balance	-72	-74	-108	-109	-117	-8	-7.4
MM003	Iron ores and concentrates:							
	Exports	243	246	229	249	248	-1	-0.3
	Imports	399	420	293	313	328	15	4.9
	Trade balance	-156	-174	-64	-64	-80	-16	-25.3
MM004	Copper ores and concentrates:							
	Exports	81	173	84	79	73	-6	-7.5
	Imports	82	(³)	58	105	18	-87	-82.9
	Trade balance	-2	173	26	-26	55	81	(⁴)
MM005	Lead ores, concentrates, and residues:							
	Exports	43	73	108	133	197	64	48.5
	Imports	3	8	1	(³)	0	(³)	-100.0
	Trade balance	40	65	108	133	197	64	48.5
MM005A	Lead ores and concentrates:							
	Exports	41	54	106	117	144	27	23.0
	Imports	3	8	(³)	(³)	0	(³)	-100.0
	Trade balance	38	46	105	117	144	27	23.0
MM006	Zinc ores, concentrates, and residues:							
	Exports	352	317	299	339	349	10	2.9
	Imports	53	38	38	53	68	15	28.0
	Trade balance	299	279	260	286	281	-5	-1.7
MM006A	Zinc ores and concentrates:							
	Exports	346	308	290	328	340	12	3.8
	Imports	40	27	32	45	60	15	34.6
	Trade balance	306	281	259	283	280	-3	-1.1
MM007	Certain ores, concentrates, ash, and residues:							
	Exports	237	232	248	183	289	106	58.0
	Imports	732	790	797	728	685	-43	-5.9
	Trade balance	-495	-558	-549	-545	-396	149	27.4
MM007A	Molybdenum ores and concentrates:							
	Exports	129	104	110	112	194	82	72.6
	Imports	35	35	33	37	51	15	39.6
	Trade balance	94	68	77	76	143	67	88.7
MM008	Precious metal ores and concentrates:							
	Exports	40	34	85	68	32	-36	-53.3
	Imports	4	10	14	43	23	-19	-45.2
	Trade balance	37	25	71	26	8	-17	-66.8
MM008A	Gold ores and concentrates:							
	Exports	2	10	7	10	13	3	36.5
	Imports	1	1	1	28	22	-6	-20.8
	Trade balance	(³)	10	6	-18	-9	9	51.1

See footnote(s) at end of table.

Table MM-7--Continued

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
		Million dollars						
MM008B	Silver ores and concentrates:							
	Exports	37	21	72	57	16	-41	-71.6
	Imports	2	(³)	3	13	1	-12	-89.6
	Trade balance	35	21	69	44	15	-29	-66.2
MM009	Cement, stone, and related products:							
	Exports	1,184	1,307	1,322	1,279	1,405	126	9.8
	Imports	4,103	4,408	4,407	4,611	4,945	334	7.2
	Trade balance	-2,919	-3,101	-3,085	-3,332	-3,540	-208	-6.2
MM009A	Cement:							
	Exports	55	64	56	58	62	4	6.7
	Imports	1,145	1,074	987	939	940	1	0.1
	Trade balance	-1,089	-1,010	-931	-881	-879	3	0.3
MM010	Industrial ceramics:							
	Exports	663	748	711	645	600	-45	-7.0
	Imports	648	827	640	497	551	54	10.9
	Trade balance	14	-80	71	148	49	-99	-67.0
MM011	Ceramic bricks and similar articles:							
	Exports	20	23	23	23	26	4	16.8
	Imports	24	35	31	34	38	4	10.3
	Trade balance	-5	-11	-8	-12	-12	(³)	2.0
MM012	Ceramic floor and wall tiles:							
	Exports	24	26	27	28	27	(³)	-1.6
	Imports	1,019	1,118	1,112	1,290	1,430	140	10.8
	Trade balance	-995	-1,092	-1,086	-1,262	-1,403	-140	-11.1
MM013	Ceramic household articles:							
	Exports	109	115	96	83	88	5	6.1
	Imports	1,671	1,797	1,635	1,691	1,757	66	3.9
	Trade balance	-1,563	-1,683	-1,539	-1,608	-1,669	-61	-3.8
MM014	Flat glass:							
	Exports	1,506	1,807	1,791	1,694	1,747	54	3.2
	Imports	1,268	1,473	1,500	1,553	1,699	145	9.4
	Trade balance	238	334	291	140	49	-92	-65.3
MM015	Glass containers:							
	Exports	173	174	211	165	161	-4	-2.7
	Imports	526	585	538	608	607	-1	-0.2
	Trade balance	-353	-411	-327	-443	-446	-3	-0.7
MM016	Household glassware:							
	Exports	183	195	209	177	165	-11	-6.4
	Imports	937	930	835	888	919	30	3.4
	Trade balance	-754	-735	-625	-711	-753	-42	-5.9
MM017	Miscellaneous glass products:							
	Exports	674	862	814	729	748	18	2.5
	Imports	805	856	769	653	701	48	7.4
	Trade balance	-131	6	46	76	46	-30	-39.1
MM018	Fiberglass insulation products:							
	Exports	71	59	74	75	88	13	17.7
	Imports	139	137	124	131	155	24	18.3
	Trade balance	-69	-78	-50	-56	-67	-11	-19.1

See footnote(s) at end of table.

Table MM-7--Continued

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM019	Natural and synthetic gemstones:							
	Exports	447	1,466	1,840	1,331	469	-863	-64.8
	Imports	11,021	13,234	11,577	13,063	13,854	792	6.1
	Trade balance	-10,575	-11,768	-9,737	-11,731	-13,386	-1,655	-14.1
MM020	Precious metals and non-numismatic coins:							
	Exports	6,510	7,685	6,826	5,070	6,299	1,228	24.2
	Imports	7,708	10,082	8,193	6,263	6,759	496	7.9
	Trade balance	-1,198	-2,397	-1,366	-1,193	-460	733	61.4
MM020A	Unrefined and refined gold:							
	Exports	4,795	5,099	4,186	2,639	4,130	1,491	56.5
	Imports	2,519	2,262	1,700	2,143	2,689	546	25.5
	Trade balance	2,276	2,836	2,486	496	1,441	945	190.5
MM021	Primary iron products:							
	Exports	14	13	7	7	11	4	51.2
	Imports	643	759	632	729	815	86	11.8
	Trade balance	-629	-746	-624	-722	-804	-82	-11.4
MM022	Ferroalloys:							
	Exports	80	96	74	50	51	1	1.7
	Imports	960	1,104	660	713	899	186	26.0
	Trade balance	-880	-1,008	-586	-663	-848	-185	-27.9
MM023	Iron and steel waste and scrap:							
	Exports	750	1,030	1,151	1,307	1,960	653	49.9
	Imports	390	393	284	397	518	121	30.4
	Trade balance	360	637	867	911	1,442	532	58.4
MM024	Abrasive and ferrous products:							
	Exports	518	565	476	445	466	21	4.7
	Imports	765	854	718	746	769	24	3.2
	Trade balance	-247	-289	-242	-301	-304	-3	-1.0
MM024A	Abrasive products:							
	Exports	298	315	289	284	310	27	9.5
	Imports	480	552	473	505	540	35	6.9
	Trade balance	-182	-237	-184	-222	-230	-8	-3.5
MM025	Steel mill products:							
	Exports	4,291	4,911	4,756	4,533	5,525	992	21.9
	Imports	12,749	15,026	11,630	12,203	10,499	-1,704	-14.0
	Trade balance	-8,458	-10,114	-6,874	-7,670	-4,974	2,696	35.2
MM025A	Ingots, blooms, billets, and slabs of carbon and alloy steels:							
	Exports	70	82	70	55	121	66	121.1
	Imports	1,402	1,705	1,056	1,601	1,078	-523	-32.7
	Trade balance	-1,331	-1,623	-986	-1,546	-957	590	38.1
MM025B	Plates, sheets, and strips of carbon and alloy steels:							
	Exports	1,647	2,087	1,926	1,799	2,476	677	37.6
	Imports	4,814	5,150	3,422	3,860	3,028	-832	-21.6
	Trade balance	-3,167	-3,063	-1,495	-2,062	-552	1,509	73.2

See footnote(s) at end of table.

Table MM-7--Continued

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
<i>Million dollars</i>								
MM025C	Bars, rods, and light shapes of carbon and alloy steels:							
	Exports	384	432	409	415	479	64	15.4
	Imports	1,882	2,077	1,886	1,928	1,669	-259	-13.4
	Trade balance	-1,499	-1,644	-1,477	-1,513	-1,190	323	21.3
MM025D	Angles, shapes, and sections of carbon and alloy steels:							
	Exports	210	235	197	154	217	64	41.4
	Imports	505	777	421	338	286	-52	-15.3
	Trade balance	-296	-543	-224	-184	-69	115	62.6
MM025E	Wire of carbon and alloy steels:							
	Exports	222	181	180	159	172	13	8.1
	Imports	502	496	449	467	463	-5	-1.0
	Trade balance	-280	-315	-269	-308	-291	18	5.7
MM025F	Ingots, blooms, billets, and slabs of stainless steels:							
	Exports	33	38	37	59	27	-32	-54.0
	Imports	315	428	299	306	242	-64	-21.0
	Trade balance	-282	-389	-262	-247	-214	32	13.1
MM025G	Plates, sheets, and strips of stainless steels:							
	Exports	357	441	403	410	575	165	40.2
	Imports	700	868	512	553	624	72	13.0
	Trade balance	-343	-427	-108	-142	-49	93	65.5
MM025H	Bars, rods, and light shapes of stainless steels:							
	Exports	73	88	94	82	89	6	7.4
	Imports	306	437	351	284	215	-70	-24.5
	Trade balance	-233	-350	-257	-202	-126	76	37.5
MM025I	Angles, shapes, and sections of stainless steels:							
	Exports	6	8	7	6	5	-1	-15.8
	Imports	16	24	14	12	9	-3	-28.9
	Trade balance	-11	-16	-7	-6	-3	2	43.7
MM025J	Wire of stainless steels:							
	Exports	38	61	71	67	52	-15	-22.1
	Imports	82	108	98	92	96	4	4.2
	Trade balance	-44	-47	-27	-25	-44	-19	-75.4
MM025K	Rails and accessories of carbon and alloy steels:							
	Exports	61	78	77	73	67	-6	-8.6
	Imports	208	190	154	167	163	-3	-2.1
	Trade balance	-147	-112	-77	-93	-96	-3	-3.1
MM025L	Pipes and tubes of carbon and alloy steels:							
	Exports	978	932	1,015	1,016	977	-39	-3.8
	Imports	1,540	2,221	2,434	2,136	2,098	-38	-1.8
	Trade balance	-562	-1,289	-1,419	-1,120	-1,120	(³)	(⁵)
MM025M	Pipes and tubes of stainless steels:							
	Exports	123	148	141	118	148	30	25.4
	Imports	261	319	338	274	309	35	12.6
	Trade balance	-138	-171	-197	-156	-161	-5	-2.9

See footnote(s) at end of table.

Table MM-7--Continued

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
</								

See footnote(s) at end of table.

Table MM-7--Continued

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM036	Copper and related articles:							
	Exports	1,668	3,109	1,852	1,744	2,086	342	19.6
	Imports	3,726	4,881	4,296	3,715	3,893	178	4.8
	Trade balance	-2,058	-1,772	-2,444	-1,972	-1,807	164	8.3
MM036A	Unrefined and refined copper:							
	Exports	89	202	69	92	214	122	131.8
	Imports	1,667	2,223	2,140	1,740	1,854	114	6.5
	Trade balance	-1,578	-2,021	-2,070	-1,648	-1,640	8	0.5
MM036B	Copper alloy plate, sheet, and strip:							
	Exports	156	208	155	117	144	26	22.5
	Imports	116	182	145	118	104	-15	-12.4
	Trade balance	40	26	9	-1	40	41	(⁴)
MM037	Unwrought aluminum:							
	Exports	980	1,130	923	950	1,000	50	5.3
	Imports	4,744	5,085	4,748	4,774	5,000	225	4.7
	Trade balance	-3,764	-3,955	-3,825	-3,824	-3,999	-175	-4.6
MM037A	Primary and secondary aluminum:							
	Exports	613	636	466	431	376	-55	-12.7
	Imports	3,969	4,297	4,085	4,188	4,401	213	5.1
	Trade balance	-3,356	-3,660	-3,619	-3,757	-4,025	-267	-7.1
MM038	Aluminum mill products:							
	Exports	2,943	3,130	2,784	2,519	2,564	45	1.8
	Imports	2,283	2,674	2,305	2,516	2,768	252	10.0
	Trade balance	660	456	479	3	-203	-207	(⁴)
MM038A	Aluminum bars, rods, and profiles:							
	Exports	226	252	245	226	243	17	7.4
	Imports	349	449	352	417	435	18	4.4
	Trade balance	-124	-197	-108	-191	-192	-1	-0.7
MM038B	Aluminum wire:							
	Exports	127	122	84	77	80	3	4.4
	Imports	172	231	162	190	269	79	41.4
	Trade balance	-44	-109	-78	-114	-189	-76	-66.4
MM038C	Aluminum plate, sheet, and strip:							
	Exports	2,059	2,129	1,872	1,652	1,655	4	0.2
	Imports	1,255	1,425	1,242	1,331	1,411	80	6.0
	Trade balance	804	703	629	321	244	-77	-23.9
MM038D	Aluminum foil:							
	Exports	325	331	328	319	338	19	5.9
	Imports	400	446	441	468	500	31	6.7
	Trade balance	-75	-114	-113	-150	-162	-12	-8.3
MM038E	Aluminum tubes, pipes, and fittings:							
	Exports	171	248	215	205	198	-7	-3.6
	Imports	98	109	90	95	134	39	40.9
	Trade balance	73	139	125	111	64	-46	-41.9
MM039	Lead and related articles:							
	Exports	154	170	78	68	117	50	73.2
	Imports	201	215	167	125	113	-12	-9.7
	Trade balance	-46	-45	-88	-57	5	62	(⁴)

See footnote(s) at end of table.

Table MM-7--Continued

Minerals and metals : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM039A	Refined lead:							
	Exports	11	16	8	14	48	34	238.8
	Imports	113	117	90	82	65	-16	-20.1
	Trade balance	-102	-101	-83	-68	-18	50	73.9
MM040	Zinc and related articles:							
	Exports	107	103	86	84	94	11	12.8
	Imports	1,252	1,298	968	908	845	-64	-7.0
	Trade balance	-1,145	-1,195	-882	-825	-750	74	9.0
MM040A	Unwrought zinc:							
	Exports	2	3	1	1	2	1	45.3
	Imports	1,066	1,104	786	731	676	-55	-7.5
	Trade balance	-1,063	-1,101	-785	-730	-674	56	7.6
MM041	Certain base metals and chemical elements:							
	Exports	1,272	1,503	1,702	1,498	1,571	73	4.9
	Imports	2,226	2,873	2,467	1,952	2,248	296	15.1
	Trade balance	-955	-1,371	-765	-454	-676	-222	-48.9
MM041A	Titanium ingot:							
	Exports	13	12	22	12	11	-2	-12.4
	Imports	14	17	27	13	7	-6	-49.0
	Trade balance	-2	-5	-6	-1	4	5	(⁴)
MM042	Nonpowered handtools:							
	Exports	2,031	2,263	2,119	2,038	2,109	71	3.5
	Imports	2,917	3,163	2,996	3,284	3,652	368	11.2
	Trade balance	-887	-901	-876	-1,246	-1,543	-297	-23.8
MM043	Certain cutlery, sewing implements, and related products:							
	Exports	583	546	556	551	550	-1	-0.2
	Imports	856	888	865	912	1,053	141	15.5
	Trade balance	-273	-342	-309	-361	-503	-142	-39.3
MM044	Table flatware and related products:							
	Exports	26	25	28	29	22	-7	-24.7
	Imports	425	507	463	478	484	6	1.2
	Trade balance	-399	-481	-435	-450	-462	-13	-2.8
MM045	Certain builders' hardware:							
	Exports	823	1,084	961	907	911	3	0.4
	Imports	1,696	1,973	1,948	2,197	2,405	208	9.5
	Trade balance	-873	-889	-987	-1,289	-1,494	-205	-15.9

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Less than \$500,000.⁴Not meaningful for purposes of comparison.⁵Less than 0.05 percent.

Note.—Calculations based on unrounded data.

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

Table MM-8

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM001	Clays and related mineral products:						
	Number of establishments	233	230	230	240	240	0.0
	Employees (thousands)	7.0	7.0	7.0	6.0	6.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	1,570	1,520	1,510	1,580	1,610	1.9
	U.S. exports (million dollars)	952	1,040	973	941	986	4.9
	U.S. imports (million dollars)	168	195	179	158	180	13.9
	Apparent U.S. consumption (million dollars)	787	675	716	798	804	0.8
	Trade balance (million dollars)	783	845	794	782	806	3.0
	Ratio of imports to consumption (percent)	21.4	28.9	25.0	19.9	22.4	12.6
	Ratio of exports to shipments (percent)	60.6	68.4	64.4	59.5	61.3	3.0
MM003	Iron ores and concentrates:						
	Number of establishments	13	13	13	12	11	-8.3
	Employees (thousands)	7.0	7.0	6.0	5.0	5.0	0.0
	Capacity utilization (percent)	89	97	83	93	95	2.2
	U.S. shipments (million dollars)	2,300	2,500	1,900	1,900	1,800	-5.3
	U.S. exports (million dollars)	243	246	229	249	248	-0.3
	U.S. imports (million dollars)	399	420	293	313	328	4.9
	Apparent U.S. consumption (million dollars)	2,456	2,674	1,964	1,964	1,880	-4.3
	Trade balance (million dollars)	-156	-174	-64	-64	-80	-25.3
	Ratio of imports to consumption (percent)	16.2	15.7	14.9	15.9	17.4	9.4
	Ratio of exports to shipments (percent)	10.6	9.8	12.1	13.1	13.8	5.3
MM004	Copper ores and concentrates:						
	Number of establishments	35	30	25	22	22	0.0
	Employees (thousands)	10.3	9.1	8.2	7.0	6.8	-2.9
	Capacity utilization (percent)	80	83	82	72	72	0.0
	U.S. shipments (million dollars)	2,143	2,251	1,816	1,512	1,618	7.0
	U.S. exports (million dollars)	81	173	84	79	73	-7.5
	U.S. imports (million dollars)	82	(²)	58	105	18	-82.9
	Apparent U.S. consumption (million dollars)	2,145	2,078	1,790	1,538	1,563	1.6
	Trade balance (million dollars)	-2	173	26	-26	55	(³)
	Ratio of imports to consumption (percent)	3.8	(⁴)	3.2	6.8	1.2	-82.4
	Ratio of exports to shipments (percent)	3.8	7.7	4.6	5.2	4.5	-13.5

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM005A	Lead ores and concentrates:						
	Number of establishments	19	19	12	11	11	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	95	85	85	84	84	0.0
	U.S. shipments (million dollars)	160	148	143	139	140	0.7
	U.S. exports (million dollars)	41	54	106	117	144	23.0
	U.S. imports (million dollars)	3	8	(²)	(²)	(²)	0.0
	Apparent U.S. consumption (million dollars)	122	102	38	22	-4	-119.5
	Trade balance (million dollars)	38	46	105	117	144	23.0
	Ratio of imports to consumption (percent)	2.8	7.7	1.2	(⁴)	(⁴)	1,000.0
	Ratio of exports to shipments (percent)	25.8	36.6	74.0	84.4	⁵ 103.0	22.0
MM006A	Zinc ores and concentrates:						
	Number of establishments	17	19	12	11	11	0.0
	Employees (thousands)	3.0	3.0	2.0	2.0	1.0	-50.0
	Capacity utilization (percent)	90	90	89	98	96	-2.0
	U.S. shipments (million dollars)	533	564	433	352	351	-0.3
	U.S. exports (million dollars)	346	308	290	328	340	3.8
	U.S. imports (million dollars)	40	27	32	45	60	34.6
	Apparent U.S. consumption (million dollars)	227	283	174	69	71	3.0
	Trade balance (million dollars)	306	281	259	283	280	-1.1
	Ratio of imports to consumption (percent)	17.8	9.5	18.1	64.6	84.4	30.7
	Ratio of exports to shipments (percent)	65.0	54.6	67.0	93.1	96.8	4.0
MM007A	Molybdenum ores and concentrates:						
	Number of establishments	8	7	6	6	6	0.0
	Employees (thousands)	0.6	0.6	0.5	0.5	0.5	0.0
	Capacity utilization (percent)	47	45	42	43	45	4.7
	U.S. shipments (million dollars)	250	231	196	270	395	46.3
	U.S. exports (million dollars)	129	104	110	112	194	72.6
	U.S. imports (million dollars)	35	35	33	37	51	39.6
	Apparent U.S. consumption (million dollars)	156	163	119	194	252	29.8
	Trade balance (million dollars)	94	68	77	76	143	88.7
	Ratio of imports to consumption (percent)	22.7	21.7	27.6	18.9	20.3	7.4
	Ratio of exports to shipments (percent)	51.7	44.8	56.2	41.6	49.1	18.0

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM008A	Gold ores and concentrates:						
	Number of establishments	296	289	283	279	277	-0.7
	Employees (thousands)	11.0	11.0	10.0	8.0	8.0	0.0
	Capacity utilization (percent)	86	90	89	84	85	1.2
	U.S. shipments (million dollars)	2,445	2,534	2,335	2,376	2,487	4.7
	U.S. exports (million dollars)	2	10	7	10	13	36.5
	U.S. imports (million dollars)	1	1	1	28	22	-20.8
	Apparent U.S. consumption (million dollars)	2,445	2,524	2,329	2,394	2,496	4.2
	Trade balance (million dollars)	(²)	10	6	-18	-9	51.1
	Ratio of imports to consumption (percent)	(⁴)	(⁴)	0.1	1.2	0.9	-25.0
	Ratio of exports to shipments (percent)	0.1	0.4	0.3	0.4	0.5	25.0
MM008B	Silver ores and concentrates:						
	Number of establishments	16	15	14	14	14	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	0.5	-50.0
	Capacity utilization (percent)	86	90	89	84	85	1.2
	U.S. shipments (million dollars)	229	207	171	147	143	-2.7
	U.S. exports (million dollars)	37	21	72	57	16	-71.6
	U.S. imports (million dollars)	2	(²)	3	13	1	-89.6
	Apparent U.S. consumption (million dollars)	194	186	102	103	128	24.7
	Trade balance (million dollars)	35	21	69	44	15	-66.2
	Ratio of imports to consumption (percent)	1.1	0.1	2.7	12.8	1.1	-91.4
	Ratio of exports to shipments (percent)	16.1	10.2	42.2	39.1	11.4	-70.8
MM009A	Cement						
	Number of establishments	116	116	116	116	116	0.0
	Employees (thousands)	18.0	18.0	18.0	18.0	18.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	7,400	7,200	7,100	7,000	7,000	0.0
	U.S. exports (million dollars)	55	64	56	58	62	6.7
	U.S. imports (million dollars)	1,145	1,074	987	939	940	(⁴)
	Apparent U.S. consumption (million dollars)	8,489	8,210	8,031	7,881	7,879	0.0
	Trade balance (million dollars)	-1,089	-1,010	-931	-881	-879	(⁴)
	Ratio of imports to consumption (percent)	13.5	13.1	12.3	11.9	11.9	0.0
	Ratio of exports to production (percent)	0.7	0.9	0.8	0.8	0.9	12.5

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM010	Industrial ceramics:						
	Number of establishments	200	200	200	190	190	0.0
	Employees (thousands)	12.0	12.0	12.0	11.0	10.0	-9.1
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,040	3,000	2,950	2,800	2,900	3.6
	U.S. exports (million dollars)	663	748	711	645	600	-7.0
	U.S. imports (million dollars)	648	827	640	497	551	10.9
	Apparent U.S. consumption (million dollars)	3,026	3,080	2,879	2,652	2,851	7.5
	Trade balance (million dollars)	14	-80	71	148	49	-67.0
	Ratio of imports to consumption (percent)	21.4	26.9	22.2	18.7	19.3	3.2
	Ratio of exports to shipments (percent)	21.8	24.9	24.1	23.0	20.7	-10.0
MM011	Ceramic bricks and similar articles:						
	Number of establishments	225	225	225	225	225	0.0
	Employees (thousands)	14.0	14.0	14.0	14.0	14.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	1,700	1,775	1,765	1,785	1,900	6.4
	U.S. exports (million dollars)	20	23	23	23	26	16.8
	U.S. imports (million dollars)	24	35	31	34	38	10.3
	Apparent U.S. consumption (million dollars)	1,705	1,786	1,773	1,797	1,912	6.4
	Trade balance (million dollars)	-5	-11	-8	-12	-12	2.0
	Ratio of imports to consumption (percent)	1.4	1.9	1.7	1.9	2.0	5.3
	Ratio of exports to shipments (percent)	1.2	1.3	1.3	1.3	1.4	7.7
MM012	Ceramic floor and wall tiles:						
	Number of establishments	169	169	169	169	169	0.0
	Employees (thousands)	9.0	9.0	9.0	9.0	9.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	843	867	776	825	812	-1.6
	U.S. exports (million dollars)	24	26	27	28	27	-1.6
	U.S. imports (million dollars)	1,019	1,118	1,112	1,290	1,430	10.8
	Apparent U.S. consumption (million dollars)	1,838	1,959	1,862	2,087	2,215	6.1
	Trade balance (million dollars)	-995	-1,092	-1,086	-1,262	-1,403	-11.1
	Ratio of imports to consumption (percent)	55.4	57.1	59.7	61.8	64.6	4.5
	Ratio of exports to shipments (percent)	2.8	3.0	3.4	3.4	3.4	0.0

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM013	Ceramic household articles:						
	Number of establishments	63	63	60	60	60	0.0
	Employees (thousands)	6.0	6.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	396	344	330	320	315	-1.6
	U.S. exports (million dollars)	109	115	96	83	88	6.1
	U.S. imports (million dollars)	1,671	1,797	1,635	1,691	1,757	3.9
	Apparent U.S. consumption (million dollars)	1,959	2,027	1,869	1,928	1,984	2.9
	Trade balance (million dollars)	-1,563	-1,683	-1,539	-1,608	-1,669	-3.8
	Ratio of imports to consumption (percent)	85.3	88.7	87.5	87.7	88.6	1.0
	Ratio of exports to shipments (percent)	27.5	33.3	29.1	25.9	28.0	8.1
MM014	Flat glass:						
	Number of establishments	900	900	900	900	900	0.0
	Employees (thousands)	45.0	46.0	44.0	46.0	46.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	8,400	7,920	7,647	8,030	8,430	5.0
	U.S. exports (million dollars)	1,506	1,807	1,791	1,694	1,747	3.2
	U.S. imports (million dollars)	1,268	1,473	1,500	1,553	1,699	9.4
	Apparent U.S. consumption (million dollars)	8,162	7,586	7,356	7,890	8,381	6.2
	Trade balance (million dollars)	238	334	291	140	49	-65.3
	Ratio of imports to consumption (percent)	15.5	19.4	20.4	19.7	20.3	3.0
	Ratio of exports to shipments (percent)	17.9	22.8	23.4	21.1	20.7	-1.9
MM015	Glass containers:						
	Number of establishments	61	61	61	61	61	0.0
	Employees (thousands)	19.0	17.0	16.0	16.0	16.0	0.0
	Capacity utilization (percent)	91	92	94	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	4,190	4,106	4,209	4,200	4,190	-0.2
	U.S. exports (million dollars)	173	174	211	165	161	-2.7
	U.S. imports (million dollars)	526	585	538	608	607	-0.2
	Apparent U.S. consumption (million dollars)	4,543	4,517	4,536	4,643	4,636	-0.1
	Trade balance (million dollars)	-353	-411	-327	-443	-446	-0.7
	Ratio of imports to consumption (percent)	11.6	13.0	11.9	13.1	13.1	0.0
	Ratio of exports to shipments (percent)	4.1	4.2	5.0	3.9	3.8	-2.6

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM016	Household glassware:						
	Number of establishments	240	240	240	240	240	0.0
	Employees (thousands)	13.0	14.0	13.0	13.0	13.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	1,900	2,000	1,800	1,900	1,950	2.6
	U.S. exports (million dollars)	183	195	209	177	165	-6.4
	U.S. imports (million dollars)	937	930	835	888	919	3.4
	Apparent U.S. consumption (million dollars)	2,654	2,735	2,425	2,611	2,703	3.5
	Trade balance (million dollars)	-754	-735	-625	-711	-753	-5.9
	Ratio of imports to consumption (percent)	35.3	34.0	34.4	34.0	34.0	0.0
	Ratio of exports to shipments (percent)	9.6	9.7	11.6	9.3	8.5	-8.6
MM018	Fiberglass insulation products:						
	Number of establishments	298	298	298	298	298	0.0
	Employees (thousands)	18.0	17.0	17.0	18.0	18.0	0.0
	Capacity utilization (percent)	88	83	86	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,800	3,700	3,700	3,900	4,000	2.6
	U.S. exports (million dollars)	71	59	74	75	88	17.7
	U.S. imports (million dollars)	139	137	124	131	155	18.3
	Apparent U.S. consumption (million dollars)	3,869	3,778	3,750	3,956	4,067	2.8
	Trade balance (million dollars)	-69	-78	-50	-56	-67	-19.1
	Ratio of imports to consumption (percent)	3.6	3.6	3.3	3.3	3.8	15.2
	Ratio of exports to shipments (percent)	1.9	1.6	2.0	1.9	2.2	15.8
MM019	Natural and synthetic gemstones:						
	Number of establishments	235	235	235	235	235	0.0
	Employees (thousands)	2.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. production (million dollars)	620	540	340	430	680	58.1
	U.S. exports (million dollars)	447	1,466	1,840	1,331	469	-64.8
	U.S. imports (million dollars)	11,021	13,234	11,577	13,063	13,854	6.1
	Apparent U.S. consumption (million dollars)	11,195	12,308	10,077	12,161	14,066	15.7
	Trade balance (million dollars)	-10,575	-11,768	-9,737	-11,731	-13,386	-14.1
	Ratio of imports to consumption (percent)	98.5	⁵ 107.5	⁵ 114.9	⁵ 107.4	98.5	-8.3
	Ratio of exports to production (percent)	72.0	⁵ 271.5	⁵ 541.0	⁵ 309.6	68.9	-77.7

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM020A	Unrefined and refined gold:						
	Number of establishments	24	24	24	24	24	0.0
	Employees (thousands)	2.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	73	77	69	67	66	-1.5
	U.S. shipments (million dollars)	7,051	7,095	5,903	4,251	4,918	15.7
	U.S. exports (million dollars)	4,795	5,099	4,186	2,639	4,130	56.5
	U.S. imports (million dollars)	2,519	2,262	1,700	2,143	2,689	25.5
	Apparent U.S. consumption (million dollars)	4,775	4,259	3,417	3,755	3,477	-7.4
	Trade balance (million dollars)	2,276	2,836	2,486	496	1,441	190.5
	Ratio of imports to consumption (percent)	52.8	53.1	49.7	57.1	77.3	35.4
	Ratio of exports to shipments (percent)	68.0	71.9	70.9	62.1	84.0	35.3
MM021	Primary iron products:						
	Number of establishments	23	23	21	16	16	0.0
	Employees (thousands)	22.0	22.0	20.0	15.0	15.0	0.0
	Capacity utilization (percent)	85	88	79	84	81	-3.6
	U.S. shipments (million dollars)	7,300	7,300	6,300	5,000	6,400	28.0
	U.S. exports (million dollars)	14	13	7	7	11	51.2
	U.S. imports (million dollars)	643	759	632	729	815	11.8
	Apparent U.S. consumption (million dollars)	7,929	8,046	6,924	5,722	7,204	25.9
	Trade balance (million dollars)	-629	-746	-624	-722	-804	-11.4
	Ratio of imports to consumption (percent)	8.1	9.4	9.1	12.7	11.3	-11.0
	Ratio of exports to shipments (percent)	0.2	0.2	0.1	0.1	0.2	100.0
MM022	Ferroalloys:						
	Number of establishments	23	23	23	20	20	0.0
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	(⁶)	(⁶)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	941	968	820	689	670	-2.8
	U.S. exports (million dollars)	80	96	74	50	51	1.7
	U.S. imports (million dollars)	960	1,104	660	713	899	26.0
	Apparent U.S. consumption (million dollars)	1,821	1,976	1,406	1,352	1,518	12.3
	Trade balance (million dollars)	-880	-1,008	-586	-663	-848	-27.9
	Ratio of imports to consumption (percent)	52.7	55.9	46.9	52.8	59.2	12.1
	Ratio of exports to shipments (percent)	8.5	9.9	9.0	7.3	7.6	4.1

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM023	Iron and steel waste and scrap:						
	Number of establishments	5,000	5,000	5,000	5,000	5,000	0.0
	Employees (thousands)	28.0	28.0	28.0	28.0	28.0	0.0
	Capacity utilization (percent)	80	75	75	75	77	2.7
	U.S. shipments (million dollars)	4,800	5,200	4,100	4,900	6,200	26.5
	U.S. exports (million dollars)	750	1,030	1,151	1,307	1,960	49.9
	U.S. imports (million dollars)	390	393	284	397	518	30.4
	Apparent U.S. consumption (million dollars)	4,440	4,563	3,233	3,989	4,758	19.3
	Trade balance (million dollars)	360	637	867	911	1,442	58.4
	Ratio of imports to consumption (percent)	8.8	8.6	8.8	9.9	10.9	10.1
	Ratio of exports to shipments (percent)	15.6	19.8	28.1	26.7	31.6	18.4
MM024A	Abrasive products:						
	Number of establishments	50	50	50	50	50	0.0
	Employees (thousands)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	3,835	3,781	3,202	3,000	3,100	3.3
	U.S. exports (million dollars)	298	315	289	284	310	9.5
	U.S. imports (million dollars)	480	552	473	505	540	6.9
	Apparent U.S. consumption (million dollars)	4,017	4,018	3,386	3,222	3,330	3.3
	Trade balance (million dollars)	-182	-237	-184	-222	-230	-3.5
	Ratio of imports to consumption (percent)	12.0	13.7	14.0	15.7	16.2	3.2
	Ratio of exports to shipments (percent)	7.8	8.3	9.0	9.5	10.0	5.3
MM025	Steel mill products:						
	Number of establishments	850	820	820	810	790	-2.5
	Employees (thousands)	195.0	195.0	185.0	170.0	160.0	-5.9
	Capacity utilization (percent)	84	86	79	89	82	-7.9
	U.S. shipments (million dollars)	59,200	60,300	51,100	54,600	52,200	-4.4
	U.S. exports (million dollars)	4,291	4,911	4,756	4,533	5,525	21.9
	U.S. imports (million dollars)	12,749	15,026	11,630	12,203	10,499	-14.0
	Apparent U.S. consumption (million dollars)	67,658	70,414	57,974	62,270	57,174	-8.2
	Trade balance (million dollars)	-8,458	-10,114	-6,874	-7,670	-4,974	35.2
	Ratio of imports to consumption (percent)	18.8	21.3	20.1	19.6	18.4	-6.1
	Ratio of exports to shipments (percent)	7.2	8.1	9.3	8.3	10.6	27.7

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM026	Steel pipe and tube fittings and certain cast products:						
	Number of establishments	62	62	62	62	62	0.0
	Employees (thousands)	12.0	12.0	12.0	12.0	12.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	2,100	2,100	2,100	2,100	2,100	0.0
	U.S. exports (million dollars)	662	767	707	669	705	5.4
	U.S. imports (million dollars)	584	706	697	669	609	-9.0
	Apparent U.S. consumption (million dollars)	2,022	2,039	2,090	2,100	2,005	-4.6
	Trade balance (million dollars)	78	61	10	(²)	95	(³)
	Ratio of imports to consumption (percent)	28.9	34.6	33.3	31.9	30.4	-4.7
	Ratio of exports to shipments (percent)	31.5	36.5	33.7	31.8	33.6	5.7
MM027	Fabricated structurals:						
	Number of establishments	2,953	2,931	2,888	2,844	2,801	-1.5
	Employees (thousands)	102.0	99.0	94.0	87.0	83.0	-4.6
	Capacity utilization (percent)	75	73	64	63	63	0.0
	U.S. shipments (million dollars)	15,596	16,450	16,105	16,023	15,577	-2.8
	U.S. exports (million dollars)	186	204	184	166	160	-3.9
	U.S. imports (million dollars)	432	534	638	627	501	-20.1
	Apparent U.S. consumption (million dollars)	15,841	16,779	16,559	16,483	15,918	-3.4
	Trade balance (million dollars)	-245	-329	-454	-460	-341	25.9
	Ratio of imports to consumption (percent)	2.7	3.2	3.9	3.8	3.1	-18.4
	Ratio of exports to shipments (percent)	1.2	1.2	1.1	1.0	1.0	0.0
MM028	Metal construction components:						
	Number of establishments	2,711	2,650	2,530	2,500	2,430	-2.8
	Employees (thousands)	151.0	157.0	150.0	154.0	150.0	-2.6
	Capacity utilization (percent)	65	70	67	70	68	-2.9
	U.S. shipments (million dollars)	18,888	19,666	18,800	19,400	19,000	-2.1
	U.S. exports (million dollars)	579	533	505	497	561	12.9
	U.S. imports (million dollars)	693	922	990	1,135	1,212	6.8
	Apparent U.S. consumption (million dollars)	19,003	20,054	19,285	20,038	19,652	-1.9
	Trade balance (million dollars)	-115	-388	-485	-638	-652	-2.1
	Ratio of imports to consumption (percent)	3.6	4.6	5.1	5.7	6.2	8.8
	Ratio of exports to shipments (percent)	3.1	2.7	2.7	2.6	3.0	15.4

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM029	Metallic containers:						
	Number of establishments	520	520	520	520	510	-1.9
	Employees (thousands)	58.0	54.0	52.0	50.0	48.0	-4.0
	Capacity utilization (percent)	82	82	82	80	79	-1.3
	U.S. shipments (million dollars)	18,285	18,485	17,415	16,900	16,430	-2.8
	U.S. exports (million dollars)	690	697	666	661	616	-6.9
	U.S. imports (million dollars)	527	549	570	645	660	2.4
	Apparent U.S. consumption (million dollars)	18,123	18,337	17,319	16,884	16,475	-2.4
	Trade balance (million dollars)	162	148	96	16	-45	(³)
	Ratio of imports to consumption (percent)	2.9	3.0	3.3	3.8	4.0	5.3
	Ratio of exports to shipments (percent)	3.8	3.8	3.8	3.9	3.7	-5.1
MM030	Wire products of base metal:						
	Number of establishments	1,500	1,500	1,470	1,470	1,430	-2.7
	Employees (thousands)	96.0	96.0	92.0	94.0	91.0	-3.2
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	16,700	17,300	16,500	17,000	16,500	-2.9
	U.S. exports (million dollars)	674	826	718	732	760	3.8
	U.S. imports (million dollars)	1,354	1,419	1,355	1,416	1,591	12.3
	Apparent U.S. consumption (million dollars)	17,381	17,893	17,137	17,684	17,331	-2.0
	Trade balance (million dollars)	-681	-593	-637	-684	-831	-21.5
	Ratio of imports to consumption (percent)	7.8	7.9	7.9	8.0	9.2	15.0
	Ratio of exports to shipments (percent)	4.0	4.8	4.3	4.3	4.6	7.0
MM032	Industrial fasteners of base metal:						
	Number of establishments	925	920	880	860	840	-2.3
	Employees (thousands)	47.0	47.0	45.0	46.0	45.0	-2.2
	Capacity utilization (percent)	73	74	71	73	71	-2.7
	U.S. shipments (million dollars)	6,940	7,009	6,700	7,000	6,800	-2.9
	U.S. exports (million dollars)	1,535	1,663	1,481	1,496	1,520	1.6
	U.S. imports (million dollars)	2,019	2,325	2,006	2,085	2,348	12.6
	Apparent U.S. consumption (million dollars)	7,424	7,672	7,225	7,589	7,628	0.5
	Trade balance (million dollars)	-484	-663	-525	-589	-828	-40.5
	Ratio of imports to consumption (percent)	27.2	30.3	27.8	27.5	30.8	12.0
	Ratio of exports to shipments (percent)	22.1	23.7	22.1	21.4	22.4	4.7

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM033	Cooking and kitchen ware:						
	Number of establishments	87	87	87	88	88	0.0
	Employees (thousands)	8.0	7.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	1,500	1,500	1,500	1,500	1,500	0.0
	U.S. exports (million dollars)	214	271	260	201	199	-1.0
	U.S. imports (million dollars)	1,585	1,798	1,743	1,933	2,070	7.1
	Apparent U.S. consumption (million dollars)	2,871	3,027	2,983	3,232	3,371	4.3
	Trade balance (million dollars)	-1,371	-1,527	-1,483	-1,732	-1,871	-8.0
	Ratio of imports to consumption (percent)	55.2	59.4	58.4	59.8	61.4	2.7
	Ratio of exports to shipments (percent)	14.3	18.1	17.3	13.4	13.3	-0.7
MM034	Metal and ceramic sanitary ware:						
	Number of establishments	140	140	140	140	140	0.0
	Employees (thousands)	18.0	18.0	17.0	17.0	17.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	2,600	2,800	2,600	2,700	2,700	0.0
	U.S. exports (million dollars)	132	141	124	134	142	6.5
	U.S. imports (million dollars)	473	533	588	742	863	16.3
	Apparent U.S. consumption (million dollars)	2,941	3,193	3,064	3,308	3,421	3.4
	Trade balance (million dollars)	-341	-393	-464	-608	-721	-18.5
	Ratio of imports to consumption (percent)	16.1	16.7	19.2	22.4	25.2	12.5
	Ratio of exports to shipments (percent)	5.1	5.0	4.8	4.9	5.3	8.2
MM035	Construction castings and other cast-iron articles:						
	Number of establishments	50	50	50	50	50	0.0
	Employees (thousands)	7.0	5.0	6.0	5.0	5.0	0.0
	Capacity utilization (percent)	85	85	85	85	85	0.0
	U.S. shipments (million dollars)	1,000	800	900	800	800	0.0
	U.S. exports (million dollars)	27	32	24	25	23	-8.3
	U.S. imports (million dollars)	120	123	110	112	124	10.8
	Apparent U.S. consumption (million dollars)	1,092	891	986	887	901	1.6
	Trade balance (million dollars)	-92	-91	-86	-87	-101	-16.3
	Ratio of imports to consumption (percent)	11.0	13.8	11.1	12.6	13.8	9.5
	Ratio of exports to shipments (percent)	2.7	4.0	2.7	3.2	2.9	-9.4

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM036A	Unrefined and refined copper:						
	Number of establishments	32	28	26	22	22	0.0
	Employees (thousands)	5.3	4.4	4.5	3.9	3.4	-12.8
	Capacity utilization (percent)	81	68	69	62	55	-11.3
	U.S. shipments (million dollars)	3,728	3,886	3,178	2,620	2,506	-4.4
	U.S. exports (million dollars)	89	202	69	92	214	131.8
	U.S. imports (million dollars)	1,667	2,223	2,140	1,740	1,854	6.5
	Apparent U.S. consumption (million dollars)	5,306	5,907	5,248	4,268	4,146	-2.9
	Trade balance (million dollars)	-1,578	-2,021	-2,070	-1,648	-1,640	0.5
	Ratio of imports to consumption (percent)	31.4	37.6	40.8	40.8	44.7	9.6
	Ratio of exports to shipments (percent)	2.4	5.2	2.2	3.5	8.5	142.9
MM036B	Copper alloy plate, sheet, and strip:						
	Number of establishments	103	73	98	83	89	7.2
	Employees (thousands)	6.4	6.4	6.4	5.4	5.8	7.4
	Capacity utilization (percent)	90	86	61	63	68	7.9
	U.S. shipments (million dollars)	1,061	1,184	765	785	888	13.1
	U.S. exports (million dollars)	156	208	155	117	144	22.5
	U.S. imports (million dollars)	116	182	145	118	104	-12.4
	Apparent U.S. consumption (million dollars)	1,021	1,158	756	786	848	7.9
	Trade balance (million dollars)	40	26	9	-1	40	(³)
	Ratio of imports to consumption (percent)	11.4	15.7	19.2	15.1	12.2	-19.2
	Ratio of exports to shipments (percent)	14.7	17.6	20.2	14.9	16.2	8.7
MM037A	Primary and secondary aluminum:						
	Number of establishments	106	108	98	100	98	-2.0
	Employees (thousands)	25.0	25.0	23.0	21.0	21.0	0.0
	Capacity utilization (percent)	86	77	69	69	71	2.9
	U.S. shipments (million dollars)	7,750	8,286	5,835	5,589	5,730	2.5
	U.S. exports (million dollars)	613	636	466	431	376	-12.7
	U.S. imports (million dollars)	3,969	4,297	4,085	4,188	4,401	5.1
	Apparent U.S. consumption (million dollars)	11,106	11,946	9,454	9,346	9,755	4.4
	Trade balance (million dollars)	-3,356	-3,660	-3,619	-3,757	-4,025	-7.1
	Ratio of imports to consumption (percent)	35.7	36.0	43.2	44.8	45.1	0.7
	Ratio of exports to shipments (percent)	7.9	7.7	8.0	7.7	6.6	-14.3

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM038	Aluminum mill products:						
	Number of establishments	358	363	379	372	381	2.4
	Employees (thousands)	57.0	57.0	59.0	58.0	58.0	0.0
	Capacity utilization (percent)	86	80	79	80	81	1.3
	U.S. shipments (million dollars)	19,316	19,632	17,489	17,960	18,320	2.0
	U.S. exports (million dollars)	2,943	3,130	2,784	2,519	2,564	1.8
	U.S. imports (million dollars)	2,283	2,674	2,305	2,516	2,768	10.0
	Apparent U.S. consumption (million dollars)	18,656	19,176	17,010	17,957	18,523	3.2
	Trade balance (million dollars)	660	456	479	3	-203	(³)
	Ratio of imports to consumption (percent)	12.2	13.9	13.6	14.0	14.9	6.4
	Ratio of exports to shipments (percent)	15.2	15.9	15.9	14.0	14.0	0.0
MM039A	Refined lead:						
	Number of establishments	31	30	29	26	25	-3.8
	Employees (thousands)	2.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	88	89	87	91	90	-1.1
	U.S. shipments (million dollars)	1,358	1,366	1,278	1,280	1,261	-1.5
	U.S. exports (million dollars)	11	16	8	14	48	238.8
	U.S. imports (million dollars)	113	117	90	82	65	-20.1
	Apparent U.S. consumption (million dollars)	1,460	1,467	1,361	1,348	1,279	-5.1
	Trade balance (million dollars)	-102	-101	-83	-68	-18	73.9
	Ratio of imports to consumption (percent)	7.7	8.0	6.6	6.1	5.1	-16.4
	Ratio of exports to shipments (percent)	0.8	1.2	0.6	1.1	3.8	245.5
MM040A	Unwrought zinc:						
	Number of establishments	11	15	15	15	14	-6.7
	Employees (thousands)	2.0	2.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	83	83	69	64	74	15.6
	U.S. shipments (million dollars)	439	455	302	251	284	13.1
	U.S. exports (million dollars)	2	3	1	1	2	45.3
	U.S. imports (million dollars)	1,066	1,104	786	731	676	-7.5
	Apparent U.S. consumption (million dollars)	1,502	1,556	1,087	981	958	-2.3
	Trade balance (million dollars)	-1,063	-1,101	-785	-730	-674	7.6
	Ratio of imports to consumption (percent)	70.9	71.0	72.3	74.5	70.6	-5.2
	Ratio of exports to shipments (percent)	0.5	0.7	0.4	0.5	0.6	20.0

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM041A	Titanium ingot						
	Number of establishments	9	9	5	5	5	0.0
	Employees (thousands)	0.3	0.3	0.3	0.3	0.3	0.0
	Capacity utilization (percent)	44	43	49	45	(¹)	(¹)
	U.S. shipments (million dollars)	718	870	600	420	470	11.9
	U.S. exports (million dollars)	13	12	22	12	11	-12.4
	U.S. imports (million dollars)	14	17	27	13	7	-49.0
	Apparent U.S. consumption (million dollars)	720	875	606	421	466	10.7
	Trade balance (million dollars)	-2	-5	-6	-1	4	(³)
	Ratio of imports to consumption (percent)	2.0	1.9	4.5	3.1	1.4	-54.8
	Ratio of exports to shipments (percent)	1.8	1.4	3.6	3.0	2.3	-23.3
MM042	Nonpowered handtools:						
	Number of establishments	1,100	1,000	950	900	850	-5.6
	Employees (thousands)	121.0	120.0	115.0	110.0	105.0	-4.5
	Capacity utilization (percent)	70	71	70	70	68	-2.9
	U.S. shipments (million dollars)	13,931	14,139	12,433	11,812	11,457	-3.0
	U.S. exports (million dollars)	2,031	2,263	2,119	2,038	2,109	3.5
	U.S. imports (million dollars)	2,917	3,163	2,996	3,284	3,652	11.2
	Apparent U.S. consumption (million dollars)	14,818	15,040	13,309	13,058	13,000	-0.4
	Trade balance (million dollars)	-887	-901	-876	-1,246	-1,543	-23.8
	Ratio of imports to consumption (percent)	19.7	21.0	22.5	25.1	28.1	12.0
	Ratio of exports to shipments (percent)	14.6	16.0	17.0	17.3	18.4	6.4
MM043	Certain cutlery, sewing implements, and related products:						
	Number of establishments	175	176	177	178	178	0.0
	Employees (thousands)	10.0	10.0	9.0	9.0	9.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	2,000	2,000	1,900	1,800	1,800	0.0
	U.S. exports (million dollars)	583	546	556	551	550	-0.2
	U.S. imports (million dollars)	856	888	865	912	1,053	15.5
	Apparent U.S. consumption (million dollars)	2,273	2,342	2,209	2,161	2,303	6.6
	Trade balance (million dollars)	-273	-342	-309	-361	-503	-39.3
	Ratio of imports to consumption (percent)	37.7	37.9	39.2	42.2	45.7	8.3
	Ratio of exports to shipments (percent)	29.2	27.3	29.3	30.6	30.6	0.0

See footnote(s) at end of table.

Table MM-8—Continued

Minerals and metals sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM044	Table flatware and related products:						
	Number of establishments	5	5	5	5	4	-20.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	95	90	90	90	90	0.0
	U.S. shipments (million dollars)	253	253	205	200	200	0.0
	U.S. exports (million dollars)	26	25	28	29	22	-24.7
	U.S. imports (million dollars)	425	507	463	478	484	1.2
	Apparent U.S. consumption (million dollars)	652	734	640	650	662	2.0
	Trade balance (million dollars)	-399	-481	-435	-450	-462	-2.8
	Ratio of imports to consumption (percent)	65.2	69.0	72.3	73.6	73.1	-0.7
	Ratio of exports to shipments (percent)	10.4	9.9	13.5	14.3	10.8	-24.5
MM045	Certain builders' hardware:						
	Number of establishments	290	286	282	278	275	-1.1
	Employees (thousands)	40.0	41.0	37.0	34.0	33.0	-2.9
	Capacity utilization (percent)	76	75	71	69	69	0.0
	U.S. shipments (million dollars)	5,843	5,898	5,797	5,447	5,179	-4.9
	U.S. exports (million dollars)	823	1,084	961	907	911	(⁴)
	U.S. imports (million dollars)	1,696	1,973	1,948	2,197	2,405	9.5
	Apparent U.S. consumption (million dollars)	6,716	6,787	6,784	6,736	6,673	-0.9
	Trade balance (million dollars)	-873	-889	-987	-1,289	-1,494	-15.9
	Ratio of imports to consumption (percent)	25.3	29.1	28.7	32.6	36.0	10.4
	Ratio of exports to shipments (percent)	14.1	18.4	16.6	16.7	17.6	5.4

¹Not available.²Less than 500,000.³Not meaningful.⁴Less than 0.05 percent.⁵Inventory changes, for which data are not available, likely account for ratios that exceed 100 percent.⁶Capacity utilization could not be meaningfully calculated for this industry.

Note.—Calculations based on unrounded data.

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

Machinery

Judith-Anne Webster, Coordinator
(202) 205-3489
judith-anne.webster@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$7.8 billion (35 percent) to \$29.7 billion
U.S. exports: Increased by \$200 million (0.3 percent) to \$63.5 billion
U.S. imports: Increased by \$8.0 billion (9 percent) to \$93.1 billion

The U.S. trade deficit in machinery increased significantly in 2003, for the third consecutive year, as imports grew 9 percent (see table MT-1). Over one-third of the import growth was accounted for by multifunctional digital (MFD) office machines and related parts, imports of which grew from \$375 million to \$3.2 billion in 2003. MFD's can print, scan, and fax,¹ and have become increasingly popular in the U.S. market (see Printing and Related Machinery). After a significant decrease in exports from 2001 to 2002, exports of machinery remained stable in 2003, increasing less than 1 percent.

The market for durable goods expanded as the U.S. economy improved in 2003, contributing to higher imports of both household appliances (up \$1.2 billion in 2003) and air-conditioning units (an increase of \$730 million - see table MT-2). Growth in these product areas was driven by purchases for new and remodeled homes, as the market for homes remained strong and home refinancing resulting from low mortgage rates left consumers with money for home improvements.² In addition, a shift in consumer taste in appliance styles to appliances in new colors and finishes, such as stainless steel, and new more efficient products, such as hanging rack dryers, also encouraged consumers to spend money.³ Imports from China gained strength, reflecting the growing consumer acceptance of Chinese brands such as Haier, a leading supplier of household appliances to Wal-Mart and Costco in the United States.⁴ Finally, according to the Air-Conditioning and Refrigeration Institute, unusually hot weather in the West and Southwest created strong demand for replacement air conditioners.⁵

Despite a growing deficit in the machinery sector, imports decreased for certain power generating components and semiconductor manufacturing machinery. Boilers, turbines and related machinery imports decreased 42 percent (\$633 million) in 2003, the first downturn in over 5 years, particularly apparent for steam turbines and parts sourced from Korea. This shift reportedly was

¹ Customs Ruling, HQ 963680, Aug. 30, 2002,

² "Unitary Shipments Set Record in 2003," Air Conditioning Heating & Refrigeration News, Feb. 23 2004, Vol. 221 Issue 8, p 1, found at <http://search.epnet.com/direct.asp?an=12388604&db=buh>, retrieved Apr. 5, 2004.

³ Daniel Lee, "Appliance Competition Intensifies," Appliance Manufacturer, Dec. 2003, Vol. 51 Issue 12, p 14, found at <http://search.epnet.com/direct.asp?an=11716791&db=buh> and "Reliable Dealer Makes a Difference in Choosing Appliances," NH Business Review, Feb. 20 - Mar. 4, 2004, p. 13C, found at www.nhbr.com.

⁴ "Haier Tops China's Brand-name List," Forbes, Feb. 8, 2004 found at <http://search.epnet.com/direct.asp?an=CX2004039H1213&db=bwb>, retrieved Apr. 5, 2004.

⁵ "Unitary Shipments Set Record in 2003," Air Conditioning Heating & Refrigeration News, Feb. 23 2004, Vol. 221 Issue 8, p 1, found at <http://search.epnet.com/direct.asp?an=12388604&db=buh>, retrieved Apr. 5, 2004.

Table MT-1

Machinery: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
Mexico	10,546	11,604	10,263	9,183	9,086	-96	-1.0
Canada	16,297	17,179	15,949	15,207	15,310	103	0.7
Japan	3,618	5,190	4,133	3,328	3,493	165	5.0
China	1,626	1,898	2,356	2,730	3,091	361	13.2
Germany	2,720	3,489	3,413	2,625	2,581	-44	-1.7
United Kingdom	3,059	3,461	3,293	2,731	2,475	-256	-9.4
Korea	2,231	3,682	2,452	2,521	2,713	192	7.6
Taiwan	3,511	6,014	2,954	3,217	2,384	-833	-25.9
Italy	1,011	1,179	957	786	942	155	19.8
France	1,937	2,583	1,955	1,622	1,539	-83	-5.1
All other	20,647	23,228	21,828	19,312	19,848	536	2.8
Total	67,201	79,508	69,552	63,262	63,462	200	0.3
EU-15	13,052	15,745	13,998	11,669	11,671	2	(²)
OPEC	2,352	2,463	2,717	2,476	2,307	-169	-6.8
Latin America	16,052	17,171	16,223	13,627	13,408	-219	-1.6
CBERA	1,737	1,645	1,577	1,357	1,366	9	0.7
Asia	15,742	23,461	17,215	16,799	16,692	-107	-0.6
Sub-Saharan Africa	527	561	669	672	714	43	6.3
Central and Eastern Europe	371	379	397	395	432	38	9.5
U.S. imports of merchandise for consumption:							
Mexico	13,899	15,487	14,821	16,321	16,596	276	1.7
Canada	9,637	10,419	9,876	9,810	10,071	260	2.7
Japan	13,230	16,537	14,286	12,689	14,013	1,324	10.4
China	6,285	7,742	8,620	10,467	13,922	3,454	33.0
Germany	9,679	9,857	9,648	8,902	9,985	1,082	12.2
United Kingdom	3,449	3,606	3,420	3,002	2,955	-46	-1.5
Korea	1,969	2,301	2,297	2,554	2,505	-50	-1.9
Taiwan	3,029	3,336	2,872	2,743	2,800	57	2.1
Italy	3,580	3,699	3,499	3,519	3,952	434	12.3
France	2,100	2,096	2,027	1,919	1,980	60	3.1
All other	12,386	14,326	13,500	13,254	14,359	1,105	8.3
Total	79,244	89,407	84,867	85,181	93,138	7,957	9.3
EU-15	24,426	25,548	24,642	23,076	25,086	2,010	8.7
OPEC	211	248	233	219	221	2	0.8
Latin America	14,832	16,636	15,899	17,469	18,018	548	3.1
CBERA	190	279	220	235	324	88	37.6
Asia	26,943	32,761	30,675	31,163	36,166	5,003	16.1
Sub-Saharan Africa	128	178	264	231	182	-49	-21.2
Central and Eastern Europe	544	714	789	836	914	78	9.3

See footnote(s) at end of table.

Table MT-1--*Continued*

Machinery: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
						Million dollars	
U.S. merchandise trade balance:							
Mexico	-3,353	-3,883	-4,558	-7,138	-7,510	-372	-5.2
Canada	6,660	6,760	6,073	5,396	5,240	-157	-2.9
Japan	-9,613	-11,347	-10,153	-9,361	-10,520	-1,159	-12.4
China	-4,659	-5,844	-6,265	-7,737	-10,831	-3,094	-40.0
Germany	-6,960	-6,368	-6,235	-6,278	-7,404	-1,126	-17.9
United Kingdom	-390	-145	-127	-271	-480	-210	-77.4
Korea	262	1,380	154	-33	208	242	(³)
Taiwan	482	2,678	82	474	-416	-890	(³)
Italy	-2,569	-2,520	-2,542	-2,732	-3,011	-278	-10.2
France	-164	486	-72	-297	-441	-144	-48.4
All other	8,261	8,902	8,328	6,058	5,489	-569	-9.4
Total	-12,043	-9,899	-15,315	-21,919	-29,676	-7,757	-35.4
EU-15	-11,374	-9,803	-10,644	-11,408	-13,415	-2,008	-17.6
OPEC	2,141	2,214	2,484	2,257	2,086	-171	-7.6
Latin America	1,220	535	324	-3,842	-4,610	-768	-20.0
CBERA	1,547	1,366	1,357	1,122	1,043	-79	-7.1
Asia	-11,200	-9,300	-13,460	-14,364	-19,474	-5,110	-35.6
Sub-Saharan Africa	400	382	406	441	532	92	20.8
Central and Eastern Europe	-173	-335	-392	-441	-481	-40	-9.1

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²Less than 0.05 percent.

³Not meaningful for purposes of comparison.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table MT-2
Leading changes in U.S. exports and imports of machinery, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<i>Million dollars</i>							
U.S. EXPORTS:							
Increases:							
Farm and garden machinery and equipment (MM078)	4,757	4,945	4,565	4,747	5,109	362	7.6
Semiconductor manufacturing machinery (MM087A) ..	7,907	13,866	8,044	6,972	7,242	269	3.9
Household appliances, including commercial applications (MM073)	5,216	5,563	5,226	4,892	4,810	-82	-1.7
Decreases:							
Nonautomotive insulated electrical wire and related products (MM097)	3,102	4,040	3,286	2,856	2,660	-196	-6.9
All other	46,219	51,093	48,431	43,796	43,641	-154	-0.4
TOTAL	67,201	79,508	69,552	63,262	63,462	200	0.3
U.S. IMPORTS:							
Increases:							
Printing and related machinery (MM081)	2,304	2,157	1,929	2,001	4,844	2,843	142.1
Household appliances, including commercial applications (MM073)	6,718	7,689	8,356	9,587	10,782	1,195	12.5
Farm and garden machinery and equipment (MM078)	3,396	3,740	3,602	3,898	4,645	747	19.2
Air-conditioning equipment and parts (MM071)	5,604	6,332	6,081	6,674	7,403	730	10.9
Decreases:							
Boilers, turbines, and related machinery (MM090)	484	833	1,204	1,514	881	-633	-41.8
Semiconductor manufacturing machinery (MM087A) ..	2,600	4,597	3,947	3,304	2,750	-555	-16.8
Electric motors, generators, and related equipment (MM091)	6,089	6,494	7,646	7,177	6,811	-366	-5.1
All other	52,048	57,565	52,102	51,026	55,023	3,997	7.8
TOTAL	79,244	89,407	84,867	85,181	93,138	7,957	9.3

Note.-Calculations based on unrounded data.

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

attributable to reduced capital expenditures by a domestic industry which had over-expanded power generating capacity in the past few years.⁶ Imports also decreased for the U.S. semiconductor manufacturing equipment industry for the third straight year as low capacity utilization within the industry reduced the need for new equipment. However, U.S. exports of semiconductor manufacturing machinery increased to \$7.2 billion in 2003, largely reflecting industry growth in certain markets, as Korea's market for semiconductor manufacturing machinery grew 91 percent and Japan's market grew 43 percent in 2003.⁷ Samsung Electronics, for example, doubled its capital spending to \$3.6 billion in 2003.⁸

Strong two-way trade of farm and garden machinery and equipment occurred in 2003. Imports increased by \$747 million, particularly for tractors and related parts from Canada and Japan. According to the Department of Agriculture, farm income in the United States, a primary driver of farm equipment sales, rose owing to additional government price supports and high crop yields in 2003.⁹ The leading export gain for these products was to Canada, the largest U.S. market for farm and garden machinery and equipment. Export decreases were relatively minor, occurring primarily in nonautomotive insulated electrical wire and related products (down \$196 million) and an aggregate product group (miscellaneous machinery). Thirty-four percent of the decrease in exports of miscellaneous machinery was attributable to the decline in exports of physical vapor deposition equipment (used for giving materials, such as semiconductors, an electric charge), particularly to Korea.

⁶ Representative of General Electric, telephone interview with USITC staff, Mar. 29, 2004.

⁷ "SEMI Reports 2003 Global Semiconductor Equipment Sales of \$22.2 billion," SEMI press release, Mar. 10, 2004, found at <http://itc.newsedg-web.com>, retrieved Mar. 11, 2004.

⁸ "Korea was the Fastest Growth Market for Semiconductor Capital Spending in 2003," SEMI press release, found at www.semi.org, retrieved Dec. 9, 2003.

⁹ Sam Stovall, "Heavy Machinery's Fork in the Road," Business Week Online, Nov. 5, 2003.

COMMODITY ANALYSIS OF PRINTING AND RELATED MACHINERY¹⁰

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$2.8 billion (320 percent) to \$3.6 billion

U.S. exports: Increased by \$79 million (7 percent) to \$1.2 billion

U.S. imports: Increased by \$2.8 billion (142 percent) to \$4.8 billion

The trade deficit increase in printing and related machinery was almost exclusively a result of increased imports of multifunction digital printers (MFD), including parts, that print, copy, scan, and transmit documents. The largest increases were from China and Japan (see table MT-3). In contrast, exports rose only slightly in relative terms, with the largest absolute increase in exports going to the Netherlands, which accounted for almost one-half of the overall export increase.¹¹ This gain in exports was moderated by the continued decline in exports of large printing press devices and parts as the domestic industry continued to contract.¹² The 2003 deficit reached its highest level during the last 5 years, eclipsing the previous largest deficit of \$958 million in 1999.

U.S. imports

MFD¹³ machine imports increased sixfold (up \$1.9 billion) and related parts (mostly ink cartridges) increased tenfold (up \$1.0 billion). The import demand was largely attributable to a 64-percent increase in sales of digital cameras in 2003, which led to a 21-percent increase in worldwide sales of MFDs and their parts, displacing stand-alone inkjet printers.¹⁴ The increasing popularity of digital cameras, along with rapid domestic conversion of analog electronics applications to digital electronics (and formerly conventional photographs to digital images), combined with improved driver technologies for laser and inkjet printers, multifunction devices, and digital presses,¹⁵ has increased the market for digital printers and scanners both in Small Office Home Office (SOHO) and Small Medium

¹⁰ This industry/commodity group includes machinery and parts for letterpress; flexographic; gravure; ink-jet; reel-and sheet-fed offset; textile; and office printers. Also included are bookbinding machinery; phototypesetting and composing machines; and printing plates, type, and other printing components.

¹¹ In 2003, Netherlands-based Aurelon announced the release of new software for large format printing using Windows and Mac systems and inkjet printers. This accelerated the recent growth in the purchase of parts for MFDs and other nontextile applications, as well as the machines used ancillary to printing. CMYKPages, "Aurelon Brings to Market New Generation of Aurelon RIP," July 2, 2003, found at <http://www.cmykpages.com/default.asp?hndlr=ORIGIN&itmid=451A772EDE2846AB8B9AFCA445A64EB1>, retrieved Mar. 23, 2004. The Netherlands also moved toward the digitization of magazine and other printed matter, further facilitated by U.S. technology contributions and the decline of the dollar versus the euro. See, e.g., Erik van Erp, "The Long Road to Digital Ads for Magazines and Newspapers in The Netherlands," found at http://seminars.seyboldreports.com/2003_amsterdam/files/pfc1_erik_vanerp.pdf, retrieved Apr. 6, 2004.

¹² The chapter 11 reorganization of Goss Graphic Systems, the last major domestic large newspaper printing press manufacturer, continued through the period, leading to decreased exports of large printing press devices and parts.

¹³ All Multi-functional digital ("MFD") office machines are capable of scanning documents and printing, and can be used to print digital camera images. Some of the machines also have fax capabilities through use of a connected modem. All of the machines are designed to operate in local area networks or in client/server environments. In 2002, U.S. Customs ruled that digital scanners and copiers with printing capability were to be classified as printing machinery. This likely led to some devices being moved from alternate classifications into printing machinery. Bureau of Customs and Border Protection Headquarters Ruling HQ 963680 issued Aug. 30, 2002.

¹⁴ Olga Kharif, "Printing a Record of Growth", *Business Week Online*, Feb. 17, 2004, found at http://www.businessweek.com/technology/content/feb2004/tc20040217_8510_tc055.htm.

¹⁵ "Consolidation Beat Goes On: Agfa Acquires Granite", *Print On Demand.com*, July 15, 2003, found at <http://www.printondemand.com/MT/archives/000613.html>.

Enterprises (SME) applications.¹⁶ These advances have allowed SOHO and SME users to apply a single MFD device to print, scan, copy, and fax.

The majority of MFDs are produced in Asia,¹⁷ and almost the entire increase of U.S. imports came from Japan (up \$1.5 billion, or 368 percent) and China (up \$1.1 billion, or 754 percent). Multiple electronics companies are launching new MFD product lines,¹⁸ as are camera and film companies,¹⁹ and multiple printer manufacturers have implemented multifunction drivers.²⁰

Christopher B. Mapes
(202) 205-3034
christopher.mapes@usitc.gov

Table MT-3
U.S. imports of printing and related machinery, 1999-2003

						Change, 2003 from 2002	
Item	1999	2000	2001	2002	2003	Absolute	Percent
	Million dollars						
Office printing machines	16	18	13	265	1,929	1,664	629
Parts and accessories for office printing machines	34	31	32	111	1,239	1,128	1,020
Offset printing machinery	867	731	591	425	411	-14	-3
Flexographic printing machinery . .	78	74	67	81	125	44	53
Bookbinding machinery, including book-sewing machines	118	125	111	73	100	27	38
Other printing machinery	1,192	1,177	1,114	1,047	1,040	-7	-1
Total	2,304	2,157	1,929	2,001	4,844	2,843	142

Note.—Calculations based on unrounded data.

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

¹⁶ Calvin Siew, "Lexmark's multifunction galore", C/NET Asia, Oct. 16, 2003, found at <http://asia.cnet.com/reviews/hardware/printers/0,39001759,39154954,00.htm>.

¹⁷ China's consumption is approximately one million per year, second only to the United States. From "Japanese Ricoh to Snatch China's Digital Network Market," People's Daily, Sept. 4, 2001, found at http://fpeng.peopledaily.com.cn/200109/04/eng20010904_79286.html.

¹⁸ For example, Hewlett-Packard; see http://www.hp.com/united-states/consumer/gateway/printing_multifunction.html.

¹⁹ "Fuji Xerox and Fuji Photo Film Team Up to Launch "inter-Graphics" Service," JCN Newswire, Mar. 12, 2004, available at http://www.japancorp.net/Article.Asp?Art_ID=6826.

²⁰ For example, companies that have implemented Granite Systems drivers include Minolta, Minolta-QMS, Seiko-Epson, Toshiba, Fujitsu, and Panasonic, all of which are Asian-based. From "Consolidation Beat Goes On", *ibid.* Another printer migrating to MFDs is Xerox; see http://www.xerox.com/go/xrx/equipment/product_landing.jsp?Xcentry=USA&Xlang=en_US.

Table MT-4
Machinery: U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM068	Wiring harnesses for motor vehicles:							
	Exports	993	938	866	961	868	-93	-9.7
	Imports	4,868	5,132	4,684	5,302	5,272	-30	-0.6
	Trade balance	-3,875	-4,194	-3,818	-4,341	-4,404	-63	-1.5
MM069	Pumps for motor vehicles:							
	Exports	546	680	642	681	690	9	1.4
	Imports	776	863	788	913	992	78	8.6
	Trade balance	-230	-183	-147	-232	-302	-69	-29.7
MM070	Pumps for liquids:							
	Exports	2,325	2,461	2,561	2,393	2,412	18	0.8
	Imports	1,643	1,809	1,801	1,883	2,180	296	15.7
	Trade balance	683	652	760	510	232	-278	-54.5
MM071	Air-conditioning equipment and parts:							
	Exports	5,641	5,884	5,694	5,318	5,334	16	0.3
	Imports	5,604	6,332	6,081	6,674	7,403	730	10.9
	Trade balance	37	-449	-387	-1,356	-2,070	-714	-52.6
MM072	Industrial thermal-processing equipment and furnaces:							
	Exports	2,292	2,631	2,496	2,064	2,099	35	1.7
	Imports	1,483	1,663	1,641	1,671	1,660	-11	-0.7
	Trade balance	809	968	855	393	439	46	11.6
MM073	Household appliances, including commercial applications:							
	Exports	5,216	5,563	5,226	4,892	4,810	-82	-1.7
	Imports	6,718	7,689	8,356	9,587	10,782	1,195	12.5
	Trade balance	-1,503	-2,126	-3,130	-4,695	-5,971	-1,277	-27.2
MM073A	Major household appliances and parts:							
	Exports	1,652	1,717	1,708	1,610	1,655	45	2.8
	Imports	1,477	1,642	1,986	2,444	2,868	423	17.3
	Trade balance	176	75	-278	-834	-1,212	-378	-45.3
MM074	Centrifuges and filtering and purifying equipment:							
	Exports	2,564	3,031	3,208	3,045	3,022	-24	-0.8
	Imports	1,783	2,010	2,275	2,403	2,663	260	10.8
	Trade balance	781	1,021	933	642	358	-284	-44.2
MM075	Wrapping, packaging, and can-sealing machinery:							
	Exports	766	804	711	639	637	-2	-0.3
	Imports	1,117	1,246	1,302	1,333	1,505	173	12.9
	Trade balance	-351	-442	-591	-694	-868	-174	-25.1
MM076	Scales and weighing machinery:							
	Exports	145	163	175	164	155	-9	-5.6
	Imports	265	294	279	293	375	82	27.9
	Trade balance	-121	-131	-104	-129	-220	-91	-70.6
MM077	Mineral processing machinery:							
	Exports	590	582	582	485	545	60	12.4
	Imports	667	723	576	565	627	61	10.8
	Trade balance	-78	-142	6	-81	-82	-1	-1.3

See footnote(s) at end of table.

Table MT-4--Continued

Machinery: U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM078	Farm and garden machinery and equipment:							
	Exports	4,757	4,945	4,565	4,747	5,109	362	7.6
	Imports	3,396	3,740	3,602	3,898	4,645	747	19.2
	Trade balance	1,361	1,205	963	848	464	-384	-45.3
MM079	Industrial food-processing and related machinery:							
	Exports	611	627	576	606	558	-48	-8.0
	Imports	621	543	537	570	684	114	20.0
	Trade balance	-9	83	40	36	-126	-162	(³)
MM080	Pulp, paper, and paperboard machinery:							
	Exports	743	779	678	560	648	88	15.7
	Imports	1,003	1,127	1,091	719	867	148	20.6
	Trade balance	-260	-348	-414	-159	-219	-60	-37.8
MM081	Printing and related machinery:							
	Exports	1,347	1,583	1,232	1,136	1,215	79	7.0
	Imports	2,304	2,157	1,929	2,001	4,844	2,843	142.1
	Trade balance	-958	-574	-697	-865	-3,628	-2,763	-319.5
MM082	Textile machinery:							
	Exports	974	978	897	871	810	-61	-7.0
	Imports	2,073	1,873	1,411	1,314	1,316	2	0.2
	Trade balance	-1,099	-895	-515	-442	-506	-63	-14.3
MM083	Metal rolling mills:							
	Exports	153	164	210	169	182	13	7.7
	Imports	321	261	180	163	210	47	28.9
	Trade balance	-168	-97	30	7	-27	-34	(³)
MM084	Metal cutting machine tools and machine tool accessories:							
	Exports	1,773	2,264	1,809	1,634	1,585	-48	-2.9
	Imports	3,921	4,240	3,407	2,558	2,704	146	5.7
	Trade balance	-2,148	-1,977	-1,598	-924	-1,118	-194	-21.0
MM085	Metal forming machine tools:							
	Exports	934	876	743	652	691	39	6.0
	Imports	1,312	1,474	1,331	846	933	87	10.3
	Trade balance	-378	-598	-588	-194	-242	-49	-25.0
MM086	Non-metalworking machine tools:							
	Exports	772	1,080	807	768	711	-57	-7.4
	Imports	1,318	1,524	1,276	1,242	1,330	88	7.1
	Trade balance	-546	-443	-468	-474	-619	-145	-30.6
MM087	Semiconductor manufacturing equipment and robotics:							
	Exports	8,176	14,585	8,553	7,341	7,599	258	3.5
	Imports	3,123	5,167	4,389	3,679	3,152	-526	-14.3
	Trade balance	5,052	9,418	4,164	3,662	4,446	784	21.4
MM087A	Semiconductor manufacturing machinery:							
	Exports	7,907	13,866	8,044	6,972	7,242	269	3.9
	Imports	2,600	4,597	3,947	3,304	2,750	-555	-16.8
	Trade balance	5,307	9,269	4,096	3,668	4,492	824	22.5

See footnote(s) at end of table.

Table MT-4--Continued

Machinery: U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM088	Taps, cocks, valves, and similar devices:							
	Exports	2,959	3,284	3,351	3,202	3,329	127	4.0
	Imports	4,335	5,021	4,809	5,156	5,500	345	6.7
	Trade balance	-1,376	-1,737	-1,458	-1,954	-2,171	-217	-11.1
MM089	Mechanical power transmission equipment:							
	Exports	942	1,029	939	936	1,054	118	12.6
	Imports	2,008	2,134	2,004	1,994	2,222	228	11.5
	Trade balance	-1,066	-1,105	-1,066	-1,057	-1,168	-110	-10.4
MM090	Boilers, turbines, and related machinery:							
	Exports	1,290	1,117	1,106	892	875	-17	-1.9
	Imports	484	833	1,204	1,514	881	-633	-41.8
	Trade balance	806	284	-98	-622	-6	616	99.1
MM091	Electric motors, generators, and related equipment:							
	Exports	3,728	3,748	4,691	3,923	4,031	108	2.8
	Imports	6,089	6,494	7,646	7,177	6,811	-366	-5.1
	Trade balance	-2,362	-2,746	-2,954	-3,255	-2,780	474	14.6
MM092	Electrical transformers, static converters, and inductors:							
	Exports	2,379	2,752	2,436	1,784	1,767	-17	-0.9
	Imports	4,950	6,156	5,134	4,707	4,680	-27	-0.6
	Trade balance	-2,571	-3,404	-2,698	-2,923	-2,912	10	0.3
MM093	Portable electric handtools:							
	Exports	392	359	291	212	191	-21	-9.9
	Imports	992	1,166	1,185	1,434	1,777	344	24.0
	Trade balance	-600	-808	-894	-1,222	-1,586	-365	-29.8
MM094	Nonelectrically powered handtools and parts thereof:							
	Exports	537	563	563	549	578	29	5.2
	Imports	890	933	901	961	992	30	3.2
	Trade balance	-353	-370	-338	-412	-414	-2	-0.4
MM095	Electric lamps (bulbs) and portable electric lights:							
	Exports	894	897	799	750	721	-29	-3.9
	Imports	1,454	1,579	1,785	1,687	1,748	61	3.6
	Trade balance	-561	-682	-986	-937	-1,028	-90	-9.6
MM096	Welding and soldering equipment:							
	Exports	989	1,050	703	635	618	-17	-2.6
	Imports	702	803	803	761	996	235	30.9
	Trade balance	287	247	-101	-126	-378	-252	-199.5
MM097	Nonautomotive insulated electrical wire and related products:							
	Exports	3,102	4,040	3,286	2,856	2,660	-196	-6.9
	Imports	3,078	3,566	3,203	3,076	3,208	132	4.3
	Trade balance	24	474	83	-220	-548	-328	-149.0
MM098	Miscellaneous machinery:							
	Exports	6,792	7,922	7,366	6,793	6,409	-384	-5.7
	Imports	6,220	7,241	6,455	6,133	6,917	785	12.8
	Trade balance	572	682	911	660	-508	-1,169	(³)

See footnote(s) at end of table.

Table MT-4--*Continued***Machinery: U.S. trade for industry/commodity groups and subgroups, 1999-2003¹**

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
<i>Million dollars</i>								
MM099	Molds and molding machinery:							
	Exports	1,879	2,129	1,791	1,605	1,550	-55	-3.4
	Imports	3,723	3,613	2,803	2,969	3,262	293	9.9
	Trade balance	-1,844	-1,484	-1,012	-1,363	-1,712	-348	-25.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes

³Not meaningful for purposes of comparison.

Note.—Calculations based on unrounded data.

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

Table MT-5

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM068	Wiring harnesses for motor vehicles:						
	Number of establishments	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Employees (thousands)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	6,150	6,240	5,740	6,450	6,100	-5.4
	U.S. exports (million dollars)	993	938	866	961	868	-9.7
	U.S. imports (million dollars)	4,868	5,132	4,684	5,302	5,272	-0.6
	Apparent U.S. consumption (million dollars)	10,025	10,434	9,558	10,791	10,504	-2.7
	Trade balance (million dollars)	-3,875	-4,194	-3,818	-4,341	-4,404	-1.5
	Ratio of imports to consumption (percent)	48.6	49.2	49.0	49.1	50.2	2.2
	Ratio of exports to shipments (percent)	16.1	15.0	15.1	14.9	14.2	-4.7
MM069	Pumps for motor vehicles:						
	Number of establishments	202	195	215	225	202	-10.2
	Employees (thousands)	27.0	25.0	28.0	30.0	27.0	-10.0
	Capacity utilization (percent)	72	72	76	78	72	-7.7
	U.S. shipments (million dollars)	2,982	3,012	3,223	3,384	3,046	-10.0
	U.S. exports (million dollars)	546	680	642	681	690	1.4
	U.S. imports (million dollars)	776	863	788	913	992	8.6
	Apparent U.S. consumption (million dollars)	3,212	3,195	3,370	3,616	3,348	-7.4
	Trade balance (million dollars)	-230	-183	-147	-232	-302	-29.7
	Ratio of imports to consumption (percent)	24.2	27.0	23.4	25.3	29.6	17.0
	Ratio of exports to shipments (percent)	18.3	22.6	19.9	20.1	22.7	12.9
MM070	Pumps for liquids:						
	Number of establishments	450	460	485	475	453	-4.6
	Employees (thousands)	36.0	37.0	37.0	35.0	31.0	-11.4
	Capacity utilization (percent)	69	70	70	69	66	-4.3
	U.S. shipments (million dollars)	6,603	6,800	6,936	6,867	6,660	-3.0
	U.S. exports (million dollars)	2,325	2,461	2,561	2,393	2,412	0.8
	U.S. imports (million dollars)	1,643	1,809	1,801	1,883	2,180	15.7
	Apparent U.S. consumption (million dollars)	5,920	6,148	6,176	6,357	6,428	1.1
	Trade balance (million dollars)	683	652	760	510	232	-54.5
	Ratio of imports to consumption (percent)	27.7	29.4	29.2	29.6	33.9	14.5
	Ratio of exports to shipments (percent)	35.2	36.2	36.9	34.8	36.2	4.0

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM071	Air-conditioning equipment and parts:						
	Number of establishments	1,225	1,262	1,295	1,240	1,265	2.0
	Employees (thousands)	148.0	151.0	155.0	142.0	134.0	-5.6
	Capacity utilization (percent)	73	75	76	71	71	0.0
	U.S. shipments (million dollars)	26,500	27,030	28,111	23,894	24,372	2.0
	U.S. exports (million dollars)	5,641	5,884	5,694	5,318	5,334	(²)
	U.S. imports (million dollars)	5,604	6,332	6,081	6,674	7,403	10.9
	Apparent U.S. consumption (million dollars)	26,463	27,479	28,498	25,250	26,442	4.7
	Trade balance (million dollars)	37	-449	-387	-1,356	-2,070	-52.6
	Ratio of imports to consumption (percent)	21.2	23.0	21.3	26.4	28.0	6.1
	Ratio of exports to shipments (percent)	21.3	21.8	20.3	22.3	21.9	-1.8
MM072	Industrial thermal-processing equipment and furnaces:						
	Number of establishments	329	331	320	325	323	-0.6
	Employees (thousands)	33.0	34.0	32.0	32.0	32.0	0.0
	Capacity utilization (percent)	67	68	66	67	66	-1.5
	U.S. shipments (million dollars)	3,715	3,752	3,564	3,599	3,675	2.1
	U.S. exports (million dollars)	2,292	2,631	2,496	2,064	2,099	1.7
	U.S. imports (million dollars)	1,483	1,663	1,641	1,671	1,660	-0.7
	Apparent U.S. consumption (million dollars)	2,906	2,784	2,709	3,206	3,236	0.9
	Trade balance (million dollars)	809	968	855	393	439	11.6
	Ratio of imports to consumption (percent)	51.0	59.7	60.6	52.1	51.3	-1.5
	Ratio of exports to shipments (percent)	61.7	70.1	70.0	57.4	57.1	-0.5
MM073	Household appliances, including commercial applications:						
	Number of establishments	100	87	98	95	99	4.2
	Employees (thousands)	57.0	50.0	55.0	53.0	53.0	0.0
	Capacity utilization (percent)	71	67	70	69	70	1.4
	U.S. shipments (million dollars)	15,867	15,111	15,741	15,427	15,736	2.0
	U.S. exports (million dollars)	5,216	5,563	5,226	4,892	4,810	-1.7
	U.S. imports (million dollars)	6,718	7,689	8,356	9,587	10,782	12.5
	Apparent U.S. consumption (million dollars)	17,370	17,237	18,871	20,122	21,707	7.9
	Trade balance (million dollars)	-1,503	-2,126	-3,130	-4,695	-5,971	-27.2
	Ratio of imports to consumption (percent)	38.7	44.6	44.3	47.6	49.7	4.4
	Ratio of exports to shipments (percent)	32.9	36.8	33.2	31.7	30.6	-3.5

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM073A	Major household appliances and parts:						
	Number of establishments	197	238	251	255	282	10.6
	Employees (thousands)	66.0	73.0	75.0	76.0	78.0	2.6
	Capacity utilization (percent)	67	69	70	71	75	5.6
	U.S. shipments (million dollars)	13,171	13,981	14,259	14,544	15,126	4.0
	U.S. exports (million dollars)	1,652	1,717	1,708	1,610	1,655	2.8
	U.S. imports (million dollars)	1,477	1,642	1,986	2,444	2,868	17.3
	Apparent U.S. consumption (million dollars)	12,995	13,906	14,537	15,378	16,338	6.2
	Trade balance (million dollars)	176	75	-278	-834	-1,212	-45.3
	Ratio of imports to consumption (percent)	11.4	11.8	13.7	15.9	17.6	10.7
	Ratio of exports to shipments (percent)	12.5	12.3	12.0	11.1	10.9	-1.8
MM075	Wrapping, packaging, and can-sealing machinery:						
	Number of establishments	756	784	813	813	813	0.0
	Employees (thousands)	31.0	29.0	28.0	29.0	30.0	3.4
	Capacity utilization (percent)	67	62	59	72	75	4.2
	U.S. shipments (million dollars)	4,119	4,202	3,939	4,807	4,951	3.0
	U.S. exports (million dollars)	766	804	711	639	637	-0.3
	U.S. imports (million dollars)	1,117	1,246	1,302	1,333	1,505	12.9
	Apparent U.S. consumption (million dollars)	4,470	4,644	4,530	5,501	5,819	5.8
	Trade balance (million dollars)	-351	-442	-591	-694	-868	-25.1
	Ratio of imports to consumption (percent)	25.0	26.8	28.7	24.2	25.9	7.0
	Ratio of exports to shipments (percent)	18.6	19.1	18.1	13.3	12.9	-3.0
MM076	Scales and weighing machinery:						
	Number of establishments	119	117	121	120	119	-0.8
	Employees (thousands)	4.9	4.9	5.0	4.8	4.6	-4.2
	Capacity utilization (percent)	66	56	57	58	60	3.4
	U.S. shipments (million dollars)	752	765	756	784	814	3.8
	U.S. exports (million dollars)	145	163	175	164	155	-5.6
	U.S. imports (million dollars)	265	294	279	293	375	27.9
	Apparent U.S. consumption (million dollars)	873	896	860	913	1,034	13.3
	Trade balance (million dollars)	-121	-131	-104	-129	-220	-70.6
	Ratio of imports to consumption (percent)	30.4	32.8	32.4	32.1	36.3	13.1
	Ratio of exports to shipments (percent)	19.3	21.4	23.2	21.0	19.1	-9.0

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM077	Mineral processing machinery:						
	Number of establishments	89	85	84	83	82	-1.2
	Employees (thousands)	6.0	6.0	5.0	5.0	5.0	0.0
	Capacity utilization (percent)	64	57	59	53	53	0.0
	U.S. shipments (million dollars)	1,563	1,542	1,542	1,286	1,285	-0.1
	U.S. exports (million dollars)	590	582	582	485	545	12.4
	U.S. imports (million dollars)	667	723	576	565	627	10.8
	Apparent U.S. consumption (million dollars)	1,641	1,684	1,536	1,367	1,367	0.0
	Trade balance (million dollars)	-78	-142	6	-81	-82	-1.3
	Ratio of imports to consumption (percent)	40.7	43.0	37.5	41.4	45.8	10.6
	Ratio of exports to shipments (percent)	37.7	37.7	37.7	37.7	42.4	12.5
MM078	Farm and garden machinery and equipment:						
	Number of establishments	1,870	1,800	1,700	1,500	1,450	-3.3
	Employees (thousands)	98.0	97.0	95.0	90.0	87.0	-3.3
	Capacity utilization (percent)	63	67	67	67	75	11.9
	U.S. shipments (million dollars)	18,013	19,676	18,582	17,653	19,418	10.0
	U.S. exports (million dollars)	4,757	4,945	4,565	4,747	5,109	7.6
	U.S. imports (million dollars)	3,396	3,740	3,602	3,898	4,645	19.2
	Apparent U.S. consumption (million dollars)	16,652	18,471	17,619	16,805	18,954	12.8
	Trade balance (million dollars)	1,361	1,205	963	848	464	-45.3
	Ratio of imports to consumption (percent)	20.4	20.2	20.4	23.2	24.5	5.6
	Ratio of exports to shipments (percent)	26.4	25.1	24.6	26.9	26.3	-2.2
MM079	Industrial food-processing and related machinery:						
	Number of establishments	582	591	600	615	616	(²)
	Employees (thousands)	19.0	18.0	18.0	18.0	19.0	5.6
	Capacity utilization (percent)	72	67	66	68	71	4.4
	U.S. shipments (million dollars)	2,614	2,563	2,404	2,514	2,600	3.4
	U.S. exports (million dollars)	611	627	576	606	558	-8.0
	U.S. imports (million dollars)	621	543	537	570	684	20.0
	Apparent U.S. consumption (million dollars)	2,623	2,480	2,364	2,478	2,726	10.0
	Trade balance (million dollars)	-9	83	40	36	-126	(³)
	Ratio of imports to consumption (percent)	23.7	21.9	22.7	23.0	25.1	9.1
	Ratio of exports to shipments (percent)	23.4	24.5	24.0	24.1	21.5	-10.8

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM080	Pulp, paper, and paperboard machinery:						
	Number of establishments	351	335	319	297	305	2.7
	Employees (thousands)	16.8	14.2	13.2	12.4	12.7	2.4
	Capacity utilization (percent)	60	64	72	82	82	0.0
	U.S. shipments (million dollars)	2,941	2,761	2,708	2,597	2,747	5.8
	U.S. exports (million dollars)	743	779	678	560	648	15.7
	U.S. imports (million dollars)	1,003	1,127	1,091	719	867	20.6
	Apparent U.S. consumption (million dollars)	3,201	3,109	3,122	2,756	2,966	7.6
	Trade balance (million dollars)	-260	-348	-414	-159	-219	-37.8
	Ratio of imports to consumption (percent)	31.3	36.2	35.0	26.1	29.2	11.9
	Ratio of exports to shipments (percent)	25.3	28.2	25.0	21.5	23.6	9.8
MM081	Printing and related machinery:						
	Number of establishments	523	520	499	484	470	-2.9
	Employees (thousands)	19.5	18.6	18.2	17.7	17.3	-2.3
	Capacity utilization (percent)	67	69	63	59	64	8.5
	U.S. shipments (million dollars)	3,606	3,827	3,865	3,919	3,973	1.4
	U.S. exports (million dollars)	1,347	1,583	1,232	1,136	1,215	7.0
	U.S. imports (million dollars)	2,304	2,157	1,929	2,001	4,844	142.1
	Apparent U.S. consumption (million dollars)	4,564	4,401	4,562	4,784	7,601	58.9
	Trade balance (million dollars)	-958	-574	-697	-865	-3,628	-319.5
	Ratio of imports to consumption (percent)	50.5	49.0	42.3	41.8	63.7	52.4
	Ratio of exports to shipments (percent)	37.3	41.4	31.9	29.0	30.6	5.5
MM082	Textile machinery:						
	Number of establishments	500	500	500	420	400	-4.8
	Employees (thousands)	13.0	13.0	12.0	10.0	8.0	-20.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	1,546	1,648	1,417	1,377	1,308	-5.0
	U.S. exports (million dollars)	974	978	897	871	810	-7.0
	U.S. imports (million dollars)	2,073	1,873	1,411	1,314	1,316	(²)
	Apparent U.S. consumption (million dollars)	2,645	2,543	1,932	1,819	1,814	-0.3
	Trade balance (million dollars)	-1,099	-895	-515	-442	-506	-14.3
	Ratio of imports to consumption (percent)	78.4	73.6	73.1	72.2	72.5	(²)
	Ratio of exports to shipments (percent)	63.0	59.3	63.3	63.3	61.9	-2.2

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM083	Metal rolling mills:						
	Number of establishments	15	15	15	15	15	0.0
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	511	545	699	584	570	-2.4
	U.S. exports (million dollars)	153	164	210	169	182	7.7
	U.S. imports (million dollars)	321	261	180	163	210	28.9
	Apparent U.S. consumption (million dollars)	679	642	669	577	597	3.5
	Trade balance (million dollars)	-168	-97	30	7	-27	(³)
	Ratio of imports to consumption (percent)	47.3	40.7	26.9	28.2	35.1	24.5
	Ratio of exports to shipments (percent)	30.0	30.0	30.1	29.0	32.0	10.3
MM084	Metal cutting machine tools and machine tool accessories:						
	Number of establishments	700	650	600	400	370	-7.5
	Employees (thousands)	84.0	81.0	75.0	66.0	62.0	-6.1
	Capacity utilization (percent)	70	68	63	60	60	0.0
	U.S. shipments (million dollars)	6,825	6,933	5,877	3,838	3,728	-2.9
	U.S. exports (million dollars)	1,773	2,264	1,809	1,634	1,585	-2.9
	U.S. imports (million dollars)	3,921	4,240	3,407	2,558	2,704	5.7
	Apparent U.S. consumption (million dollars)	8,973	8,910	7,475	4,762	4,846	1.8
	Trade balance (million dollars)	-2,148	-1,977	-1,598	-924	-1,118	-21.0
	Ratio of imports to consumption (percent)	43.7	47.6	45.6	53.7	55.8	3.9
	Ratio of exports to shipments (percent)	26.0	32.6	30.8	42.6	42.5	-0.2
MM085	Metal forming machine tools:						
	Number of establishments	250	250	220	200	175	-12.5
	Employees (thousands)	28.0	27.0	20.0	15.0	14.0	-6.7
	Capacity utilization (percent)	75	66	62	60	60	0.0
	U.S. shipments (million dollars)	2,980	2,890	2,185	1,647	1,616	-1.9
	U.S. exports (million dollars)	934	876	743	652	691	6.0
	U.S. imports (million dollars)	1,312	1,474	1,331	846	933	10.3
	Apparent U.S. consumption (million dollars)	3,358	3,488	2,773	1,841	1,858	1.0
	Trade balance (million dollars)	-378	-598	-588	-194	-242	-25.0
	Ratio of imports to consumption (percent)	39.1	42.3	48.0	46.0	50.2	9.1
	Ratio of exports to shipments (percent)	31.3	30.3	34.0	39.6	42.8	8.1

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM086	Non-metalworking machine tools:						
	Number of establishments	280	260	240	200	190	-5.0
	Employees (thousands)	41.0	42.0	36.0	34.0	33.0	-2.9
	Capacity utilization (percent)	80	77	75	70	68	-2.9
	U.S. shipments (million dollars)	6,170	6,320	5,396	5,126	5,023	-2.0
	U.S. exports (million dollars)	772	1,080	807	768	711	-7.4
	U.S. imports (million dollars)	1,318	1,524	1,276	1,242	1,330	7.1
	Apparent U.S. consumption (million dollars)	6,716	6,763	5,864	5,600	5,642	0.8
	Trade balance (million dollars)	-546	-443	-468	-474	-619	-30.6
	Ratio of imports to consumption (percent)	19.6	22.5	21.7	22.2	23.6	6.3
	Ratio of exports to shipments (percent)	12.5	17.1	15.0	15.0	14.1	-6.0
MM087A	Semiconductor manufacturing machinery:						
	Number of establishments	390	410	405	400	400	0.0
	Employees (thousands)	37.0	48.0	36.0	34.0	34.0	0.0
	Capacity utilization (percent)	75	90	72	81	82	1.2
	U.S. shipments (million dollars)	11,231	16,846	11,850	10,200	10,600	3.9
	U.S. exports (million dollars)	7,907	13,866	8,044	6,972	7,242	3.9
	U.S. imports (million dollars)	2,600	4,597	3,947	3,304	2,750	-16.8
	Apparent U.S. consumption (million dollars)	5,924	7,577	7,754	6,532	6,108	-6.5
	Trade balance (million dollars)	5,307	9,269	4,096	3,668	4,492	22.5
	Ratio of imports to consumption (percent)	43.9	60.7	50.9	50.6	45.0	-11.1
	Ratio of exports to shipments (percent)	70.4	82.3	67.9	68.4	68.3	-0.1
MM088	Taps, cocks, valves, and similar devices:						
	Number of establishments	797	785	725	695	666	-4.2
	Employees (thousands)	70.0	70.0	67.0	64.0	62.0	-3.1
	Capacity utilization (percent)	75	74	70	68	64	-5.9
	U.S. shipments (million dollars)	11,687	11,804	11,450	11,221	10,772	-4.0
	U.S. exports (million dollars)	2,959	3,284	3,351	3,202	3,329	4.0
	U.S. imports (million dollars)	4,335	5,021	4,809	5,156	5,500	6.7
	Apparent U.S. consumption (million dollars)	13,063	13,541	12,908	13,175	12,943	-1.8
	Trade balance (million dollars)	-1,376	-1,737	-1,458	-1,954	-2,171	-11.1
	Ratio of imports to consumption (percent)	33.2	37.1	37.3	39.1	42.5	8.7
	Ratio of exports to shipments (percent)	25.3	27.8	29.3	28.5	30.9	8.4

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM089	Mechanical power transmission equipment:						
	Number of establishments	200	170	140	130	130	0.0
	Employees (thousands)	37.0	37.0	35.0	32.0	31.0	-3.1
	Capacity utilization (percent)	65	62	62	60	60	0.0
	U.S. shipments (million dollars)	4,942	5,051	4,441	4,219	4,092	-3.0
	U.S. exports (million dollars)	942	1,029	939	936	1,054	12.6
	U.S. imports (million dollars)	2,008	2,134	2,004	1,994	2,222	11.5
	Apparent U.S. consumption (million dollars)	6,008	6,156	5,507	5,276	5,260	-0.3
	Trade balance (million dollars)	-1,066	-1,105	-1,066	-1,057	-1,168	-10.4
	Ratio of imports to consumption (percent)	33.4	34.7	36.4	37.8	42.2	11.6
	Ratio of exports to shipments (percent)	19.1	20.4	21.1	22.2	25.8	16.2
MM090	Boilers, turbines, and related machinery:						
	Number of establishments	28	28	28	28	26	-7.1
	Employees (thousands)	8.0	8.0	8.0	8.0	7.0	-12.5
	Capacity utilization (percent)	65	65	65	70	65	-7.1
	U.S. shipments (million dollars)	1,465	1,543	1,648	2,240	2,050	-8.5
	U.S. exports (million dollars)	1,290	1,117	1,106	892	875	-1.9
	U.S. imports (million dollars)	484	833	1,204	1,514	881	-41.8
	Apparent U.S. consumption (million dollars)	659	1,259	1,746	2,862	2,056	-28.2
	Trade balance (million dollars)	806	284	-98	-622	-6	99.1
	Ratio of imports to consumption (percent)	73.5	66.2	68.9	52.9	42.8	-19.1
	Ratio of exports to shipments (percent)	88.1	72.4	67.1	39.8	42.7	7.3
MM091	Electric motors, generators, and related equipment:						
	Number of establishments	510	505	505	500	495	-1.0
	Employees (thousands)	95.0	93.0	95.0	92.0	90.0	-2.2
	Capacity utilization (percent)	75	73	76	72	70	-2.8
	U.S. shipments (million dollars)	19,150	19,020	20,540	18,700	18,000	-3.7
	U.S. exports (million dollars)	3,728	3,748	4,691	3,923	4,031	2.8
	U.S. imports (million dollars)	6,089	6,494	7,646	7,177	6,811	-5.1
	Apparent U.S. consumption (million dollars)	21,512	21,766	23,494	21,955	20,780	-5.3
	Trade balance (million dollars)	-2,362	-2,746	-2,954	-3,255	-2,780	14.6
	Ratio of imports to consumption (percent)	28.3	29.8	32.5	32.7	32.8	(²)
	Ratio of exports to shipments (percent)	19.5	19.7	22.8	21.0	22.4	6.7

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM092	Electrical transformers, static converters, and inductors:						
	Number of establishments	420	415	410	405	400	-1.2
	Employees (thousands)	57.0	55.0	53.0	52.0	50.0	-3.8
	Capacity utilization (percent)	76	73	71	70	72	2.9
	U.S. shipments (million dollars)	8,600	8,470	7,625	6,520	6,300	-3.4
	U.S. exports (million dollars)	2,379	2,752	2,436	1,784	1,767	-0.9
	U.S. imports (million dollars)	4,950	6,156	5,134	4,707	4,680	-0.6
	Apparent U.S. consumption (million dollars)	11,171	11,874	10,323	9,443	9,212	-2.4
	Trade balance (million dollars)	-2,571	-3,404	-2,698	-2,923	-2,912	(²)
	Ratio of imports to consumption (percent)	44.3	51.8	49.7	49.8	50.8	2.0
	Ratio of exports to shipments (percent)	27.7	32.5	31.9	27.4	28.1	2.6
MM093	Portable electric handtools:						
	Number of establishments	28	27	25	24	21	-12.5
	Employees (thousands)	9.0	9.0	8.0	7.0	5.0	-28.6
	Capacity utilization (percent)	81	83	80	75	70	-6.7
	U.S. shipments (million dollars)	2,280	2,390	2,080	1,950	1,900	-2.6
	U.S. exports (million dollars)	392	359	291	212	191	-9.9
	U.S. imports (million dollars)	992	1,166	1,185	1,434	1,777	24.0
	Apparent U.S. consumption (million dollars)	2,880	3,198	2,974	3,172	3,486	9.9
	Trade balance (million dollars)	-600	-808	-894	-1,222	-1,586	-29.8
	Ratio of imports to consumption (percent)	34.5	36.5	39.8	45.2	51.0	12.8
	Ratio of exports to shipments (percent)	17.2	15.0	14.0	10.9	10.1	-7.3
MM094	Nonelectrically powered handtools and parts thereof:						
	Number of establishments	38	35	30	25	25	0.0
	Employees (thousands)	12.0	13.0	13.0	12.0	11.0	-8.3
	Capacity utilization (percent)	78	77	75	70	68	-2.9
	U.S. shipments (million dollars)	1,878	1,974	1,916	1,840	1,803	-2.0
	U.S. exports (million dollars)	537	563	563	549	578	5.2
	U.S. imports (million dollars)	890	933	901	961	992	3.2
	Apparent U.S. consumption (million dollars)	2,231	2,344	2,254	2,252	2,217	-1.6
	Trade balance (million dollars)	-353	-370	-338	-412	-414	-0.4
	Ratio of imports to consumption (percent)	39.9	39.8	40.0	42.7	44.7	4.7
	Ratio of exports to shipments (percent)	28.6	28.5	29.4	29.8	32.0	7.4

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM095	Electric lamps (bulbs) and portable electric lights:						
	Number of establishments	120	115	110	105	100	-4.8
	Employees (thousands)	22.0	21.0	20.0	19.0	17.0	-10.5
	Capacity utilization (percent)	70	68	65	64	62	-3.1
	U.S. shipments (million dollars)	3,400	3,500	3,300	3,250	3,100	-4.6
	U.S. exports (million dollars)	894	897	799	750	721	-3.9
	U.S. imports (million dollars)	1,454	1,579	1,785	1,687	1,748	3.6
	Apparent U.S. consumption (million dollars)	3,961	4,182	4,286	4,187	4,128	-1.4
	Trade balance (million dollars)	-561	-682	-986	-937	-1,028	-9.6
	Ratio of imports to consumption (percent)	36.7	37.8	41.7	40.3	42.4	5.2
	Ratio of exports to shipments (percent)	26.3	25.6	24.2	23.1	23.2	(²)
MM096	Welding and soldering equipment						
	Number of establishments	250	250	240	225	200	-11.1
	Employees (thousands)	18.0	18.0	17.0	16.0	13.0	-18.8
	Capacity utilization (percent)	78	78	77	75	60	-20.0
	U.S. shipments (million dollars)	4,500	4,770	4,250	3,930	3,200	-18.6
	U.S. exports (million dollars)	989	1,050	703	635	618	-2.6
	U.S. imports (million dollars)	702	803	803	761	996	30.9
	Apparent U.S. consumption (million dollars)	4,213	4,523	4,351	4,056	3,578	-11.8
	Trade balance (million dollars)	287	247	-101	-126	-378	-199.5
	Ratio of imports to consumption (percent)	16.7	17.7	18.5	18.8	27.8	47.9
	Ratio of exports to shipments (percent)	22.0	22.0	16.5	16.2	19.3	19.1
MM097	Nonautomotive insulated electrical wire and related products:						
	Number of establishments	525	520	500	490	475	-3.1
	Employees (thousands)	91.0	90.0	85.0	83.0	79.0	-4.8
	Capacity utilization (percent)	80	78	73	71	69	-2.8
	U.S. shipments (million dollars)	16,750	17,500	15,000	13,380	12,850	-4.0
	U.S. exports (million dollars)	3,102	4,040	3,286	2,856	2,660	-6.9
	U.S. imports (million dollars)	3,078	3,566	3,203	3,076	3,208	4.3
	Apparent U.S. consumption (million dollars)	16,726	17,026	14,917	13,600	13,398	-1.5
	Trade balance (million dollars)	24	474	83	-220	-548	-149.0
	Ratio of imports to consumption (percent)	18.4	20.9	21.5	22.6	23.9	5.8
	Ratio of exports to shipments (percent)	18.5	23.1	21.9	21.3	20.7	-2.8

See footnote(s) at end of table.

Table MT-5—Continued

Machinery sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM099	Molds and molding machinery:						
	Number of establishments	120	120	120	120	115	-4.2
	Employees (thousands)	8.0	8.0	8.0	8.0	8.0	0.0
	Capacity utilization (percent)	(¹)	(¹)	(¹)	(¹)	(¹)	(¹)
	U.S. shipments (million dollars)	5,233	5,929	5,001	4,486	4,396	-2.0
	U.S. exports (million dollars)	1,879	2,129	1,791	1,605	1,550	-3.4
	U.S. imports (million dollars)	3,723	3,613	2,803	2,969	3,262	9.9
	Apparent U.S. consumption (million dollars)	7,077	7,413	6,013	5,849	6,108	4.4
	Trade balance (million dollars)	-1,844	-1,484	-1,012	-1,363	-1,712	-25.6
	Ratio of imports to consumption (percent)	52.6	48.7	46.6	50.8	53.4	5.1
	Ratio of exports to shipments (percent)	35.9	35.9	35.8	35.8	35.3	-1.4

¹Not available.²Less than 0.05 percent.³Not meaningful.

Note.—Calculations based on unrounded data.

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

Transportation Equipment

Laura Polly, Coordinator
(202) 205-3408
laura.polly@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$6.8 billion (8 percent) to \$89.3 billion
U.S. exports: Decreased by \$1.7 billion (1 percent) to \$142.9 billion
U.S. imports: Increased by \$5.1 billion (2 percent) to \$232.2 billion

The transportation equipment trade deficit increased over 8 percent in 2003, and the sectors that contributed significantly to this shift include motor vehicle parts, aircraft, and internal combustion engines (see tables TE-1 and TE-2). U.S. imports of motor vehicles increased in 2003, but were offset by increased exports; therefore, the deficit in motor vehicles decreased slightly in 2003 (see Motor Vehicles). A decline in U.S. aircraft exports reflected the depressed demand for air travel and the poor financial condition of many of the world's airlines (see Aircraft, Spacecraft, and Related Equipment). Trade shifts in the motor-vehicle parts and engine sectors are reflective of the U.S. and foreign automotive firms' global production and sourcing strategies (see Certain Motor-Vehicle Parts and Internal Combustion Engines, Other Than For Aircraft).

Canada continued to be the largest bilateral trading partner in transportation equipment, accounting for 29 percent of U.S. transportation equipment imports and 34 percent of U.S. transportation equipment exports in 2003 (see table TE-1). The automotive industries in the United States and Canada are highly integrated, leading to large volumes of two-way trade in motor vehicles and motor-vehicle parts. Japan and Mexico are also leading U.S. trading partners in transportation equipment. Japan is a leading motor vehicle and motor-vehicle parts producer; U.S. demand for vehicles from Japan, as well as demand for Japanese motor-vehicle parts for use in vehicle assembly in the United States by "transplants" from Japan, accounts for a significant portion of transportation equipment trade with Japan. Over the last decade, Mexico has grown both as a global automotive producer and as a U.S. trading partner in the automotive sector.

During 1999-2003, U.S. transportation equipment imports from Korea grew by an average annual rate of 25 percent. Imports of motor vehicles displayed a similar trend during the period, growing by an average annual rate of 29 percent. Moreover, motor vehicles as a percentage of transportation equipment imports from Korea grew from 71 percent in 1999 to 80 percent in 2003. Quality improvements and competitive pricing have helped Korean automakers increase their share of the U.S. passenger vehicle market.

Table TE-1

Transportation equipment: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
Canada	48,132	48,387	44,207	46,733	48,568	1,835	3.9
Japan	8,458	7,825	6,812	8,099	8,402	304	3.7
Mexico	11,588	15,285	14,953	14,524	13,725	-798	-5.5
Germany	6,515	6,935	7,452	6,961	7,932	971	13.9
United Kingdom	10,303	8,957	9,234	6,970	7,526	556	8.0
Korea	2,664	2,970	3,510	3,364	2,809	-555	-16.5
France	5,700	5,164	5,760	6,042	4,288	-1,754	-29.0
China	2,888	2,368	3,198	4,293	3,757	-535	-12.5
Brazil	2,483	2,611	3,855	3,116	2,458	-658	-21.1
Italy	1,869	1,474	1,555	2,651	2,722	72	2.7
All other	45,117	41,416	43,789	41,903	40,759	-1,144	-2.7
Total	145,716	143,393	144,325	144,655	142,948	-1,707	-1.2
EU-15	36,792	34,148	33,844	31,778	32,237	459	1.4
OPEC	7,510	5,750	5,832	5,641	4,769	-872	-15.5
Latin America	19,980	23,446	23,859	22,226	20,303	-1,922	-8.6
CBERA	1,709	1,916	1,473	1,756	1,700	-56	-3.2
Asia	22,938	20,726	24,123	25,073	24,576	-497	-2.0
Sub-Saharan Africa	1,695	1,796	2,856	1,877	2,284	408	21.7
Central and Eastern Europe	427	450	523	389	751	363	93.3
U.S. imports of merchandise for consumption:							
Canada	68,517	69,296	64,781	65,462	66,727	1,265	1.9
Japan	49,425	54,226	52,200	55,583	53,274	-2,309	-4.2
Mexico	24,798	31,373	31,046	31,117	30,664	-453	-1.5
Germany	21,225	22,973	23,916	24,978	27,346	2,368	9.5
United Kingdom	9,681	9,408	9,831	10,147	10,485	337	3.3
Korea	4,093	6,152	7,810	8,282	9,836	1,554	18.8
France	7,800	9,696	10,437	9,161	7,941	-1,221	-13.3
China	1,220	1,991	1,773	2,302	3,072	769	33.4
Brazil	2,475	2,727	3,463	3,739	3,877	138	3.7
Italy	2,076	2,230	2,388	2,395	2,425	30	1.3
All other	12,249	13,169	14,264	13,980	16,567	2,587	18.5
Total	203,560	223,242	221,907	227,147	232,212	5,065	2.2
EU-15	47,863	51,499	54,414	53,599	56,103	2,504	4.7
OPEC	350	355	339	344	501	157	45.6
Latin America	27,602	34,465	34,821	35,223	34,929	-294	-0.8
CBERA	50	58	60	70	69	-1	-2.0
Asia	57,097	64,947	64,395	69,115	69,476	361	0.5
Sub-Saharan Africa	201	185	399	621	823	202	32.6
Central and Eastern Europe	397	609	799	842	1,769	927	110.1

See footnote(s) at end of table.

Table TE-1--Continued

Transportation equipment: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. merchandise trade balance:							
Canada	-20,385	-20,908	-20,574	-18,730	-18,159	571	3.0
Japan	-40,968	-46,400	-45,388	-47,484	-44,872	2,612	5.5
Mexico	-13,210	-16,088	-16,093	-16,593	-16,939	-345	-2.1
Germany	-14,710	-16,039	-16,464	-18,017	-19,414	-1,397	-7.8
United Kingdom	621	-451	-597	-3,177	-2,958	219	6.9
Korea	-1,428	-3,182	-4,300	-4,918	-7,027	-2,109	-42.9
France	-2,100	-4,531	-4,677	-3,119	-3,652	-533	-17.1
China	1,668	377	1,425	1,990	686	-1,304	-65.5
Brazil	8	-116	392	-623	-1,419	-796	-127.8
Italy	-207	-756	-833	256	297	41	16.2
All other	32,869	28,247	29,526	27,923	24,192	-3,731	-13.4
Total	-57,843	-79,849	-77,583	-82,492	-89,264	-6,772	-8.2
EU-15	-11,072	-17,350	-20,570	-21,820	-23,866	-2,045	-9.4
OPEC	7,160	5,394	5,492	5,297	4,269	-1,029	-19.4
Latin America	-7,622	-11,019	-10,961	-12,997	-14,625	-1,628	-12.5
CBERA	1,659	1,858	1,414	1,686	1,631	-55	-3.3
Asia	-34,159	-44,221	-40,272	-44,042	-44,900	-857	-1.9
Sub-Saharan Africa	1,494	1,610	2,457	1,256	1,461	206	16.4
Central and Eastern Europe	30	-159	-276	-453	-1,017	-564	-124.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table TE-2
Leading changes in U.S. exports and imports of transportation equipment, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. EXPORTS:							
Increases:							
Motor vehicles (ET009)	22,116	22,865	22,651	26,209	29,379	3,170	12.1
Miscellaneous vehicles and transportation-related equipment (ET012)	2,759	2,939	2,658	2,725	3,187	462	16.9
Rail locomotive and rolling stock (ET008)	1,558	1,336	1,422	1,006	1,386	381	37.8
Decreases:							
Aircraft, spacecraft, and related equipment (ET013) ..	47,762	39,696	42,535	41,447	37,835	-3,612	-8.7
All other	71,521	76,557	75,059	73,268	71,160	-2,107	-2.9
TOTAL	145,716	143,393	144,325	144,655	142,948	-1,707	-1.2
U.S. IMPORTS:							
Increases:							
Certain motor-vehicle parts (ET010)	22,615	25,011	23,977	27,761	30,897	3,135	11.3
Internal combustion piston engines, other than for aircraft (ET002)	14,052	15,532	13,657	14,841	16,250	1,409	9.5
Ships, tugs, pleasure boats, and similar vessels (ET014)	1,246	1,223	1,411	1,413	1,932	519	36.8
Decreases:							
Aircraft engines and gas turbines (ET001)	10,328	10,939	13,548	10,993	8,834	-2,159	-19.6
All other	155,319	170,537	169,315	172,139	174,300	2,161	1.3
TOTAL	203,560	223,242	221,907	227,147	232,212	5,065	2.2

Note.-Calculations based on unrounded data.

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

COMMODITY ANALYSIS

Aircraft, Spacecraft, and Related Equipment

Change in 2003 from 2002:

U.S. trade surplus: Decreased by \$2.9 billion (12 percent) to \$20.9 billion

U.S. exports: Decreased by \$3.6 billion (9 percent) to \$37.8 billion

U.S. imports: Decreased by \$726 million (4 percent) to \$16.9 billion

The U.S. trade surplus for aircraft, spacecraft, and related equipment declined primarily because of a sharp decline in U.S. exports. Decreased exports reflected diminished demand in certain markets for large civil aircraft (LCA). This reduced demand is attributable to the poor financial condition of the world's airlines, owing in part to the decrease in passenger air traffic. The decrease in passenger loads is owing to several factors including concerns over terrorism and contagious diseases such as Severe Acute Respiratory Syndrome and avian influenza. Over the past 5 years, the U.S. trade surplus has fluctuated downward as the market for LCA and parts, the principal goods in this trade, contracted because of the aforementioned concerns as well as increased U.S. imports of foreign LCA.

U.S. exports

U.S. exports of aircraft, spacecraft, and related equipment to Canada, China, and the EU fell in 2003, largely owing to the reduced need for new LCA, given the wide availability of used aircraft¹ and sustained lack of passenger demand for air travel. Taken together, U.S. exports to these markets declined by \$1.6 billion (to \$15.8 billion) and represented 42 percent of all such U.S. exports. The EU accounted for \$11.9 billion, about three-fourths of the total exports to these nations. However, Japan and Mexico increased their consumption of these U.S. goods in 2003 by \$989 million and \$283 million, respectively. The principal exports to Japan and Mexico were LCA; LCA shipments to Japan increased by \$1.1 billion (to \$2.5 billion), while Mexico imported an additional \$266 million worth of LCA, an increase of 885 percent.² Japan purchased some of these aircraft to replace their McDonnell Douglas MD11s, while Mexico's new aircraft will replace some of their aging DC9s.

Peder Andersen
(202) 205-3388
peder.andersen@usitc.gov

¹ As of December 14, 2003, there were 2,093 LCA in storage. Byron Callan, *Commercial Aerospace: Latest Parked Fleet Data - Still Stagnant* (New York: Merrill Lynch, Mar. 19, 2004), p. 3.

² Japan accepted 17 new Boeing aircraft, while Mexico took delivery of 5 aircraft. Boeing Commercial Airplanes Orders and Deliveries, found at <http://active.boeing.com/commercial/orders/>, retrieved Mar. 29, 2004.

Aircraft Engines, Other Gas Turbines, and Parts Thereof

Change in 2003 from 2002:

U.S. trade surplus: Increased by \$1.4 billion (31 percent) to \$5.9 billion

U.S. exports: Decreased by \$757 million (5 percent) to \$14.7 billion

U.S. imports: Decreased by \$2.2 billion (20 percent) to \$8.8 billion

In 2003, the U.S. trade surplus in aircraft engines, other gas turbines, and parts increased because of a steep decline in all U.S. imports of aircraft turbine engine parts and large turbojet engines for aircraft. In addition to reduced U.S. shipments of large civil aircraft (LCA), the principal market for large turbojet engines, the active U.S. fleet has shrunk;³ therefore, maintenance needs have declined, resulting in diminished demand for parts. Over the past 5 years, the U.S. trade surplus for aircraft engines, other gas turbines, and parts fluctuated for several reasons. First, rising production of foreign LCA increased sales and exports of U.S.-made engines. Second, declining fleet usage for airlines throughout the world led to a reduced demand for new engines. Finally, the decline in U.S. production of LCA reduced demand for both domestic- and foreign-built engines.

U.S. imports

Canada, China, Japan, Mexico, and the EU accounted for \$8 billion (91 percent) of all U.S. imports of aircraft engines, other gas turbines, and parts; imports from these countries declined by \$2.1 billion (21 percent) from 2002.⁴ In 2003, the largest dollar decline occurred between the EU and the United States and, as a result, bilateral trade between these partners declined by \$1.5 billion (21 percent) to \$5.6 billion. This decline is largely attributable to a significant drop in U.S. imports of large turbojet engines and parts for such engines from the EU, mirroring the decline in production of U.S. LCA. In addition, trade in used aircraft parts and engines may have also affected overall U.S. demand for imported engines and parts.

Peder Andersen
(202) 205-3388
peder.andersen@usitc.gov

³ The number of passenger jet aircraft is estimated to have decreased by 120 in 2003. *FAA Aerospace Forecasts, Fiscal Years 2004-2015* (Washington, DC: U.S. Department of Transportation, Federal Aviation Administration, Mar. 2004), p. III-51.

⁴ U.S. imports from subject countries amounted to \$10.1 billion in 2002. Compiled from official statistics of the U.S. Department of Commerce.

Motor Vehicles⁵

Change in 2003 from 2002:

U.S. trade deficit: Decreased by \$2.1 billion (2 percent) to \$104.9 billion

U.S. exports: Increased by \$3.2 billion (12 percent) to \$29.4 billion

U.S. imports: Increased by \$1.0 billion (0.8 percent) to \$134.3 billion

The U.S. trade deficit in motor vehicles was reduced in 2003, entirely owing to the 12-percent increase in U.S. exports.⁶ However, U.S. motor vehicle production declined nearly 2 percent in 2003,⁷ and U.S. vehicle sales declined 1 percent.⁸ The most notable deficit decreases were with Canada and Japan whereas the deficit with the EU increased, despite a sizeable increase in U.S. vehicle exports to the EU. Motor vehicle exports showed steady growth during the 5-year period 1999-2003, aside from a slight decrease in 2001. Markets to which U.S. automakers expanded exports included Canada, Germany, Mexico, and more recently, the United Kingdom. However, the deficit fluctuated upward during 1999-2003, beginning the period at \$97.6 billion and reaching \$104.9 billion in 2003, as imports also followed an increasing 5-year trend particularly for popular nameplates from Germany, Korea, and the United Kingdom.

U.S. exports

U.S. exports of motor vehicles continued to register an increase in 2003, of which Canada, the leading market for U.S. exports of motor vehicles, accounted for 59 percent of the growth in value for these exports. Although the value of U.S. exports to Canada increased 11 percent in 2003, the quantity of vehicle exports to Canada decreased 10 percent, indicating that fewer but more expensive vehicles were exported to Canada in 2003. In fact, sales of passenger vehicles in Canada declined by nearly 7 percent in 2003. The U.S. Big Three automakers (General Motors, Ford, and the Chrysler Division of DaimlerChrysler), combined, registered an 11-percent decline in Canadian market share by value, while Japanese automakers with production facilities in the United States increased their share.⁹ The luxury vehicle segment is one of the fastest growing segments of the Canadian passenger car and light truck markets, and Japanese nameplate vehicles have the highest customer satisfaction and loyalty ratings.¹⁰ U.S. motor vehicle exports to the second-leading market, the EU, accounted for 18 percent of the total. Exports to the EU increased 41 percent in 2003, with Germany accounting for 72 percent of these exports. These exports are largely shipments of Mercedes-Benz and BMW models that are produced only in the United States.¹¹

Laura Polly
(202) 205-3408
laura.polly@usitc.gov

⁵ This industry group includes passenger vehicles, trucks, and buses.

⁶ Imports increased by a modest 0.8 percent in 2003.

⁷ *Ward's Automotive Reports*, Jan. 12, 2004, p. 8.

⁸ *Automotive News*, Jan. 12, 2004, p. 51.

⁹ Bob English, "Incentives couldn't help Canada sales in 2003," *Automotive News*, Jan. 19, 2004, p. 42.

¹⁰ Dennis DesRosiers, "Emerging Trends in the Automotive Sector," *Observations 2003*, vol. 17, issue 09, May 15, 2003, found at <http://www.desrosiers.ca/>, retrieved Apr. 21, 2004.

¹¹ *Ward's Automotive Yearbook 2003* (Southfield, MI: Ward's Communications, 2003), pp. 167 and 190.

Internal Combustion Piston Engines, Other Than for Aircraft

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$1.7 billion (98 percent) to \$3.5 billion

U.S. exports: Decreased by \$329 million (3 percent) to \$12.7 billion

U.S. imports: Increased by \$1.4 billion (10 percent) to \$16.3 billion

The trade deficit in motor-vehicle engines and related components nearly doubled to \$3.5 billion in 2003, in part as the result of increased foreign sourcing by U.S.-based vehicle producers from related operations. Similar to the larger automotive industry, trade shifts in the engine sector often reflect U.S. and foreign automotive firms' global production/sourcing strategies, intracompany shipments, vehicle model changes, and increased internationalization of the industry. Extensive U.S. industry linkages with counterparts in Canada, Mexico, Japan, and Germany contribute to their dominance of sector trade. These four countries accounted for 84 percent (\$13.6 billion) of U.S. imports and 74 percent (\$9.5 billion) of U.S. exports in 2003.

The NAFTA created a highly integrated North American motor vehicle industry, with NAFTA partners Canada and Mexico consistently ranking as leading U.S. trade partners. During 2002-03, U.S. imports of engines and related parts from Canada increased nearly 10 percent to \$3.8 billion, and imports from Mexico increased 15 percent to \$3.0 billion. Expansions of engine facilities in Canada by Ford¹² and increased sourcing of engine parts from Mexico,¹³ for example, have contributed to this import increase. The sourcing of engines and related parts from facilities in Japan for the growing U.S. motor vehicle and engine output of Japanese transplants is one of the principal factors contributing to Japan's role as a leading trade partner in these products. Increased collaboration among U.S. vehicle makers in the development and production of motor-vehicle engines has also impacted bilateral trade in these products. U.S. imports from Japan remained fairly stable during the period, totaling nearly \$5 billion in 2003. The growth in sector imports from Germany is largely attributable to the increase in the number of models produced at U.S. vehicle assembly plants owned by BMW and Mercedes-Benz, which source engines from their operations in Germany. U.S. imports from Germany rose 13 percent in 2003 to \$1.8 billion.

Deborah A. McNay
(202) 205-3425
deborah.mcnay@usitc.gov

¹² "Ford V-8 Production Not Letting Up," *Ward's Automotive Reports*, May 8, 2003, p. 2.

¹³ "Metaldyne Open to Low-Volume Engine Job," *Ward's Automotive Reports*, Feb. 3, 2003, p. 7.

Certain Motor-Vehicle Parts¹⁴

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$4.2 billion (375 percent) to \$5.3 billion

U.S. exports: Decreased by \$1.0 billion (4 percent) to \$25.6 billion

U.S. imports: Increased by \$3.1 billion (11 percent) to \$30.9 billion

The trade deficit in certain motor-vehicle parts nearly quintupled to \$5.3 billion in 2003, as imports from leading suppliers with strong links to the U.S.-based motor-vehicle industry experienced further growth. The NAFTA continues to facilitate motor-vehicle parts trade within the North American industry, which in 2003 reported a 3-percent decline in motor vehicle production to 16.3 million units,¹⁵ following a 5-percent rise in vehicle production in 2002. Producers in Canada and Mexico manufacture a wide variety of vehicle components that not only incorporate significant U.S. content, but are often used in the assembly of U.S.-made vehicles, contributing to large bilateral trade flows with the United States. Japan and Germany remain leading trade partners in vehicle components, in part because of the numerous Japanese and German transplants that incorporate motor-vehicle parts from their home supplier networks in their U.S.-produced motor vehicles.

U.S. imports

The 11-percent increase in U.S. imports of motor-vehicle parts in 2003 was led by growth in miscellaneous motor-vehicle body parts (up 14 percent to \$6.4 billion), miscellaneous motor-vehicle parts (up 14 percent to \$5.0 billion), and gear boxes for passenger vehicles (up 12 percent to \$3.2 billion). Canada, Mexico, Japan, and Germany, which accounted for 80 percent of total U.S. imports of motor-vehicle parts, were the leading suppliers to the U.S. market.

NAFTA partners Canada and Mexico accounted for 52 percent of total U.S. imports of motor-vehicle parts in 2003, reflecting their critical role in the highly integrated North American automotive industry. U.S. imports from Canada increased 9 percent to \$10.6 billion during 2002-03, despite a stronger Canadian dollar. The motor-vehicle parts industry in Canada reportedly benefits from an emphasis on the manufacture of value-added components and a decade of investments in equipment and technology focused on productivity improvements,¹⁶ as well as a 15-percent labor-cost advantage over its U.S. counterpart.¹⁷ Imports from Mexico rose at a slower rate of 7 percent during the same period, to \$5.5 billion. According to industry sources, the continued depreciation of the Mexican peso compared with the U.S. dollar in 2003, and increased demand for replacement parts, boosted U.S. imports from Mexico.¹⁸ Imports from Japan, the second leading supplier of U.S. motor-vehicle components with 23 percent of imports, increased 12 percent to \$7.1 billion. The large base of transplant producers from Japan in the United States manufacturing a greater volume of motor vehicles, increased efforts by component producers in Japan to diversify their customer base, and the relatively weak yen in 2003 contributed to the growth in the level of imports from Japan. The growth of U.S. imports from Germany,

¹⁴ This commodity group includes body stampings, bumpers, brakes and parts, gear boxes, axles, wheels, shock absorbers, radiators, exhaust systems, clutches, steering wheels, and miscellaneous parts and accessories.

¹⁵ "North America Car and Truck Production," found at <http://www.autonews.com/images/dataCenter/1972.pdf>, retrieved Mar. 10, 2004.

¹⁶ "Canadian Auto Report," Scotia Economics, Feb. 27, 2004, found at <http://www.scotiabank.com>, retrieved Mar. 10, 2004.

¹⁷ AutoBriefs, Mar. 5, 2004, electronic newspaper published by KPMG Corporate Finance Inc., p. 1.

¹⁸ "Mexico's Auto Parts Exports to Get Boost From Weak Peso," *The AutoParts Report*, Mar. 19, 2003, p. 4.

which increased 31 percent to \$1.6 billion in 2003, reflects sourcing from component suppliers in Germany for the expanding U.S.-based vehicle assembly plants of BMW and Mercedes-Benz.

Deborah A. McNay
(202) 205-3425
deborah.mcnay@usitc.gov

Table TE-3

Transportation equipment : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
							<i>Million dollars</i>	
ET001	Aircraft engines and gas turbines:							
	Exports	14,218	15,011	16,524	15,498	14,742	-757	-4.9
	Imports	10,328	10,939	13,548	10,993	8,834	-2,159	-19.6
	Trade balance	3,889	4,072	2,976	4,505	5,907	1,402	31.1
ET002	Internal combustion piston engines, other than for aircraft:							
	Exports	12,522	13,808	12,408	13,069	12,741	-329	-2.5
	Imports	14,052	15,532	13,657	14,841	16,250	1,409	9.5
	Trade balance	-1,530	-1,724	-1,249	-1,771	-3,509	-1,738	-98.1
ET003	Forklift trucks and similar industrial vehicles:							
	Exports	1,243	1,332	1,341	1,090	1,028	-62	-5.7
	Imports	1,527	1,668	1,423	1,266	1,408	142	11.2
	Trade balance	-284	-337	-82	-176	-381	-205	-116.1
ET004	Construction and mining equipment:							
	Exports	8,646	9,507	9,903	9,504	9,461	-43	-0.4
	Imports	5,919	5,643	5,260	5,302	5,904	602	11.4
	Trade balance	2,727	3,864	4,643	4,202	3,557	-645	-15.3
ET005	Ball and rollers bearings:							
	Exports	1,098	1,242	1,197	1,249	1,320	71	5.7
	Imports	1,622	1,804	1,579	1,598	1,680	82	5.1
	Trade balance	-524	-562	-381	-349	-360	-11	-3.1
ET006	Primary cells and batteries and electric storage batteries:							
	Exports	2,307	2,655	2,270	1,807	1,786	-21	-1.1
	Imports	2,392	2,656	2,342	2,196	2,175	-21	-0.9
	Trade balance	-84	-1	-72	-389	-389	(³)	(⁴)
ET007	Ignition, starting, lighting, and other electrical equipment:							
	Exports	1,947	1,986	1,824	1,894	1,822	-72	-3.8
	Imports	2,817	3,076	3,052	3,467	3,858	391	11.3
	Trade balance	-870	-1,090	-1,228	-1,574	-2,036	-462	-29.4
ET008	Rail locomotive and rolling stock:							
	Exports	1,558	1,336	1,422	1,006	1,386	381	37.8
	Imports	2,307	1,828	1,357	1,039	1,105	65	6.3
	Trade balance	-749	-492	65	-33	282	315	(⁵)
ET009	Motor vehicles:							
	Exports	22,116	22,865	22,651	26,209	29,379	3,170	12.1
	Imports	119,675	129,568	127,257	133,264	134,286	1,022	0.8
	Trade balance	-97,559	-106,703	-104,606	-107,054	-104,907	2,148	2.0
ET010	Certain motor-vehicle parts:							
	Exports	26,997	28,917	26,521	26,651	25,625	-1,027	-3.9
	Imports	22,615	25,011	23,977	27,761	30,897	3,135	11.3
	Trade balance	4,382	3,907	2,544	-1,110	-5,272	-4,162	-374.9
ET011	Motorcycles, mopeds, and parts:							
	Exports	468	563	742	793	864	71	8.9
	Imports	1,755	2,519	2,870	2,927	3,213	286	9.8
	Trade balance	-1,287	-1,956	-2,128	-2,134	-2,349	-216	-10.1

See footnote(s) at end of table.

Table TE-3--Continued

Transportation equipment : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
ET012	Miscellaneous vehicles and transportation-related equipment							
	Exports	2,759	2,939	2,658	2,725	3,187	462	16.9
	Imports	2,056	2,982	2,364	2,744	2,926	182	6.6
	Trade balance	703	-43	293	-19	261	279	(⁵)
ET013	Aircraft, spacecraft, and related equipment							
	Exports	47,762	39,696	42,535	41,447	37,835	-3,612	-8.7
	Imports	14,592	18,019	21,027	17,636	16,910	-726	-4.1
	Trade balance	33,171	21,677	21,508	23,811	20,924	-2,886	-12.1
ET014	Ships, tugs, pleasure boats, and similar vessels:							
	Exports	1,682	1,083	1,820	1,234	1,195	-39	-3.1
	Imports	1,246	1,223	1,411	1,413	1,932	519	36.8
	Trade balance	437	-140	410	-179	-736	-558	-312.3
ET015	Motors and engines, except internal combustion, aircraft, or electric:							
	Exports	394	453	508	479	578	99	20.7
	Imports	658	772	784	700	834	134	19.1
	Trade balance	-264	-319	-276	-221	-256	-35	-15.8

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Less than \$500,000.⁴Less than 0.05 percent.⁵Not meaningful for purposes of comparison.

Note.—Calculations based on unrounded data.

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

Table TE-4

Transportation equipment sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET001	Aircraft engines and gas turbines:						
	Number of establishments	28	28	27	27	25	-7.4
	Employees (thousands)	110.0	103.0	109.0	99.0	94.0	-5.1
	Capacity utilization (percent)	(¹)	(¹)	80	75	75	0.0
	U.S. shipments (million dollars)	26,642	29,226	35,051	45,000	40,996	-8.9
	U.S. exports (million dollars)	14,218	15,011	16,524	15,498	14,742	-4.9
	U.S. imports (million dollars)	10,328	10,939	13,548	10,993	8,834	-19.6
	Apparent U.S. consumption (million dollars)	22,753	25,154	32,075	40,495	35,089	-13.3
	Trade balance (million dollars)	3,889	4,072	2,976	4,505	5,907	31.1
	Ratio of imports to consumption (percent)	45.4	43.5	42.2	27.1	25.2	-7.0
	Ratio of exports to shipments (percent)	53.4	51.4	47.1	34.4	36.0	4.7
ET002	Internal combustion piston engines, other than for aircraft:						
	Number of establishments	1,500	1,500	1,450	1,450	1,450	0.0
	Employees (thousands)	157.0	157.0	156.0	155.0	150.0	-3.2
	Capacity utilization (percent)	83	75	75	78	(²)	(²)
	U.S. shipments (million dollars)	54,000	54,000	48,000	50,500	49,000	-3.0
	U.S. exports (million dollars)	12,522	13,808	12,408	13,069	12,741	-2.5
	U.S. imports (million dollars)	14,052	15,532	13,657	14,841	16,250	9.5
	Apparent U.S. consumption (million dollars)	55,530	55,724	49,249	52,271	52,509	0.5
	Trade balance (million dollars)	-1,530	-1,724	-1,249	-1,771	-3,509	-98.1
	Ratio of imports to consumption (percent)	25.3	27.9	27.7	28.4	30.9	8.8
	Ratio of exports to shipments (percent)	23.2	25.6	25.9	25.9	26.0	(³)
ET003	Forklift trucks and similar industrial vehicles:						
	Number of establishments	453	451	451	450	448	-0.4
	Employees (thousands)	27.0	26.0	26.0	25.0	24.0	-4.0
	Capacity utilization (percent)	67	64	60	60	58	-3.3
	U.S. shipments (million dollars)	5,155	5,493	4,763	4,525	4,072	-10.0
	U.S. exports (million dollars)	1,243	1,332	1,341	1,090	1,028	-5.7
	U.S. imports (million dollars)	1,527	1,668	1,423	1,266	1,408	11.2
	Apparent U.S. consumption (million dollars)	5,439	5,830	4,845	4,701	4,453	-5.3
	Trade balance (million dollars)	-284	-337	-82	-176	-381	-116.1
	Ratio of imports to consumption (percent)	28.1	28.6	29.4	26.9	31.6	17.5
	Ratio of exports to shipments (percent)	24.1	24.2	28.2	24.1	25.2	4.6

See footnote(s) at end of table.

Table TE-4—Continued

Transportation equipment sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET004	Construction and mining equipment						
	Number of establishments	1,664	1,667	1,655	1,655	1,650	-0.3
	Employees (thousands)	140.0	137.0	130.0	130.0	128.0	-1.5
	Capacity utilization (percent)	63	61	59	58	57	-1.7
	U.S. shipments (million dollars)	25,783	26,112	25,169	23,911	21,520	-10.0
	U.S. exports (million dollars)	8,646	9,507	9,903	9,504	9,461	-0.4
	U.S. imports (million dollars)	5,919	5,643	5,260	5,302	5,904	11.4
	Apparent U.S. consumption (million dollars)	23,056	22,248	20,526	19,709	17,963	-8.9
	Trade balance (million dollars)	2,727	3,864	4,643	4,202	3,557	-15.3
	Ratio of imports to consumption (percent)	25.7	25.4	25.6	26.9	32.9	22.3
	Ratio of exports to shipments (percent)	33.5	36.4	39.3	39.7	44.0	10.8
ET005	Ball and rollers bearings:						
	Number of establishments	183	183	183	181	181	0.0
	Employees (thousands)	37.0	36.0	36.0	35.0	35.0	0.0
	Capacity utilization (percent)	80	73	74	62	64	3.2
	U.S. shipments (million dollars)	6,331	6,500	5,766	5,881	6,175	5.0
	U.S. exports (million dollars)	1,098	1,242	1,197	1,249	1,320	5.7
	U.S. imports (million dollars)	1,622	1,804	1,579	1,598	1,680	5.1
	Apparent U.S. consumption (million dollars)	6,855	7,062	6,147	6,230	6,535	4.9
	Trade balance (million dollars)	-524	-562	-381	-349	-360	-3.1
	Ratio of imports to consumption (percent)	23.7	25.5	25.7	25.6	25.7	(³)
	Ratio of exports to shipments (percent)	17.3	19.1	20.8	21.2	21.4	0.9
ET006	Primary cells and batteries and electric storage batteries:						
	Number of establishments	180	180	170	165	165	0.0
	Employees (thousands)	32.0	32.0	30.0	28.0	28.0	0.0
	Capacity utilization (percent)	81	71	71	75	(²)	(²)
	U.S. shipments (million dollars)	7,600	7,800	7,000	7,350	7,100	-3.4
	U.S. exports (million dollars)	2,307	2,655	2,270	1,807	1,786	-1.1
	U.S. imports (million dollars)	2,392	2,656	2,342	2,196	2,175	-0.9
	Apparent U.S. consumption (million dollars)	7,684	7,801	7,072	7,739	7,489	-3.2
	Trade balance (million dollars)	-84	-1	-72	-389	-389	0.0
	Ratio of imports to consumption (percent)	31.1	34.0	33.1	28.4	29.0	2.1
	Ratio of exports to shipments (percent)	30.4	34.0	32.4	24.6	25.2	2.4

See footnote(s) at end of table.

Table TE-4—Continued

Transportation equipment sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET007	Ignition, starting, lighting, and other electrical equipment						
	Number of establishments	700	700	670	670	670	0.0
	Employees (thousands)	77.0	80.0	80.0	80.0	80.0	0.0
	Capacity utilization (percent)	79	73	73	75	(²)	(²)
	U.S. shipments (million dollars)	17,600	17,500	15,600	16,400	15,900	-3.0
	U.S. exports (million dollars)	1,947	1,986	1,824	1,894	1,822	-3.8
	U.S. imports (million dollars)	2,817	3,076	3,052	3,467	3,858	11.3
	Apparent U.S. consumption (million dollars)	18,470	18,590	16,828	17,974	17,936	-0.2
	Trade balance (million dollars)	-870	-1,090	-1,228	-1,574	-2,036	-29.4
	Ratio of imports to consumption (percent)	15.3	16.5	18.1	19.3	21.5	11.4
	Ratio of exports to shipments (percent)	11.1	11.3	11.7	11.5	11.5	0.0
ET008	Rail locomotive and rolling stock:						
	Number of establishments	190	190	180	180	180	0.0
	Employees (thousands)	32.0	30.0	26.0	27.0	27.0	0.0
	Capacity utilization (percent)	76	69	65	65	70	7.7
	U.S. shipments (million dollars)	7,600	7,400	4,500	4,500	4,700	4.4
	U.S. exports (million dollars)	1,558	1,336	1,422	1,006	1,386	37.8
	U.S. imports (million dollars)	2,307	1,828	1,357	1,039	1,105	6.3
	Apparent U.S. consumption (million dollars)	8,349	7,892	4,435	4,533	4,418	-2.5
	Trade balance (million dollars)	-749	-492	65	-33	282	(⁴)
	Ratio of imports to consumption (percent)	27.6	23.2	30.6	22.9	25.0	9.2
	Ratio of exports to shipments (percent)	20.5	18.0	31.6	22.4	29.5	31.7
ET009	Motor vehicles:						
	Number of establishments	1,290	1,295	1,300	1,305	1,307	(³)
	Employees (thousands)	291.0	291.0	279.0	265.0	275.0	3.8
	Capacity utilization (percent)	96	95	84	85	85	0.0
	U.S. shipments (million dollars)	279,018	251,031	227,002	242,892	238,034	-2.0
	U.S. exports (million dollars)	22,116	22,865	22,651	26,209	29,379	12.1
	U.S. imports (million dollars)	119,675	129,568	127,257	133,264	134,286	0.8
	Apparent U.S. consumption (million dollars)	376,577	357,734	331,608	349,946	342,941	-2.0
	Trade balance (million dollars)	-97,559	-106,703	-104,606	-107,054	-104,907	2.0
	Ratio of imports to consumption (percent)	31.8	36.2	38.4	38.1	39.2	2.9
	Ratio of exports to shipments (percent)	7.9	9.1	10.0	10.8	12.3	13.9

See footnote(s) at end of table.

Table TE-4—Continued

Transportation equipment sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET010	Certain motor-vehicle parts:						
	Number of establishments	3,300	3,300	3,150	3,125	3,125	0.0
	Employees (thousands)	550.0	550.0	545.0	525.0	525.0	0.0
	Capacity utilization (percent)	81	75	75	80	(²)	(²)
	U.S. shipments (million dollars)	135,000	137,000	122,000	128,000	124,000	-3.1
	U.S. exports (million dollars)	26,997	28,917	26,521	26,651	25,625	-3.9
	U.S. imports (million dollars)	22,615	25,011	23,977	27,761	30,897	11.3
	Apparent U.S. consumption (million dollars)	130,618	133,093	119,456	129,110	129,272	(³)
	Trade balance (million dollars)	4,382	3,907	2,544	-1,110	-5,272	-374.9
	Ratio of imports to consumption (percent)	17.3	18.8	20.1	21.5	23.9	11.2
	Ratio of exports to shipments (percent)	20.0	21.1	21.7	20.8	20.7	-0.5
ET011	Motorcycles, mopeds, and parts:						
	Number of establishments	50	55	60	60	60	0.0
	Employees (thousands)	9.0	10.0	11.0	12.0	12.0	0.0
	Capacity utilization (percent)	90	85	85	85	85	0.0
	U.S. shipments (million dollars)	3,000	3,500	4,200	5,000	5,500	10.0
	U.S. exports (million dollars)	468	563	742	793	864	8.9
	U.S. imports (million dollars)	1,755	2,519	2,870	2,927	3,213	9.8
	Apparent U.S. consumption (million dollars)	4,287	5,456	6,328	7,134	7,849	10.0
	Trade balance (million dollars)	-1,287	-1,956	-2,128	-2,134	-2,349	-10.1
	Ratio of imports to consumption (percent)	40.9	46.2	45.3	41.0	40.9	-0.2
	Ratio of exports to shipments (percent)	15.6	16.1	17.7	15.9	15.7	-1.3
ET012	Miscellaneous vehicles and transportation-related equipment						
	Number of establishments	1,203	1,203	1,210	1,213	1,217	(³)
	Employees (thousands)	61.0	61.0	62.0	64.0	65.0	1.6
	Capacity utilization (percent)	67	58	60	64	65	1.6
	U.S. shipments (million dollars)	13,830	14,092	14,205	14,915	15,959	7.0
	U.S. exports (million dollars)	2,759	2,939	2,658	2,725	3,187	16.9
	U.S. imports (million dollars)	2,056	2,982	2,364	2,744	2,926	6.6
	Apparent U.S. consumption (million dollars)	13,127	14,135	13,912	14,934	15,698	5.1
	Trade balance (million dollars)	703	-43	293	-19	261	(⁴)
	Ratio of imports to consumption (percent)	15.7	21.1	17.0	18.4	18.6	1.1
	Ratio of exports to shipments (percent)	19.9	20.9	18.7	18.3	20.0	9.3

See footnote(s) at end of table.

Table TE-4—Continued

Transportation equipment sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET013	Aircraft, spacecraft, and related equipment:						
	Number of establishments	230	230	200	210	200	-4.8
	Employees (thousands)	413.0	383.0	381.0	349.0	316.0	-9.5
	Capacity utilization (percent)	95	90	75	75	80	6.7
	U.S. shipments (million dollars)	73,693	61,868	64,765	54,194	48,916	-9.7
	U.S. exports (million dollars)	47,762	39,696	42,535	41,447	37,835	-8.7
	U.S. imports (million dollars)	14,592	18,019	21,027	17,636	16,910	-4.1
	Apparent U.S. consumption (million dollars)	40,522	40,191	43,257	30,383	27,992	-7.9
	Trade balance (million dollars)	33,171	21,677	21,508	23,811	20,924	-12.1
	Ratio of imports to consumption (percent)	36.0	44.8	48.6	58.0	60.4	4.1
	Ratio of exports to shipments (percent)	64.8	64.2	65.7	76.5	77.3	1.0
ET014	Ships, tugs, pleasure boats, and similar vessels:						
	Number of establishments	1,600	1,600	1,600	1,600	1,600	0.0
	Employees (thousands)	113.0	119.0	112.0	113.0	115.0	1.8
	Capacity utilization (percent)	55	56	56	57	60	5.3
	U.S. shipments (million dollars)	14,200	15,200	14,000	14,100	14,300	1.4
	U.S. exports (million dollars)	1,682	1,083	1,820	1,234	1,195	-3.1
	U.S. imports (million dollars)	1,246	1,223	1,411	1,413	1,932	36.8
	Apparent U.S. consumption (million dollars)	13,763	15,340	13,590	14,279	15,036	5.3
	Trade balance (million dollars)	437	-140	410	-179	-736	-312.3
	Ratio of imports to consumption (percent)	9.1	8.0	10.4	9.9	12.8	29.3
	Ratio of exports to shipments (percent)	11.8	7.1	13.0	8.8	8.4	-4.5

See footnote(s) at end of table.

Table TE-4—Continued

Transportation equipment sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET015	Motors and engines, except internal combustion, aircraft, or electric:						
	Number of establishments	350	350	335	335	335	0.0
	Employees (thousands)	40.0	40.0	40.0	40.0	40.0	0.0
	Capacity utilization (percent)	72	68	68	70	⁽²⁾	⁽²⁾
	U.S. shipments (million dollars)	6,500	7,000	6,300	6,600	6,400	-3.0
	U.S. exports (million dollars)	394	453	508	479	578	20.7
	U.S. imports (million dollars)	658	772	784	700	834	19.1
	Apparent U.S. consumption (million dollars)	6,764	7,319	6,576	6,821	6,656	-2.4
	Trade balance (million dollars)	-264	-319	-276	-221	-256	-15.8
	Ratio of imports to consumption (percent)	9.7	10.6	11.9	10.3	12.5	21.4
	Ratio of exports to shipments (percent)	6.1	6.5	8.1	7.3	9.0	23.3

¹Capacity utilization could not be meaningfully calculated for this industry.²Not available.³Less than 0.05 percent.⁴Not meaningful.

Note.—Calculations based on unrounded data.

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

Electronic Products

John Kitzmiller, Coordinator
(202) 205-3387
john.kitzmiller@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit : Increased by \$9.2 billion (10 percent) to \$98.0 billion
U.S. exports: Increased by \$411 million (0.3 percent) to \$140.8 billion
U.S. imports: Increased by \$9.6 billion (4 percent) to \$238.8 billion

The trade deficit in electronics grew for the second consecutive year, as imports of telephone and telegraph apparatus, and television receivers and video monitors, increased; and exports of telephone and telegraph apparatus and of computers, peripherals, and parts declined. Further, the trade surplus in medical goods declined despite continued growth in U.S. exports, as imports grew even more, owing to strong demand for such goods in the United States, the largest healthcare market in the world. Semiconductors and integrated circuits was the only electronics commodity group with a significant increase in its trade surplus (see tables EL-1 and EL-2 and the following sector analyses).

The major markets for U.S. exports of electronics in 2003 were Canada, Mexico, and Japan, which together accounted for 32 percent of sector exports. Exports to all three of these major markets declined, in the case of Mexico by 13 percent. Exports to Malaysia and China increased significantly, by over 21 percent in both cases, but combined they account for only 9 percent of total exports, less than either Canada or Mexico (see table EL-1). Total U.S. exports have declined in part because, as more and more U.S. producers move production offshore, foreign markets are being served by the new foreign factories.

The major sources of U.S. imports of electronics in 2003 were China, Mexico, and Japan, which together accounted for 46 percent of sector imports. Although imports from Mexico and Japan, the second- and third-largest sources, declined 3 percent, or \$2.0 billion, imports from China more than made up for that decline, growing 30 percent to \$47.2 billion. The trade deficit with Japan decreased by almost 6 percent, to \$1.1 billion, while the deficits with China and Mexico increased 31 percent to \$41.2 billion, and by 13 percent to \$18.1 billion, respectively.

China passed Mexico to become the United States' largest trading partner in 2003. Since its entry into the WTO, China has drawn production from the United States and Mexico,¹ and from other Asian

¹ Anna Willard, "China to Double Electronic Manufacturing Share," June 4, 2003, found at <http://in.tech.yahoo.com/030603/137/24uuz.html>, retrieved May 6, 2004; China-Window.com., "China Investment Environment," Mar. 24, 2004, found at http://www.china-window.com/china/market/investment_in_china/china-investment-environm.shtml, retrieved May 6, 2004.

Table EL-1

Electronic products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
China	2,942	3,926	4,892	4,855	5,934	1,079	22.2
Mexico	19,562	24,644	20,798	18,965	16,414	-2,552	-13.5
Japan	14,906	17,795	15,393	11,810	11,348	-462	-3.9
Malaysia	5,798	6,846	5,145	5,997	7,290	1,293	21.6
Canada	22,049	25,007	20,108	17,025	16,637	-388	-2.3
Korea	9,189	10,562	6,479	6,380	7,085	705	11.1
Taiwan	5,246	7,205	5,661	5,961	5,555	-405	-6.8
Germany	8,093	8,653	8,787	7,639	7,633	-7	-0.1
Singapore	6,702	7,316	5,193	4,600	4,992	392	8.5
United Kingdom	10,047	11,978	9,748	7,432	7,065	-367	-4.9
All other	57,613	65,056	58,406	49,764	50,887	1,122	2.3
Total	162,146	188,989	160,610	140,428	140,838	411	0.3
EU-15	40,836	46,431	41,819	34,805	34,703	-102	-0.3
OPEC	2,209	2,207	2,462	1,981	1,888	-94	-4.7
Latin America	31,218	37,182	31,759	27,705	24,648	-3,056	-11.0
CBERA	2,359	2,404	2,505	2,883	3,098	215	7.5
Asia	57,257	69,210	56,809	51,835	55,638	3,804	7.3
Sub-Saharan Africa	768	703	700	637	778	141	22.1
Central and Eastern Europe	841	866	872	823	942	119	14.4
U.S. imports of merchandise for consumption:							
China	20,917	27,588	27,231	36,270	47,150	10,881	30.0
Mexico	28,793	37,207	37,221	35,029	34,560	-470	-1.3
Japan	44,018	49,888	35,676	30,745	29,177	-1,569	-5.1
Malaysia	16,953	20,550	17,751	19,501	20,695	1,195	6.1
Canada	14,609	21,200	13,868	10,605	9,768	-836	-7.9
Korea	16,100	21,400	15,409	15,411	15,955	544	3.5
Taiwan	18,399	22,429	17,391	16,594	15,654	-940	-5.7
Germany	6,572	7,399	7,242	7,295	7,983	688	9.4
Singapore	14,916	15,362	11,462	10,669	10,066	-603	-5.6
United Kingdom	5,970	7,097	5,805	4,597	4,795	198	4.3
All other	41,221	47,734	40,515	42,530	43,030	501	1.2
Total	228,469	277,854	229,571	229,245	238,833	9,588	4.2
EU-15	24,822	28,630	26,545	27,220	28,986	1,765	6.5
OPEC	2,094	2,386	2,300	2,093	1,761	-332	-15.8
Latin America	31,867	40,277	40,186	38,299	38,105	-194	-0.5
CBERA	2,496	2,091	1,510	1,732	2,164	432	25.0
Asia	150,028	178,245	141,280	145,645	153,491	7,846	5.4
Sub-Saharan Africa	56	58	53	50	66	17	33.4
Central and Eastern Europe	1,449	1,816	1,327	1,207	1,425	218	18.1

See footnote(s) at end of table.

Table EL-1--Continued

Electronic products: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

						Change, 2003 from 2002	
Item	1999	2000	2001	2002	2003	Absolute	Percent
	Million dollars						
U. S. merchandise trade balance:							
China	-17,975	-23,662	-22,340	-31,414	-41,216	-9,802	-31.2
Mexico	-9,231	-12,563	-16,423	-16,064	-18,146	-2,082	-13.0
Japan	-29,113	-32,093	-20,283	-18,935	-17,829	1,107	5.8
Malaysia	-11,155	-13,704	-12,606	-13,504	-13,406	98	0.7
Canada	7,441	3,807	6,241	6,420	6,869	449	7.0
Korea	-6,911	-10,838	-8,930	-9,031	-8,869	162	1.8
Taiwan	-13,153	-15,225	-11,729	-10,633	-10,099	534	5.0
Germany	1,520	1,254	1,544	345	-350	-695	(²)
Singapore	-8,214	-8,046	-6,269	-6,069	-5,075	995	16.4
United Kingdom	4,076	4,881	3,942	2,835	2,270	-565	-19.9
All other	16,392	17,323	17,891	7,235	7,856	622	8.6
Total	-66,324	-88,865	-68,962	-88,817	-97,994	-9,177	-10.3
EU-15	16,014	17,801	15,274	7,585	5,718	-1,867	-24.6
OPEC	115	-179	161	-111	127	238	(²)
Latin America	-649	-3,095	-8,427	-10,594	-13,457	-2,862	-27.0
CBERA	-137	313	995	1,151	934	-217	-18.9
Asia	-92,771	-109,035	-84,471	-93,811	-97,852	-4,042	-4.3
Sub-Saharan Africa	711	645	648	587	711	124	21.1
Central and Eastern Europe	-608	-950	-455	-383	-483	-99	-25.9

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²Not meaningful for purposes of comparison.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table EL-2
Leading changes in U.S. exports and imports of electronic products, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
						Million dollars	
U.S. EXPORTS:							
Increases:							
Semiconductors and integrated circuits (ET033)	36,615	44,828	33,455	31,738	35,712	3,975	12.5
Decreases:							
Telephone and telegraph apparatus (ET017)	17,717	20,147	16,506	12,952	10,946	-2,007	-15.5
Computers, peripherals, and parts (ET035)	39,300	45,392	38,125	29,534	28,038	-1,496	-5.1
Cathode-ray tubes (ET031)	2,174	2,435	2,056	1,762	1,202	-560	-31.8
All other	66,339	76,186	70,468	64,442	64,941	499	0.8
TOTAL	162,146	188,989	160,610	140,428	140,838	411	0.3
U.S. IMPORTS:							
Increases:							
Telephone and telegraph apparatus (ET017)	20,147	32,130	27,174	27,948	30,982	3,034	10.9
Medical goods (ET040)	7,932	9,178	10,869	13,232	16,143	2,911	22.0
Television receivers and video monitors (ET022)	6,652	7,713	8,615	10,586	12,654	2,067	19.5
Computers, peripherals, and parts (ET035)	81,662	90,384	74,547	75,817	76,940	1,123	1.5
Decreases:							
Semiconductors and integrated circuits (ET033)	37,158	47,448	30,016	25,651	24,190	-1,461	-5.7
All other	74,918	91,002	78,350	76,011	77,924	1,913	2.5
TOTAL	228,469	277,854	229,571	229,245	238,833	9,588	4.2

Note.-Calculations based on unrounded data.

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

countries, primarily because of low labor rates² and Chinese Government policies promoting foreign investment in China.³ China is endeavoring to become a producer of high-technology products and a more sophisticated marketer.⁴

² Daniel H. Rosen, "How China is Eating Mexico's Lunch: the Maquiladora System's Comparative Advantage is Being Challenged Head On, *The International Economy*, Spring 2003, found at http://www.findarticles.com/cf_dls/m2633/2_17/100545301/p1/article.jhtml, retrieved May 6, 2004; Chinafacturing Solutions, LLC, "Labor Costs in China: Comparative Costs by Region," found at http://www.chinafacturing.com/china_labor_costs.html, retrieved May 6, 2004.

³ "China to Promote Exports of Electronic, Machinery Products," *People's Daily*, Mar. 27, 2003, found at http://english.peopledaily.com.cn/200303/27/eng20030327_114049.shtml, retrieved Apr. 9, 2004.

⁴ Ibid.

Computers, Peripherals, and Parts

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$2.6 billion (6 percent) to \$48.9 billion

U.S. exports: Decreased by \$1.5 billion (5 percent) to \$28.0 billion

U.S. imports: Increased by \$1.1 billion (2 percent) to \$76.9 billion

The computer hardware industry⁵ experienced an increase in U.S. imports, most notably from China, and a decrease in U.S. exports during 2003. Factors leading to the shifts in trade include the continued movement in recent years of U.S. computer hardware production to countries such as China and increased consumer purchases of personal computers (PCs).⁶

U.S. exports

U.S. exports of computer hardware decreased by approximately \$1.5 billion in 2003. U.S. exports of computer hardware to most of its major trading partners declined with the exception of a few countries. Exports to China, Singapore, and Thailand increased by approximately \$591 million in 2003, consisting primarily of computer parts and subassemblies.

The decline in U.S. exports can be attributed to two major factors: depressed worldwide business information technology (IT) expenditures and the decrease in U.S. production. A cautious spending approach by the international business market in IT purchases⁷ kept demand low for U.S. exports of computer hardware. U.S. and foreign corporate IT spending remained limited as businesses evaluated their IT needs in 2003, deciding against making large purchases, if possible.⁸ The shift of capital, production, and technology offshore, especially to China, by U.S. manufacturers,⁹ resulted in lower U.S. exports to serve foreign markets. China provides several benefits to manufacturers, such as low-cost labor coupled with an increasingly skilled labor force, greater levels of performance, and improvements in manufacturing productivity.¹⁰

U.S. imports

U.S. imports of computer hardware increased by approximately \$1.1 billion in 2003, primarily attributable to a significant increase in low-cost imports from China which increased 48 percent to \$22.1 billion. Imports from most other U.S. major trading partners decreased substantially owing to a general pattern of production shifting to China. An exception was Malaysia from which imports

⁵ The computer hardware industry can be divided into three main segments: personal computers (including notebooks), servers (including mainframes and supercomputers), and workstations. The PC segment is the largest sector of the computer hardware industry in terms of units and dollars. Standard & Poor's, "Industry Surveys, Computers: Hardware," Dec. 11, 2003, p. 1 and p. 7.

⁶ Worldwide personal computer unit shipments increased 11 percent. Semiconductor Industry Association, "Global Semiconductor Sales Up 18.3% in 2003," found at http://www.semichips.org/pre_release.cfm?ID=299, retrieved Mar. 25, 2004.

⁷ Standard & Poor's, "Industry Surveys, Computers: Hardware," p. 20.

⁸ "Global IT Spending Remains Flat Amidst Tentative Signs of U.S. Economic Recovery, According to IDC," Jul. 16, 2003, found at http://www.idc.com/getdoc.jsp?containerId=pr2003_07_15_150906, retrieved May 6, 2004; Dinesh C. Sharma, "IT Spending Remains Low, Study Says," found at <http://www.news.com.com/2100-1010-5107545.html>, retrieved May 6, 2004; and Dinesh C. Sharma, "Study: IT Spending to Improve in 2004," found at <http://news.com.com/2100-1012-5154580.html>, retrieved May 6, 2004.

⁹ Taizo Nishimuro, JEF/CSIS Conference, "Chinese Economic Development: Implications for the Global Economy," Oct. 15, 2003, found at http://www.csis.org/china/031015_nishimuro.pdf, retrieved Mar. 25, 2004.

¹⁰ CNET news.com, "Behind the Asian outsourcing phenomenon," found at <http://news.com.com/2030-1069-5162352.html>, retrieved Mar. 25, 2004.

increased 10 percent to \$10.0 billion. Most of the increase in imports from Malaysia consisted of portable automatic data processing machines, reflecting a growing demand for notebook computers in the consumer PC market.

A significant shift in production to China from the United States and other computer hardware-producing Asian countries has occurred since China acceded to the World Trade Organization. The Chinese Government has facilitated this shift by creating infrastructure such as industrial parks in special economic zones for the manufacturing industry.¹¹ Fourteen of the world's top 20 monitor display manufacturers and 6 notebook computer makers from Taiwan have built factories in China.¹² Major U.S. computer hardware original equipment manufacturers (OEMs) such as Dell and Hewlett-Packard and the largest contract manufacturers in the world also have shifted some operations to China, attempting to serve not only the U.S. market, but also the growing Asian markets.

Queena Fan
(202) 205-3055
queena.fan@usitc.gov

¹¹ U.S. Department of Commerce, U.S. and Foreign Commercial Service, *China Country Commercial Guide FY 2004*, found at <http://www.stat-usa.gov/>, retrieved Mar. 31, 2004.

¹² Global Sources, "China's computer industry output booming," Jan. 15, 2004, found at <http://www.globalsources.com/>, retrieved Feb. 26, 2004.

Medical Goods

Change in 2003 from 2002:

U.S. trade surplus: Decreased by \$1.1 billion (63 percent) to \$683 million

U.S. exports: Increased by \$1.8 billion (12 percent) to \$16.8 billion

U.S. imports: Increased by \$2.9 billion (22 percent) to \$16.1 billion

The United States is the world's largest producer of medical goods, producing a broad range of such goods from commodity hospital supplies to advanced electromedical equipment. Its traditional rivals have been Japan, Germany, and other larger European countries; however, in recent years, other countries such as Mexico, the Dominican Republic, Costa Rica, Malaysia, Ireland, and Switzerland have become more important as producers of medical goods, often in partnership with U.S.-headquartered firms. Owing to its longstanding strength as a global producer of medical products, the United States has maintained a trade surplus in such goods for the past decade. However, the U.S. trade surplus in such goods has declined in recent years, including 2003 when the surplus dropped below \$1 billion for the first time in 4 years. Despite healthy growth in U.S. exports, strong domestic demand for medical goods in the United States, the largest and most dynamic health care market in the world, led to an even greater increase in imports.

A large portion of the major shifts in U.S. trade in medical goods is owing to the continued globalization of the U.S. medical goods industry, resulting in increasing intrafirm trade between U.S. medical equipment producers and their overseas manufacturing facilities and partners.¹³ Such trade consists of intrafirm imports and exports of completed medical equipment and devices, including heart pacemakers, medical imaging equipment, and orthopedic goods, to fill different product niches in the United States and other global markets. The intrafirm trade also consists of (1) parts and subassemblies of low-end commodity hospital supplies, such as intravenous and blood administration sets, exported to and assembled in Latin America and Asia to reduce labor costs for products to be consumed primarily in the United States; and (2) more sophisticated components for such devices as pacemakers, defibrillators, and magnetic resonance imaging equipment exported to foreign manufacturing subsidiaries and partners¹⁴ in the European Union, Switzerland, and Japan for purposes of proximity to those important overseas markets for medical goods.¹⁵

U.S. exports

U.S. exports of medical goods increased 12 percent in 2003, to almost \$16.8 billion. The most significant growth occurred in exports to both Ireland and China, which increased by more than 40 percent. U.S. exports to Ireland consisted largely of components and subassemblies of implantable pacemakers and defibrillators, as that country has rapidly become one of the leading global manufacturers

¹³ U.S. industry representatives, communication with USITC staff, Feb. 24, 2004; U.S. industry representatives, telephone interviews by USITC staff, Mar. 2004; and U.S. industry representatives, interviews by USITC staff, Wisconsin, Illinois, and Michigan, Sept. 2002.

¹⁴ Components and subassemblies, as well as completed medical products, are also traded among, otherwise competing, global producers of advanced medical technology. For instance, U.S., European, and Japanese competitors often engage in such intra-industry trade to help one another fill out different medical imaging product lines and niches.

¹⁵ U.S. industry representative, communication with USITC staff, Feb. 24, 2004; U.S. industry representatives, telephone interviews by USITC staff, Mar. 2004; and U.S. industry representatives, interviews by USITC staff, Milwaukee, Wisconsin, and Chicago, Illinois, Sept. 2002.

of such devices.¹⁶ Two manufacturers of implantable pacemakers and defibrillators in the United States--Medtronic, the global leader, and Guidant--have continued to expand production capacity in Ireland for sales to the European and U.S. markets.¹⁷ U.S. exports to China grew partly owing to that country's rapid economic growth and government efforts to improve its healthcare infrastructure, causing demand to increase for a variety of medical goods such as patient monitoring systems, x-ray and other medical imaging equipment, and general medical and surgical instruments and apparatus. U.S. exports to China of parts and subassemblies of commodity hospital goods, such as intravenous and blood administration systems, also increased as U.S.-based firms transferred some of their labor-intensive production-sharing operations from Mexico and the Dominican Republic to China to take advantage of lower production and wage costs.¹⁸

U.S. imports

European and Chinese firms took advantage of the almost 8-percent growth in U.S. healthcare expenditures in 2003 to increase their exports of medical goods to the United States.¹⁹ With an almost 60-percent increase in exports to the United States in 2003, Ireland for the first time became the leading individual country supplier of U.S. imports of medical equipment, surpassing both traditional U.S. global rival Germany and Mexico. In 2003, major U.S. manufacturers continued to establish research and manufacturing facilities in Ireland,²⁰ allowing that country to broaden its base as a leading European supplier of pacemakers and defibrillators and expand into other high-technology products. For example, Boston Scientific, one of two leading innovators of drug-eluting stents,²¹ has established significant manufacturing and research capabilities in cardiovascular technology in Ireland over the past 2 years.²² In addition, Johnson & Johnson's De Puy division in Ireland manufactures and exports orthopedic implants to both the U.S. and European markets.²³ Meanwhile, Medtronic has been increasing its manufacturing of pacemaker, defibrillator, and other advanced cardiovascular products in Switzerland.²⁴ That country increased its exports to the United States by 70 percent from 2002 to 2003, largely owing to such U.S. investment. Finally, China and Mexico continued to supply the United States with imports of low-end commodity products, as U.S., Japanese, and European firms took advantage of relatively low-wage rates in those two countries to reduce their costs in supplying these high-volume, but low-margin, products to the United States. However, investment in the manufacture of more advanced medical products, such as cardiology devices, has recently been made by Medtronic and several other U.S.- and European-based

¹⁶ Enterprise Ireland, "Medical Devices and Diagnostics," *Sector Profiles*, 2003, pp. 1-3, found at <http://www.enterprise-ireland.com>, retrieved Mar. 1, 2004.

¹⁷ SEC 10-K filings by Medtronic Inc. and Guidant Corp., 2003.

¹⁸ U.S. industry representatives, telephone interviews by USITC staff, Mar. 1, 2004.

¹⁹ Although the rate of growth of U.S. healthcare expenditures declined more than 1 percent in 2003, the almost 8-percent increase in exports of medical goods in 2003 still well exceeds that in other major markets such as the European Union and Japan. U.S. Centers for Medicare and Medicaid Services (CMS), "Expected to Mark First Slowdown in Health Care Cost Growth in Six Years," p. 1, *CMS News*, found at <http://www.cms.hhs.gov>, retrieved Mar. 1, 2004.

²⁰ U.S. medical device firms benefitted from a series of programs by the Irish Government to implement national programs designed to increase labor force skills and to promote foreign investment in high technology industries. U.S. Central Intelligence Agency (CIA), "Ireland," *CIA The World Factbook 2003*, found at <http://www.cia.gov>, retrieved Mar. 1, 2004.

²¹ Stents are cylindrical metal, mesh-type, devices used to maintain the opening of arteries after angioplasty (balloon) catheterization procedures. The newest drug eluting stents have been shown in recent clinical trials to maintain the opening for longer periods than bare metal stents.

²² U.S. industry representative, communication with USITC staff, Feb. 24, 2004.

²³ Other major U.S.-based companies with manufacturing operations in Ireland include Abbott, Tyco, Baxter International, Johnson & Johnson, and De Puy. IDA Ireland, "Industry Profile-Medical Devices," 2004, p. 1, found at <http://www.idaireland.com>, retrieved Feb. 25, 2004.

²⁴ Medtronic, *Europe and Emerging Markets*, p. 3, 2003, pp. 1-10, found at <http://www.medtronic.com>, retrieved Mar. 1, 2004.

medical goods firms in Shanghai, as Chinese workers become more skilled in the manufacture of medical goods.²⁵

Christopher Johnson
(202) 205-3488
christopher.johnson@usitc.gov

²⁵ SEC 10-K filings by Medtronic Inc., 2003; U.S. industry representatives, telephone interviews by USITC staff, Feb. 25 and Mar. 1, 2004; and U.S. industry representative, communication with USITC staff, Feb. 24, 2004.

Semiconductors and Integrated Circuits

Change in 2003 from 2002:

U.S. trade surplus: Increased by \$5.4 billion (89 percent) to \$11.5 billion

U.S. exports: Increased by \$4.0 billion (13 percent) to \$35.7 billion

U.S. imports: Decreased by \$1.5 billion (6 percent) to \$24.2 billion

After enjoying a modest recovery in 2002, the global semiconductor industry experienced major growth in 2003. Global sales in 2003 rose 18.3 percent, with growth in the second half of the year among the strongest on record.²⁶ U.S. exports reflected this marked growth and increased for the first time since 2000. In addition, for the third year in a row, U.S. imports declined, albeit less than the declines in 2002 and 2001. The increase in exports and decrease in imports led to an overall increase in the U.S. trade surplus of \$5.4 billion for 2003. This year was the third year in a row that the United States experienced a surplus in semiconductor trade after more than two decades of deficits.

U.S. exports

One of the main reasons for an increase in U.S. semiconductor exports was the relatively strong worldwide recovery of the industries that consume semiconductors, particularly the computer and telecommunications equipment industries, the two largest end markets of semiconductors. For example, personal computer (PC) shipments experienced an 11-percent unit volume increase worldwide, and the global wireless telecommunications equipment market grew 16 percent.²⁷

As the trend of electronic equipment production moving to Asia continues, the region remains, by far, the most important foreign market for U.S. semiconductors.²⁸ In 2003, U.S. exports to Asia increased by \$4.1 billion with most other regions experiencing minimal increases and one region, the EU, experiencing a decrease. As a result, Asia accounted for 75 percent of total exports in 2003, up from 71 percent in 2002. China, Malaysia, Korea, and the Philippines, in particular, experienced dramatic rises in U.S. exports in 2003 of 64, 36, 20, and 23 percent, respectively.

Besides direct demand from industries producing electronic equipment, other factors contributed to increasing U.S. exports to Asia. In an effort to keep down production costs, U.S. semiconductor manufacturers traditionally have engaged in production sharing arrangements wherein unfinished semiconductors are exported to East Asia to complete the more labor intensive production;²⁹ 2003 was no exception with production sharing partners Malaysia and the Philippines accounting for the greatest absolute increase in U.S. exports. After completion of the production process, most of the finished chips are shipped to a third country, often elsewhere in Asia, or back to the United States for final consumption.³⁰

U.S. imports

U.S. imports in 2003 decreased, primarily because the industries that consume semiconductors continue to move overseas, mainly to Asia. The value of U.S. imports of semiconductors fell 6 percent in 2003, the third year in a row in which U.S. imports have decreased. Of the 3 years of decreases, 2003

²⁶ "Global Semiconductor Sales Up 18.3% in 2003," Semiconductor Industry Association press release, Feb. 1, 2004, found at <http://www.semichips.org>, retrieved Mar. 8, 2004.

²⁷ Ibid.

²⁸ Bill McClean, Brian Matas, and Trevor Yancey, *The McClean Report: A Complete Analysis and Forecast of the Integrated Circuit Industry*, Richard D. Skinner, 2004 Edition (Arizona: IC Insights, Inc., 2004), pp. 2-11.

²⁹ Thomas Walter Smith, Standard & Poor's, *Industry Surveys: Semiconductors*, Jan. 15, 2004, pp. 13-14.

³⁰ *SIA 2003 Annual Report*, found at <http://www.semichips.org>, retrieved Mar. 10, 2004.

experienced the smallest percent and absolute decrease from the previous year. This limited decline was owing in large measure to a gradual increase in demand for semiconductor end use products caused by the general recovery of the U.S. economy in the second half of 2003 (see U.S. Merchandise Trade Performance). The decrease in U.S. imports was across the board, with declines occurring from each of the top 10 leading sources, with the exception of China.

Falan Yinug
(202) 205-2160
falen.yinug@usitc.gov

Telephone and Telegraph Apparatus

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$5.0 billion (34 percent) to \$20.0 billion

U.S. exports: Decreased by \$2.0 billion (16 percent) to \$10.9 billion

U.S. imports: Increased by \$3.0 billion (11 percent) to \$31.0 billion

The U.S. trade deficit in telephone and telegraph apparatus increased significantly for the second year in a row. U.S. imports rose as certain segments of the U.S. telecommunications equipment market began to recover after declining and stagnant growth in 2001 and 2002,³¹ respectively. Declining network infrastructure investments and increased cellular phone competition in important Asian markets contributed to falling U.S. export revenues.

U.S. exports

U.S. exports of telephone and telegraph apparatus declined 16 percent to less than \$11 billion. The most significant reductions occurred in exports to China, Japan, Malaysia, Canada, and Mexico. China's market, one of the fastest growing markets for telecommunications equipment over the past 5 years, continued its second year of declining growth as that country's total investment in fixed telecommunications assets in 2002 and 2003³² was less than one-half the investment in 2001.³³ This decline in investment was owing in part to the completion of a number of major wireline and wireless network infrastructure projects.³⁴ Further, despite continued relatively high volume growth in the Chinese market for cellular telephones,³⁵ intense price competition,³⁶ movement of cell phone assembly by U.S.-based firms to China, and the emergence of several domestic suppliers in lower and mid-priced handsets in the past 2 years have slowed U.S. exports of all but the most sophisticated cellular telephones and parts. U.S. exports of telecommunications network equipment to Malaysia, meanwhile, dropped more than 40 percent, partly owing to increasing competition from Korean-based producers in that market, as well as the completion of some major telecommunications infrastructure projects there.³⁷ Finally, Japan and Canada, large mature markets for U.S.-made telecommunications equipment, continued to face large overcapacity in their fiber optic and other wireline network equipment markets. This contributed to a

³¹ Telecommunications Industry Association (TIA), *2003 Telecommunications Market Review and Forecast* (Washington, DC: TIA, 2003), p. 3.

³² However, industry experts indicate that total telecommunications equipment expenditures have recently begun to rebound in China, which likely will benefit U.S. exporters during the next several years. "U.S. Companies Sign \$2.3 billion in China Technology Deals," *IT Matters*, Jan. 15, 2004, pp. 1-3, found at <http://www.itmatters.com.ph>, retrieved Mar. 8, 2004; and U.S. industry representatives, telephone interviews by USITC staff, Mar. 2 and 8, 2004.

³³ "Telecom Equipment Industry Plows Ahead Despite Difficulties," TDCTrade.com, Mar. 17, 2004, pp. 1-4, found at <http://www.tdctrade.com>, retrieved Mar. 8, 2004.

³⁴ U.S. industry representatives, telephone interviews by USITC staff, Mar. 2 and 8, 2004.

³⁵ "U.S. Companies Sign \$2.3 billion in China Technology Deals," *IT Matters*, Jan. 15, 2004, pp. 1-3, found at <http://www.itmatters.com.ph>, retrieved Mar. 8, 2004.

³⁶ Although China accounts for a considerable portion of global wireless subscriber growth, adding about 5 million subscribers a month, handset prices are falling as wireless operators try to increase market share. Standard & Poor's, "Communications Equipment," *Standard & Poor's Industry Surveys*, Jan. 20, 2004, p. 3; and U.S. industry representative, telephone interview by USITC staff, Mar. 8, 2004.

³⁷ Maxis Communications Board, "GPRS Malaysia Asian Mobile Network Plans, Malaysia," [Maxis] *Industry Projects*, pp. 1-3, [undated], found at <http://www.mobilecommms-technology.com>, retrieved Feb. 25, 2004; Motorola Inc., SEC 10-K filing, Mar. 27, 2003, pp. 1-15, 2003; and U.S. industry representatives, telephone interviews by USITC staff, Mar. 2 and 8, 2004.

combined reduction of \$268 million in U.S. exports to both of those countries, representing a decline of 10 percent from the previous year.³⁸

U.S. imports

After continued sluggish U.S. demand for most types of telecommunications equipment in 2002,³⁹ growing purchases of wireless and specialized digital wireline products contributed to an increase of almost 11 percent in U.S. imports in 2003. Sales of cellular handsets and other wireless products continue to surge in the United States, compensating for declines in fiber optic and other wireline network equipment demand over the past several years.⁴⁰ Among the five leading worldwide producers of cell phones are two Korean-based firms, Samsung and LG Electronics,⁴¹ which helped Korea maintain its position as the largest supplier of U.S. imports of telecommunications equipment in 2003. Increased investment in cell phone assembly and use of contract manufacturers in China and Malaysia by other leading global cellular suppliers, including U.S.-based Motorola⁴² and European-headquartered Nokia and Siemens, over the past several years also contributed to significantly higher U.S. imports. Meanwhile, producers of digital communications gear in Germany, the United Kingdom, and Mexico took advantage of increased equipment demand⁴³ by U.S. telephone service providers, which were increasing their digital subscriber line offerings to customers demanding faster Internet connections.⁴⁴

Christopher Johnson
(202) 205-3488
christopher.johnson@usitc.gov

³⁸ U.S. industry representatives, telephone interviews by USITC staff, Mar. 2 and 8, 2004.

³⁹ Telecommunications Industry Association (TIA), *2003 Telecommunications Market Review and Forecast* (Washington, DC: TIA, 2003), pp. 3-14.

⁴⁰ Standard & Poor's, "Communications Equipment," *Standard & Poor's Industry Surveys*, Jan. 20, 2004, p. 3; and Telecommunications Industry Association (TIA), *2003 Telecommunications Market Review and Forecast* (Washington, DC: TIA, 2003), pp. 12-13.

⁴¹ Standard & Poor's, "Communications Equipment," *Standard & Poor's Industry Surveys*, Jan. 20, 2004, p. 6.

⁴² Motorola Inc., SEC 10-K filing, Mar. 27, 2003, pp. 1-15, 2003.

⁴³ Telecommunications Industry Association (TIA), "Table 111-1.5," *2003 Telecommunications Market Review and Forecast* (Washington, DC: TIA, 2003), p. 88.

⁴⁴ U.S. industry representatives, telephone interviews by USITC staff, Mar. 2, 8, and Apr. 8, 2004.

Television Receivers and Video Monitors

Change in 2003 from 2002:

U.S. trade deficit : Increased by \$2.5 billion (27 percent) to \$11.8 billion

U.S. exports: Decreased by \$449 million (36 percent) to \$809 million

U.S. imports: Increased by \$2.1 billion (20 percent) to \$12.7 billion

The trade deficit for television receivers and video monitors continued to grow in 2003, exceeding \$11 billion for the first time. U.S. demand for more expensive flat-panel receivers and monitors not made in the United States plus export-oriented low-end receivers from China led to the increase.⁴⁵

U.S. imports

U.S. imports of television receivers and video monitors increased 20 percent, to \$12.7 billion. The greatest increases in the value of U.S. imports were from China, Japan, and Korea, which grew by \$641 million, \$551 million, and \$463 million, respectively. Mexico, the largest source of U.S. imports, showed a gain of \$367 million.

China is a major source of low-cost television receivers for the U.S. market, with imports from China up 465 percent since 2001, when China acceded to the WTO. A number of factors are responsible for this dramatic increase. First, the Chinese Ministry of Commerce is actively promoting the export of electronic and machine products.⁴⁶ Second, Japanese television producers like Toshiba have moved production of picture-tube based television receivers to China in order to concentrate on producing higher value flat-panel⁴⁷ receivers at home.⁴⁸ Third, producers in China are beginning to manufacture LCD and plasma flat-panel televisions, including LCD panels.⁴⁹

The increases from Japan and Korea are owing to increased demand for larger and higher quality television receivers and monitors to take advantage of the growth in high definition programming available by broadcast, satellite, and cable signals,⁵⁰ and for television receivers and monitors incorporating flat panels, which are not made in the United States. As screen size and picture quality increase, so does price. Also, a flat-panel receiver or monitor costs more for a given screen size than a conventional picture-tube based receiver or monitor.

⁴⁵ China was the subject of an antidumping investigation, in which the Commission determined that the U.S. industry was materially injured by reason of imports of certain color television receivers from China. See USITC, Inv. No. 731-TA-1034 and 1035 (Final), *Certain Color Television Receivers from China*, publication 3659, May 2004.

⁴⁶ "China to Promote Exports of Electronic, Machinery Products," *People's Daily*, Mar. 27, 2004, found at http://english.peopledaily.com.cn/200303/27/eng20030327_114049.shtml, retrieved March 31, 2004.

⁴⁷ Flat-panel technology includes Liquid Crystal Display (LCD), Liquid Crystal on Silicon (LCOS), and plasma.

⁴⁸ "Japan's Toshiba to Shift Television Output to China," *People's Daily*, Mar. 19, 2001, found at http://fpeng.peopledaily.com.cn/200103/19/eng20010319_65362.html, retrieved Mar. 31, 2004.

⁴⁹ "Image Quality Upgrades Top Makers' Agendas," *Asian Sources: Electronics*, Jan. 2004, pp. 217 - 222.

⁵⁰ RCA, "New RCA HDTV Receiver Delivers Directv® Satellite, Digital and Analog Terrestrial Broadcasts," press release, Jan. 7, 2004, found at <http://www.rca.com/content/viewdetail/1.2811.EI700571-CI258.00.html?>, Apr. 1, 2004. RocSearch, "Research Report - HDTV Market," Jan. 2002, found at <http://www.rocsearch.com/ReportGallery/dispReport.asp>, retrieved Apr. 1, 2004; and Yankee Group, "Nearly 40 Percent of U.S. Homes will be Viewing HDTV Programs in Five Years, Says New Yankee Group Report," May 13, 2003, found at http://www.yankeegroup.com/public/news_releases/news_release_detail.jsp?ID=PressReleases/news_05122003_mcs.htm, retrieved Apr. 1, 2004.

Advances in flat-panel technology have allowed the production of larger panels, up to 61 inches in diagonal measurement,⁵¹ taking flat panels out of the novelty market and making them suitable for use in a living room or family room. Because of their lighter weight and smaller footprint, flat-panel television receivers have increased the market for larger screen size receivers and monitors to include consumers who do not have room for a large picture-tube based receiver or a projection television. It is now possible to hang a flat-panel receiver or monitor on a wall like a painting. Demand for flat-panel television receivers in combination with DVD players for portable and mobile use is increasing. DVD players require less power and weigh less than videocassette players, the former source for playing back prerecorded video, making them more suitable for portable/mobile use. As production volumes of the new technology increase, economies of scale will permit the lowering of unit prices, increasing the market further. Some industry analysts are predicting that flat panel receivers and monitors will become the predominant television display in the future, usurping the picture tube, which has been the dominant technology since the inception of television.⁵²

John W. Kitzmiller
(202) 205-3387
john.kitzmiller@usitc.gov

⁵¹ The largest screen size currently available in commercial quantities.

⁵² Greg Tarr, "Flat-Panel TV Suppliers Flood CE Market," *TWICE*, Jan. 8, 2004, found at <http://www.twice.com/>, Mar. 29, 2004. *Global Sources*, "China Makers Moving into 16:9 TV Production," May 23, 2003, found at http://www.electronics.globalsources.com/am/article_id/9000000041049/page/showarticle?action=GetArticle, Mar. 29, 2004.

Table EL-3

Electronic products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
ET016	Office machines:							
	Exports	967	1,033	1,061	816	725	-91	-11.2
	Imports	1,784	1,892	1,817	1,491	1,544	53	3.6
	Trade balance	-817	-859	-757	-675	-819	-144	-21.4
ET017	Telephone and telegraph apparatus:							
	Exports	17,717	20,147	16,506	12,952	10,946	-2,007	-15.5
	Imports	20,147	32,130	27,174	27,948	30,982	3,034	10.9
	Trade balance	-2,430	-11,982	-10,668	-14,996	-20,037	-5,041	-33.6
ET018	Consumer electronics (except televisions):							
	Exports	2,678	2,969	2,791	2,631	2,392	-239	-9.1
	Imports	18,282	21,974	19,525	21,455	21,471	16	0.1
	Trade balance	-15,604	-19,005	-16,734	-18,825	-19,079	-254	-1.4
ET019	Blank media:							
	Exports	1,692	1,420	1,017	970	1,082	111	11.5
	Imports	2,225	2,415	2,423	2,746	3,127	381	13.9
	Trade balance	-533	-995	-1,406	-1,776	-2,045	-269	-15.2
ET020	Prerecorded media:							
	Exports	3,707	3,636	3,195	3,069	3,010	-59	-1.9
	Imports	1,252	1,389	1,259	1,308	1,436	128	9.8
	Trade balance	2,455	2,247	1,935	1,761	1,574	-187	-10.6
ET021	Navigational instruments and remote control apparatus:							
	Exports	2,530	2,626	3,102	2,921	2,866	-55	-1.9
	Imports	1,361	1,702	1,796	1,858	2,286	427	23.0
	Trade balance	1,169	924	1,306	1,063	580	-483	-45.4
ET022	Television receivers and video monitors:							
	Exports	1,104	1,164	1,237	1,257	809	-449	-35.7
	Imports	6,652	7,713	8,615	10,586	12,654	2,067	19.5
	Trade balance	-5,548	-6,549	-7,378	-9,329	-11,845	-2,516	-27.0
ET023	Radio and television broadcasting equipment:							
	Exports	2,323	2,602	2,321	1,364	1,241	-123	-9.0
	Imports	4,948	7,178	6,066	4,977	4,120	-857	-17.2
	Trade balance	-2,624	-4,576	-3,745	-3,613	-2,879	734	20.3
ET024	Electric sound and visual signaling apparatus:							
	Exports	858	851	949	1,042	937	-105	-10.1
	Imports	2,053	2,334	1,968	1,797	1,845	48	2.6
	Trade balance	-1,195	-1,483	-1,020	-755	-908	-153	-20.3
ET025	Electrical capacitors and resistors:							
	Exports	2,393	3,410	2,002	1,706	1,623	-84	-4.9
	Imports	2,435	4,177	2,333	2,093	1,964	-129	-6.2
	Trade balance	-42	-767	-331	-386	-341	45	11.8
ET026	Printed circuits:							
	Exports	2,386	2,865	2,089	1,853	1,742	-111	-6.0
	Imports	2,236	2,988	2,141	1,896	1,785	-111	-5.8
	Trade balance	150	-123	-53	-44	-44	(³)	0.3
ET027	Circuit apparatus exceeding 1000V:							
	Exports	590	701	612	549	487	-62	-11.2
	Imports	287	386	357	338	272	-66	-19.5
	Trade balance	302	315	255	211	215	4	2.1

See footnote(s) at end of table.

Table EL-3--Continued

Electronic products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
ET028	Circuit apparatus not exceeding 1000V:							
	Exports	4,991	6,101	5,098	4,478	4,431	-46	-1.0
	Imports	5,606	6,872	5,280	4,933	5,127	195	3.9
	Trade balance	-615	-771	-182	-455	-696	-241	-53.0
ET029	Circuit apparatus assemblies:							
	Exports	1,078	1,340	1,179	1,108	1,150	42	3.8
	Imports	2,141	2,593	2,528	2,577	2,920	344	13.3
	Trade balance	-1,063	-1,253	-1,350	-1,469	-1,771	-301	-20.5
ET030	Parts of circuit apparatus:							
	Exports	1,809	1,914	1,503	1,592	1,807	215	13.5
	Imports	999	1,202	1,108	1,087	1,206	120	11.0
	Trade balance	809	712	396	506	601	95	18.8
ET031	Cathode-ray tubes:							
	Exports	2,174	2,435	2,056	1,762	1,202	-560	-31.8
	Imports	732	634	612	607	577	-30	-5.0
	Trade balance	1,442	1,801	1,444	1,155	625	-530	-45.9
ET032	Electron tubes other than CRTs:							
	Exports	215	209	178	180	165	-16	-8.7
	Imports	190	213	271	247	203	-44	-17.7
	Trade balance	25	-4	-93	-66	-38	28	42.2
ET033	Semiconductors and integrated circuits:							
	Exports	36,615	44,828	33,455	31,738	35,712	3,975	12.5
	Imports	37,158	47,448	30,016	25,651	24,190	-1,461	-5.7
	Trade balance	-542	-2,619	3,439	6,087	11,522	5,435	89.3
ET034	Miscellaneous electrical equipment:							
	Exports	1,590	2,153	1,805	1,564	1,426	-137	-8.8
	Imports	2,358	2,937	2,277	2,428	2,649	221	9.1
	Trade balance	-769	-784	-473	-865	-1,223	-358	-41.4
ET035	Computers, peripherals, and parts:							
	Exports	39,300	45,392	38,125	29,534	28,038	-1,496	-5.1
	Imports	81,662	90,384	74,547	75,817	76,940	1,123	1.5
	Trade balance	-42,362	-44,991	-36,422	-46,283	-48,902	-2,619	-5.7
ET036	Photographic film and paper:							
	Exports	2,154	2,755	1,953	2,127	2,233	106	5.0
	Imports	2,009	2,205	1,856	1,865	1,820	-45	-2.4
	Trade balance	146	550	96	262	413	151	57.5
ET037	Optical fibers, optical fiber bundles and cables:							
	Exports	1,081	1,888	1,689	474	437	-37	-7.8
	Imports	729	1,399	1,244	252	210	-42	-16.7
	Trade balance	352	488	446	222	227	5	2.2
ET038	Optical goods, including ophthalmic goods:							
	Exports	2,682	3,995	3,727	3,548	3,309	-240	-6.8
	Imports	4,225	5,881	4,957	4,142	4,495	353	8.5
	Trade balance	-1,543	-1,887	-1,230	-594	-1,186	-592	-99.7
ET039	Photographic cameras and equipment:							
	Exports	1,825	1,800	1,694	1,187	954	-233	-19.6
	Imports	5,843	5,299	3,560	3,029	2,715	-314	-10.4
	Trade balance	-4,018	-3,499	-1,866	-1,842	-1,761	81	4.4

See footnote(s) at end of table.

Table EL-3--Continued

Electronic products : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
		Million dollars						
ET040	Medical goods:							
	Exports	12,455	13,411	14,987	15,059	16,827	1,768	11.7
	Imports	7,932	9,178	10,869	13,232	16,143	2,911	22.0
	Trade balance	4,522	4,232	4,119	1,826	683	-1,143	-62.6
ET041	Watches and clocks:							
	Exports	335	348	279	235	242	8	3.3
	Imports	3,136	3,354	2,957	3,098	3,291	193	6.2
	Trade balance	-2,801	-3,006	-2,678	-2,864	-3,049	-185	-6.5
ET042	Drawing, drafting, and calculating instruments:							
	Exports	415	366	395	368	364	-4	-1.0
	Imports	431	234	207	192	223	32	16.5
	Trade balance	-15	132	188	176	141	-35	-20.0
ET043	Measuring, testing, and controlling instruments:							
	Exports	14,480	16,629	15,605	14,346	14,683	337	2.4
	Imports	9,656	11,743	11,806	11,595	12,638	1,042	9.0
	Trade balance	4,824	4,886	3,799	2,751	2,046	-705	-25.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes³Less than \$500,000.

Note.—Calculations based on unrounded data.

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

Table EL-4

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET016	Office machines:						
	Number of establishments	137	137	137	137	137	0.0
	Employees (thousands)	13.0	11.0	10.0	8.0	7.0	-12.5
	Capacity utilization (percent)	65	70	51	56	61	8.9
	U.S. shipments (million dollars)	2,993	2,711	3,072	2,460	2,200	-10.6
	U.S. exports (million dollars)	967	1,033	1,061	816	725	-11.2
	U.S. imports (million dollars)	1,784	1,892	1,817	1,491	1,544	3.6
	Apparent U.S. consumption (million dollars)	3,810	3,570	3,829	3,135	3,019	-3.7
	Trade balance (million dollars)	-817	-859	-757	-675	-819	-21.4
	Ratio of imports to consumption (percent)	46.8	53.0	47.5	47.6	51.1	7.4
	Ratio of exports to shipments (percent)	32.3	38.1	34.5	33.2	33.0	-0.6
ET017	Telephone and telegraph apparatus:						
	Number of establishments	1,056	1,030	1,000	980	965	-1.5
	Employees (thousands)	238.0	248.0	231.0	189.0	180.0	-4.8
	Capacity utilization (percent)	77	75	73	57	60	5.3
	U.S. shipments (million dollars)	79,544	93,614	80,151	62,718	64,700	3.2
	U.S. exports (million dollars)	17,717	20,147	16,506	12,952	10,946	-15.5
	U.S. imports (million dollars)	20,147	32,130	27,174	27,948	30,982	10.9
	Apparent U.S. consumption (million dollars)	81,974	105,596	90,819	77,714	84,737	9.0
	Trade balance (million dollars)	-2,430	-11,982	-10,668	-14,996	-20,037	-33.6
	Ratio of imports to consumption (percent)	24.6	30.4	29.9	36.0	36.6	1.7
	Ratio of exports to shipments (percent)	22.3	21.5	20.6	20.7	16.9	-18.4
ET018	Consumer electronics (except televisions):						
	Number of establishments	210	215	225	215	205	-4.7
	Employees (thousands)	20.0	21.0	21.0	20.0	18.0	-10.0
	Capacity utilization (percent)	58	58	58	54	50	-7.4
	U.S. shipments (million dollars)	4,235	4,260	4,200	4,000	3,600	-10.0
	U.S. exports (million dollars)	2,678	2,969	2,791	2,631	2,392	-9.1
	U.S. imports (million dollars)	18,282	21,974	19,525	21,455	21,471	(¹)
	Apparent U.S. consumption (million dollars)	19,839	23,265	20,934	22,825	22,679	-0.6
	Trade balance (million dollars)	-15,604	-19,005	-16,734	-18,825	-19,079	-1.4
	Ratio of imports to consumption (percent)	92.2	94.5	93.3	94.0	94.7	0.7
	Ratio of exports to shipments (percent)	63.2	69.7	66.5	65.8	66.4	0.9

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET019	Blank media:						
	Number of establishments	240	230	220	212	210	-0.9
	Employees (thousands)	17.0	15.0	13.0	11.0	9.0	-18.2
	Capacity utilization (percent)	73	69	80	75	70	-6.7
	U.S. shipments (million dollars)	3,764	3,402	3,074	2,800	2,600	-7.1
	U.S. exports (million dollars)	1,692	1,420	1,017	970	1,082	11.5
	U.S. imports (million dollars)	2,225	2,415	2,423	2,746	3,127	13.9
	Apparent U.S. consumption (million dollars)	4,297	4,397	4,480	4,576	4,645	1.5
	Trade balance (million dollars)	-533	-995	-1,406	-1,776	-2,045	-15.2
	Ratio of imports to consumption (percent)	51.8	54.9	54.1	60.0	67.3	12.2
	Ratio of exports to shipments (percent)	45.0	41.8	33.1	34.6	41.6	20.2
ET020	Prerecorded media:						
	Number of establishments	670	680	690	700	708	1.1
	Employees (thousands)	29.0	29.0	29.0	28.0	27.0	-3.6
	Capacity utilization (percent)	78	75	66	70	74	5.7
	U.S. shipments (million dollars)	4,900	5,298	5,728	6,200	6,700	8.1
	U.S. exports (million dollars)	3,707	3,636	3,195	3,069	3,010	-1.9
	U.S. imports (million dollars)	1,252	1,389	1,259	1,308	1,436	9.8
	Apparent U.S. consumption (million dollars)	2,445	3,051	3,793	4,439	5,126	15.5
	Trade balance (million dollars)	2,455	2,247	1,935	1,761	1,574	-10.6
	Ratio of imports to consumption (percent)	51.2	45.5	33.2	29.5	28.0	-5.1
	Ratio of exports to shipments (percent)	75.7	68.6	55.8	49.5	44.9	-9.3
ET021	Navigational instruments and remote control apparatus:						
	Number of establishments	105	107	107	107	107	0.0
	Employees (thousands)	115.0	116.0	120.0	119.0	118.0	-0.8
	Capacity utilization (percent)	75	80	80	80	80	0.0
	U.S. shipments (million dollars)	15,500	18,500	21,275	22,125	22,000	-0.6
	U.S. exports (million dollars)	2,530	2,626	3,102	2,921	2,866	-1.9
	U.S. imports (million dollars)	1,361	1,702	1,796	1,858	2,286	23.0
	Apparent U.S. consumption (million dollars)	14,331	17,576	19,969	21,062	21,420	1.7
	Trade balance (million dollars)	1,169	924	1,306	1,063	580	-45.4
	Ratio of imports to consumption (percent)	9.5	9.7	9.0	8.8	10.7	21.6
	Ratio of exports to shipments (percent)	16.3	14.2	14.6	13.2	13.0	-1.5

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET022	Television receivers and video monitors:						
	Number of establishments	14	12	10	9	8	-11.1
	Employees (thousands)	8.0	8.0	7.0	6.0	5.0	-16.7
	Capacity utilization (percent)	58	58	58	54	50	-7.4
	U.S. shipments (million dollars)	3,950	3,400	3,037	3,285	2,500	-23.9
	U.S. exports (million dollars)	1,104	1,164	1,237	1,257	809	-35.7
	U.S. imports (million dollars)	6,652	7,713	8,615	10,586	12,654	19.5
	Apparent U.S. consumption (million dollars)	9,498	9,949	10,415	12,614	14,345	13.7
	Trade balance (million dollars)	-5,548	-6,549	-7,378	-9,329	-11,845	-27.0
	Ratio of imports to consumption (percent)	70.0	77.5	82.7	83.9	88.2	5.1
	Ratio of exports to shipments (percent)	28.0	34.2	40.7	38.3	32.3	-15.7
ET023	Radio and television broadcasting equipment						
	Number of establishments	155	160	165	170	175	2.9
	Employees (thousands)	15.0	15.0	15.0	14.0	13.0	-7.1
	Capacity utilization (percent)	71	73	65	56	48	-14.3
	U.S. shipments (million dollars)	4,000	3,900	3,500	3,300	3,000	-9.1
	U.S. exports (million dollars)	2,323	2,602	2,321	1,364	1,241	-9.0
	U.S. imports (million dollars)	4,948	7,178	6,066	4,977	4,120	-17.2
	Apparent U.S. consumption (million dollars)	6,624	8,476	7,245	6,913	5,879	-15.0
	Trade balance (million dollars)	-2,624	-4,576	-3,745	-3,613	-2,879	20.3
	Ratio of imports to consumption (percent)	74.7	84.7	83.7	72.0	70.1	-2.6
	Ratio of exports to shipments (percent)	58.1	66.7	66.3	41.3	41.4	(¹)
ET024	Electric sound and visual signaling apparatus:						
	Number of establishments	499	499	499	499	499	0.0
	Employees (thousands)	24.0	23.0	28.0	26.0	27.0	3.8
	Capacity utilization (percent)	78	71	66	66	66	0.0
	U.S. shipments (million dollars)	4,539	4,905	5,571	5,290	5,400	2.1
	U.S. exports (million dollars)	858	851	949	1,042	937	-10.1
	U.S. imports (million dollars)	2,053	2,334	1,968	1,797	1,845	2.6
	Apparent U.S. consumption (million dollars)	5,734	6,388	6,591	6,045	6,308	4.3
	Trade balance (million dollars)	-1,195	-1,483	-1,020	-755	-908	-20.3
	Ratio of imports to consumption (percent)	35.8	36.5	29.9	29.7	29.2	-1.7
	Ratio of exports to shipments (percent)	18.9	17.3	17.0	19.7	17.4	-11.7

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET025	Electrical capacitors and resistors:						
	Number of establishments	286	276	267	214	253	18.2
	Employees (thousands)	26.0	27.0	24.0	19.0	22.0	15.8
	Capacity utilization (percent)	75	80	60	50	60	20.0
	U.S. shipments (million dollars)	3,006	3,768	2,510	1,983	2,346	18.3
	U.S. exports (million dollars)	2,393	3,410	2,002	1,706	1,623	-4.9
	U.S. imports (million dollars)	2,435	4,177	2,333	2,093	1,964	-6.2
	Apparent U.S. consumption (million dollars)	3,048	4,535	2,841	2,369	2,687	13.4
	Trade balance (million dollars)	-42	-767	-331	-386	-341	11.8
	Ratio of imports to consumption (percent)	79.9	92.1	82.1	88.3	73.1	-17.2
	Ratio of exports to shipments (percent)	79.6	90.5	79.8	86.0	69.2	-19.5
ET026	Printed circuits:						
	Number of establishments	730	694	641	435	515	18.4
	Employees (thousands)	83.0	86.0	75.0	51.0	60.0	17.6
	Capacity utilization (percent)	78	77	49	33	39	18.2
	U.S. shipments (million dollars)	9,150	11,892	8,911	6,045	7,151	18.3
	U.S. exports (million dollars)	2,386	2,865	2,089	1,853	1,742	-6.0
	U.S. imports (million dollars)	2,236	2,988	2,141	1,896	1,785	-5.8
	Apparent U.S. consumption (million dollars)	9,000	12,015	8,964	6,089	7,195	18.2
	Trade balance (million dollars)	150	-123	-53	-44	-44	(¹)
	Ratio of imports to consumption (percent)	24.8	24.9	23.9	31.1	24.8	-20.3
	Ratio of exports to shipments (percent)	26.1	24.1	23.4	30.6	24.4	-20.3
ET027	Circuit apparatus exceeding 1000V:						
	Number of establishments	200	210	200	200	200	0.0
	Employees (thousands)	15.0	17.0	16.0	15.0	14.0	-6.7
	Capacity utilization (percent)	75	80	60	60	60	0.0
	U.S. shipments (million dollars)	5,000	5,500	4,150	3,800	3,600	-5.3
	U.S. exports (million dollars)	590	701	612	549	487	-11.2
	U.S. imports (million dollars)	287	386	357	338	272	-19.5
	Apparent U.S. consumption (million dollars)	4,698	5,185	3,895	3,589	3,385	-5.7
	Trade balance (million dollars)	302	315	255	211	215	2.1
	Ratio of imports to consumption (percent)	6.1	7.4	9.2	9.4	8.0	-14.9
	Ratio of exports to shipments (percent)	11.8	12.7	14.7	14.4	13.5	-6.3

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET028	Circuit apparatus not exceeding 1000V:						
	Number of establishments	600	620	600	600	600	0.0
	Employees (thousands)	50.0	55.0	52.0	46.0	43.0	-6.5
	Capacity utilization (percent)	75	80	60	60	60	0.0
	U.S. shipments (million dollars)	15,000	17,000	13,000	11,800	11,200	-5.1
	U.S. exports (million dollars)	4,991	6,101	5,098	4,478	4,431	-1.0
	U.S. imports (million dollars)	5,606	6,872	5,280	4,933	5,127	3.9
	Apparent U.S. consumption (million dollars)	15,615	17,771	13,182	12,255	11,896	-2.9
	Trade balance (million dollars)	-615	-771	-182	-455	-696	-53.0
	Ratio of imports to consumption (percent)	35.9	38.7	40.1	40.2	43.1	7.2
	Ratio of exports to shipments (percent)	33.3	35.9	39.2	37.9	39.6	4.5
ET031	Cathode-ray tubes:						
	Number of establishments	18	16	15	14	13	-7.1
	Employees (thousands)	14.0	13.0	12.0	11.0	8.0	-27.3
	Capacity utilization (percent)	77	80	64	73	83	13.7
	U.S. shipments (million dollars)	3,579	3,450	2,847	2,040	1,400	-31.4
	U.S. exports (million dollars)	2,174	2,435	2,056	1,762	1,202	-31.8
	U.S. imports (million dollars)	732	634	612	607	577	-5.0
	Apparent U.S. consumption (million dollars)	2,137	1,649	1,403	885	775	-12.5
	Trade balance (million dollars)	1,442	1,801	1,444	1,155	625	-45.9
	Ratio of imports to consumption (percent)	34.2	38.4	43.6	68.6	74.4	8.5
	Ratio of exports to shipments (percent)	60.7	70.6	72.2	86.4	85.8	-0.7
ET032	Electron tubes other than CRTs:						
	Number of establishments	43	40	38	35	33	-5.7
	Employees (thousands)	4.0	4.0	4.0	4.0	4.0	0.0
	Capacity utilization (percent)	77	80	64	64	60	-6.3
	U.S. shipments (million dollars)	696	730	661	628	594	-5.4
	U.S. exports (million dollars)	215	209	178	180	165	-8.7
	U.S. imports (million dollars)	190	213	271	247	203	-17.7
	Apparent U.S. consumption (million dollars)	671	734	754	694	632	-8.9
	Trade balance (million dollars)	25	-4	-93	-66	-38	42.2
	Ratio of imports to consumption (percent)	28.4	29.1	36.0	35.5	32.1	-9.6
	Ratio of exports to shipments (percent)	30.9	28.7	27.0	28.7	27.7	-3.5

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET033	Semiconductors and integrated circuits:						
	Number of establishments	1,271	1,241	1,194	1,190	1,291	8.5
	Employees (thousands)	197.0	216.0	189.0	180.0	226.0	25.6
	Capacity utilization (percent)	86	87	57	57	86	50.9
	U.S. shipments (million dollars)	76,646	85,611	55,149	63,600	75,239	18.3
	U.S. exports (million dollars)	36,615	44,828	33,455	31,738	35,712	12.5
	U.S. imports (million dollars)	37,158	47,448	30,016	25,651	24,190	-5.7
	Apparent U.S. consumption (million dollars)	77,188	88,230	51,710	57,513	63,717	10.8
	Trade balance (million dollars)	-542	-2,619	3,439	6,087	11,522	89.3
	Ratio of imports to consumption (percent)	48.1	53.8	58.0	44.6	38.0	-14.8
	Ratio of exports to shipments (percent)	47.8	52.4	60.7	49.9	47.5	-4.8
ET035	Computers, peripherals, and parts:						
	Number of establishments	750	750	730	715	715	0.0
	Employees (thousands)	208.0	205.0	193.0	177.0	175.0	-1.1
	Capacity utilization (percent)	69	66	62	59	60	1.7
	U.S. shipments (million dollars)	113,161	110,028	89,528	82,100	84,000	2.3
	U.S. exports (million dollars)	39,300	45,392	38,125	29,534	28,038	-5.1
	U.S. imports (million dollars)	81,662	90,384	74,547	75,817	76,940	1.5
	Apparent U.S. consumption (million dollars)	155,523	155,019	125,950	128,383	132,902	3.5
	Trade balance (million dollars)	-42,362	-44,991	-36,422	-46,283	-48,902	-5.7
	Ratio of imports to consumption (percent)	52.5	58.3	59.2	59.1	57.9	-2.0
	Ratio of exports to shipments (percent)	34.7	41.3	42.6	36.0	33.4	-7.2
ET036	Photographic film and paper:						
	Number of establishments	310	310	310	310	310	0.0
	Employees (thousands)	34.0	34.0	33.0	34.0	30.0	-11.8
	Capacity utilization (percent)	85	80	65	69	73	5.8
	U.S. shipments (million dollars)	13,080	15,750	12,343	9,673	8,500	-12.1
	U.S. exports (million dollars)	2,154	2,755	1,953	2,127	2,233	5.0
	U.S. imports (million dollars)	2,009	2,205	1,856	1,865	1,820	-2.4
	Apparent U.S. consumption (million dollars)	12,934	15,200	12,247	9,411	8,087	-14.1
	Trade balance (million dollars)	146	550	96	262	413	57.5
	Ratio of imports to consumption (percent)	15.5	14.5	15.2	19.8	22.5	13.6
	Ratio of exports to shipments (percent)	16.5	17.5	15.8	22.0	26.3	19.5

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET037	Optical fibers, optical fiber bundles and cables:						
	Number of establishments	68	72	60	45	47	4.4
	Employees (thousands)	14.0	15.0	13.0	8.0	8.0	0.0
	Capacity utilization (percent)	95	95	88	65	68	4.6
	U.S. shipments (million dollars)	4,800	5,800	5,300	4,000	4,300	7.5
	U.S. exports (million dollars)	1,081	1,888	1,689	474	437	-7.8
	U.S. imports (million dollars)	729	1,399	1,244	252	210	-16.7
	Apparent U.S. consumption (million dollars)	4,448	5,312	4,854	3,778	4,073	7.8
	Trade balance (million dollars)	352	488	446	222	227	2.2
	Ratio of imports to consumption (percent)	16.4	26.3	25.6	6.7	5.1	-23.9
	Ratio of exports to shipments (percent)	22.5	32.5	31.9	11.8	10.2	-13.6
ET038	Optical goods, including ophthalmic goods:						
	Number of establishments	950	1,000	900	850	855	0.6
	Employees (thousands)	63.0	70.0	60.0	50.0	50.0	0.0
	Capacity utilization (percent)	87	92	82	78	78	0.0
	U.S. shipments (million dollars)	6,550	8,515	7,960	7,700	7,800	1.3
	U.S. exports (million dollars)	2,682	3,995	3,727	3,548	3,309	-6.8
	U.S. imports (million dollars)	4,225	5,881	4,957	4,142	4,495	8.5
	Apparent U.S. consumption (million dollars)	8,093	10,402	9,190	8,294	8,986	8.3
	Trade balance (million dollars)	-1,543	-1,887	-1,230	-594	-1,186	-99.7
	Ratio of imports to consumption (percent)	52.2	56.5	53.9	49.9	50.0	(¹)
	Ratio of exports to shipments (percent)	40.9	46.9	46.8	46.1	42.4	-8.0
ET039	Photographic cameras and equipment:						
	Number of establishments	428	428	428	428	428	0.0
	Employees (thousands)	20.0	16.0	13.0	11.0	9.0	-18.2
	Capacity utilization (percent)	62	53	54	54	54	0.0
	U.S. shipments (million dollars)	8,397	5,463	3,567	2,854	2,400	-15.9
	U.S. exports (million dollars)	1,825	1,800	1,694	1,187	954	-19.6
	U.S. imports (million dollars)	5,843	5,299	3,560	3,029	2,715	-10.4
	Apparent U.S. consumption (million dollars)	12,415	8,962	5,433	4,696	4,161	-11.4
	Trade balance (million dollars)	-4,018	-3,499	-1,866	-1,842	-1,761	4.4
	Ratio of imports to consumption (percent)	47.1	59.1	65.5	64.5	65.2	1.1
	Ratio of exports to shipments (percent)	21.7	32.9	47.5	41.6	39.7	-4.6

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET040	Medical goods:						
	Number of establishments	2,340	2,345	2,350	2,350	2,380	1.3
	Employees (thousands)	183.0	185.0	188.0	190.0	192.0	1.1
	Capacity utilization (percent)	91	92	94	94	95	1.1
	U.S. shipments (million dollars)	31,500	33,075	37,000	41,440	44,755	8.0
	U.S. exports (million dollars)	12,455	13,411	14,987	15,059	16,827	11.7
	U.S. imports (million dollars)	7,932	9,178	10,869	13,232	16,143	22.0
	Apparent U.S. consumption (million dollars)	26,978	28,843	32,881	39,614	44,072	11.3
	Trade balance (million dollars)	4,522	4,232	4,119	1,826	683	-62.6
	Ratio of imports to consumption (percent)	29.4	31.8	33.1	33.4	36.6	9.6
	Ratio of exports to shipments (percent)	39.5	40.5	40.5	36.3	37.6	3.6
ET041	Watches and clocks:						
	Number of establishments	145	145	145	145	145	0.0
	Employees (thousands)	7.0	7.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	62	61	55	51	46	-9.8
	U.S. shipments (million dollars)	1,168	1,151	1,018	920	900	-2.2
	U.S. exports (million dollars)	335	348	279	235	242	3.3
	U.S. imports (million dollars)	3,136	3,354	2,957	3,098	3,291	6.2
	Apparent U.S. consumption (million dollars)	3,969	4,157	3,696	3,784	3,949	4.4
	Trade balance (million dollars)	-2,801	-3,006	-2,678	-2,864	-3,049	-6.5
	Ratio of imports to consumption (percent)	79.0	80.7	80.0	81.9	83.3	1.7
	Ratio of exports to shipments (percent)	28.7	30.3	27.4	25.5	26.9	5.5
ET042	Drawing, drafting, and calculating instruments:						
	Number of establishments	175	175	180	180	180	0.0
	Employees (thousands)	10.0	11.0	13.0	13.0	13.0	0.0
	Capacity utilization (percent)	75	80	80	75	70	-6.7
	U.S. shipments (million dollars)	605	720	825	875	865	-1.1
	U.S. exports (million dollars)	415	366	395	368	364	-1.0
	U.S. imports (million dollars)	431	234	207	192	223	16.5
	Apparent U.S. consumption (million dollars)	620	588	637	699	724	3.6
	Trade balance (million dollars)	-15	132	188	176	141	-20.0
	Ratio of imports to consumption (percent)	69.4	39.8	32.6	27.4	30.8	12.4
	Ratio of exports to shipments (percent)	68.7	50.8	47.9	42.0	42.1	(¹)

See footnote(s) at end of table.

Table EL-4—Continued

Electronic products sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
ET043	Measuring, testing, and controlling instruments:						
	Number of establishments	3,235	3,235	3,235	3,235	3,235	0.0
	Employees (thousands)	245.0	245.0	245.0	242.0	240.0	-0.8
	Capacity utilization (percent)	75	75	75	75	75	0.0
	U.S. shipments (million dollars)	39,200	44,790	55,000	58,300	58,000	-0.5
	U.S. exports (million dollars)	14,480	16,629	15,605	14,346	14,683	2.4
	U.S. imports (million dollars)	9,656	11,743	11,806	11,595	12,638	9.0
	Apparent U.S. consumption (million dollars)	34,376	39,904	51,201	55,549	55,954	0.7
	Trade balance (million dollars)	4,824	4,886	3,799	2,751	2,046	-25.6
	Ratio of imports to consumption (percent)	28.1	29.4	23.1	20.9	22.6	8.1
	Ratio of exports to shipments (percent)	36.9	37.1	28.4	24.6	25.3	2.8

¹Less than 0.05 percent.

Note.—Calculations based on unrounded data.

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

Miscellaneous Manufactures

Gail Burns, Coordinator
(202) 205-2501
gail.burns@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$2.8 billion (5 percent) to \$59.9 billion
U.S. exports: Decreased by \$146 million (1 percent) to \$14.9 billion
U.S. imports: Increased by \$2.6 billion (4 percent) to \$74.8 billion

The U.S. trade deficit in miscellaneous manufactures¹ continued to expand in 2003, but at a considerably slower rate than in 2002 (see table MS-1). The trade deficit increased by \$2.8 billion in 2003, compared with the \$7 billion increase in 2002 when the deficit reached \$57.1 billion. Expansion of the U.S. trade deficit reflected little change in U.S. exports and a 4-percent growth in U.S. imports (compared with an 8-percent increase in 2002). The slower growth in imports in 2003 reflects reduced imports of video games, as the market matured for the generation of game consoles introduced in late 2001 and early 2002 (see table MS-2).

Historically, the United States has maintained a trade deficit in the miscellaneous manufactures sector as production processes of these goods tend to be labor intensive and the production technology is readily transferable to developing or newly industrialized countries. China is the dominant supplier of sector products other than works of art and seats for motor vehicles and aircraft. Numerous sector imports are produced in China and elsewhere in Asia under license from U.S. companies. Asian countries were the source of 64 percent of U.S. imports of all sector products in 2003; China accounted for 48 percent.

Canada was the leading market for U.S. exports of miscellaneous manufactures in 2003, taking one-quarter of the total, followed by the EU at 23 percent. Japan and Mexico accounted for 11 and 10 percent, respectively. Leading export categories are paintings returning to Europe or sold to investors in Japan, furniture and copyrighted games to Canada, military weapons to strategic allies, and parts for assembly in Mexico and Asia (see table MS-1).

The miscellaneous manufactures industries with the largest import and export shifts are shown in the table MS-2. Furniture, the largest traded commodity in this sector, registered a \$2.0 billion increase in U.S. imports in 2003 (see Furniture). Other commodity groups within the sector experiencing sizeable shifts in trade in 2003 included games, works of art, and seats for motor vehicles and aircraft. These

¹ U.S. imports of miscellaneous manufactures tend to be concentrated in products for which there is no competing U.S. industry (e.g., certain works of art), where there is no remaining U.S. production (e.g., home video games and Christmas decorations), that require semiskilled assembly (e.g., jewelry, furniture, lamps and lighting fittings), or that require sewing (e.g., luggage, automobile seat covers, and baseballs) or low-technology injection molding (e.g., toys and dolls). Less import-sensitive industry/commodity groups are characterized by products with high transportation costs (e.g., upholstered furniture and fairground amusement rides), low raw-material cost in the United States relative to those of foreign producers (e.g., baseball bats and silverware), or for which U.S. manufacturers have superior design and production technology or copyright protection (e.g., water skis and board games).

Table MS-1

Miscellaneous manufactures: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U.S. exports of domestic merchandise:							
China	113	132	136	137	143	6	4.
Canada	3,883	4,174	3,759	3,561	3,697	136	3.8
Mexico	1,717	1,977	1,729	1,687	1,511	-177	-10.5
Italy	251	165	250	236	247	12	5.0
Japan	1,598	2,057	2,007	1,686	1,604	-82	-4.9
United Kingdom	1,382	1,506	1,516	1,327	1,315	-13	-1.0
Taiwan	227	349	404	230	299	68	29.7
France	345	418	505	334	299	-35	-10.5
Germany	493	590	667	455	450	-5	-1.1
Thailand	55	76	67	71	70	-1	-0.9
All other	5,206	5,429	5,387	5,280	5,225	-56	-1.1
Total	15,270	16,872	16,428	15,004	14,859	-146	-1.0
EU-15	3,502	3,987	4,119	3,434	3,344	-90	-2.6
OPEC	641	401	461	394	456	63	15.9
Latin America	2,913	3,244	2,970	2,869	2,755	-114	-4.0
CBERA	579	674	688	789	827	37	4.7
Asia	2,945	3,662	3,629	3,303	3,151	-153	-4.6
Sub-Saharan Africa	69	73	99	69	89	19	27.7
Central and Eastern Europe	39	39	39	38	45	7	19.1
U.S. imports of merchandise for consumption:							
China	21,733	25,365	25,690	31,490	35,812	4,321	13.7
Canada	5,740	6,452	5,931	5,967	6,137	170	2.9
Mexico	4,697	5,160	5,295	6,356	6,252	-104	-1.6
Italy	3,689	3,971	3,818	4,020	3,852	-168	-4.2
Japan	4,179	3,946	4,732	3,399	1,992	-1,407	-41.4
United Kingdom	1,804	1,923	1,730	1,602	1,496	-107	-6.7
Taiwan	2,969	3,052	2,427	2,325	2,282	-43	-1.9
France	2,446	2,989	2,914	2,546	2,220	-327	-12.8
Germany	1,073	1,164	1,107	1,189	1,409	220	18.5
Thailand	1,435	1,665	1,693	1,634	1,670	36	2.2
All other	10,547	11,636	11,238	11,598	11,643	45	0.4
Total	60,312	67,322	66,575	72,129	74,765	2,636	3.7
EU-15	10,845	11,745	11,403	11,338	10,815	-523	-4.6
OPEC	952	1,119	1,126	1,125	1,053	-72	-6.4
Latin America	5,863	6,393	6,582	7,779	7,582	-197	-2.5
CBERA	475	408	419	465	418	-47	-10.1
Asia	35,972	40,365	40,296	44,775	47,838	3,062	6.8
Sub-Saharan Africa	99	97	109	118	123	6	5.0
Central and Eastern Europe	372	468	589	485	542	57	11.7

See footnote(s) at end of table.

Table MS-1--*Continued*

Miscellaneous manufactures: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by selected countries and country groups, 1999-2003¹

	Change, 2003 from 2002						
Item	1999	2000	2001	2002	2003	Absolute	Percent
	Million dollars						
U.S. merchandise trade balance:							
China	-21,620	-25,233	-25,554	-31,353	-35,669	-4,316	-13.8
Canada	-1,858	-2,278	-2,172	-2,406	-2,440	-34	-1.4
Mexico	-2,980	-3,184	-3,566	-4,668	-4,741	-73	-1.6
Italy	-3,438	-3,806	-3,568	-3,785	-3,605	180	4.7
Japan	-2,581	-1,890	-2,724	-1,713	-388	1,325	77.4
United Kingdom	-422	-417	-214	-275	-181	94	34.2
Taiwan	-2,742	-2,704	-2,022	-2,095	-1,984	112	5.3
France	-2,101	-2,571	-2,409	-2,213	-1,921	292	13.2
Germany	-580	-573	-440	-734	-959	-225	-30.6
Thailand	-1,380	-1,588	-1,627	-1,564	-1,600	-36	-2.3
All other	-5,342	-6,207	-5,851	-6,318	-6,418	-100	-1.6
Total	-45,042	-50,450	-50,147	-57,124	-59,906	-2,782	-4.9
EU-15	-7,343	-7,759	-7,284	-7,905	-7,471	434	5.5
OPEC	-312	-718	-665	-732	-597	135	18.4
Latin America	-2,950	-3,149	-3,612	-4,910	-4,827	83	1.7
CBERA	104	266	269	324	409	84	26.0
Asia	-33,027	-36,703	-36,667	-41,472	-44,687	-3,215	-7.8
Sub-Saharan Africa	-30	-24	-9	-48	-35	13	27.9
Central and Eastern Europe	-332	-429	-550	-447	-496	-50	-11.1

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data. The countries shown are those with the largest total U.S. trade (U.S. imports plus exports) in these products in 2003.

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

Table MS-2
Leading changes in U.S. exports and imports of miscellaneous manufactures, 1999-2003

Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent

Note.-Calculations based on unrounded data.

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

changes were led by declining imports of video games and paintings, and increased imports of parts for car seats.

U.S. imports of games, which accounted for 7 percent of total sector imports in 2003, fell 15 percent during the year. Home video games (video game consoles) accounted for nearly one-half of the imports of games² in 2003. This product segment is subject to sharp swings in levels of trade as demand surges with the introduction of each new generation of video games, settles into a plateau in the ensuing (usually post-Christmas) months, then falls as prices are cut on the mature product and customers await the introduction of the next generation of games. All three producers of video game consoles (Nintendo, Sony, and Microsoft) introduced their versions of the new generation in late 2001 and early 2002, leading to a sharp increase in imports in 2002. As the market matured in 2003, imports of video game consoles declined 35 percent to \$2.4 billion. Imports of all other types of games (including handheld video games, most of which are assembled in China) rose by \$381 million (18 percent) in 2003 to \$2.6 billion. The three video game console producers manufactured the bulk of their new generation of video games in Japan and Mexico in 2002. As the market matured, production by each was shifted to China. As a result, U.S. imports of all type of games (predominantly video game consoles) from Japan and Mexico dropped by \$1.4 billion (65 percent) to \$726 million and by \$633 million (92 percent) to \$55 million, respectively in 2003. Meanwhile, imports of all games from China grew by \$1.1 billion (41 percent) to \$3.7 billion. Video game consoles accounted for over half of this increase from China, rising by \$537 million (34 percent) to \$2.1 billion.

U.S. imports under the category works of art and miscellaneous manufactures goods fell by \$718 million (8 percent) in 2003 as imports of paintings and antiques fell by \$749 million and \$97 million, respectively. Imports of such items include goods that are destined for private buyers and auction houses, as well as items entered for temporary exhibition. Such articles are recorded as U.S. exports when they are returned to their home museum. Exports of paintings and antiques increased by \$152 million and \$23 million, respectively, in 2003. The leading sources of paintings in 2003 were France, Spain, and the United Kingdom. The same countries, plus Germany and Switzerland, were the leading destinations.

Mexico is the leading foreign supplier of seats and parts used in the assembly of motor vehicles in North America, accounting for 70 percent (\$3.1 billion) of total U.S. imports of seats for motor vehicles and aircraft in 2003. Canada supplied 16 percent (\$718 million). Parts accounted for 91 percent of U.S. imports in this category, with Mexico typically supplying seat covers sewn in maquiladora operations and Canada providing motorized units for power-adjustable seats. There was an incremental shift in the final assembly of motor vehicle seats and interior modules from Mexico and Canada to the United States in 2003. Certain models made in Mexico lost their popularity in the U.S. market³ and a 15-percent appreciation of the Canadian dollar against the U.S. dollar led manufacturers to favor assembly in the United States rather than Canada to reduce costs. As a result, the production of some Mexican and Canadian parts was redirected from vehicle assembly plants in Mexico and Canada to U.S. plants. U.S. imports of car seats and parts from Mexico rose by \$430 million (16 percent) in 2003, and imports from Canada increased by \$109 million (12 percent).⁴

Overall, there was little change in U.S. exports of miscellaneous manufactures between 2002 and 2003. U.S. exports of games climbed by \$226 million, with exports of pinball machines, arcade video games, and home video game software to Canada, the EU, and South America accounting for most of the

² Games include (1) video games of a kind used with a television receiver (home video games or video game consoles); (2) coin-operated game machines (arcade games), including video games and pinball machines; (3) equipment for billiards; (4) playing cards; (5) chess, checkers, and other board games; (6) arcade, table or parlor games; and (7) bowling alley equipment.

³ "Detroit South Faces Competition from Detroit East," *Mexico Watch*, Aug. 1, 2003, p. 6.

⁴ For more information, see Transportation Equipment.

increase. Exports of works of art and miscellaneous manufactured goods rose by \$182 million in 2003, with paintings, sculptures, and antiques accounting for all of the increase. The return of touring collections to Switzerland, the United Kingdom, and Spain accounted for much of the increase in exports. Exports of parts of seats for motor vehicles fell by \$309 million (23 percent) as fewer vehicles were assembled in Mexico and Canada, the predominant markets for such exports. Exports of arms and ammunition dropped by \$282 million, as sales of military weapons and munitions by entities other than the Department of Defense fell.⁵ Exports of bombs, grenades, torpedoes, mines, missiles, and similar munitions fell by \$221 million (17 percent) and exports of rocket launchers, flame-throwers, grenade launchers, torpedo tubes, and similar projectors dropped by \$101 million (73 percent). The sharpest declines in exports of arms and ammunition were to Korea, Egypt, Japan, and Bahrain.

⁵ Exports by the Department of Defense are not reported in statistics of the U.S. Department of Commerce.

COMMODITY ANALYSIS OF FURNITURE⁶

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$1.8 billion (13 percent) to \$16.4 billion

U.S. exports: Increased by \$ 186 million (8 percent) to \$2.6 billion

U.S. imports: Increased by \$2.0 billion (12 percent) to \$19.0 billion

Continued low interest rates in the United States in 2003 contributed to a strong market for both new houses and home renovations, which in turn led to growth in the U.S. furniture market. Imports continued to expand their share of apparent U.S. consumption from 20 percent in 2002 to 22 percent in 2003, as imports grew 12 percent to \$19.0 billion, while U.S. manufacturers' shipments of furniture and related products edged downward 0.3 percent (\$228 million) to \$69.8 billion.⁷

Overall, the U.S. trade deficit in furniture expanded by \$1.8 billion to reach \$16.4 billion in 2003, somewhat lower than the deficit growth in 2002 which registered an increase of \$2.5 billion. China accounted for \$1.6 billion of the increase in the trade deficit in 2003, compared with \$1.8 billion of the increase in 2002.⁸

U.S. exports

NAFTA partners Canada and Mexico accounted for nearly three-fifths of total furniture exports from the United States in 2003. Lower transportation costs relative to other markets and shared tastes in furniture styles encourage cross border trade with Canada. U.S. exports of furniture to Mexico include office furniture for U.S. multinational operations and U.S.-made furniture components that are subsequently assembled into complete articles of furniture in maquiladora operations and destined chiefly for the U.S. market.

While U.S. exports to Canada increased by a modest 4 percent in 2003, exports to Mexico nearly doubled. The \$186 million increase in exports to Mexico matched the total growth in exports of furniture in 2003 (see table MS-3). Exports of parts of seats (which includes parts of sofas as well as chairs) to Mexico more than quintupled in 2003, rising by \$188 million to reach \$223 million and accounted for over one-half of all U.S. furniture exports to Mexico. An estimated one-quarter of the increase in exports of furniture parts went to plants for the assembly of upholstered furniture. Another one-quarter of the growth in exports of parts was accounted for by operations that further processed the parts, then exported them to furniture factories in the United States.

U.S. imports

The \$1.6 billion increase in U.S. imports from China accounted for three-quarters of the rise in total imports of furniture in 2003 (see table MS-4) and 86 percent of the increase in the total U.S. trade

⁶ This industry/commodity group includes any movable articles which have the essential characteristic that they are constructed for placing on the floor or ground and have a utilitarian purpose, to equip homes and buildings (see *Explanatory Notes to the Harmonized System*, Section XX, Chapter 94 Gen., p.1698.)

⁷ U.S. Census Bureau, *Manufacturers' Shipments, Inventories, and Orders: December 2003*, issued Feb. 2004, p. 3.

⁸ China is the subject of an antidumping investigation in which the Commission made a preliminary determination of a reasonable indication that the U.S. industry was materially injured by reason of imports of wooden bedroom furniture from China. This determination was sent to the U.S. Department of Commerce on Jan. 12, 2004, and the final phase of the investigation is to be scheduled. See USITC, Inv. No. 731-TA-1058, *Wooden Bedroom Furniture from China*, publication 3667, Jan. 2004.

deficit in furniture. China was the leading supplier of U.S. imports of furniture, with its share of U.S. furniture imports rising from 38 percent to 42 percent during 2002-03.

The principal categories for imports of furniture are wood (54 percent), metal (19 percent), and upholstered (13 percent) (see table MS-4). China was the leading supplier to the United States in each of these product categories in 2003. The furniture industry in China has expanded with substantial investments from Taiwan and the United States. As labor costs in Taiwan rose, furniture companies there shifted much of their production to China. More recently, U.S. furniture companies have shifted production of certain labor-intensive styles and components to China, incorporating components from China into their domestic production and importing entire suites of fully assembled furniture to broaden their production lines. China's competitive advantages include a highly consolidated furniture industry that has significant domestic and regional sources of timber, economies of scale, low-cost labor, and state-of-the-art production facilities.

Imports of wood furniture from China rose by \$778 million (23 percent) in 2003 and accounted for 84 percent of the \$925 million growth in total imports of wood furniture that year. Leading growth categories in wood furniture were bedroom furniture (by \$346 million), dining room tables (by \$290 million), and office furniture (by \$47 million). Imports of wood furniture from Vietnam more than doubled in 2003 to reach \$158 million, and grew by \$90 million for the second largest absolute increase by all foreign suppliers to the U.S. market.

Furniture produced in China accounts for an increased share of the U.S. market for upholstered furniture, with U.S. imports growing by \$257 million (63 percent) in 2003, following a \$200 million (72 percent) expansion the previous year. China accounted for 61 percent of the total increase in imports of upholstered furniture in 2003, which rose by \$420 million. Leather tanneries and processing plants in China, which have traditionally supplied materials for producers of athletic shoes and hiking boots, are beginning to expand production to leather sofas and chairs. As a result, China has overtaken Italy as the leading supplier of upholstered furniture.⁹ China has become an important supplier of fabric to the U.S. upholstered furniture industry, with imports of furniture components of textile material nearly doubling in 2003, growing by \$162 million to reach \$327 million.

Imports of upholstered furniture from Mexico rose by \$41 million in 2003, reaching \$296 million and accounting for the second-largest increase in the category after China. Industry sources attribute this growth to the gradual shift in production over the past decade from Southern California to Baja, Mexico, because of the strict air pollution standards in the Los Angeles Basin and lower labor costs in Mexico.¹⁰

Josephine Spalding-Masgarha
(202) 205-3498
josephine.spalding@usitc.gov

⁹ Leather furniture accounts for the bulk of upholstered furniture imported from China and Italy.

¹⁰ Russ Batsun, Director, American Furniture Manufacturers Association, Washington, DC, telephone interview with USITC staff, Apr. 20, 2004.

Table MS-3
U.S. exports of furniture , 1999-2003

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent

Note.—Calculations based on unrounded data.

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

Table MS-4
U.S. imports of furniture, 1999-2003

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
Wood furniture	6,768	8,054	8,004	9,403	10,328	925	10
Metal furniture	2,994	3,631	3,377	3,621	3,618	-3	¹
Upholstered furniture	1,393	1,694	1,688	2,006	2,426	420	21
All other	1,998	1,780	1,770	1,998	2,663	665	33
Total	12,775	15,159	14,839	17,028	19,035	2,007	12

¹ Less than -0.5 percent.

Note.—Calculations based on unrounded data.

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

Table MS-5

Miscellaneous manufactures : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM046	Luggage, handbags, and flat goods:							
	Exports	329	351	308	278	298	20	7.2
	Imports	4,073	4,381	4,309	4,412	4,734	322	7.3
	Trade balance	-3,744	-4,029	-4,001	-4,134	-4,437	-302	-7.3
MM046A	Luggage:							
	Exports	250	253	223	194	187	-7	-3.6
	Imports	2,619	2,741	2,667	2,656	2,622	-34	-1.3
	Trade balance	-2,369	-2,489	-2,444	-2,462	-2,435	27	1.1
MM046B	Handbags:							
	Exports	42	63	58	55	76	21	39.2
	Imports	1,004	1,179	1,203	1,301	1,503	201	15.5
	Trade balance	-963	-1,116	-1,146	-1,247	-1,426	-180	-14.4
MM046C	Flat goods:							
	Exports	32	30	22	25	23	-2	-9.8
	Imports	428	435	417	433	473	40	9.3
	Trade balance	-396	-404	-396	-408	-451	-43	-10.5
MM047	Certain other leather goods:							
	Exports	123	173	100	94	87	-8	-8.1
	Imports	209	242	256	291	348	58	19.8
	Trade balance	-86	-69	-156	-197	-262	-65	-33.2
MM048	Musical instruments and accessories:							
	Exports	360	371	398	373	381	8	2.2
	Imports	1,256	1,413	1,300	1,306	1,363	57	4.3
	Trade balance	-896	-1,042	-902	-933	-982	-48	-5.2
MM049	Umbrellas, whips, riding crops, and canes:							
	Exports	11	11	11	9	7	-1	-15.6
	Imports	248	284	293	275	310	35	12.7
	Trade balance	-237	-273	-281	-266	-303	-36	-13.6
MM050	Silverware and related articles of precious metal:							
	Exports	123	165	180	155	161	5	3.4
	Imports	57	68	57	54	68	14	26.6
	Trade balance	66	98	124	101	92	-9	-8.9
MM051	Precious jewelry and related articles:							
	Exports	822	1,272	1,659	1,826	1,770	-56	-3.1
	Imports	5,063	5,737	5,533	6,261	6,559	298	4.8
	Trade balance	-4,241	-4,464	-3,874	-4,435	-4,789	-355	-8.0

See footnote(s) at end of table.

Table MS-5--*Continued*Miscellaneous manufactures : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
Million dollars								
MM052	Costume jewelry and related articles:							
	Exports	133	127	113	104	100	-4	-3.5
	Imports	546	619	655	750	816	67	8.9
	Trade balance	-413	-492	-542	-646	-716	-70	-10.9
MM053	Bicycles and certain parts:							
	Exports	271	235	226	216	240	24	11.1
	Imports	1,199	1,348	1,025	1,125	1,106	-19	-1.7
	Trade balance	-928	-1,113	-799	-909	-867	43	4.7
MM054	Furniture:							
	Exports	2,597	3,026	2,689	2,409	2,595	186	7.7
	Imports	12,775	15,159	14,839	17,028	19,035	2,007	11.8
	Trade balance	-10,178	-12,132	-12,150	-14,620	-16,440	-1,820	-12.5
MM055	Writing instruments and related articles:							
	Exports	333	288	263	269	241	-28	-10.4
	Imports	965	1,146	1,027	1,044	1,100	56	5.4
	Trade balance	-632	-857	-764	-775	-859	-84	-10.8
MM056	Lamps and lighting fittings:							
	Exports	585	678	648	671	628	-43	-6.3
	Imports	3,858	4,496	4,148	4,605	4,781	176	3.8
	Trade balance	-3,272	-3,818	-3,500	-3,934	-4,153	-219	-5.6
MM057	Prefabricated buildings:							
	Exports	327	331	291	275	309	33	12.1
	Imports	221	281	308	341	347	6	1.8
	Trade balance	107	50	-17	-66	-39	27	41.3
MM058	Dolls:							
	Exports	25	30	33	24	20	-4	-16.1
	Imports	1,374	1,475	1,218	1,257	1,226	-31	-2.5
	Trade balance	-1,349	-1,445	-1,186	-1,233	-1,206	28	2.2
MM059	Toys:							
	Exports	497	532	489	424	378	-46	-10.9
	Imports	7,978	8,462	7,905	8,292	8,452	160	1.9
	Trade balance	-7,481	-7,930	-7,416	-7,868	-8,074	-206	-2.6
MM060	Games:							
	Exports	936	944	788	858	1,084	226	26.4
	Imports	4,086	3,879	5,537	5,887	4,985	-902	-15.3
	Trade balance	-3,150	-2,935	-4,748	-5,029	-3,901	1,128	22.4

See footnote(s) at end of table.

Table MS-5--*Continued*Miscellaneous manufactures : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Change, 2003 from 2002	
							Absolute	Percent
		Million dollars						
MM061	Sporting goods:							
	Exports	1,621	1,679	1,672	1,537	1,534	-3	-0.2
	Imports	3,027	3,565	3,632	3,859	4,149	289	7.5
	Trade balance	-1,407	-1,886	-1,960	-2,322	-2,615	-292	-12.6
MM062	Smokers' articles:							
	Exports	71	77	77	82	93	10	12.7
	Imports	134	140	163	139	170	31	22.0
	Trade balance	-63	-63	-86	-57	-77	-20	-35.4
MM063	Brooms, brushes, and hair grooming articles:							
	Exports	206	243	213	205	228	24	11.6
	Imports	955	859	894	999	1,011	12	1.2
	Trade balance	-750	-616	-682	-795	-783	12	1.5
MM063A	Brooms and brushes:							
	Exports	179	214	187	185	211	27	14.4
	Imports	614	625	697	815	847	32	3.9
	Trade balance	-435	-410	-510	-630	-635	-5	-0.9
MM063B	Hair grooming articles, non-electric (except brushes):							
	Exports	27	28	25	20	17	-3	-13.7
	Imports	341	234	197	184	164	-20	-10.8
	Trade balance	-315	-205	-172	-164	-147	17	10.4
MM064	Works of art and miscellaneous manufactured goods:							
	Exports	1,731	2,142	2,177	1,379	1,561	182	13.2
	Imports	8,463	9,641	9,312	9,274	8,556	-718	-7.7
	Trade balance	-6,732	-7,499	-7,136	-7,895	-6,995	900	11.4
MM065	Apparel fasteners:							
	Exports	140	183	154	157	148	-9	-5.9
	Imports	89	85	73	65	69	4	5.9
	Trade balance	51	98	81	92	79	-13	-14.2
MM066	Arms and ammunition:							
	Exports	2,152	2,151	2,130	2,019	1,736	-282	-14.0
	Imports	711	836	850	978	1,090	112	11.4
	Trade balance	1,442	1,314	1,280	1,040	646	-394	-37.9

See footnote(s) at end of table.

Table MS-5--*Continued*Miscellaneous manufactures : U.S. trade for industry/commodity groups and subgroups, 1999-2003¹

							Change, 2003 from 2002	
USITC code ²	Industry/commodity group	1999	2000	2001	2002	2003	Absolute	Percent
<i>Million dollars</i>								
MM066A	Small arms and ammunition:							
	Exports	464	535	558	480	551	71	14.8
	Imports	608	637	679	800	873	73	9.1
	Trade balance	-144	-102	-120	-320	-321	-2	-0.6
MM067	Seats for motor vehicles and aircraft							
	Exports	1,878	1,861	1,808	1,641	1,260	-381	-23.2
	Imports	3,024	3,209	3,239	3,886	4,489	603	15.5
	Trade balance	-1,146	-1,348	-1,431	-2,245	-3,229	-984	-43.8

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²This coding system is used by the U.S. International Trade Commission to identify major groupings and subgroupings of HTS import and export items for trade monitoring purposes

Note.—Calculations based on unrounded data.

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

Table MS-6

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM046A	Luggage:						
	Number of establishments	223	209	189	183	181	-1.1
	Employees (thousands)	8.0	7.0	6.0	6.0	6.0	0.0
	Capacity utilization (percent)	67	67	68	68	72	5.9
	U.S. shipments (million dollars)	964	972	853	825	875	6.1
	U.S. exports (million dollars)	250	253	223	194	187	-3.6
	U.S. imports (million dollars)	2,619	2,741	2,667	2,656	2,622	-1.3
	Apparent U.S. consumption (million dollars)	3,333	3,461	3,297	3,287	3,310	0.7
	Trade balance (million dollars)	-2,369	-2,489	-2,444	-2,462	-2,435	1.1
	Ratio of imports to consumption (percent)	78.6	79.2	80.9	80.8	79.2	-2.0
	Ratio of exports to shipments (percent)	25.9	26.0	26.1	23.5	21.4	-8.9
MM046B	Handbags:						
	Number of establishments	107	102	93	90	88	-2.2
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	60	60	59	60	64	6.7
	U.S. shipments (million dollars)	214	234	229	220	233	5.9
	U.S. exports (million dollars)	42	63	58	55	76	39.2
	U.S. imports (million dollars)	1,004	1,179	1,203	1,301	1,503	15.5
	Apparent U.S. consumption (million dollars)	1,177	1,350	1,375	1,467	1,659	13.2
	Trade balance (million dollars)	-963	-1,116	-1,146	-1,247	-1,426	-14.4
	Ratio of imports to consumption (percent)	85.4	87.3	87.5	88.7	90.6	2.1
	Ratio of exports to shipments (percent)	19.5	26.7	25.1	24.9	32.7	31.3
MM046C	Flat goods:						
	Number of establishments	138	129	117	112	110	-1.8
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	66	66	64	64	68	6.3
	U.S. shipments (million dollars)	381	375	390	375	398	6.1
	U.S. exports (million dollars)	32	30	22	25	23	-9.8
	U.S. imports (million dollars)	428	435	417	433	473	9.3
	Apparent U.S. consumption (million dollars)	777	779	786	783	849	8.4
	Trade balance (million dollars)	-396	-404	-396	-408	-451	-10.5
	Ratio of imports to consumption (percent)	55.1	55.8	53.1	55.3	55.8	0.9
	Ratio of exports to shipments (percent)	8.4	8.1	5.5	6.7	5.7	-14.9

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM047	Certain other leather goods:						
	Number of establishments	450	450	450	434	430	-0.9
	Employees (thousands)	9.0	9.0	9.0	9.0	9.0	0.0
	Capacity utilization (percent)	60	60	58	58	62	6.9
	U.S. shipments (million dollars)	685	669	565	545	578	6.1
	U.S. exports (million dollars)	123	173	100	94	87	-8.1
	U.S. imports (million dollars)	209	242	256	291	348	19.8
	Apparent U.S. consumption (million dollars)	771	738	721	742	840	13.2
	Trade balance (million dollars)	-86	-69	-156	-197	-262	-33.2
	Ratio of imports to consumption (percent)	27.1	32.8	35.5	39.2	41.5	5.9
	Ratio of exports to shipments (percent)	17.9	25.9	17.8	17.3	15.0	-13.3
MM048	Musical instruments and accessories:						
	Number of establishments	600	620	600	600	600	0.0
	Employees (thousands)	14.0	15.0	14.0	14.0	14.0	0.0
	Capacity utilization (percent)	80	85	75	75	75	0.0
	U.S. shipments (million dollars)	1,648	1,794	1,600	1,600	1,600	0.0
	U.S. exports (million dollars)	360	371	398	373	381	2.2
	U.S. imports (million dollars)	1,256	1,413	1,300	1,306	1,363	4.3
	Apparent U.S. consumption (million dollars)	2,544	2,836	2,502	2,533	2,582	1.9
	Trade balance (million dollars)	-896	-1,042	-902	-933	-982	-5.2
	Ratio of imports to consumption (percent)	49.4	49.8	52.0	51.6	52.8	2.3
	Ratio of exports to shipments (percent)	21.8	20.7	24.9	23.3	23.8	2.1
MM049	Umbrellas, whips, riding crops, and canes:						
	Number of establishments	16	16	12	12	12	0.0
	Employees (thousands)	0.5	0.5	0.4	0.4	0.4	0.0
	Capacity utilization (percent)	72	72	50	50	50	0.0
	U.S. shipments (million dollars)	77	79	55	55	55	0.0
	U.S. exports (million dollars)	11	11	11	9	7	-15.6
	U.S. imports (million dollars)	248	284	293	275	310	12.7
	Apparent U.S. consumption (million dollars)	314	352	336	321	358	11.3
	Trade balance (million dollars)	-237	-273	-281	-266	-303	-13.6
	Ratio of imports to consumption (percent)	79.0	80.7	87.1	85.6	86.7	1.3
	Ratio of exports to shipments (percent)	14.4	14.0	20.8	15.8	13.3	-15.8

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM050	Silverware and related articles of precious metal:						
	Number of establishments	35	35	30	30	30	0.0
	Employees (thousands)	6.0	5.0	4.0	4.0	4.0	0.0
	Capacity utilization (percent)	75	75	75	75	77	2.7
	U.S. shipments (million dollars)	452	451	390	400	400	0.0
	U.S. exports (million dollars)	123	165	180	155	161	3.4
	U.S. imports (million dollars)	57	68	57	54	68	26.6
	Apparent U.S. consumption (million dollars)	386	353	266	299	308	3.0
	Trade balance (million dollars)	66	98	124	101	92	-8.9
	Ratio of imports to consumption (percent)	14.8	19.1	21.3	18.0	22.2	23.3
	Ratio of exports to shipments (percent)	27.2	36.7	46.2	38.8	40.1	3.4
MM051	Precious jewelry and related articles:						
	Number of establishments	2,290	2,270	2,270	2,270	2,270	0.0
	Employees (thousands)	37.0	40.0	39.0	39.0	39.0	0.0
	Capacity utilization (percent)	74	73	70	70	73	4.3
	U.S. shipments (million dollars)	5,745	6,009	5,410	5,800	5,800	0.0
	U.S. exports (million dollars)	822	1,272	1,659	1,826	1,770	-3.1
	U.S. imports (million dollars)	5,063	5,737	5,533	6,261	6,559	4.8
	Apparent U.S. consumption (million dollars)	9,986	10,473	9,284	10,235	10,589	3.5
	Trade balance (million dollars)	-4,241	-4,464	-3,874	-4,435	-4,789	-8.0
	Ratio of imports to consumption (percent)	50.7	54.8	59.6	61.2	61.9	1.1
	Ratio of exports to shipments (percent)	14.3	21.2	30.7	31.5	30.5	-3.2
MM052	Costume jewelry and related articles:						
	Number of establishments	780	770	700	700	700	0.0
	Employees (thousands)	15.0	15.0	14.0	14.0	14.0	0.0
	Capacity utilization (percent)	64	64	64	64	70	9.4
	U.S. shipments (million dollars)	1,145	1,061	941	930	900	-3.2
	U.S. exports (million dollars)	133	127	113	104	100	-3.5
	U.S. imports (million dollars)	546	619	655	750	816	8.9
	Apparent U.S. consumption (million dollars)	1,558	1,553	1,483	1,576	1,616	2.5
	Trade balance (million dollars)	-413	-492	-542	-646	-716	-10.9
	Ratio of imports to consumption (percent)	35.1	39.8	44.2	47.6	50.5	6.1
	Ratio of exports to shipments (percent)	11.6	12.0	12.0	11.2	11.2	0.0

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM053	Bicycles and certain parts:						
	Number of establishments	160	160	143	141	136	-3.5
	Employees (thousands)	5.0	5.0	4.0	4.0	4.0	0.0
	Capacity utilization (percent)	60	60	57	58	58	0.0
	U.S. shipments (million dollars)	775	665	630	620	605	-2.4
	U.S. exports (million dollars)	271	235	226	216	240	11.1
	U.S. imports (million dollars)	1,199	1,348	1,025	1,125	1,106	-1.7
	Apparent U.S. consumption (million dollars)	1,703	1,778	1,429	1,529	1,472	-3.8
	Trade balance (million dollars)	-928	-1,113	-799	-909	-867	4.7
	Ratio of imports to consumption (percent)	70.4	75.8	71.7	73.6	75.2	2.2
	Ratio of exports to shipments (percent)	34.9	35.4	35.9	34.8	39.6	13.8
MM054	Furniture:						
	Number of establishments	18,800	18,000	17,500	17,000	17,000	0.0
	Employees (thousands)	535.0	535.0	500.0	480.0	480.0	0.0
	Capacity utilization (percent)	75	75	73	71	71	0.0
	U.S. shipments (million dollars)	66,500	69,800	64,200	62,400	62,300	-0.2
	U.S. exports (million dollars)	2,597	3,026	2,689	2,409	2,595	7.7
	U.S. imports (million dollars)	12,775	15,159	14,839	17,028	19,035	11.8
	Apparent U.S. consumption (million dollars)	76,678	81,932	76,350	77,020	78,740	2.2
	Trade balance (million dollars)	-10,178	-12,132	-12,150	-14,620	-16,440	-12.5
	Ratio of imports to consumption (percent)	16.7	18.5	19.4	22.1	24.2	9.5
	Ratio of exports to shipments (percent)	3.9	4.3	4.2	3.9	4.2	7.7
MM055	Writing instruments and related articles:						
	Number of establishments	190	190	190	187	186	-0.5
	Employees (thousands)	16.0	16.0	16.0	15.0	15.0	0.0
	Capacity utilization (percent)	75	76	77	77	77	0.0
	U.S. shipments (million dollars)	2,746	2,751	2,510	2,470	2,450	-0.8
	U.S. exports (million dollars)	333	288	263	269	241	-10.4
	U.S. imports (million dollars)	965	1,146	1,027	1,044	1,100	5.4
	Apparent U.S. consumption (million dollars)	3,378	3,608	3,274	3,245	3,309	2.0
	Trade balance (million dollars)	-632	-857	-764	-775	-859	-10.8
	Ratio of imports to consumption (percent)	28.6	31.8	31.4	32.2	33.3	3.4
	Ratio of exports to shipments (percent)	12.1	10.5	10.5	10.9	9.9	-9.2

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM056	Lamps and lighting fittings:						
	Number of establishments	1,550	1,550	1,500	1,500	1,500	0.0
	Employees (thousands)	62.0	62.0	61.0	61.0	60.0	-1.6
	Capacity utilization (percent)	87	85	84	85	85	0.0
	U.S. shipments (million dollars)	10,090	9,500	9,400	9,500	9,260	-2.5
	U.S. exports (million dollars)	585	678	648	671	628	-6.3
	U.S. imports (million dollars)	3,858	4,496	4,148	4,605	4,781	3.8
	Apparent U.S. consumption (million dollars)	13,362	13,318	12,900	13,434	13,413	-0.2
	Trade balance (million dollars)	-3,272	-3,818	-3,500	-3,934	-4,153	-5.6
	Ratio of imports to consumption (percent)	28.9	33.8	32.2	34.3	35.6	3.8
	Ratio of exports to shipments (percent)	5.8	7.1	6.9	7.1	6.8	-4.2
MM057	Prefabricated buildings:						
	Number of establishments	1,700	1,725	1,725	1,716	1,720	(¹)
	Employees (thousands)	101.0	104.0	104.0	104.0	108.0	3.8
	Capacity utilization (percent)	73	74	74	74	77	4.1
	U.S. shipments (million dollars)	14,341	11,853	10,558	10,500	11,200	6.7
	U.S. exports (million dollars)	327	331	291	275	309	12.1
	U.S. imports (million dollars)	221	281	308	341	347	1.8
	Apparent U.S. consumption (million dollars)	14,234	11,803	10,575	10,566	11,239	6.4
	Trade balance (million dollars)	107	50	-17	-66	-39	41.3
	Ratio of imports to consumption (percent)	1.5	2.4	2.9	3.2	3.1	-3.1
	Ratio of exports to shipments (percent)	2.3	2.8	2.8	2.6	2.8	7.7
MM058	Dolls:						
	Number of establishments	150	150	150	148	148	0.0
	Employees (thousands)	3.0	2.0	2.0	2.0	2.0	0.0
	Capacity utilization (percent)	47	47	47	47	46	-2.1
	U.S. shipments (million dollars)	116	108	92	91	89	-2.2
	U.S. exports (million dollars)	25	30	33	24	20	-16.1
	U.S. imports (million dollars)	1,374	1,475	1,218	1,257	1,226	-2.5
	Apparent U.S. consumption (million dollars)	1,465	1,553	1,278	1,324	1,295	-2.2
	Trade balance (million dollars)	-1,349	-1,445	-1,186	-1,233	-1,206	2.2
	Ratio of imports to consumption (percent)	93.8	95.0	95.3	94.9	94.7	-0.2
	Ratio of exports to shipments (percent)	21.3	27.5	35.4	26.2	22.5	-14.1

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM059	Toys:						
	Number of establishments	330	330	330	330	330	0.0
	Employees (thousands)	36.0	30.0	30.0	20.0	20.0	0.0
	Capacity utilization (percent)	62	62	60	60	60	0.0
	U.S. shipments (million dollars)	2,378	2,392	2,307	2,272	2,226	-2.0
	U.S. exports (million dollars)	497	532	489	424	378	-10.9
	U.S. imports (million dollars)	7,978	8,462	7,905	8,292	8,452	1.9
	Apparent U.S. consumption (million dollars)	9,859	10,322	9,723	10,140	10,300	1.6
	Trade balance (million dollars)	-7,481	-7,930	-7,416	-7,868	-8,074	-2.6
	Ratio of imports to consumption (percent)	80.9	82.0	81.3	81.8	82.1	(¹)
	Ratio of exports to shipments (percent)	20.9	22.3	21.2	18.7	17.0	-9.1
MM060	Games:						
	Number of establishments	300	300	300	300	300	0.0
	Employees (thousands)	23.0	21.0	21.0	21.0	21.0	0.0
	Capacity utilization (percent)	78	78	80	80	80	0.0
	U.S. shipments (million dollars)	3,053	2,838	2,794	2,750	2,695	-2.0
	U.S. exports (million dollars)	936	944	788	858	1,084	26.4
	U.S. imports (million dollars)	4,086	3,879	5,537	5,887	4,985	-15.3
	Apparent U.S. consumption (million dollars)	6,203	5,773	7,542	7,779	6,596	-15.2
	Trade balance (million dollars)	-3,150	-2,935	-4,748	-5,029	-3,901	22.4
	Ratio of imports to consumption (percent)	65.9	67.2	73.4	75.7	75.6	-0.1
	Ratio of exports to shipments (percent)	30.7	33.3	28.2	31.2	40.2	28.8
MM061	Sporting goods:						
	Number of establishments	2,140	2,140	2,140	2,140	2,140	0.0
	Employees (thousands)	70.0	70.0	70.0	70.0	70.0	0.0
	Capacity utilization (percent)	68	68	68	68	68	0.0
	U.S. shipments (million dollars)	10,128	10,853	10,661	10,925	10,870	-0.5
	U.S. exports (million dollars)	1,621	1,679	1,672	1,537	1,534	-0.2
	U.S. imports (million dollars)	3,027	3,565	3,632	3,859	4,149	7.5
	Apparent U.S. consumption (million dollars)	11,535	12,739	12,621	13,247	13,485	1.8
	Trade balance (million dollars)	-1,407	-1,886	-1,960	-2,322	-2,615	-12.6
	Ratio of imports to consumption (percent)	26.2	28.0	28.8	29.1	30.8	5.8
	Ratio of exports to shipments (percent)	16.0	15.5	15.7	14.1	14.1	0.0

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM062	Smokers' articles:						
	Number of establishments	11	10	10	10	10	0.0
	Employees (thousands)	1.0	1.0	1.0	1.0	1.0	0.0
	Capacity utilization (percent)	80	80	80	80	75	-6.3
	U.S. shipments (million dollars)	210	222	230	222	255	14.9
	U.S. exports (million dollars)	71	77	77	82	93	12.7
	U.S. imports (million dollars)	134	140	163	139	170	22.0
	Apparent U.S. consumption (million dollars)	273	285	316	279	332	19.1
	Trade balance (million dollars)	-63	-63	-86	-57	-77	-35.4
	Ratio of imports to consumption (percent)	49.0	49.3	51.6	50.0	51.2	2.4
	Ratio of exports to shipments (percent)	33.8	34.9	33.5	37.1	36.4	-1.9
MM063A	Brooms and brushes:						
	Number of establishments	175	175	175	170	170	0.0
	Employees (thousands)	6.0	6.0	6.0	5.0	5.0	0.0
	Capacity utilization (percent)	75	75	73	70	70	0.0
	U.S. shipments (million dollars)	2,090	2,020	1,895	1,800	1,800	0.0
	U.S. exports (million dollars)	179	214	187	185	211	14.4
	U.S. imports (million dollars)	614	625	697	815	847	3.9
	Apparent U.S. consumption (million dollars)	2,525	2,430	2,405	2,430	2,435	(¹)
	Trade balance (million dollars)	-435	-410	-510	-630	-635	-0.9
	Ratio of imports to consumption (percent)	24.3	25.7	29.0	33.5	34.8	3.9
	Ratio of exports to shipments (percent)	8.6	10.6	9.9	10.3	11.7	13.6
MM063B	Hair grooming articles, non-electric (except brushes):						
	Number of establishments	90	90	88	88	85	-3.4
	Employees (thousands)	3.0	3.0	3.0	3.0	3.0	0.0
	Capacity utilization (percent)	80	85	84	85	85	0.0
	U.S. shipments (million dollars)	580	585	572	575	600	4.3
	U.S. exports (million dollars)	27	28	25	20	17	-13.7
	U.S. imports (million dollars)	341	234	197	184	164	-10.8
	Apparent U.S. consumption (million dollars)	895	790	744	739	747	1.1
	Trade balance (million dollars)	-315	-205	-172	-164	-147	10.4
	Ratio of imports to consumption (percent)	38.1	29.6	26.5	24.9	22.0	-11.6
	Ratio of exports to shipments (percent)	4.6	4.8	4.4	3.5	2.9	-17.1

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM064	Works of art and miscellaneous manufactured goods:						
	Number of establishments	3,000	3,050	3,100	3,200	3,200	0.0
	Employees (thousands)	115.0	119.0	121.0	125.0	125.0	0.0
	Capacity utilization (percent)	73	73	72	73	73	0.0
	U.S. shipments (million dollars)	37,000	38,340	39,100	41,100	43,155	5.0
	U.S. exports (million dollars)	1,731	2,142	2,177	1,379	1,561	13.2
	U.S. imports (million dollars)	8,463	9,641	9,312	9,274	8,556	-7.7
	Apparent U.S. consumption (million dollars)	43,732	45,839	46,236	48,995	50,150	2.4
	Trade balance (million dollars)	-6,732	-7,499	-7,136	-7,895	-6,995	11.4
	Ratio of imports to consumption (percent)	19.4	21.0	20.1	18.9	17.1	-9.5
	Ratio of exports to shipments (percent)	4.7	5.6	5.6	3.4	3.6	5.9
MM065	Apparel fasteners:						
	Number of establishments	90	90	90	85	85	0.0
	Employees (thousands)	5.0	4.5	4.3	4.5	4.5	0.0
	Capacity utilization (percent)	90	85	83	85	85	0.0
	U.S. shipments (million dollars)	745	700	690	610	600	-1.6
	U.S. exports (million dollars)	140	183	154	157	148	-5.9
	U.S. imports (million dollars)	89	85	73	65	69	5.9
	Apparent U.S. consumption (million dollars)	694	602	609	518	521	0.6
	Trade balance (million dollars)	51	98	81	92	79	-14.2
	Ratio of imports to consumption (percent)	12.8	14.1	12.0	12.5	13.2	5.6
	Ratio of exports to shipments (percent)	18.8	26.1	22.3	25.8	24.6	-4.7
MM066A	Small arms and ammunition:						
	Number of establishments	290	280	280	280	280	0.0
	Employees (thousands)	18.0	17.0	17.0	17.0	17.0	0.0
	Capacity utilization (percent)	70	70	75	75	75	0.0
	U.S. shipments (million dollars)	2,610	2,500	2,650	2,650	2,650	0.0
	U.S. exports (million dollars)	464	535	558	480	551	14.8
	U.S. imports (million dollars)	608	637	679	800	873	9.1
	Apparent U.S. consumption (million dollars)	2,754	2,602	2,770	2,970	2,971	(¹)
	Trade balance (million dollars)	-144	-102	-120	-320	-321	-0.6
	Ratio of imports to consumption (percent)	22.1	24.5	24.5	26.9	29.4	9.3
	Ratio of exports to shipments (percent)	17.8	21.4	21.1	18.1	20.8	14.9

See footnote(s) at end of table.

Table MS-6—Continued

Miscellaneous manufactures sector: Profile of U.S. industry and market, by industry/commodity groups and subgroups, 1999-2003

USITC code	Industry/commodity group	1999	2000	2001	2002	2003	Percent change, 2003 from 2002
MM067	Seats for motor vehicles and aircraft						
	Number of establishments	200	200	190	190	190	0.0
	Employees (thousands)	25.0	25.0	23.0	24.0	23.0	-4.2
	Capacity utilization (percent)	76	75	75	77	75	-2.6
	U.S. shipments (million dollars)	7,520	7,725	7,030	7,400	7,180	-3.0
	U.S. exports (million dollars)	1,878	1,861	1,808	1,641	1,260	-23.2
	U.S. imports (million dollars)	3,024	3,209	3,239	3,886	4,489	15.5
	Apparent U.S. consumption (million dollars)	8,666	9,073	8,461	9,645	10,409	7.9
	Trade balance (million dollars)	-1,146	-1,348	-1,431	-2,245	-3,229	-43.8
	Ratio of imports to consumption (percent)	34.9	35.4	38.3	40.3	43.1	6.9
	Ratio of exports to shipments (percent)	25.0	24.1	25.7	22.2	17.5	-21.2

¹Less than 0.05 percent.

Note.—Calculations based on unrounded data.

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

Canada

Josephine Spalding-Masgarha, Coordinator
(202) 205-3498
josephine.spalding@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$7.3 billion (11 percent) to \$75.3 billion

U.S. exports: Increased by \$6.2 billion (4 percent) to \$148.7 billion

U.S. imports: Increased by \$13.5 billion (6 percent) to \$224.0 billion

- The rebounding U.S. economy (see U.S. Merchandise Trade Performance) and sharply higher energy prices were chiefly responsible for increased U.S. imports from Canada and the expansion of the bilateral trade deficit with that partner in 2003. Increased imports of energy-related products accounted for 87 percent of the total growth in U.S. imports from Canada (see tables CANADA-1 and CANADA-2), but exports to Canada of energy-related products grew, but at a slower rate than imports, for a net expansion of the U.S. trade deficit with Canada in the energy sector.
- The U.S. trade deficit with Canada in products outside the energy sector declined in 2003, as the increase in U.S. exports exceeded the rise in U.S. imports from Canada. Despite the deceleration in Canada's gross domestic product (GDP) growth to a relatively modest 1.7-percent rate in 2003,¹ U.S. exporters of machinery and equipment (see Machinery, Transportation Equipment, and Electronic Products) benefitted from a strong buildup of business inventories in Canada, record orders in the transportation and computer sectors, and brisk business investment in plant and equipment.² Likewise, the relatively slow rise in non-energy imports from Canada during a time of more rapid U.S. GDP growth reflects the 15-percent appreciation of the Canadian dollar against the U.S. dollar in the latter half of 2003,³ making Canadian goods more expensive in the U.S. market.

¹ Chief factors that slowed Canada's economic growth in 2003 were the war in Iraq, concerns about incidences of Severe Acute Respiratory Syndrome, a case of "mad-cow disease" in Alberta, forest fires in the Western Provinces, a hurricane in the Eastern Provinces, a massive power outage in Ontario, and appreciation of the Canadian dollar against the U.S. dollar. Bank of Canada, *Annual Report*, found at <http://bank-banque-canada.ca/en/annual/index.htm>, retrieved Mar. 31, 2004.

² Zoltan Pozar, "GDP Analysis-Canada," *Economy*, found at <http://www.economy.com/dismal/pro/release>, retrieved Feb. 18, 2004.

³ Bank of Canada, *Annual Report*.

Table CANADA-1

Canada: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major industry/commodity sectors, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
			Million dollars				
U. S. exports of domestic merchandise:							
Agricultural products	7,608	8,209	8,694	9,121	9,805	684	7.5
Forest products	7,231	7,858	7,462	7,502	7,960	457	6.1
Chemicals and related products	18,783	20,327	19,692	20,115	21,516	1,401	7.0
Energy-related products	2,370	2,896	3,862	2,889	4,296	1,408	48.7
Textiles and apparel	3,545	3,646	3,344	3,193	3,121	-72	-2.3
Footwear	85	72	70	65	57	-8	-12.7
Minerals and metals	13,578	15,421	13,262	13,447	13,820	373	2.8
Machinery	16,297	17,179	15,949	15,207	15,310	103	0.7
Transportation equipment	48,132	48,387	44,207	46,733	48,568	1,835	3.9
Electronic products	22,049	25,007	20,108	17,025	16,637	-388	-2.3
Miscellaneous manufactures	3,883	4,174	3,759	3,561	3,697	136	3.8
Special provisions	2,171	2,424	4,211	3,686	3,961	276	7.5
Total	145,731	155,601	144,621	142,543	148,749	6,206	4.4
U. S. imports of merchandise for consumption:							
Agricultural products	10,349	11,189	12,373	12,953	12,975	21	0.2
Forest products	23,829	24,782	23,449	22,311	22,640	329	1.5
Chemicals and related products	13,708	15,858	16,398	16,673	18,440	1,767	10.6
Energy-related products	17,766	31,860	34,598	29,903	41,579	11,676	39.0
Textiles and apparel	3,640	3,945	3,791	3,859	3,788	-72	-1.9
Footwear	89	76	79	68	64	-4	-5.3
Minerals and metals	17,285	19,215	16,916	17,797	18,003	206	1.2
Machinery	9,637	10,419	9,876	9,810	10,071	260	2.7
Transportation equipment	68,517	69,296	64,781	65,462	66,727	1,265	1.9
Electronic products	14,609	21,200	13,868	10,605	9,768	-836	-7.9
Miscellaneous manufactures	5,740	6,452	5,931	5,967	6,137	170	2.9
Special provisions	13,072	14,766	14,778	15,108	13,824	-1,284	-8.5
Total	198,242	229,060	216,836	210,518	224,016	13,498	6.4
U. S. merchandise trade balance:							
Agricultural products	-2,740	-2,980	-3,679	-3,833	-3,170	663	17.3
Forest products	-16,599	-16,924	-15,987	-14,809	-14,680	129	0.9
Chemicals and related products	5,075	4,469	3,294	3,442	3,076	-366	-10.6
Energy-related products	-15,396	-28,964	-30,736	-27,014	-37,283	-10,268	-38.0
Textiles and apparel	-96	-299	-446	-666	-666	-1	-0.1
Footwear	-5	-4	-9	-3	-8	-5	-140.9
Minerals and metals	-3,708	-3,795	-3,654	-4,350	-4,183	167	3.8
Machinery	6,660	6,760	6,073	5,396	5,240	-157	-2.9
Transportation equipment	-20,385	-20,908	-20,574	-18,730	-18,159	571	3.0
Electronic products	7,441	3,807	6,241	6,420	6,869	449	7.0
Miscellaneous manufactures	-1,858	-2,278	-2,172	-2,406	-2,440	-34	-1.4
Special provisions	-10,901	-12,342	-10,566	-11,423	-9,863	1,560	13.7
Total	-52,511	-73,459	-72,215	-67,975	-75,267	-7,293	-10.7

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data.

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

Table CANADA-2
Leading changes in U.S. exports to and U.S. imports from Canada, 1999-2003

Sector/commodity	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
				Million dollars			
U.S. EXPORTS:							
Increases:							
Motor vehicles (ET009)	14,443	14,500	12,846	15,486	17,193	1,707	11.0
Energy-related products:							
Natural gas and components (CH006)	148	307	338	523	1,285	762	145.7
Electrical energy (CH001)	206	398	1,258	304	716	412	135.9
Medicinal chemicals (CH025)	1,913	2,226	2,200	2,349	2,706	357	15.2
Decreases:							
Transportation equipment:							
Certain motor-vehicle parts (ET010)	16,186	15,801	14,096	15,460	15,126	-334	-2.2
Aircraft, spacecraft, and related equipment (ET013)	1,883	2,000	2,262	1,727	1,520	-208	-12.0
Electronic products:							
Computers, peripherals, and parts (ET035)	5,038	5,898	4,987	3,948	3,655	-293	-7.4
Television receivers and video monitors (ET022)	297	330	379	452	296	-156	-34.5
All other	105,617	114,142	106,255	102,294	106,251	3,957	3.9
TOTAL	145,731	155,601	144,621	142,543	148,749	6,206	4.4
U.S. IMPORTS:							
Increases:							
Energy-related products:							
Natural gas and components (CH006)	6,933	11,970	16,817	12,647	20,043	7,396	58.5
Crude petroleum (CH004)	6,552	12,654	10,121	11,196	14,086	2,890	25.8
Petroleum products (CH005)	2,362	3,911	4,287	4,258	5,479	1,221	28.7
Aircraft, spacecraft, and related equipment (ET013)	3,801	4,747	6,094	5,268	6,345	1,077	20.5
Medicinal chemicals (CH025)	721	853	1,199	1,326	1,946	620	46.7
Decreases:							
Cattle and beef (AG002)	1,683	1,760	2,187	2,289	1,271	-1,018	-44.5
Transportation equipment:							
Aircraft engines and gas turbines (ET001)	1,461	1,957	2,465	2,300	1,594	-705	-30.7
Motor vehicles (ET009)	46,573	45,666	41,159	41,589	41,022	-566	-1.4
Forest products: Lumber (AG052)	7,041	6,242	5,898	5,450	4,835	-615	-11.3
All other	121,116	139,299	126,608	124,195	127,393	3,198	2.6
TOTAL	198,242	229,060	216,836	210,518	224,016	13,498	6.4

Note.-Calculations based on unrounded data.

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

U.S. exports

- Trade with Canada in the automotive sector is strongly influenced by the highly integrated nature of North American manufacturing, facilitated by shared infrastructure and markets, and high levels of foreign direct investment. The 11-percent rise in the value of motor vehicles destined for Canada was also the largest absolute shift among all export products in 2003 (see table CANADA-2). However, the quantity declined 10 percent, as fewer but more expensive vehicles were exported to Canada (see Motor Vehicles in Transportation). For the automotive sector as a whole, the net effect was a reduction in the U.S. trade deficit with Canada, although cost reductions in Canada through productivity improvements in the manufacture of certain motor vehicle parts (see Certain Motor-Vehicle Parts in Transportation) have led to increased U.S. imports from Canada.⁴

⁴ “Canadian Auto Report,” Scotia Economics, Feb. 27, 2004, found at <http://www.scotiabank.com>, retrieved Mar. 10, 2004.

U.S. imports

- Natural gas and components from Canada accounted for the largest increase in imports in 2003 (see table CANADA-2), as Canada is the leading supplier of natural gas and components and a major supplier of crude petroleum and petroleum products to the highly energy import-dependent U.S. economy. Growth in the value of imports is attributed to increased prices, as the average price of natural gas increased 73 percent (see Natural Gas and Components in Energy Products)⁵ and the price of crude petroleum increased by 22 percent in 2003 (see Crude Petroleum in Energy Products),⁶ far outpacing quantity growth rates.⁷ The quantity of petroleum products imported by the United States from Canada decreased 1 percent,⁸ belying the 29-percent rise in the value of such imports in that year (see Petroleum Products in Energy Products).
- Rather than trade in large civil aircraft (see Aircraft, Spacecraft, and Related Equipment in Transportation Equipment), the increased imports of aircraft, spacecraft, and related equipment from Canada in 2003 reflected higher U.S. demand for regional jets and business jets.⁹ Quebec-based Bombardier is one of the world's largest producers of both types of aircraft.
- On May 20, 2003, Canada confirmed a case of "mad-cow disease" (bovine spongiform encephalopathy, BSE) in Alberta. The United States immediately prohibited imports of a large number of animals and animal products from Canada, including live cattle and beef.¹⁰ Although by August 2003, imports of beef from cattle below 30 months of age were allowed,¹¹ the value of Canadian beef imports dropped nearly 25 percent from the 2002 level. Live cattle imports, however, continued to be prohibited throughout 2003; consequently, the value of live cattle imports decreased 65 percent from the previous year (see Agricultural Products).

⁵ Natural-gas prices rose from \$2.95 per thousand cubic feet in 2002 to \$5.09 per thousand cubic feet in 2003. U.S. Department of Energy, Energy Information Administration, *Energy Supply Monthly*, *Natural Gas Monthly* and *Short-Term Energy Outlook*, 2003 and 2004 reports.

⁶ Crude oil prices rose from \$22.51 per barrel in 2002 to \$27.48 per barrel in 2003. U.S. Department of Energy, Energy Information Administration, *Short-Term Energy Outlook*, 2003 and 2004 reports.

⁷ For example, U.S. imports of crude petroleum grew 7 percent, from 1.4 million barrels per day in 2002 to 1.5 million barrels per day in 2003.

⁸ U.S. imports of petroleum products from Canada decreased from 526,000 barrels per day in 2002 to 521,000 barrels per day in 2003.

⁹ Regional jets allow airlines to expand existing service and provide new service at less financial risk than with larger aircraft, and have largely displaced turboprop aircraft at regional airlines. Business jets provide executives the flexibility to fly when needed, unencumbered by an airline's schedule. Bombardier Aerospace, "Regional Aircraft," found at http://www.bombardier.com/index.jsp?id=3_0&lang=en&file=/en/3_0/3_0.jsp, retrieved Feb. 26, 2004.

¹⁰ The list included live ruminants, ruminant products, processed animal proteins, and animal feed. A complete list of prohibited products can be found at <http://www.fsis.usda.gov/oa/topics/bse.htm>. For more information on BSE, see http://www.aphis.usda.gov/lpa/issues/bse/bse-canada_memo.html or <http://www.fsis.usda.gov/oa/topics/bse.htm>.

¹¹ U.S. Department of Agriculture, "Veneman Announces that Import Permit Applications for Certain Ruminant Products from Canada will be Accepted," news release, Aug. 8, 2003, found at <http://www.usda.gov/news/releases/2003/08/0281.htm>, retrieved on Apr. 2, 2004.

China

Judith-Anne Webster, Coordinator
(202) 205-3489
judith-anne.webster@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$20.7 billion (20 percent) to \$124.9 billion

U.S. exports: Increased by \$6.2 billion (30 percent) to \$26.7 billion

U.S. imports: Increased by \$26.8 billion (22 percent) to \$151.6 billion

- Increased production by foreign manufacturers in China,¹ bolstered by China's undervalued currency,² contributed to the U.S. trade deficit with China, which has almost doubled in the past 5 years. In each year since 2001, the United States recorded a larger deficit with China than with any other trade partner (see table US-3). The largest deficit expansion occurred in 2003.
- In 2003, the most significant growth in U.S. imports from China in absolute terms was for electronic products, followed by miscellaneous manufactures and machinery (see table CHINA-1). Despite the deficit with the United States, exports to China also have increased significantly over the past 5 years. Exports grew the most in 2003, owing to China's robust economic growth combined with reductions of import tariffs in that year.³

¹ Stephen Roach, "Why We Ought to be Thanking the Chinese," *Fortune*, Mar. 22, 2004, p. 36.

² China maintains the yuan (renminbi) at a fixed rate of exchange to the dollar. Not all economists, however, consider the yuan to be undervalued. Brian Bremner and Dexter Roberts, "A Scouting Report on the Yuan," *Business Week*, Mar. 8, 2004 p. 31.

³ Import tariff reductions are owing to China's entry into the WTO. "China—The Economy of the Year," *Rediff.com*, Dec. 29, 2003, found at <http://www.rediff.com/money/2003/dec/29guest.htm>, retrieved Apr. 12, 2004.

Table CHINA-1

China: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major industry/commodity sectors, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
Million dollars							
U. S. exports of domestic merchandise:							
Agricultural products	965	1,895	2,101	2,128	5,129	3,001	141.0
Forest products	637	787	820	1,058	1,314	256	24.1
Chemicals and related products	2,149	2,430	2,315	3,069	3,816	747	24.3
Energy-related products	145	86	130	142	180	39	27.3
Textiles and apparel	166	221	261	339	405	65	19.2
Footwear	41	43	46	35	36	2	4.6
Minerals and metals	713	1,333	1,497	1,539	2,636	1,097	71.3
Machinery	1,626	1,898	2,356	2,730	3,091	361	13.2
Transportation equipment	2,888	2,368	3,198	4,293	3,757	-535	-12.5
Electronic products	2,942	3,926	4,892	4,855	5,934	1,079	22.2
Miscellaneous manufactures	113	132	136	137	143	6	4.1
Special provisions	201	218	208	228	266	37	16.4
Total	12,585	15,335	17,959	20,553	26,707	6,154	29.9
U. S. imports of merchandise for consumption:							
Agricultural products	1,191	1,396	1,489	1,896	2,470	574	30.2
Forest products	1,526	1,967	2,168	2,749	3,362	612	22.3
Chemicals and related products	4,242	4,942	5,333	6,262	7,438	1,175	18.8
Energy-related products	302	596	406	457	561	105	22.9
Textiles and apparel	9,234	10,710	11,124	12,602	15,426	2,823	22.4
Footwear	8,438	9,206	9,767	10,242	10,546	305	3.0
Minerals and metals	5,520	6,947	7,250	8,656	10,054	1,398	16.2
Machinery	6,285	7,742	8,620	10,467	13,922	3,454	33.0
Transportation equipment	1,220	1,991	1,773	2,302	3,072	769	33.4
Electronic products	20,917	27,588	27,231	36,270	47,150	10,881	30.0
Miscellaneous manufactures	21,733	25,365	25,690	31,490	35,812	4,321	13.7
Special provisions	914	1,132	1,218	1,401	1,808	406	29.0
Total	81,522	99,581	102,069	124,796	151,620	26,824	21.5
U. S. merchandise trade balance:							
Agricultural products	-226	499	612	232	2,659	2,428	1,047.4
Forest products	-890	-1,180	-1,348	-1,691	-2,048	-357	-21.1
Chemicals and related products	-2,093	-2,512	-3,017	-3,193	-3,622	-429	-13.4
Energy-related products	-157	-510	-276	-315	-381	-66	-20.9
Textiles and apparel	-9,068	-10,489	-10,863	-12,263	-15,021	-2,758	-22.5
Footwear	-8,397	-9,163	-9,721	-10,207	-10,510	-303	-3.0
Minerals and metals	-4,807	-5,614	-5,754	-7,117	-7,418	-301	-4.2
Machinery	-4,659	-5,844	-6,265	-7,737	-10,831	-3,094	-40.0
Transportation equipment	1,668	377	1,425	1,990	686	-1,304	-65.5
Electronic products	-17,975	-23,662	-22,340	-31,414	-41,216	-9,802	-31.2
Miscellaneous manufactures	-21,620	-25,233	-25,554	-31,353	-35,669	-4,316	-13.8
Special provisions	-713	-914	-1,010	-1,173	-1,542	-369	-31.4
Total	-68,937	-84,245	-84,110	-104,243	-124,913	-20,671	-19.8

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data.

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

Table CHINA-2

Leading changes in U.S. exports to and U.S. imports from China, 1999-2003

Sector/commodity	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<hr/>							
	Million dollars						
<hr/>							
U.S. EXPORTS:							
Increases:							
Oilseeds (AG032)	353	1,013	1,014	890	2,832	1,942	218.2
Semiconductors and integrated circuits (ET033)	642	686	946	1,238	2,025	787	63.6
Steel mill products (MM025)	48	44	49	52	429	377	726.7
Decreases:							
Aircraft, spacecraft, and related equipment (ET013) ..	2,294	1,689	2,429	3,367	2,447	-920	-27.3
All other	9,249	11,903	13,521	15,007	18,975	3,968	26.4
<hr/>							
TOTAL	12,585	15,335	17,959	20,553	26,707	6,154	29.9
<hr/>							
U.S. IMPORTS:							
Increases:							
Electronic products:							
Computers, peripherals, and parts (ET035)	7,761	10,670	10,548	14,928	22,141	7,213	48.3
Telephone and telegraph apparatus (ET017)	2,172	2,942	3,222	4,659	5,932	1,273	27.3
Apparel (CH049)	7,399	8,528	8,912	9,602	11,408	1,805	18.8
Furniture (MM054)	3,001	4,060	4,608	6,396	7,964	1,567	24.5
Printing and related machinery (MM081)	4	6	5	145	1,238	1,093	754.3
Decreases:							
Construction and mining equipment (ET004)	74	66	71	212	132	-80	-37.9
All other	61,111	73,308	74,703	88,852	102,805	13,953	15.7
<hr/>							
TOTAL	81,522	99,581	102,069	124,796	151,620	26,824	21.5

Note.-Calculations based on unrounded data.

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

U.S. exports

- From 1999 to 2003, agricultural products posted the largest overall growth in U.S. exports to China (see table CHINA-2). Expansion of agricultural exports in 2003 was largely attributable to increased shipments of oilseeds—specifically soybeans. Record prices for soybeans in that year, along with China’s growing population, strengthening economy, and limited domestic production accounted for the growth in U.S. exports (see Oilseeds in Agricultural Products).⁴
- Exports of semiconductors and integrated circuits to China increased by \$787 million from 2002 to 2003. The reported relocation of semiconductor-consuming industries (such as computers and communications)⁵ to China and the relatively strong global recovery of these markets also helped spur China’s demand for semiconductors (see Semiconductors and Integrated Circuits in Electronic Products).⁶
- To meet the input needs for its world-dominant textiles and apparel industries, China has become a major importer of natural and synthetic fibers, reflected in increased U.S. exports of cotton, not carded or combed, to China in 2003 (see Agricultural Products).⁷
- A worldwide slowdown in the large civil aircraft (LCA) manufacturing industry affected shipments of aircraft, spacecraft, and related equipment to China, for which U.S. exports dropped in 2003. Overall declining demand for LCA led to reduced commercial deliveries for both Boeing and Airbus in 2003 (see Aircraft, Spacecraft and Related Equipment in Transportation Equipment).⁸

⁴ Jim Butterworth and Wu Xinping, *China, Oilseeds and Products*, U.S. Department of Agriculture, Foreign Agricultural Service, Global Agriculture Information Network, rept. CH4007, Mar. 3, 2004.

⁵ “IC Demand on the Rise in China,” *Reed Electronics News*, Mar. 24, 2004, found at <http://www.reed-electronics.com/electronicnews/article/CA405683?industryid=22113&industry=Semiconductors&nid=2019>, retrieved Mar. 25, 2004.

⁶ Semiconductor Industry Association, “Global Semiconductor Sales Up 18.3% in 2003,” press release, Feb. 1, 2004, found at <http://www.semichips.org>, retrieved Mar. 8, 2004.

⁷ Michael Barry, “China,” *Textiles and Apparel: Assessment of the Competitiveness of Certain Foreign Suppliers to the U.S. Market*, USITC Inv. No. 332-448, publication 3671, Jan. 2004, pp. E-5 to E-23.

⁸ Airbus is a European firm. Phillip Finnegan, “Civil Avionics in the Doldrums,” *Aviation Week & Space Technology*, Jan. 19, 2004, p. 203.

U.S. imports

- The most significant sector growth from China occurred in electronics (see table CHINA-2), as U.S. imports of personal computers grew in 2003. According to the Chinese Ministry of Information, increasing economic development and preferential policies toward the information technology sector has led to higher production levels in China.⁹ This exemplifies the overall trend in the electronics industry as many foreign manufacturers are moving production to take advantage of China's low production costs (see Computers, Peripherals, and Parts in Electronic Products).
- China also expanded its role as the leading supplier of apparel to the U. S. market in 2003, as the United States imported increased amounts of apparel goods in 2003. With its large supply of low-cost labor and raw materials along with strong sewing skills, effective middle management, and technical know-how, China is able to produce a wide range of low-cost apparel goods (see Textiles, Apparel, and Footwear).¹⁰
- U.S. imports of furniture from China increased 25 percent in 2003. U.S. sourcing of furniture from China has grown steadily over the past 5 years as China's low-cost labor and state-of-the-art production facilities provide a competitive advantage to furniture producers in China (see Furniture in Miscellaneous Manufactures).¹¹
- Increased investment in assembly production and use of contract manufacturers in China (and Malaysia) by leading global cellular suppliers of telephone and telegraph apparatus also led to growth in U.S. imports in 2003, especially for cellular phones. Investments by U.S.-based Motorola¹² and European-headquartered Nokia and Siemens over the past several years reportedly were made to take advantage of lower wages in those countries (see Telephone and Telegraph Apparatus in Electronic Products).
- U.S. imports from China of printing and related machinery, specifically office printing machines and related products, grew in 2003 in response to their increasing popularity. These products are multifunctional digital office machines which can print, scan, and transmit facsimiles (see Printing and Related Machinery in Machinery).¹³

⁹ U.S. and Foreign Commercial Service, "Best Prospects for Non-Agricultural Goods and Services: Information Technology," Market Research Reports, *County Commercial Guide: China*, June 15, 2003, found at http://www.stat-usa.gov/mrd.nsf/vwCCG_Country/B72F0F83CA35543285256E5A0032D1B3?OpenDocument&sessID=B032049D01B4ABA, retrieved Apr. 1, 2004.

¹⁰ Barry, "China," p. E-5.

¹¹ Lawrence Benjamin, "One World, One Market: The China Solution," *Lodging Hospitality*, Mar. 2004, Vol. 60 Issue 3, p. 56.

¹² Motorola, Inc., U.S. Securities and Exchange Commission Form 10-K filing, Mar. 27, 2003, pp. 1-15.

¹³ Olga Kharif, "Printing a Record of Growth," *BusinessWeek Online*, Feb. 17, 2004, found at http://www.businessweek.com/technology/content/feb2004/tc20040217_8510_tc055.htm, retrieved Apr. 6, 2004.

European Union

Vincent DeSapio, Coordinator
(202) 205-3435
vince.desapio@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$12.9 billion (14 percent) to \$104.1 billion

U.S. exports: Increased by \$5.6 billion (4 percent) to \$138.1 billion

U.S. imports: Increased by \$18.5 billion (8 percent) to \$242.2 billion

- Total trade (imports plus exports) in 2003 between the United States and the European Union (EU) was greater than in any other year during 1999-2003. In 2003, relatively strong economic growth in the United States, particularly during the final 6 months (see U.S. Merchandise Trade Performance), contributed to a sharp increase in imports from the EU, despite a nearly 20-percent depreciation of the dollar relative to the euro over the year.¹ The U.S. deficit with the EU increased substantially in 2003 and has doubled during 1999-2003 (see table EU-1).
- Germany and the United Kingdom, among two of the largest EU economies, were the leading EU markets for U.S. manufacturers in 2003, accounting for 20 percent and 22 percent, respectively, of all U.S. exports to the EU (see table US-3). Likewise, these countries were the principal EU suppliers to the U.S. market, accounting for 28 percent and 17 percent, respectively, of all U.S. imports from the EU. The United Kingdom was a major supplier of aircraft, spacecraft, and related equipment; and medicinal chemicals; whereas Germany was a major supplier of motor vehicles and medical goods. Increased net imports of these products (with the exception of aircraft, spacecraft, and related equipment) accounted for most of the increase in the U.S. trade deficit with the EU (see table EU-1 and EU-2).

¹ Foreign Exchange Rates (Annual), Federal Reserve Statistical Release (Jan. 5, 2004), <http://www.federalreserve.gov/releases/g5a/current/>.

Table EU-1

EU-15: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major industry/commodity sectors, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²Less than 0.05 percent.

Note.—Calculations based on unrounded data.

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

Table EU-2

Leading changes in U.S. exports to and U.S. imports from EU15, 1999-2003

Sector/commodity	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
<hr/>							
<i>Million dollars</i>							
<hr/>							
U.S. EXPORTS:							
Increases:							
Medicinal chemicals (CH025)	7,085	8,341	10,258	10,765	13,078	2,313	21.5
Motor vehicles (ET009)	2,607	2,059	2,951	3,865	5,431	1,566	40.5
Medical goods (ET040)	5,683	5,979	6,922	7,074	8,059	985	13.9
Decreases:							
Telephone and telegraph apparatus (ET017)	3,868	4,734	4,240	3,165	2,622	-543	-17.1
All other	122,786	131,540	122,956	107,694	108,949	1,255	1.2
<hr/>							
TOTAL	142,029	152,652	147,327	132,563	138,138	5,575	4.2
<hr/>							
U.S. IMPORTS:							
Increases:							
Medicinal chemicals (CH025)	17,803	22,678	26,353	31,761	37,214	5,453	17.2
Motor vehicles (ET009)	22,057	22,894	23,813	26,481	30,657	4,176	15.8
Medical goods (ET040)	3,328	3,760	4,854	5,916	7,526	1,610	27.2
Decreases:							
Aircraft, spacecraft, and related equipment (ET013) ..	7,288	9,532	10,330	8,286	6,685	-1,601	-19.3
All other	143,932	159,511	153,560	151,288	160,128	8,840	5.8
<hr/>							
TOTAL	194,409	218,375	218,911	223,732	242,210	18,479	8.3

Note.-Calculations based on unrounded data.

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

U.S. exports

- The increase in U.S. exports of medicinal chemicals to the EU in 2003 (see table EU-2) was largely attributable to a high degree of intracompany sales to U.S. multinational pharmaceutical operations in the Netherlands and Germany (see Medicinal Chemicals in Chemicals and Related Products).
- U.S. motor vehicle exports to the EU increased in 2003, largely composed of shipments to the German market of Mercedes-Benz and BMW models made only in the United States (see Motor Vehicles in Transportation Equipment).²
- The increase in U.S. exports of medical goods to the EU in 2003 reflected the increased use of U.S. components and subassemblies of implantable pacemakers and defibrillators by Ireland, which has rapidly become one of the leading global manufacturers of such devices (see Medical Goods in Electronic Products).³ Two of the leading manufacturers of such devices in the United States, Medtronic and Guidant, have continued to expand production capacity in Ireland for sales to the European and U.S. markets.

² *Ward's Automotive Yearbook 2003* (Southfield, MI: Ward's Communications, 2003), pp. 167 and 190.

³ Enterprise Ireland, "Medical Devices and Diagnostics," Sector Profiles, 2003, pp. 1-3, found at <http://www.enterprise-ireland.com>, retrieved Mar. 1, 2004.

U.S. imports

- During 2003, the increase in U.S. imports of medicinal chemicals accounted for about one-third of the growth in U.S. imports from the EU (see table EU-2). Nearly one-half of the increase in U.S. imports of medicinal chemicals from the EU was composed of certain cardiovascular drugs, primarily supplied by Ireland. U.S. companies in recent years have taken advantage of Ireland's national tax policy favoring research-oriented corporations, lower production costs, advanced manufacturing technology, and skilled work force to establish production facilities to supply the U.S. and European markets (see Medicinal Chemicals in Chemicals and Related Products).⁴
- U.S. imports of motor vehicles from the EU increased in 2003 reflecting lower interest rates, rising income, and higher consumer confidence levels in the United States. German shipments increased 13 percent to account for 66 percent of all U.S. motor vehicle imports from the EU (see Motor Vehicles in Transportation Equipment).
- U.S. imports of medical goods increased from the EU, primarily from Ireland. Ireland has become a leading European supplier of pacemakers, defibrillators, and other high-technology products, a result of historical investment by health-care products manufacturers (see Medical Goods in Electronic Products).⁵
- U.S. imports of petroleum products from the EU rose in 2003, reflecting higher unit prices and increased consumer and industrial demand for refined petroleum products from the United Kingdom and the Netherlands (see Petroleum Products in Energy Products).
- By contrast, imports of aircraft, spacecraft, and related equipment and of aircraft engines and gas turbines sustained 2 consecutive years of declines. These declines were due to persistent weak aircraft-related demand as the airline industry has not fully recovered from the events of September 11, 2001, and a sluggish recovery in the U.S. transportation sector (see Aircraft, Spacecraft, and Related Equipment; and Aircraft Engines and Gas Turbines in Transportation Equipment).

⁴ Of the 15 leading pharmaceutical companies in the world, 13 have substantial operations in Ireland. Forty finished pharmaceutical plants are now operating there and 29 plants have been approved by the Irish Federal Drug Administration. IDA Ireland, "Industry Profile, Pharmaceutical/Biopharmaceuticals," found at http://www.idaireland.com/industry/pharmaceutical_industry.asp, retrieved Mar. 5, 2004.

⁵ Major U.S.-based companies with manufacturing operations in Ireland include Abbott Laboratories, Tyco Inc., Johnson & Johnson, and De Puy Inc., among others. IDA Ireland, "Investments Index," found at <http://www.idaireland.com/investments/index.asp>, retrieved Mar. 9, 2004.

Japan

Karl Tsuji, Coordinator
(202) 205-3434
karl.tsuji@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Decreased by \$3.4 billion (5 percent) to \$69.6 billion

U.S. exports: Increased by \$589 million (1 percent) to \$48.9 billion

U.S. imports: Decreased by \$2.8 billion (2 percent) to \$118.5 billion

- The U.S. trade deficit with Japan fluctuated but trended downward over the past 5 years, slipping from being the largest with any individual trade partner in 1999 to the third-largest behind China and Canada in 2003 (see table US-3). In 2003, the deficit with Japan narrowed from the previous year's amount, as imports declined and exports increased (see table JAPAN-1). Bilateral trade trends in 2003 were affected by the 9.8-percent appreciation of the yen against the dollar.¹
- Trade trends also reflected the revival of Japan's economy since March 2003, attributed to the Bank of Japan's expansionist monetary policy to fight persistent deflation, dating back to the 1989 real-estate and stock-market crashes.² Although of debatable sustainability,³ the upturn in the Japanese economy appears broader-based than the three previous ones that relied extensively on public-works spending and exports to the United States.⁴ Key distinctions of the upturn in 2003 are reduced saving by households,⁵ rising corporate profitability, reduced indebtedness, fewer bankruptcies, and upturn of capital investment;⁶ as well as stronger global exports, enhanced by China's robust growth (see China).⁷

¹ Based on yen per dollar rates of 107.13 on Dec. 31, 2003, and 118.75 on Dec. 31, 2002. Compiled from official statistics of the U.S. Federal Reserve Bank of New York, historical data release H.10 "Foreign Exchange Rates."

² "Japan's Economy," *Economist.com*, Feb. 20, 2004, found at <http://www.economist.com/research/backgrounders/displayBackgrounder.cfm?bg=532400>, retrieved Feb. 23, 2004.

³ See e.g., "Japanese Recovery, Growth Built Mainly on Exports and Investment May Not Last," *Financial Times*, Feb. 24, 2004, p. 21.

⁴ "Japan's Economy, Learning to Love a Growing China, from Threat to Opportunity," *Economist*, Nov. 29, 2003, pp. 38-39.

⁵ "A Saving Grace, Japanese Households Have Lost Their Appetite for Thrift," *Economist*, July 5, 2003, p. 67.

⁶ "Japanese Corporate Debt, an End in Sight," *Economist*, Feb. 14, 2004, pp. 67-68; "Japan, Flying Again, This Time the Economic Recovery Looks Sustainable," *Economist*, Feb. 14, 2004, p. 10; and "Japan's Economy, Surprise, Surprise, Japan Grows Its Fastest in a Decade," *Economist*, Feb. 21, 2004, p. 73.

⁷ Japan's exports grew roughly 10 percent in 2003, of which China accounted for two-thirds during the first 3 quarters of that year. "Japan's Economy, Surprise, Surprise," *Economist*; and "Japan's Economy, Learning to Love a Growing China," *Economist*.

Table JAPAN-1

Japan: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major industry/commodity sectors, 1999-2003¹

	Change, 2003 from 2002						
Item	1999	2000	2001	2002	2003	Absolute	Percent
	Million dollars						
U. S. exports of domestic merchandise:							
Agricultural products	11,984	12,573	11,342	10,416	10,845	429	4.1
Forest products	2,847	3,004	2,497	2,017	1,887	-130	-6.4
Chemicals and related products	5,575	6,267	6,105	5,762	6,176	414	7.2
Energy-related products	1,435	1,527	1,239	1,609	1,513	-96	-6.0
Textiles and apparel	731	777	644	568	546	-22	-3.9
Footwear	92	85	70	39	24	-15	-38.7
Minerals and metals	1,890	2,344	1,919	1,590	1,654	64	4.1
Machinery	3,618	5,190	4,133	3,328	3,493	165	5.0
Transportation equipment	8,458	7,825	6,812	8,099	8,402	304	3.7
Electronic products	14,906	17,795	15,393	11,810	11,348	-462	-3.9
Miscellaneous manufactures	1,598	2,057	2,007	1,686	1,604	-82	-4.9
Special provisions	1,179	1,308	1,386	1,348	1,369	20	1.5
Total	54,310	60,751	53,546	48,273	48,862	589	1.2
U. S. imports of merchandise for consumption:							
Agricultural products	482	487	441	461	482	21	4.6
Forest products	610	652	542	600	610	10	1.6
Chemicals and related products	8,869	9,563	8,601	9,099	10,121	1,022	11.2
Energy-related products	305	302	306	207	333	126	60.6
Textiles and apparel	711	767	710	724	815	91	12.5
Footwear	2	2	1	2	2	(2)	27.4
Minerals and metals	5,159	5,339	4,634	4,123	4,036	-87	-2.1
Machinery	13,230	16,537	14,286	12,689	14,013	1,324	10.4
Transportation equipment	49,425	54,226	52,200	55,583	53,274	-2,309	-4.2
Electronic products	44,018	49,888	35,676	30,745	29,177	-1,569	-5.1
Miscellaneous manufactures	4,179	3,946	4,732	3,399	1,992	-1,407	-41.4
Special provisions	3,961	4,035	4,011	3,629	3,630	1	(3)
Total	130,951	145,742	126,139	121,262	118,485	-2,777	-2.3
U. S. merchandise trade balance:							
Agricultural products	11,502	12,087	10,901	9,955	10,362	408	4.1
Forest products	2,237	2,352	1,955	1,417	1,278	-139	-9.8
Chemicals and related products	-3,294	-3,296	-2,496	-3,337	-3,945	-608	-18.2
Energy-related products	1,130	1,226	933	1,402	1,180	-222	-15.8
Textiles and apparel	19	10	-66	-156	-269	-113	-72.2
Footwear	90	83	69	37	22	-16	-41.6
Minerals and metals	-3,270	-2,995	-2,716	-2,534	-2,382	152	6.0
Machinery	-9,613	-11,347	-10,153	-9,361	-10,520	-1,159	-12.4
Transportation equipment	-40,968	-46,400	-45,388	-47,484	-44,872	2,612	5.5
Electronic products	-29,113	-32,093	-20,283	-18,935	-17,829	1,107	5.8
Miscellaneous manufactures	-2,581	-1,890	-2,724	-1,713	-388	1,325	77.4
Special provisions	-2,782	-2,727	-2,625	-2,280	-2,261	19	0.8
Total	-76,641	-84,991	-72,593	-72,989	-69,623	3,367	4.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.²Less than \$500,000.³Less than 0.05 percent.

Note.—Calculations based on unrounded data.

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

Table JAPAN-2

Leading changes in U.S. exports to and U.S. imports from Japan, 1999-2003

Sector/commodity	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. EXPORTS:							
Increases:							
Aircraft, spacecraft, and related equipment (ET013) ..	4,557	3,252	2,648	3,768	4,757	989	26.3
Cattle and beef (AG002)	1,720	1,776	1,534	975	1,331	357	36.6
Decreases:							
Computers, peripherals, and parts (ET035)	3,681	4,457	3,780	2,498	2,246	-252	-10.1
Transportation equipment:							
Aircraft engines and gas turbines (ET001)	979	1,216	1,394	1,230	1,043	-187	-15.2
Internal combustion piston engines, other than for aircraft (ET002)	510	485	375	815	639	-176	-21.6
Certain motor-vehicle parts (ET010)	986	1,312	1,095	1,156	990	-166	-14.3
All other	41,878	48,251	42,719	37,831	37,855	24	0.1
TOTAL	54,310	60,751	53,546	48,273	48,862	589	1.2
U.S. IMPORTS:							
Increases:							
Printing and related machinery (MM081)	401	428	313	409	1,913	1,504	367.5
Transportation equipment:							
Certain motor-vehicle parts (ET010)	4,550	5,359	5,173	6,321	7,052	732	11.6
Construction and mining equipment (ET004)	1,646	1,449	1,212	1,259	1,526	267	21.2
Medicinal chemicals (CH025)	1,894	2,243	2,266	2,536	3,166	630	24.8
Television receivers and video monitors (ET022)	409	732	1,280	1,678	2,229	551	32.8
Decreases:							
Motor vehicles (ET009)	32,116	34,508	33,020	35,847	33,061	-2,785	-7.8
Electronic products:							
Computers, peripherals, and parts (ET035)	13,645	14,540	10,200	8,734	6,977	-1,756	-20.1
Telephone and telegraph apparatus (ET017)	3,210	3,896	2,488	1,815	1,477	-339	-18.7
Semiconductors and integrated circuits (ET033) ...	6,401	8,045	4,531	2,809	2,505	-304	-10.8
Games (MM060)	2,525	2,179	3,264	2,084	726	-1,358	-65.2
Machinery:							
Semiconductor manufacturing machinery (MM087A)	1,392	2,714	2,406	1,750	1,292	-458	-26.2
Electric motors, generators, and related equipment (MM091)	1,174	1,161	1,588	1,362	959	-403	-29.6
All other	61,587	68,487	58,398	54,659	55,601	943	1.7
TOTAL	130,951	145,742	126,139	121,262	118,485	-2,777	-2.3

Note.-Calculations based on unrounded data.

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

U.S. exports

- Among leading export shifts in 2003 (see table JAPAN-2), the largest increase was for aircraft, spacecraft, and related equipment, as air carriers in Japan took delivery of the same number (14) of new large civil aircrafts (LCAs) from Boeing Co. as in the previous year,⁸ but with a higher proportion of more expensive 777-model than 767-model LCAs (see Aircraft, Spacecraft, and Related Equipment in Transportation Equipment).⁹ New aircraft deliveries also reduced the need for replacement components, as exports of aircraft engines and gas turbines to Japan declined in that year (see Aircraft Engines and Gas Turbines in Transportation Equipment).
- Japan continued as the largest foreign market for U.S. exports of cattle and beef (see Agricultural Products), shipped predominantly as bone-in cuts but also as fresh or cold whole or half carcasses. U.S. exports to Japan rebounded in 2003 from the previous year's lower level. In 2001-02, 2 events led consumers in Japan to question the safety of both domestic and imported beef products. "Mad cow disease" (bovine spongiform encephalopathy, BSE) was detected in herds in Japan in September-November 2001. Further, in January 2002, the integrity of the Japanese meat distribution system was questioned after a major producer in Japan reportedly mislabeled foreign beef as being of Japanese origin to gain eligibility for a BSE buy-back credit.¹⁰

⁸ Boeing Co., "Boeing Commercial Airplanes Orders and Deliveries," found at <http://active.boeing.com/commercial/orders/usersdefinedselection.cfm>, retrieved Apr. 2, 2004.

⁹ Base prices in 2002 for Boeing's 777s range from \$153.5 to \$231.5 million, compared to \$101.0 to \$138.5 million for 767s. See: Boeing, "Boeing Commercial Airplane Prices," at <http://www.boeing.com/commercial/prices>.

¹⁰ Kakuyu Obara, *Japan, Livestock and Products Semi-Annual 2002*, U.S. Department of Agriculture, Foreign Agriculture Service, Global Agriculture Information Network report JA2008, Mar. 1, 2002.

U.S. imports

- Among leading import shifts in 2003 (see table JAPAN-2), the largest increase was for printing and related machinery, particularly multifunction digital devices (MFDs) that also scan and transmit documents, unlike stand-alone computer printers (see Printing and Related Machinery in Machinery). As a preeminent global supplier, Japan benefitted from the rising popularity of MFDs over stand-alone printers in U.S. homes and offices.¹¹
- Motor vehicles exhibited the largest import decline, primarily for passenger vehicles. Although combined sales volume for the 11 Japanese brand-names sold in the U.S. market rose 3.3 percent in 2003,¹² apparently production by transplant assemblers increased at the expense of imports from Japan (see Motor Vehicles in Transportation Equipment). The shift in favor of domestic transplants was further reflected in increased imports of certain motor-vehicle parts for incorporation into larger components (see Certain Motor-Vehicle Parts in Transportation Equipment).
- Imports (and exports) of computers, peripherals, and parts continued to decline in each of the past 3 years, concurrent with rising U.S. imports from other Asian countries (especially China). This decline reflects both ongoing shifts of production to lower cost locations and cautious business spending on information technology worldwide in 2003 (see Computers, Peripherals, and Parts in Electronic Products).¹³
- Reduced imports of games from Japan (see Miscellaneous Manufactures), such as video game consoles, with corresponding increased imports from China, reflected the shifting of production by Nintendo and Sony out of Japan, as their new generation of video games entered the maturity phase of the product cycle in 2003.¹⁴

¹¹ Sales of MFDs ("all-in-ones") rose from 25 to 42 percent of the U.S. market for inkjet printers between second and third quarters 2003. Olga Kharif, "Printing a Record of Growth," *BusinessWeek Online*, Feb. 17, 2004, found at http://www.businessweek.com/technology/content/feb2004/tc20040217_8510_tc055.htm, retrieved Apr. 6, 2004.

¹² John H. Teahen, Jr., "2003: Records for Import Brands, Record Low Share for Big 3," *Automotive News*, Jan. 19, 2004, p. 49.

¹³ Standard & Poor's, *Industry Surveys, Computers: Hardware*, Dec. 11, 2003, p. 20.

¹⁴ The GameCube was initially released in Nov. 2001, but Nintendo recently recorded lower sales and cut the suggested retail price. "Nintendo 2nd-Half Net May Fall One-Third as GameCube Sales Drop," *Bloomberg.com*, May 21, 2003, found at <http://quote.bloomberg.com/apps/news?pid=71000001&refer=japan&sid=acLBGfHWHP3M>, retrieved Apr. 5, 2004.

Mexico

Ruben Mata, Coordinator
(202) 205-3403
ruben.mata@usitc.gov

Change in 2003 from 2002:

U.S. trade deficit: Increased by \$6.0 billion (13 percent) to \$54.1 billion

U.S. exports: Decreased by \$2.9 billion (3 percent) to \$83.1 billion

U.S. imports: Increased by \$3.1 billion (2 percent) to \$137.2 billion

- Higher prices for U.S. imports of crude petroleum and increased imports of motor-vehicle parts (including seats and engines) offset reduced imports of other manufactured goods, for an overall increase in imports from Mexico in 2003 (see tables MEXICO-1 and MEXICO-2). Mexico's continued loss of U.S. market share to imports from China were reflected in reductions of certain-sector imports from Mexico and decreased exports of U.S. components and materials to assembly plants in Mexico. However, a continued decline in total U.S. exports to Mexico and a continued increase in total U.S. imports from that country resulted in a further expansion of the U.S. trade deficit with Mexico in 2003 (see table MEXICO-1).
- In contrast to previous years, Mexico's assembly industry did not participate fully in the growth of the U.S. economy in 2003 (see U.S. Merchandise Trade Performance). However, the 10-percent depreciation of the peso vis-a-vis the dollar in 2003 reportedly slowed the shift of sourcing by U.S. companies away from Mexico and most likely prevented an absolute decline in U.S. imports from Mexico.¹
- Despite an \$11.9-billion (15-percent) rise in U.S. manufacturers' shipments of computers, peripherals, and parts in 2003,² exports of such equipment (mostly parts) to Mexico fell (by \$952 million), but not as much as did imports (by \$1.3 billion) (mostly finished goods) from Mexico (see table MEXICO-2). Meanwhile, U.S. imports from China grew, a reflection of China's rise as the leading location for global outsourcing of computer-related equipment (see China; and Computers, Peripherals, and Parts in Electronic Products), thereby limiting Mexico's appeal as a production-sharing partner in that sector.³

¹ John Christman, "Mexico Economic, Political Update and Trade Forecasts: Projections and Implications for Investment in Mexico 2004-2008," *Global Insight*, Mar. 10, 2004.

² U.S. Census Bureau (Census), *Manufacturers' Shipments, Inventories, and Orders: Dec. 2003*, issued Feb. 2004, p. 3.

³ Mexico's share of U.S. imports of computers, peripherals, and parts dipped from 12 percent in 2002 to 10 percent in 2003, but China's climbed from 20 percent to 29 percent.

Table MEXICO-1

Mexico: U.S. exports of domestic merchandise, imports for consumption, and merchandise trade balance, by major industry/commodity sectors, 1999-2003¹

Item	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
			Million dollars				
U. S. exports of domestic merchandise:							
Agricultural products	5,850	6,772	7,645	7,534	8,176	643	8.5
Forest products	3,091	3,628	3,282	3,056	3,217	161	5.3
Chemicals and related products	10,731	13,105	12,266	12,444	13,300	856	6.9
Energy-related products	2,311	4,342	3,296	3,274	2,897	-376	-11.5
Textiles and apparel	5,550	6,155	5,232	4,939	4,696	-243	-4.9
Footwear	94	114	123	95	90	-5	-5.7
Minerals and metals	6,528	8,210	6,956	6,671	6,454	-217	-3.3
Machinery	10,546	11,604	10,263	9,183	9,086	-96	-1.0
Transportation equipment	11,588	15,285	14,953	14,524	13,725	-798	-5.5
Electronic products	19,562	24,644	20,798	18,965	16,414	-2,552	-13.5
Miscellaneous manufactures	1,717	1,977	1,729	1,687	1,511	-177	-10.5
Special provisions	3,815	4,607	3,994	3,705	3,541	-164	-4.4
Total	81,381	100,442	90,537	86,076	83,108	-2,968	-3.4
U. S. imports of merchandise for consumption:							
Agricultural products	5,631	6,033	6,157	6,378	7,220	842	13.2
Forest products	1,044	1,055	999	1,038	1,075	38	3.6
Chemicals and related products	3,124	3,473	3,388	3,637	3,779	142	3.9
Energy-related products	6,280	11,356	9,103	11,567	14,792	3,225	27.9
Textiles and apparel	9,413	10,580	9,941	9,649	9,015	-634	-6.6
Footwear	354	351	312	279	275	-3	-1.2
Minerals and metals	5,997	6,767	6,528	7,013	7,116	103	1.5
Machinery	13,899	15,487	14,821	16,321	16,596	276	1.7
Transportation equipment	24,798	31,373	31,046	31,117	30,664	-453	-1.5
Electronic products	28,793	37,207	37,221	35,029	34,560	-470	-1.3
Miscellaneous manufactures	4,697	5,160	5,295	6,356	6,252	-104	-1.6
Special provisions	4,987	5,893	5,697	5,738	5,855	117	2.0
Total	109,018	134,734	130,509	134,121	137,199	3,078	2.3
U. S. merchandise trade balance:							
Agricultural products	219	739	1,488	1,155	956	-199	-17.2
Forest products	2,046	2,573	2,283	2,018	2,142	123	6.1
Chemicals and related products	7,607	9,632	8,878	8,807	9,521	714	8.1
Energy-related products	-3,970	-7,014	-5,807	-8,294	-11,894	-3,601	-43.4
Textiles and apparel	-3,863	-4,426	-4,709	-4,710	-4,319	391	8.3
Footwear	-260	-237	-189	-183	-185	-2	-1.1
Minerals and metals	531	1,443	428	-342	-661	-320	-93.6
Machinery	-3,353	-3,883	-4,558	-7,138	-7,510	-372	-5.2
Transportation equipment	-13,210	-16,088	-16,093	-16,593	-16,939	-345	-2.1
Electronic products	-9,231	-12,563	-16,423	-16,064	-18,146	-2,082	-13.0
Miscellaneous manufactures	-2,980	-3,184	-3,566	-4,668	-4,741	-73	-1.6
Special provisions	-1,172	-1,286	-1,703	-2,033	-2,314	-281	-13.8
Total	-27,637	-34,292	-39,971	-48,045	-54,091	-6,046	-12.6

¹Import values are based on customs value; export values are based on f.a.s. value, U.S. port of export.

Note.—Calculations based on unrounded data.

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

Table MEXICO-2
Leading changes in U.S. exports to and U.S. imports from Mexico, 1999-2003

Sector/commodity	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. EXPORTS:							
Increases:							
Aircraft, spacecraft, and related equipment (ET013) . .	330	271	549	317	600	283	89.1
Decreases:							
Electronic products:							
Computers, peripherals, and parts (ET035)	2,806	3,307	3,188	3,612	2,660	-952	-26.3
Cathode-ray tubes (ET031)	1,820	2,110	1,773	1,595	1,103	-492	-30.8
Television receivers and video monitors (ET022) . . .	376	393	396	406	171	-235	-58.0
Transportation equipment:							
Certain motor-vehicle parts (ET010)	5,058	6,628	6,218	5,852	5,278	-574	-9.8
Motor vehicles (ET009)	2,320	3,223	3,614	3,711	3,186	-524	-14.1
Internal combustion piston engines, other than for aircraft (ET002)	1,407	2,407	1,917	2,095	2,031	-64	-3.1
Natural gas and components (CH006)	302	668	510	805	430	-376	-46.6
Seats for motor vehicles and aircraft (MM067)	493	572	660	584	265	-319	-54.7
All other	66,467	80,863	71,712	67,099	67,385	285	0.4
TOTAL	81,381	100,442	90,537	86,076	83,108	-2,968	-3.4
U.S. IMPORTS:							
Increases:							
Crude petroleum (CH004)	5,265	9,838	7,957	10,490	13,630	3,140	29.9
Electronic products:							
Telephone and telegraph apparatus (ET017)	2,668	4,641	4,390	4,210	4,664	455	10.8
Television receivers and video monitors (ET022) . . .	4,609	4,928	5,071	5,165	5,532	367	7.1
Medical goods (ET040)	970	1,280	1,533	1,957	2,315	358	18.3
Measuring, testing, and controlling instruments (ET043)	2,240	2,550	2,576	2,820	3,106	286	10.1
Seats for motor vehicles and aircraft (MM067)	1,817	2,026	2,130	2,696	3,126	430	15.9
Transportation equipment:							
Internal combustion piston engines, other than for aircraft (ET002)	2,527	2,734	2,403	2,633	3,024	391	14.9
Certain motor-vehicle parts (ET010)	3,663	4,574	4,550	5,121	5,492	371	7.2

Table MEXICO-2--Continued

Leading changes in U.S. exports to and U.S. imports from Mexico, 1999-2003

Sector/commodity	1999	2000	2001	2002	2003	Change, 2003 from 2002	
						Absolute	Percent
	Million dollars						
U.S. IMPORTS (continued):							
Decreases:							
Motor vehicles (ET009)	15,813	21,025	21,327	20,793	19,327	-1,467	-7.1
Electronic products:							
Computers, peripherals, and parts (ET035)	7,239	9,047	10,365	8,913	7,640	-1,274	-14.3
Radio and television broadcasting equipment (ET023)	1,974	3,279	3,157	2,364	1,556	-807	-34.2
Games (MM060)	174	74	194	689	55	-633	-92.0
Apparel (CH049)	7,846	8,731	8,129	7,732	7,200	-532	-6.9
All other	52,213	60,007	56,726	58,537	60,532	1,994	3.4
TOTAL	109,018	134,734	130,509	134,121	137,199	3,078	2.3

Note.-Calculations based on unrounded data.

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

U.S. exports

- The 3-percent downturn in U.S. exports to Mexico in 2003 nearly mirrored the 2-percent decline in Mexican manufacturers' shipments to the United States in that year.⁴ The bulk of U.S. exports to Mexico were intermediate products (machinery, materials, components, and other industrial inputs; see table MEXICO-2) destined for companies operating under Mexico's maquiladora and PITEEX Programs.⁵
- U.S. exports to Mexico of certain motor-vehicle parts (as well as seats and engines) fell in 2003, reflecting reduced production of vehicles in Mexico for both domestic sales and export (see Certain Motor-Vehicle Parts in Transportation Equipment).⁶
- Although Mexican demand for motor vehicles was relatively stable in 2003 (0.2 percent below 2002), sales of domestically produced vehicles fell as imports rose 9 percent to increase their share of the Mexican market from 55 percent in 2002 to over 60 percent in 2003.⁷ Nevertheless, U.S. exports of vehicles to Mexico slipped as U.S. producers lost market share to imports of smaller, lower-NAFTA-content vehicles from Europe and South America (see Motor Vehicles in Transportation Equipment).⁸
- The decline in U.S. exports of cathode tubes reflected a shift toward the production of flat-screen televisions in Mexico, reducing demand there for picture tubes (see Television Receivers and Video Monitors in Electronic Products).⁹

⁴ "Q4 GDP Surprises On the Upside, But the Engine Sputters in January," *Mexico Watch*, Mar. 1, 2004, p. 1.

⁵ Seventy percent of the foreign inputs into companies registered under the Maquiladora Program and PITEEX in 2002 came from the United States, and 92 percent of their exports went to the United States. Products from these companies accounted for 84 percent of all Mexican exports to the United States in 2002. See Ralph Watkins, "Production-Sharing Update: Developments in 2002," *Industry Trade and Technology Review*, USITC publication 3661, Nov. 2003, pp. C-2, C-9, and C-16.

⁶ "Detroit South Faces Competition from Detroit East," *Mexico Watch*, Aug. 1, 2003, p. 6.

⁷ Dale Jewett, "GM Comes from Behind to Take Mexico Sales Crown," *Automotive News*, Jan. 26, 2004, p. 24.

⁸ Haig Stoddard, "Mexico Market Growing," *Ward's AutoWorld*, Nov. 2003, p. 15.

⁹ "JVC Cuts Ribbon on TJ Plant," *Mexico Watch*, July 1, 2003, p. 12.

U.S. imports

- The increased value of crude petroleum imports, the largest import increase (see table MEXICO-2), matched the growth of all U.S. imports from Mexico in 2003. Higher prices accounted for the increased value as unit prices rose more (22 percent) than did quantities imported (6 percent) (see Crude Petroleum in Energy Products).¹⁰
- Imports of seats for motor vehicles and aircraft; internal combustion piston engines, other than for aircraft; and certain motor-vehicle parts from Mexico rose as some U.S. parts producers shifted a portion of their assembly operations to Mexico in response to their customers' demands for lower prices.¹¹ Depreciation of the peso against the dollar and increased demand for replacement parts also helped boost U.S. imports from Mexico (see Certain Motor-Vehicle Parts in Transportation Equipment).
- Declining imports of motor vehicles from Mexico reflected the loss of U.S. market share by Detroit's Big Three to foreign-based auto producers. The Big Three (especially Ford and General Motors) account for the bulk of Mexico's vehicle exports to the United States (see Motor Vehicles in Transportation Equipment).¹²
- Cellular telephones and printed circuit assemblies accounted for nearly one-half of U.S. imports of telephone and telegraph apparatus from Mexico in 2003. Imports of digital communications gear rose in response to growing demand for faster Internet connections (see Telephone and Telegraph Apparatus in Electronic Products).¹³

¹⁰ The average price of crude petroleum rose from \$22.51 per barrel in 2002 to \$27.48 per barrel in 2003. Meanwhile, the volume of U.S. imports of crude petroleum from Mexico rose from 1.5 million barrels per day to 1.6 million barrels per day.

¹¹ "Detroit South Faces Competition from Detroit East," *Mexico Watch*.

¹² Stoddard, *Ibid*.

¹³ U.S. industry representatives, telephone interviews by USITC staff, Mar. 2 and 8, and Apr. 8, 2004.

FAQs

Why is this information prepared?

The international trade analysts of the U.S. International Trade Commission (USITC or the Commission), Office of Industries, routinely monitor trade developments in all natural resource, agricultural, and manufacturing industries, and in the services sector, which enables the USITC to better anticipate and address issues of concern in its various roles under U.S. trade statutes.¹ Trade monitoring at the industry/commodity sector and subsector levels (the latter referred to as industry/ commodity groups and subgroups² in this report) is a facet of the research and analysis undertaken by the Office of Industries as part of its responsibility to provide advice and technical information on industry and trade issues.

On August 27, 1993, on its own motion and pursuant to section 332(b) of the Tariff Act of 1930 (19 U.S.C. 1332(b)), the U.S. International Trade Commission instituted investigation No. 332-345, *Annual Reports on U.S. Trade Shifts in Selected Industries*. The report format was developed by the USITC in response to Congressional interest in establishing a systematic means of examining and reporting on the significance of major trade shifts, by product and with leading U.S. trade partners in all natural-resource, agricultural, and manufacturing industries.

On December 20, 1994, the Commission on its own motion expanded the scope of this study to include selected service industries. Under the expanded scope, the Commission publishes two separate reports annually: *Shifts in U.S. Merchandise Trade* and *Recent Trends in U.S. Services Trade*. A separate report covering services trade was instituted to provide more comprehensive coverage of U.S. trade performance and overall economic competitiveness.

¹ Major roles include determining whether U.S. industries are materially injured or threatened with material injury by unfair imports, conducting studies on the international competitiveness of U.S. industries, and advising the President and the Congress on the likely effects of trade-policy changes and proposals.

² In some cases, industry/commodity groups have been further broken down into subgroups to create more meaningful data sets.

How is this information organized?

Overall U.S. merchandise trade performance is summarized for 2003, in comparison with such trade for 2002. Coverage of the individual merchandise sectors includes data showing U.S. export, import, and trade balance shifts by sectors, industry/commodity groups (and in some cases subgroups), and shifts in trade with U.S. trade partners.

The shift in U.S. trade with each of the top five U.S. trade partners—Canada, China, the European Union, Japan, and Mexico— is also presented. Summary tables detail the important shifts in U.S. bilateral trade and highlight leading changes in industry/commodity groups for each of the five major trade partners.

A general sector overview is presented for each of the 10 sectors, identifying significant shifts in merchandise trade within the sector. In most cases, significant shifts in specific industry/commodity groups or subgroups are also identified. A statistical summary table of industry/commodity groups or subgroups is included in each sector analysis chapter, showing absolute and percent changes in a year-to-year comparison for 2002 and 2003. Industry/commodity profile tables are also included.

What trade statistics are used?

Trade statistics are compiled from official statistics of the U.S. Department of Commerce. These statistics are categorized using the U.S. Harmonized Tariff Schedules (for imports) and Schedule B (for exports) using an international nomenclature system.

Why is your data different from other trade data?

TRADE DATA NOTE

Although all import and export data presented in this report are official statistics of the USDOC, these data may be different from the data presented by other government agencies and private institutions that cite Commerce as the source for trade data. Possible reasons for these discrepancies are as follows:

- Data in this report include merchandise trade only; other reported data may include services.
- Data are not seasonally adjusted; the values of other reported data may be so adjusted.
- Data are not adjusted on a balance of payments (BOP) basis; the values of other reported data may be so adjusted in line with the concepts and definitions used to prepare national and international accounts.
- Exports are on a domestic export/f.a.s. basis; other reported export data may be on a total export/f.a.s. basis, which include re-exports of foreign merchandise.
- Imports are on an imports-for-consumption/customs value basis; other reported import data may be on a general imports/customs value basis.
- Exports and imports may not include all errata because certain errors may not be corrected by Commerce in time to be included in this report.
- Data in this report may be adjusted for errors that are not of sufficient magnitude to be changed in Commerce data.
- There are no adjustments for carryover (exports and imports received late or not processed for any reason and then subsequently included in a later month's data are reassigned to the month of exportation/entry), and trade is reported as originally released by Commerce. Other reported data may adjust export/import trade for carryover.
- The industry/commodity groups contained in this report are developed by the USITC and may differ from similarly labeled groups from other sources.

What are sectors?

Sectors are major segments of the U.S. economy, e.g., Agricultural Products, Minerals and Metals. We divide the U.S. economy into 10 merchandise sectors.

What are industry/commodity profiles?

Industry/commodity profiles contain official and estimated data (1999-2003) for domestic consumption, production, employment, trade, and import penetration for most of the industry/commodity groups and subgroups covered in this report.³ USITC international trade analysts have estimated certain components of these data, based on publicly available primary and secondary government and industry sources. The estimated data are subject to change as information from these sources is updated.

³ Certain industry/commodity groups that cover a wide variety of products or a miscellaneous group of products are not included because data in these cases are of limited value. In some cases, certain subgroups have been included in place of the related aggregate group.

ASEAN (ASSOCIATION OF SOUTHEAST ASIAN NATIONS)

Brunei	Malaysia
Burma (Myanmar)	Philippines
Cambodia	Singapore
Indonesia	Thailand
Laos	Vietnam

ASIA

Afghanistan	Macao
Bangladesh	Malaysia
Bhutan	Maldives Islands
Brunei	Mongolia
Burma (Myanmar)	Nepal
Cambodia	North Korea
China	Pakistan
Hong Kong	Philippines
India	Singapore
Indonesia	Sri Lanka
Japan	Taiwan
Korea	Thailand
Laos	Vietnam

**CBERA (CARIBBEAN BASIN ECONOMIC RECOVERY ACT)
BENEFICIARIES**

Antigua and Barbuda	Guyana
Aruba	Haiti
The Bahamas	Honduras
Barbados	Jamaica
Belize	Montserrat
British Virgin Islands	Netherlands Antilles
Costa Rica	Nicaragua
Dominica	Panama
Dominican Republic	St. Kitts and Nevis
El Salvador	St. Lucia
Grenada	St. Vincent and the Grenadines
Guatemala	Trinidad and Tobago

CENTRAL AND EASTERN EUROPE

Albania	Macedonia
Bosnia-Herzegovina	Poland
Bulgaria	Romania
Croatia	Slovakia
Czech Republic	Slovenia
Hungary	Yugoslavia (Serbia and Montenegro)

EU/EU-15 (EUROPEAN UNION)

Austria	Italy
Belgium	Luxembourg
Denmark	Netherlands
Finland	Portugal
France	Spain
Germany	Sweden
Greece	United Kingdom
Ireland	

LATIN AMERICA

Anguilla	Guadeloupe
Antigua and Barbuda	Guatemala
Argentina	Guyana
Aruba	Haiti
The Bahamas	Honduras
Barbados	Jamaica
Belize	Martinique
Bermuda	Mexico
Bolivia	Montserrat
Brazil	Netherlands Antilles
British Virgin Islands	Nicaragua
Cayman Islands	Panama
Chile	Paraguay
Colombia	Peru
Costa Rica	St. Kitts and Nevis
Cuba	St. Lucia
Dominica Island	St. Pierre and Miquelon
Dominican Republic	St. Vincent and the Grenadines
Ecuador	Suriname
El Salvador	Trinidad and Tobago
Falkland Islands	Turks and Caicos Islands
French Guiana	Uruguay
Grenada	Venezuela

NAFTA (NORTH AMERICAN FREE TRADE AGREEMENT) PARTNERS

Canada	Mexico
United States	

OPEC (ORGANIZATION OF PETROLEUM EXPORTING COUNTRIES)

Algeria	Nigeria
Indonesia	Qatar
Iran	Saudi Arabia
Iraq	United Arab Emirates
Kuwait	Venezuela
Libya	

SUB-SAHARAN AFRICA

Angola	Lesotho
Benin	Liberia
Botswana	Madagascar
Burkina Faso	Malawi
Burundi	Mali
Cameroon	Mauritania
Cape Verde	Mauritius
Central African Republic	Mozambique
Chad	Namibia
Comoros	Niger
Côte d'Ivoire	Nigeria
Republic of the Congo	Rwanda
(Congo-Brazzaville)	São Tomé and Príncipe
Democratic Republic of the	Senegal
Congo (Congo-Kinshasa)	Seychelles
Djibouti	Sierra Leone
Equatorial Guinea	Somalia
Eritrea	South Africa
Ethiopia	Sudan
Gabon	Swaziland
The Gambia	Tanzania
Ghana	Togo
Guinea	Uganda
Guinea-Bissau	Zambia
Kenya	Zimbabwe

What are industry/commodity groups and subgroups?

Sectors are broken down into industry/commodity groups, which are aggregations of similar products, e.g., motor vehicles, footwear. In some cases, industry/commodity groups have been further broken down into subgroups to create more meaningful data sets. The groups and subgroups discussed in this report are as follows:

Agricultural products sector¹

(HTS chapters² 1-24, 35, 41, 43, 51, 52)

AG001 Certain miscellaneous animals and meats
AG002 Cattle and beef
AG003 Swine and pork
AG004 Sheep and meat of sheep
AG005 Poultry
AG006 Fresh or frozen fish
AG007 Canned fish
AG008 Cured and other fish
AG009 Shellfish
AG010 Dairy produce
AG011 Eggs
AG012 Sugar and other sweeteners
 AG012A Sugar
 AG012B High fructose corn sweetener
AG013 Animal feeds
AG014 Live plants
AG015 Seeds
AG016 Cut flowers
AG017 Miscellaneous vegetable substances
AG018 Fresh, chilled, or frozen vegetables
AG019 Prepared or preserved vegetables, mushrooms, and olives
AG020 Edible nuts
AG021 Tropical fruit
AG022 Citrus fruit
AG023 Deciduous fruit
AG024 Other fresh fruit
AG025 Dried fruit other than tropical
AG026 Frozen fruit
AG027 Prepared or preserved fruit
AG028 Coffee and tea
AG029 Spices
AG030 Cereals
AG031 Milled grains, malts, and starches
AG032 Oilseeds
AG033 Animal or vegetable fats and oils
AG034 Pasta, cereals, and other bakery goods
AG035 Sauces, condiments, and soups

AG036 Infant formulas, malt extracts, and other edible preparations
AG037 Cocoa, chocolate, and confectionery
AG038 Fruit and vegetable juices
AG039 Nonalcoholic beverages, excluding fruit and vegetable juices
AG040 Malt beverages

AG041 Wine and certain other fermented beverages
AG042 Distilled spirits
AG043 Unmanufactured tobacco
AG044 Cigars and certain other manufactured tobacco
AG045 Cigarettes
AG046 Hides, skins, and leather
AG047 Furskins
AG048 Wool and other animal hair
AG049 Cotton, not carded or combed
AG050 Ethyl alcohol for nonbeverage purposes

Forest products sector

(HTS chapters 14, 44-49)

AG051 Logs and rough wood products
AG052 Lumber
AG053 Moldings, millwork, and joinery
AG054 Wood veneer and wood panels
AG055 Wooden containers
AG056 Tools and tool handles of wood
AG057 Miscellaneous articles of wood
AG058 Cork and rattan
AG059 Wood pulp and wastepaper
AG060 Paper boxes and bags
AG061 Industrial papers and paperboards
 AG061A Paperboard
 AG061B Tissue and tissue products
 AG061C Industrial paper
AG062 Newsprint
AG063 Printing and writing papers
AG064 Certain specialty papers
AG065 Miscellaneous paper products
AG066 Printed matter

Chemicals and related products sector
(HTS chapters 13-15, 22, 25, 27-40)

CH007 Major primary olefins
CH008 Other olefins
CH009 Primary aromatics
CH010 Organic commodity chemicals
CH011 Organic specialty chemicals
CH012 Certain organic chemicals
CH013 Miscellaneous inorganic chemicals
CH014 Inorganic acids
CH015 Chlor-alkali chemicals
CH016 Fertilizers
CH017 Paints, inks, and related items, and certain components thereof
CH018 Synthetic organic pigments
CH019 Synthetic dyes and azoic couplers
CH020 Synthetic tanning agents
CH021 Natural tanning and dyeing materials
CH022 Photographic chemicals and preparations
CH023 Pesticide products and formulations
CH024 Adhesives and glues
CH025 Medicinal chemicals
CH026 Essential oils and other flavoring materials
CH027 Perfumes, cosmetics, and toiletries
CH028 Soaps, detergents, and surface-active agents
CH029 Miscellaneous chemicals and specialties
CH030 Explosives, propellant powders, and related items
CH031 Polyethylene resins in primary forms
CH032 Polypropylene resins in primary forms
CH033 Polyvinyl chloride resins in primary forms
CH034 Styrene polymers in primary forms
CH035 Saturated polyester resins
CH036 Other plastics in primary forms
CH037 Styrene-butadiene rubber in primary forms
CH038 Other synthetic rubber
CH039 Pneumatic tires and tubes (new)
CH040 Other tires
CH041 Miscellaneous plastic products
CH042 Miscellaneous rubber products
CH043 Gelatin
CH044 Natural rubber

Energy-related products sector
(HTS chapters 27-29, 34, 36, 38)

CH001 Electrical energy
CH002 Nuclear materials
CH003 Coal, coke, and related chemical products
CH004 Crude petroleum
CH005 Petroleum products
CH006 Natural gas and components

Textiles, apparel, and footwear sector
(HTS chapters 39, 40, 42, 43, 50-65)

CH045 Fibers and yarns, except raw cotton and raw wool
CH046 Fabrics
 CH046A Broadwoven fabrics
 CH046B Knit fabrics
 CH046C Specialty fabrics
 CH046D Coated and other fabrics
 CH046E Glass fiber fabrics
 CH046F Other fabrics
CH047 Carpets and rugs
CH048 Home furnishings
 CH048A Blankets
 CH048B Pillowcases and sheets
 CH048C Table/kitchen linens and towels
 CH048D Curtains
 CH048E Bedspreads and other furnishing articles
 CH048F Pillows, cushions, and sleeping bags
 CH048G Tapestries and other wall hangings
CH049 Apparel
 CH049A Men's and boys' suits and sports coats
 CH049B Men's and boys' coats and jackets
 CH049C Men's and boys' trousers
 CH049D Women's and girls' trousers
 CH049E Shirts and blouses
 CH049F Sweaters
 CH049G Women's and girls' suits, skirts, and coats
 CH049H Women's and girls' dresses
 CH049I Robes, nightwear, and underwear
 CH049J Hosiery
 CH049K Body-supporting garments
 CH049L Neckwear, handkerchiefs, and scarves

CH049M Gloves, including gloves for sports
 CH049N Headwear
 CH049O Leather apparel and accessories
 CH049P Fur apparel and other fur articles
 CH049Q Rubber, plastic, and coated-fabric apparel
 CH049R Nonwoven apparel
 CH049S Other wearing apparel
 CH050 Miscellaneous textile products
 CH051 Footwear

Minerals and metals sector

(HTS chapters 25, 26, 68-76, 78-83)

MM001 Clays and related mineral products
 MM002 Fluorspar and miscellaneous mineral substances
 MM003 Iron ores and concentrates
 MM004 Copper ores and concentrates
 MM005 Lead ores, concentrates, and residues
 MM005A Lead ores and concentrates
 MM006 Zinc ores, concentrates, and residues
 MM006A Zinc ores and concentrates
 MM007 Certain ores, concentrates, ash, and residues
 MM007A Molybdenum ores and concentrates
 MM008 Precious metal ores and concentrates
 MM008A Gold ores and concentrates
 MM008B Silver ores and concentrates
 MM009 Cement, stone, and related products
 MM009A Cement
 MM010 Industrial ceramics
 MM011 Ceramic bricks and similar articles
 MM012 Ceramic floor and wall tiles
 MM013 Ceramic household articles
 MM014 Flat glass
 MM015 Glass containers
 MM016 Household glassware
 MM017 Miscellaneous glass products
 MM018 Fiberglass insulation products
 MM019 Natural and synthetic gemstones
 MM020 Precious metals and non-numismatic coins
 MM020A Unrefined and refined gold
 MM021 Primary iron products
 MM022 Ferroalloys
 MM023 Iron and steel waste and scrap
 MM024 Abrasive and ferrous products
 MM024A Abrasive products
 MM025 Steel mill products

MM025A Ingots, blooms, billets, and slabs of carbon and alloy steels
 MM025B Plates, sheets, and strips of carbon and alloy steels
 MM025C Bars, rods, and light shapes of carbon and alloy steels
 MM025D Angles, shapes, and sections of carbon and alloy steels
 MM025E Wire of carbon and alloy steels
 MM025F Ingots, blooms, billets, and slabs of stainless steels
 MM025G Plates, sheets, and strips of stainless steels
 MM025H Bars, rods, and light shapes of stainless steels
 MM025I Angles, shapes, and sections of stainless steels
 MM025J Wire of stainless steels
 MM025K Rails and accessories of carbon and alloy steels
 MM025L Pipes and tubes of carbon and alloy steels
 MM025M Pipes and tubes of stainless steels
 MM025N Tool steels
 MM026 Steel pipe and tube fittings and certain cast products
 MM027 Fabricated structurals
 MM028 Metal construction components
 MM029 Metallic containers
 MM030 Wire products of base metal
 MM031 Miscellaneous products of base metal
 MM032 Industrial fasteners of base metal
 MM033 Cooking and kitchen ware
 MM034 Metal and ceramic sanitary ware
 MM035 Construction castings and other cast-iron articles
 MM036 Copper and related articles
 MM036A Unrefined and refined copper
 MM036B Copper alloy plate, sheet, and strip
 MM037 Unwrought aluminum
 MM037A Primary and secondary aluminum
 MM038 Aluminum mill products
 MM038A Aluminum bars, rods, and profiles
 MM038B Aluminum wire
 MM038C Aluminum plate, sheet, and strip
 MM038D Aluminum foil
 MM038E Aluminum tubes, pipes, and fittings
 MM039 Lead and related articles
 MM039A Refined lead
 MM040 Zinc and related articles

MM040A Unwrought zinc
MM041 Certain base metals and chemical elements
MM041A Titanium ingot
MM042 Nonpowered handtools
MM043 Certain cutlery, sewing implements, and related products
MM044 Table flatware and related products
MM045 Certain builders' hardware

Machinery sector

(HTS chapters 84, 85, 87)

MM068 Wiring harnesses for motor vehicles
MM069 Pumps for motor vehicles
MM070 Pumps for liquids
MM071 Air-conditioning equipment and parts
MM072 Industrial thermal-processing equipment and furnaces
MM073 Household appliances, including commercial applications
MM073A Major household appliances and parts
MM074 Centrifuges and filtering and purifying equipment
MM075 Wrapping, packaging, and can-sealing machinery
MM076 Scales and weighing machinery
MM077 Mineral processing machinery
MM078 Farm and garden machinery and equipment
MM079 Industrial food-processing and related machinery
MM080 Pulp, paper, and paperboard machinery
MM081 Printing and related machinery
MM082 Textile machinery
MM083 Metal rolling mills
MM084 Metal cutting machine tools and machine tool accessories
MM085 Metal forming machine tools
MM086 Non-metalworking machine tools
MM087 Semiconductor manufacturing equipment and robotics
MM087A Semiconductor manufacturing machinery
MM088 Taps, cocks, valves, and similar devices
MM089 Mechanical power transmission equipment
MM090 Boilers, turbines, and related machinery
MM091 Electric motors, generators, and related

equipment
MM092 Electrical transformers, static converters, and inductors
MM093 Portable electric handtools
MM094 Nonelectrically powered handtools and parts thereof
MM095 Electric lamps (bulbs) and portable electric lights
MM096 Welding and soldering equipment
MM097 Nonautomotive insulated electrical wire and related products
MM098 Miscellaneous machinery
MM099 Molds and molding machinery

Transportation equipment sector

(HTS chapters 84-89)

ET001 Aircraft engines and gas turbines
ET002 Internal combustion piston engines, other than for aircraft
ET003 Forklift trucks and similar industrial vehicles
ET004 Construction and mining equipment
ET005 Ball and rollers bearings
ET006 Primary cells and batteries and electric storage batteries
ET007 Ignition, starting, lighting, and other electrical equipment
ET008 Rail locomotive and rolling stock
ET009 Motor vehicles
ET010 Certain motor-vehicle parts
ET011 Motorcycles, mopeds, and parts
ET012 Miscellaneous vehicles and transportation-related equipment
ET013 Aircraft, spacecraft, and related equipment
ET014 Ships, tugs, pleasure boats, and similar vessels
ET015 Motors and engines, except internal combustion, aircraft, or electric

Electronic products sector

(HTS chapters 37, 84, 85, 88, 90, 91)

ET016 Office machines
ET017 Telephone and telegraph apparatus
ET018 Consumer electronics (except televisions)
ET019 Blank media

ET020 Prerecorded media
 ET021 Navigational instruments and remote control apparatus
 ET022 Television receivers and video monitors
 ET023 Radio and television broadcasting equipment
 ET024 Electric sound and visual signaling apparatus
 ET025 Electrical capacitors and resistors
 ET026 Printed circuits
 ET027 Circuit apparatus exceeding 1000V
 ET028 Circuit apparatus not exceeding 1000V
 ET029 Circuit apparatus assemblies
 ET030 Parts of circuit apparatus
 ET031 Cathode-ray tubes
 ET032 Electron tubes other than CRTs
 ET033 Semiconductors and integrated circuits
 ET034 Miscellaneous electrical equipment
 ET035 Computers, peripherals, and parts
 ET036 Photographic film and paper
 ET037 Optical fibers, optical fiber bundles and cables
 ET038 Optical goods, including ophthalmic goods
 ET039 Photographic cameras and equipment
 ET040 Medical goods
 ET041 Watches and clocks
 ET042 Drawing, drafting, and calculating instruments
 ET043 Measuring, testing, and controlling instruments

Miscellaneous manufactures sector
 (HTS chapters 14, 44-49)

MM046 Luggage, handbags, and flat goods
 MM046A Luggage
 MM046B Handbags
 MM046C Flat goods
 MM047 Certain other leather goods
 MM048 Musical instruments and accessories
 MM049 Umbrellas, whips, riding crops, and canes
 MM050 Silverware and related articles of precious metal
 MM051 Precious jewelry and related articles
 MM052 Costume jewelry and related articles
 MM053 Bicycles and certain parts
 MM054 Furniture
 MM055 Writing instruments and related articles
 MM056 Lamps and lighting fittings
 MM057 Prefabricated buildings
 MM058 Dolls
 MM059 Toys
 MM060 Games
 MM061 Sporting goods
 MM062 Smokers' articles
 MM063 Brooms, brushes, and hair grooming articles
 MM063A Brooms and brushes
 MM063B Hair grooming articles, non-electric (except brushes)
 MM064 Works of art and miscellaneous manufactured goods
 MM065 Apparel fasteners
 MM066 Arms and ammunition
 MM066A Small arms and ammunition
 MM067 Seats for motor vehicles and aircraft

¹ This coding system (e.g., AG0012, AG012A) is used by the USITC to identify major groupings and subgroupings of U.S. Harmonized Tariff Schedule headings/subheadings and corresponding export categories for trade monitoring purposes.

² Products in some HTS chapters are divided between industry/commodity groups monitored by the Commission; however, no products are in more than one sector. Chapter 77 of the HTS is not used and is reserved for possible future use. Chapters 98-99 of the HTS are for special classification provisions.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector

USITC code	Industry/commodity group or subgroup title	HTS subheading range
Agricultural products sector:		
AG001	Certain miscellaneous animals and meats	0101.10.00 - 0102.10.00 0103.10.00 - 0103.10.00 0104.20.00 - 0104.20.00 0106.00.10 - 0106.90.00 0204.50.00 - 0205.00.00 0206.80.00 - 0206.90.00 0208.10.00 - 0208.90.90 0210.11.00 - 0210.99.90 0410.00.00 - 0511.10.00 0511.99.20 - 0511.99.40 1601.00.20 - 1602.10.00 1602.41.10 - 1603.00.90 3502.90.00 - 3502.90.00
AG002	Cattle and beef	0102.90.20 - 0102.90.40 0201.10.05 - 0202.30.80 0206.10.00 - 0206.29.00
AG003	Swine and pork	0103.91.00 - 0103.92.00 0203.11.00 - 0203.29.40 0206.30.00 - 0206.49.00
AG004	Sheep and meat of sheep	0104.10.00 - 0104.10.00 0204.10.00 - 0204.43.40
AG005	Poultry	0105.11.00 - 0105.99.00 0207.11.00 - 0207.36.00 1602.20.20 - 1602.39.00
AG006	Fresh or frozen fish	0302.11.00 - 0304.90.90
AG007	Canned fish	1604.11.20 - 1604.19.80
AG008	Cured and other fish	0301.10.00 - 0301.99.00 0305.10.20 - 0305.69.60 0511.91.00 - 0511.91.00 1604.20.05 - 1604.30.40
AG009	Shellfish	0306.11.00 - 0307.99.00 1605.10.05 - 1605.90.60
AG010	Dairy produce	0401.10.00 - 0406.90.99 2105.00.05 - 2105.00.50 3501.10.10 - 3501.10.50 3501.90.60 - 3501.90.60 3502.20.00 - 3502.20.00
AG011	Eggs	0407.00.00 - 0408.99.00 3502.11.00 - 3502.19.00
AG012	Sugar and other sweeteners	0409.00.00 - 0409.00.00 1212.91.00 - 1212.92.00 1212.99.10 - 1212.99.10 1701.11.05 - 1703.90.50
AG012A	Sugar	1701.11.05 - 1701.99.50 1702.90.05 - 1702.90.90
AG012B	High fructose corn sweetener	1702.40.22 - 1702.40.40 1702.60.22 - 1702.60.40
AG013	Animal feeds	1208.10.00 - 1208.90.00 1213.00.00 - 1214.90.00 2301.10.00 - 2309.90.95
AG014	Live plants	0601.10.15 - 0602.90.40 0602.90.60 - 0602.90.90

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
AG015	Seeds	0602.90.50 - 0602.90.50 0701.10.00 - 0701.10.00 0712.90.80 - 0712.90.80 0712.90.85 - 0712.90.85 0713.10.10 - 0713.10.10 0713.20.10 - 0713.20.10 0713.31.10 - 0713.31.10 0713.32.10 - 0713.32.10 0713.33.10 - 0713.33.10 0713.39.10 - 0713.39.10 0713.40.10 - 0713.40.10 0713.50.10 - 0713.50.10 0713.90.10 - 0713.90.10 1001.10.00 - 1001.10.00 1001.90.10 - 1001.90.10 1002.00.00 - 1002.00.00 1003.00.40 - 1003.00.40 1004.00.00 - 1004.00.00 1005.10.00 - 1005.10.00 1007.00.00 - 1007.00.00 1008.20.00 - 1008.20.00 1201.00.00 - 1201.00.00 1204.00.00 - 1204.00.00 1205.00.00 - 1205.00.00 1205.10.00 - 1205.10.00 1205.90.00 - 1205.90.00 1206.00.00 - 1206.00.00 1207.20.00 - 1207.20.00 1209.10.00 - 1209.99.40
AG016	Cut flowers	0603.10.30 - 0603.90.00
AG017	Miscellaneous vegetable substances	0604.10.00 - 0604.99.60 1108.20.00 - 1108.20.00 1210.10.00 - 1212.30.90 1212.99.00 - 1212.99.00 1212.99.90 - 1212.99.90 1301.10.00 - 1301.90.90 1302.12.00 - 1302.39.00 1402.00.91 - 1403.90.40 1404.90.00 - 1404.90.00
AG018	Fresh, chilled, or frozen vegetables	0701.90.10 - 0710.90.91
AG019	Prepared or preserved vegetables, mushrooms, and olives	0711.10.00 - 0712.90.78 0712.90.80 - 0712.90.80 0712.90.85 - 0712.90.85 0713.10.20 - 0713.10.40 0713.20.20 - 0713.20.20 0713.31.20 - 0713.31.40 0713.32.20 - 0713.32.20 0713.33.20 - 0713.33.40 0713.39.15 - 0713.39.40 0713.40.20 - 0713.40.20 0713.50.20 - 0713.50.20 0713.90.50 - 0714.90.60 1105.10.00 - 1106.20.90

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		2001.10.00 - 2005.90.97
		2008.91.00 - 2008.91.00
		2008.99.61 - 2008.99.61
		2008.99.65 - 2008.99.71
AG020	Edible nuts	0801.11.00 - 0802.90.98
		0813.50.00 - 0813.50.00
		1202.10.05 - 1202.20.80
		2008.11.02 - 2008.19.90
AG021	Tropical fruit	0803.00.20 - 0804.50.80
		0807.20.00 - 0807.20.00
		0810.60.00 - 0810.60.00
		0810.90.25 - 0810.90.25
		0813.40.10 - 0813.40.10
		0813.40.80 - 0813.40.80
AG022	Citrus fruit	0805.10.00 - 0805.90.01
		0812.90.20 - 0812.90.20
		0814.00.10 - 0814.00.80
		2008.30.10 - 2008.30.96
AG023	Deciduous fruit	0808.10.00 - 0809.40.40
AG024	Other fresh fruit	0806.10.20 - 0806.10.60
		0807.11.30 - 0807.19.80
		0810.10.20 - 0810.50.00
		0810.90.20 - 0810.90.20
		0810.90.25 - 0810.90.45
AG025	Dried fruit other than tropical	0806.20.10 - 0806.20.90
		0813.10.00 - 0813.30.00
		0813.40.15 - 0813.40.40
		0813.40.90 - 0813.40.90
		0813.50.00 - 0813.50.00
AG026	Frozen fruit	0811.10.00 - 0811.90.80
AG027	Prepared or preserved fruit	0812.10.00 - 0812.90.10
		0812.90.30 - 0812.90.90
		1106.30.20 - 1106.30.40
		2006.00.20 - 2007.99.75
		2008.20.00 - 2008.20.00
		2008.40.00 - 2008.80.00
		2008.92.10 - 2008.99.60
		2008.99.63 - 2008.99.63
		2008.99.80 - 2008.99.90
AG028	Coffee and tea	0901.11.00 - 0903.00.00
		2101.11.21 - 2101.30.00
AG029	Spices	0904.11.00 - 0910.99.60
		1207.50.00 - 1207.50.00
		2103.30.20 - 2103.30.40
AG030	Cereals	1001.10.00 - 1001.10.00
		1001.90.20 - 1001.90.20
		1002.00.00 - 1003.00.20
		1003.00.40 - 1003.00.40
		1004.00.00 - 1004.00.00
		1005.90.20 - 1006.40.00
		1007.00.00 - 1008.10.00
		1008.30.00 - 1008.90.00
AG031	Milled grains, malts, and starches	1101.00.00 - 1104.30.00
		1107.10.00 - 1108.19.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		Industry/commodity group or subgroup title	HTS subheading range
code			
			1109.00.10 - 1109.00.90
			1903.00.20 - 1903.00.40
AG032	Oilseeds		1201.00.00 - 1201.00.00
			1203.00.00 - 1203.00.00
			1204.00.00 - 1204.00.00
			1205.00.00 - 1205.00.00
			1205.10.00 - 1205.10.00
			1205.90.00 - 1205.90.00
			1206.00.00 - 1207.10.00
			1207.20.00 - 1207.40.00
			1207.60.00 - 1207.99.01
AG033	Animal or vegetable fats and oils		0209.00.00 - 0209.00.00
			1501.00.00 - 1518.00.40
			1522.00.00 - 1522.00.00
AG034	Pasta, cereals, and other bakery goods		1901.20.02 - 1901.20.80
			1902.11.20 - 1902.40.00
			1904.10.00 - 1905.90.90
			2102.10.00 - 2102.30.00
AG035	Sauces, condiments, and soups		2103.10.00 - 2103.20.40
			2103.90.20 - 2104.20.00
			2209.00.00 - 2209.00.00
AG036	Infant formulas, malt extracts, and other edible preparations		1901.10.05 - 1901.10.95
			1901.90.10 - 1901.90.90
			2106.10.00 - 2106.90.09
			2106.90.22 - 2106.90.46
			2106.90.58 - 2106.90.99
			3504.00.10 - 3504.00.50
AG037	Cocoa, chocolate, and confectionery		1704.10.00 - 1806.90.90
AG038	Fruit and vegetable juices		2009.11.00 - 2009.90.40
			2106.90.48 - 2106.90.54
AG039	Nonalcoholic beverages, excluding fruit and vegetable juices		2201.10.00 - 2202.90.90
AG040	Malt beverages		2203.00.00 - 2203.00.00
AG041	Wine and certain other fermented beverages		2204.10.00 - 2206.00.90
AG042	Distilled spirits		2106.90.12 - 2106.90.18
			2207.10.30 - 2207.10.30
			2208.20.10 - 2208.90.80
AG043	Unmanufactured tobacco		2401.10.21 - 2401.30.70
AG044	Cigars and certain other manufactured tobacco		2402.10.30 - 2402.10.80
			2402.90.00 - 2403.99.90
AG045	Cigarettes		2402.20.10 - 2402.20.90
AG046	Hides, skins, and leather		4101.10.00 - 4115.20.00
AG047	Furskins		4301.10.00 - 4302.30.00
AG048	Wool and other animal hair		5101.11.10 - 5102.20.00
AG049	Cotton, not carded or combed		5201.00.05 - 5201.00.80
AG050	Ethyl alcohol for nonbeverage purposes		2207.10.60 - 2207.20.00
Forest products sector:			
AG051	Logs and rough wood products		4401.10.00 - 4405.00.00
			4418.50.00 - 4418.50.00
AG052	Lumber		4406.10.00 - 4407.99.00
AG053	Moldings, millwork, and joinery		4409.10.05 - 4409.20.90
			4414.00.00 - 4414.00.00
			4418.10.00 - 4418.30.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		4418.90.20 - 4418.90.45
AG054	Wood veneer and wood panels	4408.10.00 - 4408.90.01
		4410.11.00 - 4412.99.96
AG055	Wooden containers	4415.10.30 - 4416.00.90
		4420.90.20 - 4420.90.80
AG056	Tools and tool handles of wood	4417.00.20 - 4417.00.80
		4419.00.40 - 4419.00.80
AG057	Miscellaneous articles of wood	4413.00.00 - 4413.00.00
		4418.40.00 - 4418.40.00
		4420.10.00 - 4420.10.00
		4421.10.00 - 4421.90.98
AG058	Cork and rattan	1401.10.00 - 1401.90.40
		4501.10.00 - 4601.20.90
		4601.91.20 - 4601.99.00
		4602.10.05 - 4602.90.00
AG059	Wood pulp and wastepaper	1404.20.00 - 1404.20.00
		4601.91.05 - 4601.91.05
		4601.99.05 - 4601.99.90
		4701.00.00 - 4707.90.00
AG060	Paper boxes and bags	4819.10.00 - 4819.60.00
AG061	Industrial papers and paperboards	4803.00.20 - 4808.90.60
		4810.31.00 - 4810.92.14
		4810.99.00 - 4811.10.10
		4811.31.20 - 4811.31.40
		4811.39.40 - 4811.40.00
		4811.51.20 - 4811.51.40
		4811.59.40 - 4811.59.40
		4811.60.40 - 4811.60.40
		4811.90.10 - 4812.00.00
		4818.10.00 - 4818.90.00
		4823.20.10 - 4823.20.90
AG061A	Paperboard	4804.11.00 - 4805.93.40
		4808.10.00 - 4808.90.60
		4810.31.00 - 4810.92.14
		4810.99.00 - 4810.99.65
		4811.39.40 - 4811.39.40
		4811.51.20 - 4811.51.40
		4811.59.40 - 4811.59.40
AG061B	Tissue and tissue products	4803.00.20 - 4803.00.40
		4818.10.00 - 4818.90.00
AG061C	Industrial paper	4806.10.00 - 4807.90.40
		4811.10.00 - 4811.10.10
		4811.31.20 - 4811.31.40
		4811.40.00 - 4811.40.00
		4811.60.40 - 4811.60.40
		4811.90.10 - 4812.00.00
		4823.20.10 - 4823.20.90
AG062	Newsprint	4801.00.00 - 4801.00.00
AG063	Printing and writing papers	4802.30.20 - 4802.30.60
		4802.51.10 - 4802.54.30
		4802.55.10 - 4802.55.40
		4802.56.10 - 4802.56.40
		4802.57.10 - 4802.58.20

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
AG064	Certain specialty papers	4802.60.10 - 4802.61.30
		4802.62.10 - 4802.62.30
		4802.69.10 - 4802.69.30
		4810.11.20 - 4810.13.20
		4810.14.11 - 4810.14.20
		4810.19.11 - 4810.22.10
		4810.29.00 - 4810.29.10
		4811.39.20 - 4811.39.20
		4811.59.20 - 4811.59.20
		4802.10.00 - 4802.20.40
		4802.30.70 - 4802.40.00
		4802.54.40 - 4802.54.60
		4802.55.50 - 4802.55.70
		4802.56.50 - 4802.56.70
		4802.58.40 - 4802.58.60
		4802.61.40 - 4802.61.60
		4802.62.40 - 4802.62.60
		4809.10.20 - 4809.90.80
		4810.13.50 - 4810.13.70
AG065	Miscellaneous paper products	4810.14.50 - 4810.14.70
		4810.22.50 - 4810.22.70
		4810.29.50 - 4810.29.70
		4813.10.00 - 4814.90.00
		4816.10.00 - 4816.20.00
		4816.90.00 - 4817.30.00
		4823.51.00 - 4823.59.40
		4810.92.30 - 4810.92.65
		4811.10.20 - 4811.29.00
		4811.41.10 - 4811.49.30
		4811.51.60 - 4811.51.60
		4811.59.60 - 4811.59.60
		4811.60.60 - 4811.60.60
		4815.00.00 - 4815.00.00
		4816.30.00 - 4816.30.00
		4820.10.20 - 4823.19.01
		4823.30.00 - 4823.40.00
		4823.60.00 - 4823.90.86
		4901.10.00 - 4911.99.80
Chemicals and related products sector:		
CH007	Major primary olefins	2711.14.00 - 2711.14.00
		2901.21.00 - 2901.24.10
CH008	Other olefins	2901.24.20 - 2901.29.50
CH009	Primary aromatics	2902.20.00 - 2902.30.00
		2902.44.00 - 2902.44.00
CH010	Organic commodity chemicals	2902.11.00 - 2902.19.00
		2902.41.00 - 2902.43.00
		2902.50.00 - 2902.90.90
		2906.12.00 - 2906.12.00
		2907.11.00 - 2907.11.00
		2917.35.00 - 2917.37.00
		2921.41.10 - 2921.41.20
		2933.71.00 - 2933.71.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		
code	Industry/commodity group or subgroup title	HTS subheading range
CH011	Organic specialty chemicals	2903.51.00 - 2903.59.05
		2903.59.15 - 2903.69.27
		2903.69.70 - 2904.20.20
		2904.20.35 - 2904.90.50
		2905.22.20 - 2905.29.90
		2906.19.10 - 2906.21.00
		2906.29.30 - 2906.29.60
		2907.12.00 - 2907.21.00
		2907.22.50 - 2908.10.10
		2908.10.25 - 2908.90.50
		2909.20.00 - 2909.30.09
		2909.30.40 - 2909.30.60
		2909.49.10 - 2909.49.60
		2909.50.45 - 2909.60.50
		2910.90.20 - 2910.90.20
		2912.21.00 - 2912.30.10
		2912.50.10 - 2913.00.50
		2914.22.10 - 2914.22.20
		2914.29.10 - 2914.61.00
		2914.69.60 - 2914.70.90
		2915.13.10 - 2915.13.10
		2915.39.30 - 2915.39.35
		2916.20.50 - 2916.31.15
		2916.31.30 - 2916.32.20
		2916.34.25 - 2916.34.55
		2916.35.25 - 2916.39.12
		2916.39.17 - 2916.39.17
		2916.39.45 - 2916.39.75
		2917.12.10 - 2917.12.50
		2917.14.10 - 2917.14.50
		2917.19.15 - 2917.34.00
		2917.39.04 - 2917.39.70
		2918.19.10 - 2918.19.10
		2918.19.20 - 2918.19.90
		2918.21.50 - 2918.21.50
		2918.22.50 - 2918.22.50
		2918.23.30 - 2918.90.05
		2918.90.43 - 2919.00.50
		2920.10.30 - 2920.10.50
		2920.90.20 - 2921.19.60
		2921.30.05 - 2921.30.50
		2921.42.10 - 2921.42.36
		2921.42.65 - 2921.45.90
		2921.49.10 - 2921.49.15
		2921.49.45 - 2921.51.10
		2921.51.30 - 2921.59.80
		2922.19.20 - 2922.29.20
		2922.29.60 - 2922.39.50
		2922.43.10 - 2922.43.50
		2922.49.05 - 2922.49.10
		2922.49.30 - 2922.49.37
		2922.50.07 - 2922.50.11
		2922.50.35 - 2922.50.50
		2924.21.18 - 2924.23.75

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC	Industry/commodity group or subgroup title	HTS subheading range
		2924.29.01 - 2924.29.05
		2924.29.20 - 2924.29.36
		2924.29.65 - 2924.29.95
		2925.19.10 - 2925.19.90
		2925.20.18 - 2925.20.18
		2925.20.60 - 2925.20.90
		2926.30.20 - 2926.90.19
		2926.90.43 - 2927.00.18
		2927.00.40 - 2927.00.50
		2928.00.15 - 2928.00.25
		2929.10.10 - 2929.90.50
		2930.20.20 - 2930.20.70
		2930.90.24 - 2930.90.29
		2931.00.05 - 2931.00.15
		2931.00.27 - 2932.19.50
		2932.29.25 - 2932.29.50
		2932.99.32 - 2932.99.90
		2933.19.04 - 2933.19.18
		2933.19.37 - 2933.19.43
		2933.19.70 - 2933.19.90
		2933.29.05 - 2933.29.10
		2933.29.35 - 2933.29.43
		2933.29.60 - 2933.32.50
		2933.39.08 - 2933.39.20
		2933.39.61 - 2933.40.17
		2933.40.60 - 2933.40.70
		2933.49.08 - 2933.49.17
		2933.49.60 - 2933.49.70
		2933.59.70 - 2933.59.95
		2933.79.04 - 2933.90.13
		2933.90.79 - 2933.90.89
		2933.90.97 - 2933.90.97
		2933.99.01 - 2933.99.05
		2933.99.08 - 2933.99.13
		2933.99.79 - 2933.99.89
		2933.99.97 - 2934.20.30
		2934.20.40 - 2934.30.18
		2934.30.43 - 2934.30.50
		2934.90.05 - 2934.90.06
		2934.90.08 - 2934.90.08
		2934.90.39 - 2934.90.44
		2934.90.70 - 2934.90.90
		2934.99.05 - 2934.99.06
		2934.99.08 - 2934.99.08
		2934.99.39 - 2934.99.44
		2934.99.70 - 2935.00.05
		2935.00.10 - 2935.00.15
		2935.00.75 - 2935.00.95
		2942.00.03 - 2942.00.03
		2942.00.10 - 2942.00.50
CH012	Certain organic chemicals	2903.11.00 - 2903.49.90
		2905.11.10 - 2905.19.60
		2905.31.00 - 2905.59.90
		2909.11.00 - 2909.19.60

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		2909.41.00 - 2909.44.00
		2910.10.00 - 2910.90.10
		2910.90.50 - 2912.13.00
		2912.19.40 - 2912.19.50
		2914.11.10 - 2914.19.00
		2915.11.00 - 2915.12.00
		2915.13.50 - 2915.35.00
		2915.39.47 - 2915.60.50
		2915.90.20 - 2916.14.20
		2916.19.10 - 2916.19.50
		2917.11.00 - 2917.11.00
		2917.13.00 - 2917.13.00
		2918.11.10 - 2918.16.50
		2921.21.00 - 2921.29.00
		2922.11.00 - 2922.13.00
		2922.41.00 - 2922.41.00
		2922.42.50 - 2922.42.50
		2922.49.40 - 2922.49.80
		2924.10.10 - 2924.19.80
		2926.10.00 - 2926.20.00
		2928.00.10 - 2928.00.10
		2928.00.50 - 2928.00.50
		2930.10.00 - 2930.10.00
		2930.30.30 - 2930.30.60
		2933.61.00 - 2933.69.60
		3507.10.00 - 3507.90.70
		3812.10.10 - 3812.30.90
		3814.00.10 - 3814.00.50
		3817.00.10 - 3817.20.00
		3824.10.00 - 3824.20.00
		3824.40.10 - 3824.40.10
		3824.40.21 - 3824.40.50
		3824.71.00 - 3824.79.00
		3824.90.21 - 3824.90.22
		3824.90.26 - 3824.90.28
		3824.90.45 - 3825.90.00
CH013	Miscellaneous inorganic chemicals	2501.00.00 - 2502.00.00
		2509.00.10 - 2509.00.20
		2511.10.10 - 2511.20.00
		2528.10.00 - 2528.90.00
		2801.20.00 - 2801.30.20
		2804.50.00 - 2804.69.50
		2804.80.00 - 2805.40.00
		2811.22.10 - 2813.90.50
		2815.30.00 - 2816.40.20
		2818.10.10 - 2820.90.00
		2822.00.00 - 2822.00.00
		2825.10.00 - 2830.10.00
		2830.20.20 - 2834.10.50
		2834.22.00 - 2834.29.05
		2834.29.20 - 2836.10.00
		2836.50.00 - 2836.60.00
		2836.91.00 - 2843.90.00
		2846.10.00 - 2851.00.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		3813.00.10 - 3813.00.50
		3815.11.00 - 3816.00.00
		3818.00.00 - 3818.00.00
		3824.30.00 - 3824.30.00
		3824.40.20 - 3824.40.20
		3824.50.00 - 3824.50.00
		3824.90.11 - 3824.90.19
		3824.90.31 - 3824.90.39
CH014	Inorganic acids	2806.10.00 - 2811.19.60
CH015	Chlor-alkali chemicals	2801.10.00 - 2801.10.00
		2815.11.00 - 2815.20.00
		2836.20.00 - 2836.40.20
CH016	Fertilizers	2503.00.00 - 2503.00.00
		2510.10.00 - 2510.20.00
		2802.00.00 - 2802.00.00
		2804.70.00 - 2804.70.00
		2814.10.00 - 2814.20.00
		2834.21.00 - 2834.21.00
		2834.29.10 - 2834.29.10
		3100.00.00 - 3105.90.00
CH017	Paints, inks, and related items, and certain components thereof	2803.00.00 - 2803.00.00
		2817.00.00 - 2817.00.00
		2821.10.00 - 2821.20.00
		2823.00.00 - 2824.90.50
		2830.20.10 - 2830.20.10
		2836.70.00 - 2836.70.00
		3206.11.00 - 3215.90.50
CH018	Synthetic organic pigments	3204.17.04 - 3204.17.90
		3205.00.05 - 3205.00.50
CH019	Synthetic dyes and azoic couplers	2921.42.55 - 2921.42.55
		2921.49.32 - 2921.49.32
		2922.29.26 - 2922.29.26
		2924.29.52 - 2924.29.52
		2927.00.30 - 2927.00.30
		2935.00.20 - 2935.00.20
		3204.11.10 - 3204.16.50
		3204.19.06 - 3204.90.00
		3809.10.00 - 3809.10.00
CH020	Synthetic tanning agents	3202.10.10 - 3202.90.50
CH021	Natural tanning and dyeing materials	1404.10.00 - 1404.10.00
		3201.10.00 - 3201.90.50
		3203.00.10 - 3203.00.80
CH022	Photographic chemicals and preparations	2907.22.10 - 2907.22.10
		2914.69.10 - 2914.69.10
		2921.51.20 - 2921.51.20
		2922.29.29 - 2922.29.29
		2927.00.25 - 2927.00.25
		2933.19.24 - 2933.19.30
		2933.90.24 - 2933.90.24
		2933.99.24 - 2933.99.24
		2934.90.20 - 2934.90.20
		2934.99.20 - 2934.99.20
		3707.90.31 - 3707.90.60
CH023	Pesticide products and formulations	2903.59.10 - 2903.59.10

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC	code	Industry/commodity group or subgroup title	HTS subheading range
			2903.69.30 - 2903.69.30
			2908.10.15 - 2908.10.20
			2909.30.30 - 2909.30.30
			2916.20.10 - 2916.20.10
			2918.90.06 - 2918.90.20
			2920.10.10 - 2920.10.10
			2920.90.10 - 2920.90.10
			2924.21.04 - 2924.21.16
			2924.29.41 - 2924.29.47
			2926.90.21 - 2926.90.30
			2930.20.10 - 2930.20.10
			2930.20.90 - 2930.20.90
			2930.90.10 - 2930.90.10
			2930.90.30 - 2930.90.44
			2931.00.25 - 2931.00.25
			2932.29.10 - 2932.29.10
			2932.99.04 - 2932.99.20
			2933.19.23 - 2933.19.23
			2933.39.21 - 2933.39.27
			2933.40.30 - 2933.40.30
			2933.49.30 - 2933.49.30
			2933.59.10 - 2933.59.18
			2933.90.14 - 2933.90.22
			2933.99.06 - 2933.99.06
			2933.99.14 - 2933.99.22
			2934.20.35 - 2934.20.35
			2934.90.01 - 2934.90.03
			2934.90.07 - 2934.90.07
			2934.90.09 - 2934.90.18
			2934.99.01 - 2934.99.03
			2934.99.07 - 2934.99.07
			2934.99.09 - 2934.99.18
			2935.00.06 - 2935.00.06
			3808.10.10 - 3808.90.95
CH024	Adhesives and glues		3501.90.20 - 3501.90.20
			3503.00.10 - 3503.00.40
			3505.20.00 - 3506.99.00
CH025	Medicinal chemicals		1302.11.00 - 1302.11.00
			2906.13.10 - 2906.13.50
			2909.49.05 - 2909.49.05
			2909.50.10 - 2909.50.20
			2912.19.30 - 2912.19.30
			2914.69.20 - 2914.69.20
			2916.39.15 - 2916.39.16
			2917.19.10 - 2917.19.10
			2918.17.10 - 2918.17.50
			2918.19.12 - 2918.19.15
			2918.21.10 - 2918.21.10
			2918.22.10 - 2918.22.10
			2918.23.10 - 2918.23.10
			2918.90.30 - 2918.90.30
			2921.46.00 - 2921.46.00
			2921.49.38 - 2921.49.43
			2922.14.00 - 2922.19.18

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		2922.29.27 - 2922.29.27
		2922.44.00 - 2922.44.00
		2922.49.26 - 2922.49.27
		2922.50.13 - 2922.50.25
		2923.10.00 - 2923.10.00
		2924.24.00 - 2924.24.00
		2924.29.57 - 2924.29.62
		2925.12.00 - 2925.12.00
		2925.20.10 - 2925.20.10
		2925.20.20 - 2925.20.20
		2926.30.10 - 2926.30.10
		2928.00.30 - 2928.00.30
		2930.40.00 - 2930.40.00
		2931.00.22 - 2931.00.22
		2932.29.20 - 2932.29.20
		2932.95.00 - 2932.95.00
		2933.11.00 - 2933.11.00
		2933.19.35 - 2933.19.35
		2933.19.45 - 2933.19.45
		2933.21.00 - 2933.21.00
		2933.29.20 - 2933.29.20
		2933.29.45 - 2933.29.45
		2933.33.00 - 2933.33.00
		2933.39.30 - 2933.39.41
		2933.40.20 - 2933.40.26
		2933.41.00 - 2933.41.00
		2933.49.20 - 2933.49.26
		2933.51.10 - 2933.55.00
		2933.59.21 - 2933.59.59
		2933.72.00 - 2933.72.00
		2933.90.26 - 2933.90.75
		2933.90.90 - 2933.90.90
		2933.91.00 - 2933.91.00
		2933.99.26 - 2933.99.75
		2933.99.90 - 2933.99.90
		2934.30.23 - 2934.30.27
		2934.90.30 - 2934.90.30
		2934.90.47 - 2934.90.47
		2934.91.00 - 2934.91.00
		2934.99.30 - 2934.99.30
		2934.99.47 - 2934.99.47
		2935.00.29 - 2935.00.60
		2936.10.00 - 2939.99.00
		2941.10.10 - 2941.90.50
		2942.00.05 - 2942.00.05
		3001.10.00 - 3004.90.91
		3006.20.00 - 3006.30.50
		3006.60.00 - 3006.80.00
		3822.00.10 - 3822.00.60
CH026	Essential oils and other flavoring materials	2904.20.30 - 2904.20.30
		2905.22.10 - 2905.22.10
		2906.11.00 - 2906.11.00
		2906.14.00 - 2906.14.00
		2906.29.10 - 2906.29.20

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		2909.30.10 - 2909.30.20
		2909.50.40 - 2909.50.40
		2912.19.10 - 2912.19.20
		2912.30.20 - 2912.49.50
		2914.23.00 - 2914.23.00
		2915.39.10 - 2915.39.20
		2915.39.40 - 2915.39.45
		2916.31.20 - 2916.31.20
		2916.34.10 - 2916.34.15
		2916.35.15 - 2916.35.15
		2916.39.20 - 2916.39.20
		2918.23.20 - 2918.23.20
		2918.90.35 - 2918.90.35
		2922.42.10 - 2922.42.10
		2924.29.10 - 2924.29.10
		2925.11.00 - 2925.11.00
		2932.21.00 - 2932.21.00
		2932.91.00 - 2932.94.00
		3301.11.00 - 3302.90.20
CH027	Perfumes, cosmetics, and toiletries	3303.00.10 - 3307.90.00
CH028	Soaps, detergents, and surface-active agents	2923.20.10 - 2923.90.00
		3401.11.10 - 3403.11.50
		3403.91.10 - 3403.99.00
		3804.00.10 - 3804.00.10
		3809.91.00 - 3809.93.50
		3912.31.00 - 3912.31.00
CH029	Miscellaneous chemicals and specialties	1519.11.00 - 1521.90.40
		2712.90.10 - 2712.90.20
		2804.10.00 - 2804.40.00
		2811.21.00 - 2811.21.00
		2914.21.10 - 2914.21.20
		2915.70.00 - 2915.90.18
		2916.15.10 - 2916.15.50
		2930.90.45 - 2930.90.90
		2940.00.20 - 2940.00.60
		3005.10.10 - 3006.10.00
		3006.40.00 - 3006.50.00
		3404.10.00 - 3407.00.40
		3505.10.00 - 3505.10.00
		3801.10.10 - 3803.00.00
		3804.00.50 - 3807.00.00
		3810.10.00 - 3810.90.50
		3820.00.00 - 3821.00.00
		3823.11.00 - 3823.70.60
		3824.60.00 - 3824.60.00
		3824.90.25 - 3824.90.25
		3824.90.40 - 3824.90.40
CH030	Explosives, propellant powders, and related items	3601.00.00 - 3605.00.00
		3606.90.30 - 3606.90.80
CH031	Polyethylene resins in primary forms	3901.10.00 - 3901.90.90
CH032	Polypropylene resins in primary forms	3902.10.00 - 3902.10.00
		3902.30.00 - 3902.30.00
CH033	Polyvinyl chloride resins in primary forms	3904.10.00 - 3904.40.00
CH034	Styrene polymers in primary forms	3903.11.00 - 3903.90.50

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
CH035	Saturated polyester resins	3907.60.00 - 3907.60.00 3907.99.00 - 3907.99.00
CH036	Other plastics in primary forms	3902.20.10 - 3902.20.50 3902.90.00 - 3902.90.00 3904.50.00 - 3907.50.00 3907.91.20 - 3907.91.50 3908.10.00 - 3911.90.10 3911.90.35 - 3912.20.00 3912.39.00 - 3914.00.60
CH037	Styrene-butadiene rubber in primary forms	4002.11.00 - 4002.19.00
CH038	Other synthetic rubber	4002.20.00 - 4002.99.00 4005.10.00 - 4006.90.50
CH039	Pneumatic tires and tubes (new)	3911.90.15 - 3911.90.25 4011.10.10 - 4011.99.85 4013.10.00 - 4013.90.50
CH040	Other tires	4012.10.10 - 4012.90.90
CH041	Miscellaneous plastic products	3915.10.00 - 3926.10.00 3926.30.10 - 3926.90.98
CH042	Miscellaneous rubber products	3926.90.98 - 3926.90.98 4003.00.00 - 4004.00.00 4007.00.00 - 4010.39.90 4014.10.00 - 4014.90.50 4016.10.00 - 4017.00.00
CH043	Gelatin	3503.00.55 - 3503.00.55
CH044	Natural rubber	4001.10.00 - 4001.30.00
Energy-related products sector:		
CH001	Electrical energy	2716.00.00 - 2716.00.00
CH002	Nuclear materials	2844.10.10 - 2845.90.00
CH003	Coal, coke, and related chemical products	2701.11.00 - 2708.20.00
CH004	Crude petroleum	2709.00.10 - 2709.00.20
CH005	Petroleum products	2710.00.05 - 2710.99.90 2712.10.00 - 2712.20.00 2713.11.00 - 2715.00.00 3403.19.10 - 3403.19.50 3606.10.00 - 3606.10.00 3811.11.10 - 3811.90.00 3819.00.00 - 3819.00.00
CH006	Natural gas and components	2711.11.00 - 2711.13.00 2711.19.00 - 2711.29.00 2901.10.10 - 2901.10.50
Textiles, apparel, and footwear sector:		
CH045	Fibers and yarns, except raw cotton and raw wool	5001.00.00 - 5006.00.90 5103.10.00 - 5110.00.00 5202.10.00 - 5207.90.00 5301.10.00 - 5308.90.90 5401.10.00 - 5406.20.00 5501.10.00 - 5511.30.00 5604.10.00 - 5606.00.00 7019.11.00 - 7019.19.90 7019.90.50 - 7019.90.50

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
CH046	Fabrics	5007.10.30 - 5007.90.60 5111.11.20 - 5113.00.00 5208.11.20 - 5212.25.60 5309.11.00 - 5311.00.60 5407.10.00 - 5408.34.90 5512.11.00 - 5516.94.00 5603.11.00 - 5603.94.90 5801.10.00 - 5804.30.00 5806.10.10 - 5806.39.30 5809.00.00 - 5809.00.00 5901.10.10 - 5903.90.30 5905.00.10 - 5907.00.80 5911.10.10 - 5911.20.30 6001.10.20 - 6006.90.90 7019.40.05 - 7019.90.10
CH046A	Broadwoven fabrics	5007.10.30 - 5007.90.60 5111.11.20 - 5113.00.00 5208.11.20 - 5212.25.60 5309.11.00 - 5311.00.60 5407.10.00 - 5408.34.90 5512.11.00 - 5516.94.00
CH046B	Knit fabrics	6001.10.20 - 6006.90.90
CH046C	Specialty fabrics	5801.10.00 - 5804.30.00 5806.10.10 - 5806.39.30 5809.00.00 - 5809.00.00
CH046D	Coated and other fabrics	5901.10.10 - 5903.90.30 5905.00.10 - 5907.00.80 5911.10.10 - 5911.20.30
CH046E	Glass fiber fabrics	7019.40.05 - 7019.90.10
CH046F	Other fabrics	5603.11.00 - 5603.94.90
CH047	Carpets and rugs	5701.10.13 - 5705.00.20
CH048	Home furnishings	5805.00.10 - 5805.00.40 6301.10.00 - 6304.99.60 9404.90.10 - 9404.90.95
CH048A	Blankets	6301.10.00 - 6301.90.00
CH048B	Pillowcases and sheets	6302.10.00 - 6302.39.00
CH048C	Table/kitchen linens and towels	6302.40.10 - 6302.99.20
CH048D	Curtains	6303.11.00 - 6303.99.00
CH048E	Bedspreads and other furnishing articles	6304.11.10 - 6304.99.60 9404.90.85 - 9404.90.95
CH048F	Pillows, cushions, and sleeping bags	9404.90.10 - 9404.90.80
CH048G	Tapestries and other wall hangings	5805.00.10 - 5805.00.40
CH049	Apparel	3926.20.10 - 3926.20.90 4015.11.00 - 4015.90.00 4203.10.20 - 4203.40.60 4303.10.00 - 4303.90.00 6101.10.00 - 6217.90.90 6501.00.30 - 6507.00.00
CH049A	Men's and boys' suits and sports coats	6103.11.00 - 6103.39.80 6203.11.15 - 6203.21.90 6203.22.30 - 6203.39.90
CH049B	Men's and boys' coats and jackets	6101.10.00 - 6101.90.90 6103.21.00 - 6103.29.20 6112.11.00 - 6112.20.10

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		6113.00.90 - 6113.00.90
		6201.11.00 - 6201.99.90
		6203.21.30 - 6203.21.90
		6203.22.30 - 6203.29.30
		6210.20.50 - 6210.20.50
		6210.20.90 - 6210.20.90
		6210.40.50 - 6210.40.50
		6210.40.90 - 6210.40.90
		6211.20.04 - 6211.20.04
		6211.20.15 - 6211.20.28
		6211.31.00 - 6211.39.90
		6211.49.10 - 6211.49.10
CH049C	Men's and boys' trousers	6103.21.00 - 6103.29.20
		6103.41.10 - 6103.49.80
		6112.11.00 - 6112.20.10
		6113.00.90 - 6113.00.90
		6203.21.30 - 6203.21.90
		6203.22.30 - 6203.29.30
		6203.41.05 - 6203.49.80
		6210.40.50 - 6210.40.50
		6210.40.90 - 6210.40.90
		6211.20.08 - 6211.20.15
		6211.20.34 - 6211.20.48
		6211.32.00 - 6211.39.90
		6211.49.10 - 6211.49.10
CH049D	Women's and girls' trousers	6104.21.00 - 6104.29.20
		6104.61.00 - 6104.69.80
		6112.11.00 - 6112.20.10
		6113.00.90 - 6113.00.90
		6204.21.00 - 6204.21.00
		6204.22.30 - 6204.29.40
		6204.61.10 - 6204.69.90
		6210.50.50 - 6210.50.50
		6210.50.90 - 6210.50.90
		6211.20.08 - 6211.20.15
		6211.20.64 - 6211.31.00
		6211.41.00 - 6211.43.00
		6211.49.90 - 6211.49.90
CH049E	Shirts and blouses	6103.21.00 - 6103.29.20
		6104.21.00 - 6104.29.20
		6105.10.00 - 6106.90.30
		6109.10.00 - 6110.10.20
		6110.20.10 - 6110.90.90
		6112.11.00 - 6112.19.80
		6114.10.00 - 6114.30.10
		6114.30.30 - 6114.90.90
		6203.21.90 - 6203.21.90
		6203.22.30 - 6203.29.30
		6204.21.00 - 6204.21.00
		6204.22.30 - 6204.29.40
		6205.10.10 - 6206.90.00
		6211.31.00 - 6211.49.90
		6217.90.90 - 6217.90.90
CH049F	Sweaters	6103.21.00 - 6103.29.20

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		HTS subheading range
code	Industry/commodity group or subgroup title	
		6104.21.00 - 6104.29.20
		6110.10.10 - 6110.10.10
		6110.11.00 - 6110.90.90
CH049G	Women's and girls' suits, skirts, and coats	6102.10.00 - 6102.90.90
		6104.11.00 - 6104.29.10
		6104.31.00 - 6104.39.20
		6104.51.00 - 6104.59.80
		6112.11.00 - 6112.20.10
		6113.00.90 - 6114.20.00
		6114.90.10 - 6114.90.90
		6202.11.00 - 6202.99.90
		6204.11.00 - 6204.21.00
		6204.22.30 - 6204.29.20
		6204.31.10 - 6204.39.80
		6204.51.00 - 6204.59.40
		6210.30.50 - 6210.30.50
		6210.30.90 - 6210.30.90
		6210.50.50 - 6210.50.50
		6210.50.90 - 6210.50.90
		6211.20.04 - 6211.20.04
		6211.20.15 - 6211.20.15
		6211.20.54 - 6211.20.58
		6211.41.00 - 6211.43.00
		6211.49.90 - 6211.49.90
CH049H	Women's and girls' dresses	6104.41.00 - 6104.49.90
		6204.41.10 - 6204.49.50
CH049I	Robes, nightwear, and underwear	6107.11.00 - 6109.10.00
		6109.90.15 - 6109.90.15
		6207.11.00 - 6208.99.80
CH049J	Hosiery	6115.11.00 - 6115.99.80
CH049K	Body-supporting garments	6212.10.30 - 6212.90.00
CH049L	Neckwear, handkerchiefs, and scarves	6117.10.10 - 6117.20.90
		6117.90.90 - 6117.90.90
		6213.10.10 - 6215.90.00
CH049M	Gloves, including gloves for sports	3926.20.10 - 3926.20.40
		4015.11.00 - 4015.19.50
		4203.21.20 - 4203.29.50
		6116.10.05 - 6116.99.95
		6216.00.05 - 6216.00.90
CH049N	Headwear	6501.00.30 - 6507.00.00
CH049O	Leather apparel and accessories	4203.10.20 - 4203.10.40
		4203.30.00 - 4203.40.60
CH049P	Fur apparel and other fur articles	4303.10.00 - 4303.90.00
CH049Q	Rubber, plastic, and coated-fabric apparel	3926.20.60 - 3926.20.90
		4015.90.00 - 4015.90.00
		6113.00.10 - 6113.00.10
		6210.20.30 - 6210.20.30
		6210.20.70 - 6210.20.70
		6210.30.30 - 6210.30.30
		6210.30.70 - 6210.30.70
		6210.40.30 - 6210.40.30
		6210.40.70 - 6210.40.70
		6210.50.30 - 6210.50.30

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		6210.50.70 - 6210.50.70
CH049R	Nonwoven apparel	6210.10.20 - 6210.10.90
CH049S	Other wearing apparel	6103.21.00 - 6103.29.20
		6104.21.00 - 6104.29.20
		6104.69.40 - 6104.69.80
		6110.10.10 - 6110.10.20
		6110.20.10 - 6110.90.10
		6111.10.00 - 6111.90.90
		6112.20.20 - 6112.49.00
		6113.00.90 - 6114.20.00
		6114.30.20 - 6114.90.90
		6117.80.10 - 6117.90.90
		6203.21.90 - 6203.29.30
		6204.21.00 - 6204.29.40
		6204.62.40 - 6204.62.40
		6209.10.00 - 6209.90.90
		6210.10.90 - 6210.10.90
		6210.40.50 - 6210.40.50
		6210.40.90 - 6210.40.90
		6210.50.50 - 6210.50.50
		6210.50.90 - 6211.12.80
		6211.20.15 - 6211.20.15
		6211.31.00 - 6211.49.90
		6217.10.10 - 6217.90.90
CH050	Miscellaneous textile products	4304.00.00 - 4304.00.00
		5601.10.10 - 5602.90.90
		5607.10.00 - 5609.00.40
		5806.40.00 - 5808.90.00
		5810.10.00 - 5811.00.40
		5904.10.00 - 5904.92.00
		5908.00.00 - 5910.00.90
		5911.31.00 - 5911.90.00
		6305.10.00 - 6310.90.20
		7019.31.00 - 7019.32.00
		7019.39.50 - 7019.39.50
		7019.90.50 - 7019.90.50
		9404.30.40 - 9404.30.80
CH051	Footwear	6401.10.00 - 6406.99.90
Minerals and metals sector:		
MM001	Clays and related mineral products	2507.00.00 - 2508.70.00
		2517.20.00 - 2517.20.00
		2530.10.00 - 2530.10.00
		2618.00.00 - 2618.00.00
		6806.20.00 - 6807.10.00
MM002	Fluorspar and miscellaneous mineral substances	2529.21.00 - 2529.22.00
		2530.20.10 - 2530.90.80
MM003	Iron ores and concentrates	2601.11.00 - 2601.12.00
MM004	Copper ores and concentrates	2603.00.00 - 2603.00.00
MM005	Lead ores, concentrates, and residues	2607.00.00 - 2607.00.00
		2620.20.00 - 2620.29.00
MM005A	Lead ores and concentrates	2607.00.00 - 2607.00.00
MM006	Zinc ores, concentrates, and residues	2608.00.00 - 2608.00.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		2620.11.00 - 2620.19.60
MM006A	Zinc ores and concentrates	2608.00.00 - 2608.00.00
MM007	Certain ores, concentrates, ash, and residues	2602.00.00 - 2602.00.00
		2604.00.00 - 2605.00.00
		2609.00.00 - 2615.90.60
		2617.10.00 - 2617.90.00
		2620.50.00 - 2621.90.00
MM007A	Molybdenum ores and concentrates	2613.10.00 - 2613.90.00
MM008	Precious metal ores and concentrates	2616.10.00 - 2616.90.00
MM008A	Gold ores and concentrates	2616.90.00 - 2616.90.00
MM008B	Silver ores and concentrates	2616.10.00 - 2616.10.00
MM009	Cement, stone, and related products	2504.10.10 - 2506.29.00
		2512.00.00 - 2512.00.00
		2514.00.00 - 2517.10.00
		2517.30.00 - 2527.00.00
		2529.10.00 - 2529.10.00
		2529.30.00 - 2529.30.00
		6801.00.00 - 6803.00.50
		6806.10.00 - 6806.10.00
		6807.90.00 - 6815.99.40
MM009A	Cement	2523.10.00 - 2523.90.00
MM010	Industrial ceramics	6901.00.00 - 6903.90.00
		6909.11.20 - 6909.90.00
		6914.10.40 - 6914.90.80
		8113.00.00 - 8113.00.00
MM011	Ceramic bricks and similar articles	6904.10.00 - 6906.00.00
MM012	Ceramic floor and wall tiles	6907.10.00 - 6908.90.00
MM013	Ceramic household articles	6911.10.10 - 6913.90.50
MM014	Flat glass	7003.12.00 - 7009.92.50
MM015	Glass containers	7010.10.00 - 7010.94.50
MM016	Household glassware	7013.10.10 - 7013.99.90
MM017	Miscellaneous glass products	7001.00.10 - 7002.39.00
		7011.10.10 - 7012.00.00
		7014.00.10 - 7018.90.50
		7020.00.30 - 7020.00.60
MM018	Fiberglass insulation products	7019.39.10 - 7019.39.10
MM019	Natural and synthetic gemstones	7101.10.30 - 7102.10.00
		7102.31.00 - 7104.90.50
MM020	Precious metals and non-numismatic coins	7106.10.00 - 7112.99.00
		7118.10.00 - 7118.90.00
MM020A	Unrefined and refined gold	7108.12.10 - 7108.12.50
MM021	Primary iron products	2601.20.00 - 2601.20.00
		7201.10.00 - 7201.50.60
		7203.10.00 - 7203.90.00
MM022	Ferroalloys	7202.11.10 - 7202.99.50
MM023	Iron and steel waste and scrap	2619.00.30 - 2619.00.90
		7204.10.00 - 7204.50.00
MM024	Abrasive and ferrous products	2513.11.00 - 2513.29.00
		6804.10.00 - 6805.30.50
		7102.21.10 - 7102.29.00
		7105.10.00 - 7105.90.00
		7205.10.00 - 7205.29.00
MM024A	Abrasive products	6804.10.00 - 6805.30.50
MM025	Steel mill products	7206.10.00 - 7301.10.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		
code	Industry/commodity group or subgroup title	HTS subheading range
		7302.10.10 - 7302.90.90
		7304.10.10 - 7306.90.50
MM025A	Ingots, blooms, billets, and slabs of carbon and alloy steels	7206.10.00 - 7207.20.00
		7224.10.00 - 7224.90.00
MM025B	Plates, sheets, and strips of carbon and alloy steels	7208.10.15 - 7212.60.00
		7225.11.00 - 7225.19.00
		7225.30.30 - 7225.30.30
		7225.30.70 - 7225.30.70
		7225.40.30 - 7225.40.30
		7225.40.70 - 7225.40.70
		7225.50.60 - 7226.19.90
		7226.91.50 - 7226.91.80
		7226.92.50 - 7226.99.00
MM025C	Bars, rods, and light shapes of carbon and alloy steels	7213.10.00 - 7216.22.00
		7227.20.00 - 7227.20.00
		7227.90.60 - 7227.90.60
		7228.20.10 - 7228.20.50
		7228.30.80 - 7228.40.00
		7228.50.50 - 7228.50.50
		7228.60.60 - 7228.70.30
		7228.80.00 - 7228.80.00
MM025D	Angles, shapes, and sections of carbon and alloy steels	7216.31.00 - 7216.99.00
		7228.70.30 - 7228.70.60
		7301.10.00 - 7301.10.00
MM025E	Wire of carbon and alloy steels	7217.10.10 - 7217.90.50
		7229.20.00 - 7229.90.90
MM025F	Ingots, blooms, billets, and slabs of stainless steels	7218.10.00 - 7218.99.00
MM025G	Plates, sheets, and strips of stainless steels	7219.11.00 - 7220.90.00
MM025H	Bars, rods, and light shapes of stainless steels	7221.00.00 - 7222.40.30
MM025I	Angles, shapes, and sections of stainless steels	7222.40.30 - 7222.40.60
MM025J	Wire of stainless steels	7223.00.10 - 7223.00.90
MM025K	Rails and accessories of carbon and alloy steels	7302.10.10 - 7302.90.90
MM025L	Pipes and tubes of carbon and alloy steels	7304.10.10 - 7304.39.00
		7304.51.10 - 7306.30.50
		7306.50.10 - 7306.90.50
MM025M	Pipes and tubes of stainless steels	7304.41.30 - 7304.49.00
		7306.40.10 - 7306.40.50
		7306.60.70 - 7306.60.70
MM025N	Tool steels	7224.10.00 - 7224.90.00
		7225.20.00 - 7225.30.10
		7225.30.50 - 7225.30.50
		7225.40.10 - 7225.40.10
		7225.40.50 - 7225.40.50
		7225.50.10 - 7225.50.10
		7226.20.00 - 7226.91.25
		7226.92.10 - 7226.92.30
		7227.10.00 - 7227.10.00
		7227.90.10 - 7227.90.20
		7228.10.00 - 7228.10.00
		7228.30.20 - 7228.30.60
		7228.50.10 - 7228.50.10
		7228.60.10 - 7228.60.10
		7229.10.00 - 7229.10.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
MM026	Steel pipe and tube fittings and certain cast products	7303.00.00 - 7303.00.00 7307.11.00 - 7307.99.50
MM027	Fabricated structurals	7301.20.10 - 7301.20.50 7308.10.00 - 7308.20.00 7308.40.00 - 7308.90.60
MM028	Metal construction components	7308.30.10 - 7308.30.50 7308.90.70 - 7308.90.95 7610.10.00 - 7610.90.00
MM029	Metallic containers	7309.00.00 - 7311.00.00 7611.00.00 - 7613.00.00
MM030	Wire products of base metal	7312.10.05 - 7314.49.60 7317.00.10 - 7317.00.75 7320.20.50 - 7320.90.50 7413.00.10 - 7415.10.00 7416.00.00 - 7416.00.00 7508.10.00 - 7508.90.50 7614.10.10 - 7614.90.50 7616.10.10 - 7616.10.10 7616.91.00 - 7616.91.00
MM031	Miscellaneous products of base metal	7314.50.00 - 7316.00.00 7320.10.30 - 7320.20.10 7321.11.10 - 7323.10.00 7325.91.00 - 7326.90.85 7417.00.00 - 7417.00.00 7419.10.00 - 7419.10.00 7616.99.10 - 7616.99.50 8301.20.00 - 8301.20.00 8301.40.30 - 8301.40.30 8302.10.30 - 8302.10.30 8302.20.00 - 8302.30.60 8302.49.20 - 8302.49.80 8303.00.00 - 8311.90.00
MM032	Industrial fasteners of base metal	7318.11.00 - 7318.29.00 7415.21.00 - 7415.39.00 7616.10.30 - 7616.10.90
MM033	Cooking and kitchen ware	7323.91.10 - 7323.99.90 7418.11.20 - 7418.19.50 7615.11.00 - 7615.19.90 7907.00.10 - 7907.00.10 8007.00.10 - 8007.00.10 8007.00.50 - 8007.00.50
MM034	Metal and ceramic sanitary ware	6910.10.00 - 6910.90.00 7324.10.00 - 7324.90.00 7418.20.10 - 7418.20.50 7615.20.00 - 7615.20.00 8007.00.10 - 8007.00.10
MM035	Construction castings and other cast-iron articles	7325.10.00 - 7325.10.00
MM036	Copper and related articles	2620.30.00 - 2620.30.00 7401.10.00 - 7412.20.00 7419.91.00 - 7419.99.50
MM036A	Unrefined and refined copper	7402.00.00 - 7403.11.00
MM036B	Copper alloy plate, sheet, and strip	7409.21.00 - 7409.90.90
MM037	Unwrought aluminum	2606.00.00 - 2606.00.00 2620.40.00 - 2620.40.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		7601.10.30 - 7602.00.00
MM037A	Primary and secondary aluminum	7601.10.30 - 7601.20.90
MM038	Aluminum mill products	7603.10.00 - 7609.00.00
MM038A	Aluminum bars, rods, and profiles	7604.10.10 - 7604.29.50
MM038B	Aluminum wire	7605.11.00 - 7605.29.00
MM038C	Aluminum plate, sheet, and strip	7606.11.30 - 7606.92.60
MM038D	Aluminum foil	7607.11.30 - 7607.20.50
MM038E	Aluminum tubes, pipes, and fittings	7608.10.00 - 7609.00.00
MM039	Lead and related articles	7801.10.00 - 7806.00.00
MM039A	Refined lead	7801.10.00 - 7801.10.00
MM040	Zinc and related articles	7901.11.00 - 7906.00.00
		7907.00.60 - 7907.00.60
MM040A	Unwrought zinc	7901.11.00 - 7901.12.50
MM041	Certain base metals and chemical elements	7501.10.00 - 7507.20.00
		8001.10.00 - 8006.00.00
		8101.10.00 - 8112.99.01
MM041A	Titanium ingot	8108.10.50 - 8108.20.00
MM042	Nonpowered handtools	8201.10.00 - 8207.90.75
		8209.00.00 - 8209.00.00
MM043	Certain cutlery, sewing implements, and related products	7319.10.00 - 7319.90.00
		8208.10.00 - 8208.90.60
		8210.00.00 - 8210.00.00
		8211.92.20 - 8214.90.90
MM044	Table flatware and related products	8211.10.00 - 8211.91.80
		8215.10.00 - 8215.99.50
MM045	Certain builders' hardware	8301.10.20 - 8301.10.90
		8301.30.00 - 8301.30.00
		8301.40.60 - 8301.70.00
		8302.10.60 - 8302.10.90
		8302.41.30 - 8302.42.60
		8302.50.00 - 8302.60.90
Machinery sector:		
MM068	Wiring harnesses for motor vehicles	8544.30.00 - 8544.30.00
MM069	Pumps for motor vehicles	8413.30.10 - 8413.30.90
		8413.91.10 - 8413.91.10
MM070	Pumps for liquids	8413.11.00 - 8413.20.00
		8413.40.00 - 8413.82.00
		8413.91.20 - 8413.92.00
MM071	Air-conditioning equipment and parts	8414.10.00 - 8415.90.80
MM072	Industrial thermal-processing equipment and furnaces	8416.10.00 - 8417.10.00
		8417.80.00 - 8417.90.00
		8419.11.00 - 8419.20.00
		8419.39.00 - 8419.60.50
		8419.89.60 - 8419.90.10
		8419.90.30 - 8419.90.80
		8419.90.85 - 8419.90.95
		8514.10.00 - 8514.20.00
		8514.20.60 - 8514.20.80
		8514.30.80 - 8514.90.00
		8514.90.80 - 8514.90.80
		8545.11.00 - 8545.11.00
MM073	Household appliances, including commercial applications	8418.10.00 - 8418.99.80

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		8419.81.10 - 8419.81.90
		8419.90.80 - 8419.90.80
		8419.90.95 - 8419.90.95
		8421.12.00 - 8421.12.00
		8421.91.20 - 8421.91.40
		8422.11.00 - 8422.19.00
		8422.90.02 - 8422.90.06
		8450.11.00 - 8451.30.00
		8451.90.30 - 8451.90.90
		8476.21.00 - 8476.90.00
		8479.89.10 - 8479.89.70
		8479.90.40 - 8479.90.85
		8509.10.00 - 8510.90.55
		8514.20.40 - 8514.20.40
		8514.90.40 - 8514.90.40
		8516.10.00 - 8516.90.90
MM073A	Major household appliances and parts	8418.10.00 - 8418.40.00
		8418.99.40 - 8418.99.80
		8422.11.00 - 8422.11.00
		8422.90.04 - 8422.90.06
		8450.11.00 - 8450.20.00
		8450.90.60 - 8450.90.60
		8516.60.40 - 8516.60.40
		8516.90.55 - 8516.90.80
MM074	Centrifuges and filtering and purifying equipment	8421.19.00 - 8421.19.00
		8421.19.90 - 8421.22.00
		8421.29.00 - 8421.29.00
		8421.39.40 - 8421.39.80
		8421.91.60 - 8421.99.00
MM075	Wrapping, packaging, and can-sealing machinery	8422.20.00 - 8422.40.91
		8422.90.10 - 8422.90.91
MM076	Scales and weighing machinery	8423.10.00 - 8423.90.00
MM077	Mineral processing machinery	8474.10.00 - 8474.90.00
MM078	Farm and garden machinery and equipment	8419.31.00 - 8419.31.00
		8424.81.10 - 8424.81.90
		8432.10.00 - 8434.90.00
		8436.10.00 - 8436.99.00
		8701.10.00 - 8701.10.00
		8701.30.10 - 8701.90.50
		8706.00.30 - 8706.00.50
		8707.90.10 - 8707.90.10
		8708.31.10 - 8708.31.10
		8708.39.10 - 8708.39.10
		8708.40.30 - 8708.40.30
		8708.50.10 - 8708.50.30
		8708.60.10 - 8708.60.30
		8708.70.05 - 8708.70.35
		8708.80.15 - 8708.80.25
		8708.91.10 - 8708.91.10
		8708.92.10 - 8708.92.10
		8708.93.15 - 8708.93.30
		8708.94.10 - 8708.94.10
		8708.99.03 - 8708.99.49
		8716.80.10 - 8716.80.10

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		HTS subheading range
code	Industry/commodity group or subgroup title	
MM079	Industrial food-processing and related machinery	8716.90.10 - 8716.90.10
		8417.20.00 - 8417.20.00
		8421.11.00 - 8421.11.00
		8435.10.00 - 8435.90.00
		8437.10.00 - 8438.90.90
MM080	Pulp, paper, and paperboard machinery	8419.32.10 - 8419.32.50
		8419.89.10 - 8419.89.10
		8419.90.20 - 8419.90.20
		8420.10.20 - 8420.10.20
		8420.91.20 - 8420.91.20
		8420.99.20 - 8420.99.20
		8439.10.00 - 8439.99.50
		8441.10.00 - 8441.90.00
MM081	Printing and related machinery	8440.10.00 - 8440.90.00
		8442.10.00 - 8443.40.00
		8443.51.50 - 8443.51.50
		8443.59.50 - 8443.60.00
		8443.90.50 - 8443.90.90
		8472.90.80 - 8472.90.80
		8473.40.80 - 8473.40.80
		8479.89.96 - 8479.89.96
MM082	Textile machinery	8420.10.10 - 8420.10.10
		8420.91.10 - 8420.91.10
		8420.99.10 - 8420.99.10
		8443.50.10 - 8443.51.10
		8443.59.10 - 8443.59.10
		8443.90.10 - 8443.90.10
		8444.00.00 - 8449.00.50
		8451.40.00 - 8451.80.00
MM083	Metal rolling mills	8451.90.90 - 8452.90.00
		8455.10.00 - 8455.90.80
MM084	Metal cutting machine tools and machine tool accessories	8456.10.10 - 8456.10.10
		8456.20.10 - 8456.20.10
		8456.30.10 - 8456.30.10
		8456.99.30 - 8456.99.30
		8457.10.00 - 8461.90.80
		8466.10.80 - 8466.20.10
		8466.20.80 - 8466.30.10
		8466.30.60 - 8466.30.80
		8466.93.15 - 8466.93.45
		8466.93.53 - 8466.93.75
		8466.93.90 - 8466.93.95
		8462.10.00 - 8462.21.00
MM085	Metal forming machine tools	8462.21.80 - 8462.29.00
		8462.29.80 - 8463.90.00
		8466.94.20 - 8466.94.40
		8466.94.60 - 8466.94.65
		8466.94.80 - 8466.94.85
MM086	Non-metalworking machine tools	8456.10.50 - 8456.10.50
		8456.10.80 - 8456.10.80
		8456.20.50 - 8456.20.50
		8456.30.50 - 8456.30.50
		8456.99.50 - 8456.99.50

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		HTS subheading range
code	Industry/commodity group or subgroup title	
		8456.99.90 - 8456.99.90
		8464.10.00 - 8464.10.00
		8464.20.50 - 8464.20.50
		8464.90.90 - 8465.96.00
		8465.99.80 - 8465.99.80
		8466.91.10 - 8466.92.50
MM087	Semiconductor manufacturing equipment and robotics	8421.19.30 - 8421.19.30
		8424.89.30 - 8424.89.50
		8428.90.00 - 8428.90.00
		8456.10.60 - 8456.10.60
		8456.91.00 - 8456.99.10
		8456.99.70 - 8456.99.70
		8462.21.40 - 8462.21.40
		8462.29.40 - 8462.29.40
		8464.20.10 - 8464.20.10
		8464.90.10 - 8464.90.60
		8465.99.40 - 8465.99.40
		8466.10.40 - 8466.10.40
		8466.20.40 - 8466.20.40
		8466.30.45 - 8466.30.45
		8466.93.47 - 8466.93.47
		8466.93.85 - 8466.93.85
		8466.94.55 - 8466.94.55
		8466.94.75 - 8466.94.75
		8477.10.70 - 8477.10.70
		8477.40.40 - 8477.40.40
		8477.59.40 - 8477.59.40
		8477.90.15 - 8477.90.15
		8477.90.35 - 8477.90.35
		8477.90.55 - 8477.90.55
		8477.90.75 - 8477.90.75
		8479.50.00 - 8479.50.00
		8479.89.84 - 8479.89.87
		8479.90.94 - 8479.90.94
		8479.90.95 - 8479.90.95
		8480.71.40 - 8480.71.40
		8514.30.20 - 8514.30.60
		8515.90.10 - 8515.90.10
		8543.11.00 - 8543.11.00
		8543.89.10 - 8543.89.10
		8543.90.10 - 8543.90.10
		9010.41.00 - 9010.49.00
		9010.90.70 - 9010.90.70
		9030.82.00 - 9030.82.00
		9030.90.64 - 9030.90.64
		9030.90.84 - 9030.90.84
		9031.41.00 - 9031.41.00
		9031.49.70 - 9031.49.70
		9031.80.40 - 9031.80.40
		9031.90.54 - 9031.90.54
		9031.90.70 - 9031.90.70
MM087A	Semiconductor manufacturing machinery	8421.19.30 - 8421.19.30
		8424.89.30 - 8424.89.50
		8456.10.60 - 8456.10.60

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC		HTS subheading range
code	Industry/commodity group or subgroup title	
		8456.91.00 - 8456.99.10
		8456.99.70 - 8456.99.70
		8462.21.40 - 8462.21.40
		8462.29.40 - 8462.29.40
		8464.20.10 - 8464.20.10
		8464.90.10 - 8464.90.60
		8465.99.40 - 8465.99.40
		8466.10.40 - 8466.10.40
		8466.20.40 - 8466.20.40
		8466.30.45 - 8466.30.45
		8466.93.47 - 8466.93.47
		8466.93.85 - 8466.93.85
		8466.94.55 - 8466.94.55
		8466.94.75 - 8466.94.75
		8477.10.70 - 8477.10.70
		8477.40.40 - 8477.40.40
		8477.59.40 - 8477.59.40
		8477.90.15 - 8477.90.15
		8477.90.35 - 8477.90.35
		8477.90.55 - 8477.90.55
		8477.90.75 - 8477.90.75
		8479.89.84 - 8479.89.87
		8480.71.40 - 8480.71.40
		8514.30.20 - 8514.30.60
		8515.90.10 - 8515.90.10
		8543.11.00 - 8543.11.00
		8543.89.10 - 8543.89.10
		8543.90.10 - 8543.90.10
		9010.41.00 - 9010.49.00
		9010.90.70 - 9010.90.70
		9030.82.00 - 9030.82.00
		9030.90.64 - 9030.90.64
		9030.90.84 - 9030.90.84
		9031.41.00 - 9031.41.00
		9031.49.70 - 9031.49.70
		9031.80.40 - 9031.80.40
		9031.90.54 - 9031.90.54
		9031.90.70 - 9031.90.70
MM088	Taps, cocks, valves, and similar devices	8481.10.00 - 8481.90.90
MM089	Mechanical power transmission equipment	8483.40.10 - 8483.90.80
MM090	Boilers, turbines, and related machinery	8401.10.00 - 8401.10.00
		8401.30.00 - 8404.90.00
		8406.10.10 - 8406.90.75
		8410.11.00 - 8410.90.00
MM091	Electric motors, generators, and related equipment	8501.10.20 - 8503.00.95
		8505.11.00 - 8505.90.80
		8545.19.20 - 8545.20.00
		8545.90.40 - 8545.90.40
		8546.90.00 - 8546.90.00
MM092	Electrical transformers, static converters, and inductors	8504.10.00 - 8504.40.40
		8504.40.85 - 8504.40.95
		8504.50.80 - 8504.50.80
		8504.90.65 - 8504.90.95
		8543.40.00 - 8543.40.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
MM093	Portable electric handtools	8467.21.00 - 8467.29.00 8508.10.00 - 8508.90.80
MM094	Nonelectrically powered handtools and parts thereof	8467.11.10 - 8467.19.50 8467.81.00 - 8467.99.01
MM095	Electric lamps (bulbs) and portable electric lights	8513.10.20 - 8513.90.40 8539.10.00 - 8539.90.00 8545.90.20 - 8545.90.20
MM096	Welding and soldering equipment	8468.10.00 - 8468.90.50 8515.11.00 - 8515.80.00 8515.90.20 - 8515.90.40
MM097	Nonautomotive insulated electrical wire and related products	8544.11.00 - 8544.20.00 8544.41.40 - 8544.60.60 8546.10.00 - 8546.20.00 8547.20.00 - 8547.90.00
MM098	Miscellaneous machinery	8401.20.00 - 8401.20.00 8405.10.00 - 8405.90.00 8420.10.90 - 8420.10.90 8420.91.90 - 8420.91.90 8420.99.90 - 8420.99.90 8424.10.00 - 8424.30.90 8424.89.70 - 8425.49.00 8428.10.00 - 8428.60.00 8428.90.00 - 8428.90.00 8431.10.00 - 8431.10.00 8431.31.00 - 8431.39.00 8453.10.00 - 8453.90.50 8475.10.00 - 8475.90.90 8478.10.00 - 8478.90.00 8479.20.00 - 8479.40.00 8479.60.00 - 8479.82.00 8479.89.95 - 8479.89.95 8479.89.97 - 8479.89.98 8479.90.94 - 8479.90.94 8479.90.95 - 8479.90.95 8484.10.00 - 8484.90.00 8485.90.00 - 8485.90.00 8543.89.20 - 8543.89.20
MM099	Molds and molding machinery	8454.10.00 - 8454.90.00 8477.10.30 - 8477.10.40 8477.10.90 - 8477.30.00 8477.40.80 - 8477.51.00 8477.59.80 - 8477.80.00 8477.90.25 - 8477.90.25 8477.90.45 - 8477.90.45 8477.90.65 - 8477.90.65 8477.90.85 - 8477.90.85 8480.10.00 - 8480.71.10 8480.71.80 - 8480.79.90
Transportation equipment sector:		
ET001	Aircraft engines and gas turbines	8407.10.00 - 8407.10.00 8409.10.00 - 8409.10.00 8411.11.40 - 8412.10.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
ET002	Internal combustion piston engines, other than for aircraft	8412.90.90 - 8412.90.90
		8407.21.00 - 8408.90.90
		8409.91.10 - 8409.99.99
		8421.23.00 - 8421.23.00
		8421.31.00 - 8421.31.00
ET003	Forklift trucks and similar industrial vehicles	8483.10.10 - 8483.10.50
		8427.10.40 - 8427.90.00
		8431.20.00 - 8431.20.00
ET004	Construction and mining equipment	8709.11.00 - 8709.90.00
		8426.11.00 - 8426.99.00
		8429.11.00 - 8430.69.01
		8431.41.00 - 8431.49.90
		8479.10.00 - 8479.10.00
		8479.90.94 - 8479.90.94
ET005	Ball and rollers bearings	8479.90.95 - 8479.90.95
		8704.10.10 - 8704.10.50
		8482.10.10 - 8482.99.65
ET006	Primary cells and batteries and electric storage batteries	8483.20.40 - 8483.30.80
		8506.10.00 - 8507.90.80
ET007	Ignition, starting, lighting, and other electrical equipment	8548.10.05 - 8548.90.00
		8511.10.00 - 8512.90.90
ET008	Rail locomotive and rolling stock	8547.10.40 - 8547.10.80
ET009	Motor vehicles	8601.10.00 - 8609.00.00
		8701.20.00 - 8701.20.00
		8702.10.30 - 8702.90.60
		8703.22.00 - 8703.90.00
		8704.21.00 - 8704.90.00
		8706.00.03 - 8706.00.15
		8707.10.00 - 8707.10.00
		8707.90.50 - 8707.90.50
		8708.10.30 - 8708.29.50
		8708.31.50 - 8708.31.50
ET010	Certain motor-vehicle parts	8708.39.50 - 8708.40.20
		8708.40.50 - 8708.40.50
		8708.50.50 - 8708.50.80
		8708.60.50 - 8708.60.80
		8708.70.45 - 8708.70.60
		8708.80.30 - 8708.80.45
		8708.91.50 - 8708.91.50
		8708.92.50 - 8708.92.50
		8708.93.60 - 8708.93.75
		8708.94.50 - 8708.94.50
ET011	Motorcycles, mopeds, and parts	8708.99.52 - 8708.99.80
		8711.10.00 - 8711.90.00
ET012	Miscellaneous vehicles and transportation-related equipment	8714.11.00 - 8714.19.00
		8703.10.10 - 8703.21.00
		8705.10.00 - 8705.90.00
		8706.00.25 - 8706.00.25
		8710.00.00 - 8710.00.00
		8713.10.00 - 8713.90.00
		8714.20.00 - 8714.20.00
		8716.10.00 - 8716.40.00
		8716.80.50 - 8716.80.50

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
		8716.90.30 - 8716.90.50
ET013	Aircraft, spacecraft, and related equipment	8801.10.00 - 8802.40.00
		8802.60.90 - 8803.30.00
		8803.90.90 - 8805.29.00
ET014	Ships, tugs, pleasure boats, and similar vessels	8485.10.00 - 8485.10.00
		8901.10.00 - 8908.00.00
ET015	Motors and engines, except internal combustion, aircraft, or electric	8412.21.00 - 8412.90.10
		8412.90.90 - 8412.90.90
Electronic products sector:		
ET016	Office machines	8469.11.00 - 8470.40.00
		8470.90.00 - 8470.90.00
		8472.10.00 - 8472.30.00
		8472.90.20 - 8472.90.20
		8472.90.40 - 8472.90.60
		8472.90.90 - 8473.29.00
		8473.40.20 - 8473.40.20
		8473.40.85 - 8473.40.95
		8520.10.00 - 8520.10.00
ET017	Telephone and telegraph apparatus	8517.11.00 - 8518.10.40
		8518.29.40 - 8518.29.40
		8518.30.10 - 8518.30.10
		8518.40.10 - 8518.40.10
		8518.90.20 - 8518.90.60
		8520.20.00 - 8520.20.00
		8522.90.45 - 8522.90.55
		8525.10.90 - 8525.20.90
		8527.31.05 - 8527.31.05
		8527.90.40 - 8527.90.40
		8527.90.85 - 8527.90.95
		8529.10.70 - 8529.10.70
		8529.90.22 - 8529.90.22
		8529.90.75 - 8529.90.76
		8529.90.99 - 8529.90.99
		8531.80.40 - 8531.80.70
		8531.90.10 - 8531.90.10
		8531.90.70 - 8531.90.70
		8543.89.60 - 8543.89.60
		8802.60.30 - 8802.60.30
		8803.90.30 - 8803.90.30
ET018	Consumer electronics (except televisions)	8518.10.80 - 8518.22.00
		8518.29.80 - 8518.29.80
		8518.30.20 - 8518.30.20
		8518.40.20 - 8518.50.00
		8518.90.80 - 8519.99.00
		8520.32.00 - 8522.90.35
		8522.90.65 - 8522.90.75
		8525.40.40 - 8525.40.80
		8527.12.00 - 8527.29.80
		8527.31.40 - 8527.39.00
		8527.90.50 - 8527.90.50
ET019	Blank media	8523.11.00 - 8523.90.00

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
ET020	Prerecorded media	8524.10.00 - 8524.99.40
ET021	Navigational instruments and remote control apparatus	8526.10.00 - 8526.92.00
		8529.10.40 - 8529.10.40
		8529.90.16 - 8529.90.19
		8529.90.26 - 8529.90.26
		8529.90.73 - 8529.90.73
		8529.90.95 - 8529.90.97
		9014.10.10 - 9014.90.60
ET022	Television receivers and video monitors	8528.12.04 - 8528.30.90
		8529.90.01 - 8529.90.06
		8529.90.29 - 8529.90.53
		8529.90.88 - 8529.90.93
ET023	Radio and television broadcasting equipment	8525.10.10 - 8525.10.70
		8525.30.30 - 8525.30.90
		8529.10.20 - 8529.10.20
		8529.10.90 - 8529.10.90
		8529.90.09 - 8529.90.13
		8529.90.63 - 8529.90.69
		8529.90.78 - 8529.90.86
ET024	Electric sound and visual signaling apparatus	8530.10.00 - 8531.80.00
		8531.80.90 - 8531.80.90
		8531.90.15 - 8531.90.40
		8531.90.75 - 8531.90.90
ET025	Electrical capacitors and resistors	8532.10.00 - 8533.90.80
		8543.89.96 - 8543.89.96
ET026	Printed circuits	8534.00.00 - 8534.00.00
ET027	Circuit apparatus exceeding 1000V	8535.10.00 - 8535.90.80
ET028	Circuit apparatus not exceeding 1000V	8536.10.00 - 8536.90.80
ET029	Circuit apparatus assemblies	8537.10.30 - 8537.20.00
ET030	Parts of circuit apparatus	8538.10.00 - 8538.90.80
ET031	Cathode-ray tubes	8540.11.10 - 8540.20.20
		8540.40.00 - 8540.60.00
		8540.91.15 - 8540.91.50
ET032	Electron tubes other than CRTs	8540.20.40 - 8540.20.40
		8540.71.20 - 8540.89.00
		8540.99.40 - 8540.99.80
ET033	Semiconductors and integrated circuits	8541.10.00 - 8541.50.00
		8541.90.00 - 8542.90.00
ET034	Miscellaneous electrical equipment	8541.60.00 - 8541.60.00
		8543.19.00 - 8543.30.00
		8543.81.00 - 8543.81.00
		8543.89.40 - 8543.89.40
		8543.89.70 - 8543.89.92
		8543.89.96 - 8543.89.96
		8543.90.15 - 8543.90.88
ET035	Computers, peripherals, and parts	8470.50.00 - 8470.50.00
		8471.10.00 - 8471.90.00
		8472.90.10 - 8472.90.10
		8472.90.20 - 8472.90.20
		8473.30.10 - 8473.40.10
		8473.50.30 - 8473.50.90
		8504.40.60 - 8504.40.70
		8504.50.40 - 8504.50.40
		8504.90.20 - 8504.90.40

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
ET036	Photographic film and paper	3701.10.00 - 3707.10.00
ET037	Optical fibers, optical fiber bundles and cables	8544.70.00 - 8544.70.00
		9001.10.00 - 9001.10.00
ET038	Optical goods, including ophthalmic goods	9001.20.00 - 9005.90.80
		9011.10.40 - 9013.90.90
ET039	Photographic cameras and equipment	8472.90.70 - 8472.90.70
		8473.40.60 - 8473.40.60
		9006.10.00 - 9010.10.00
		9010.50.10 - 9010.90.40
		9010.90.80 - 9010.90.90
		9027.40.00 - 9027.40.00
		9027.90.54 - 9027.90.54
ET040	Medical goods	9018.11.30 - 9022.90.95
ET041	Watches and clocks	9101.11.40 - 9114.90.50
ET042	Drawing, drafting, and calculating instruments	9017.10.00 - 9017.90.36
ET043	Measuring, testing, and controlling instruments	9015.10.40 - 9016.00.60
		9023.00.00 - 9027.30.80
		9027.50.40 - 9027.90.45
		9027.90.54 - 9030.40.00
		9030.83.00 - 9030.90.45
		9030.90.65 - 9030.90.68
		9030.90.85 - 9031.30.00
		9031.49.40 - 9031.49.40
		9031.49.80 - 9031.49.90
		9031.80.80 - 9031.90.45
		9031.90.55 - 9031.90.60
		9031.90.90 - 9033.00.00
Miscellaneous manufactures sector:		
MM046	Luggage, handbags, and flat goods	4202.11.00 - 4202.99.90
		9605.00.00 - 9605.00.00
MM046A	Luggage	4202.11.00 - 4202.19.00
		4202.91.00 - 4202.99.90
MM046B	Handbags	4202.21.30 - 4202.29.90
MM046C	Flat goods	4202.31.30 - 4202.39.90
MM047	Certain other leather goods	4201.00.30 - 4201.00.60
		4204.00.30 - 4205.00.80
MM048	Musical instruments and accessories	9201.10.00 - 9209.99.80
MM049	Umbrellas, whips, riding crops, and canes	6601.10.00 - 6603.90.80
MM050	Silverware and related articles of precious metal	7114.11.10 - 7115.90.05
MM051	Precious jewelry and related articles	7113.11.10 - 7113.20.50
		7115.90.30 - 7116.20.50
MM052	Costume jewelry and related articles	7117.11.00 - 7117.90.90
MM053	Bicycles and certain parts	8712.00.15 - 8712.00.50
		8714.91.20 - 8714.99.80
MM054	Furniture	9401.30.40 - 9401.80.60
		9401.90.15 - 9403.40.40
		9403.40.90 - 9403.50.40
		9403.50.90 - 9403.80.60
		9403.90.25 - 9404.29.90
MM055	Writing instruments and related articles	9608.10.00 - 9610.00.00
MM056	Lamps and lighting fittings	9405.10.40 - 9405.99.40
MM057	Prefabricated buildings	9406.00.40 - 9406.00.80

See note at end of table.

HTS 8-digit subheading ranges included in industry/commodity groups and subgroups, by sector—Continued

USITC code	Industry/commodity group or subgroup title	HTS subheading range
MM058	Dolls	9502.10.00 - 9502.99.00
MM059	Toys	9501.00.20 - 9501.00.60 9503.10.00 - 9503.10.00 9503.30.00 - 9503.90.00 9505.90.20 - 9505.90.60
MM060	Games	9504.10.00 - 9504.90.90
MM061	Sporting goods	9506.11.20 - 9507.90.80
MM062	Smokers' articles	9613.10.00 - 9614.90.80
MM063	Brooms, brushes, and hair grooming articles	9603.10.05 - 9603.90.80 9615.11.10 - 9615.90.60
MM063A	Brooms and brushes	9603.10.05 - 9603.90.80
MM063B	Hair grooming articles, non-electric (except brushes)	9615.11.10 - 9615.90.60
MM064	Works of art and miscellaneous manufactured goods	4206.10.30 - 4206.90.00 6701.00.30 - 6704.90.00 8715.00.00 - 8715.00.00 9503.20.00 - 9503.20.00 9505.10.10 - 9505.10.50 9508.00.00 - 9602.00.50 9604.00.00 - 9604.00.00 9611.00.00 - 9612.20.00 9616.10.00 - 9706.00.00
MM065	Apparel fasteners	9606.10.40 - 9607.20.00
MM066	Arms and ammunition	9301.00.30 - 9307.00.00
MM066A	Small arms and ammunition	9301.00.30 - 9301.00.90 9301.90.30 - 9306.30.80 9307.00.00 - 9307.00.00
MM067	Seats for motor vehicles and aircraft	9401.10.40 - 9401.20.00 9401.90.10 - 9401.90.10 9403.40.60 - 9403.40.60 9403.50.60 - 9403.50.60 9403.90.10 - 9403.90.10

Note.—A duplicate listing for an individual 8-digit HTS subheading indicates that the 10-digit categories within that 8-digit subheading are in more than one industry/commodity group or subgroup.

The above table shows the range of HTS 8-digit items assigned to industry/commodity groups and subgroups, and should be considered a guideline only because actual industry/commodity group and subgroup assignments are made on a HTS 10-digit basis. Therefore, any data generated on the basis of the information contained in this table may not accurately represent trade for these groups. For accurate trade data based on information contained here, see tables in the commodity chapters or the Profile of U.S. Industry and Market, by Industry/Commodity Groups and Subgroups, 1999-2003. In addition, this information represents only a snapshot of the HTS subheading composition of these groups and subgroups at a point in time. The USITC's industry/commodity groupings and subgroupings are subject to frequent revision as dictated by modifications to the HTS and other factors.