Northeast Wisconsin Global Trade Strategy Background Report

Part 2 of 2: Background documents supporting the Northeast Wisconsin Global Trade Strategy Report

Submitted to the Economic Development Administration on April 30, 2012

This report was prepared under an award from the

U.S. Department of Commerce

Economic Development Administration

to the East Central Wisconsin Regional Planning Commission and the Bay Lakes Regional Planning Commission

EDA Grant Award #06-46-05616

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Part 2 of 2: Background documents supporting the Northeast Wisconsin Global Trade Strategy

April 30, 2012

This publication was prepared by East Central Wisconsin Regional Planning Commission. The statements, conclusions, and recommendations are those of the author(s) and do not necessarily reflect the view of the Economic Development Committee.

ABSTRACT

TITLE: Northeast Wisconsin Global Trade Strategy Background Report

AUTHOR: Tom Baron, Associate Planner

SUBJECT: Supporting global trade in Northeastern Wisconsin.

DATE: April 30, 2012

PLANNING AGENCY: East Central Wisconsin Regional Planning Commission
400 Ahnaip Street, Suite 100
Menasha, WI 54952

This report, the *NE WI Global Trade Strategy Background Report*, acts as a supporting document for the *Northeast Wisconsin Global Trade Strategy* is intended to be supplemental document.

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Northeast Wisconsin Global Trade Strategy Outreach

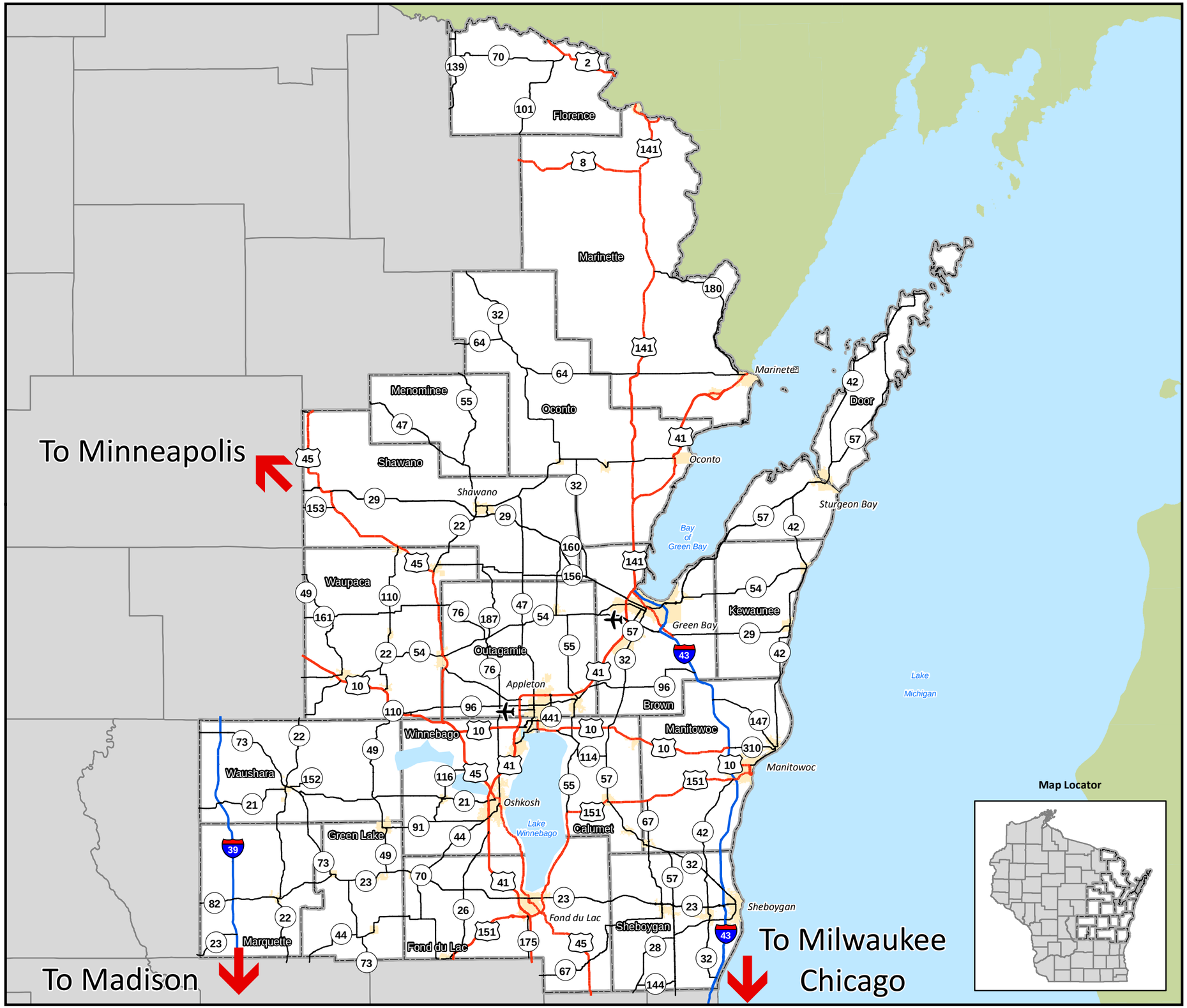
Presentations

- Northeast Wisconsin Regional Economic Development Partnership meeting, 12/16/11, Appleton, WI
- American Planning Association Wisconsin Chapter Annual Conference, 3/1/12, Oshkosh, WI
- Northeast Wisconsin Regional Economic Development Partnership meeting, 3/16/12,

Newsletter Articles

- East Central WI RPC Rapport Newsletter, Volume 39 Number 2, Fall 2010
- Bay Lake Regional Planning Commission E-newsletter, March 2011
- East Central WI RPC E-newsletter, April 2011
- East Central WI RPC E-newsletter, June 2011
- East Central WI RPC Rapport Newsletter, Volume 40 Number 1, Summer 2011
- East Central WI RPC E-newsletter, August 2011
- East Central WI RPC Rapport Newsletter, Volume 40 Number 2, Fall 2011
- Bay Lake Regional Planning Commission E-newsletter, October 2011
- East Central WI RPC E-newsletter, December 2011
- East Central WI RPC Rapport Newsletter, Volume 40 Number 3, Winter 2011
- UW Extension Outagamie County Newsletter, Winter 2011
- East Central WI RPC E-newsletter, April 2012

NEW Global Trade Strategy Highway Network / Airports



Airport

Interstate Highway

US Highway

State Highway

Wisconsin Counties

County within Study Area

N

0 10 20

Scale in Miles

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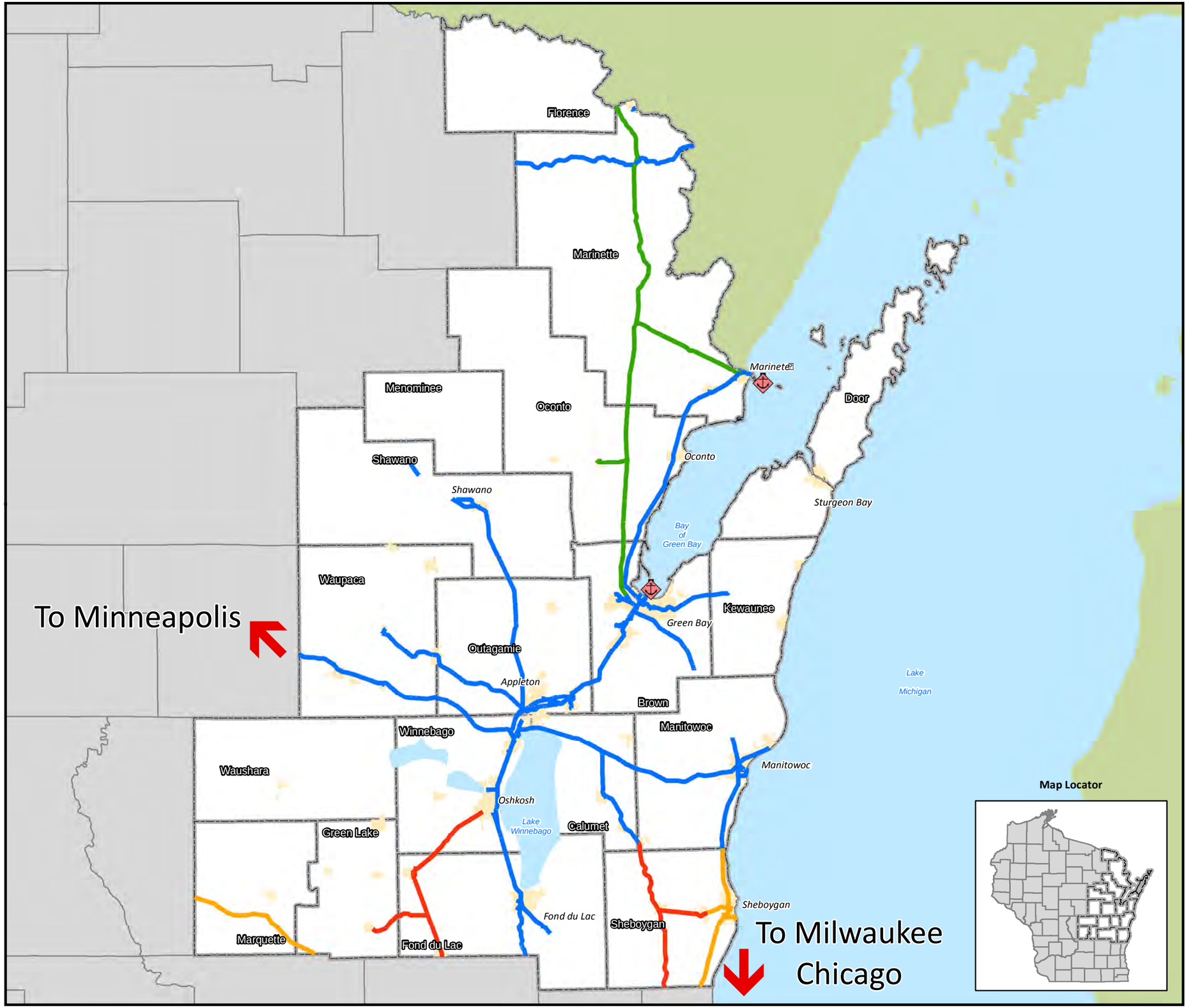
NEW Global Trade Strategy Railways / Ports



Ports

Wisconsin & Southern

Canadian National

Union Pacific

Escanaba & Lake Superior

Wisconsin Counties

County within Study Area

N

0 10 20

Scale in Miles

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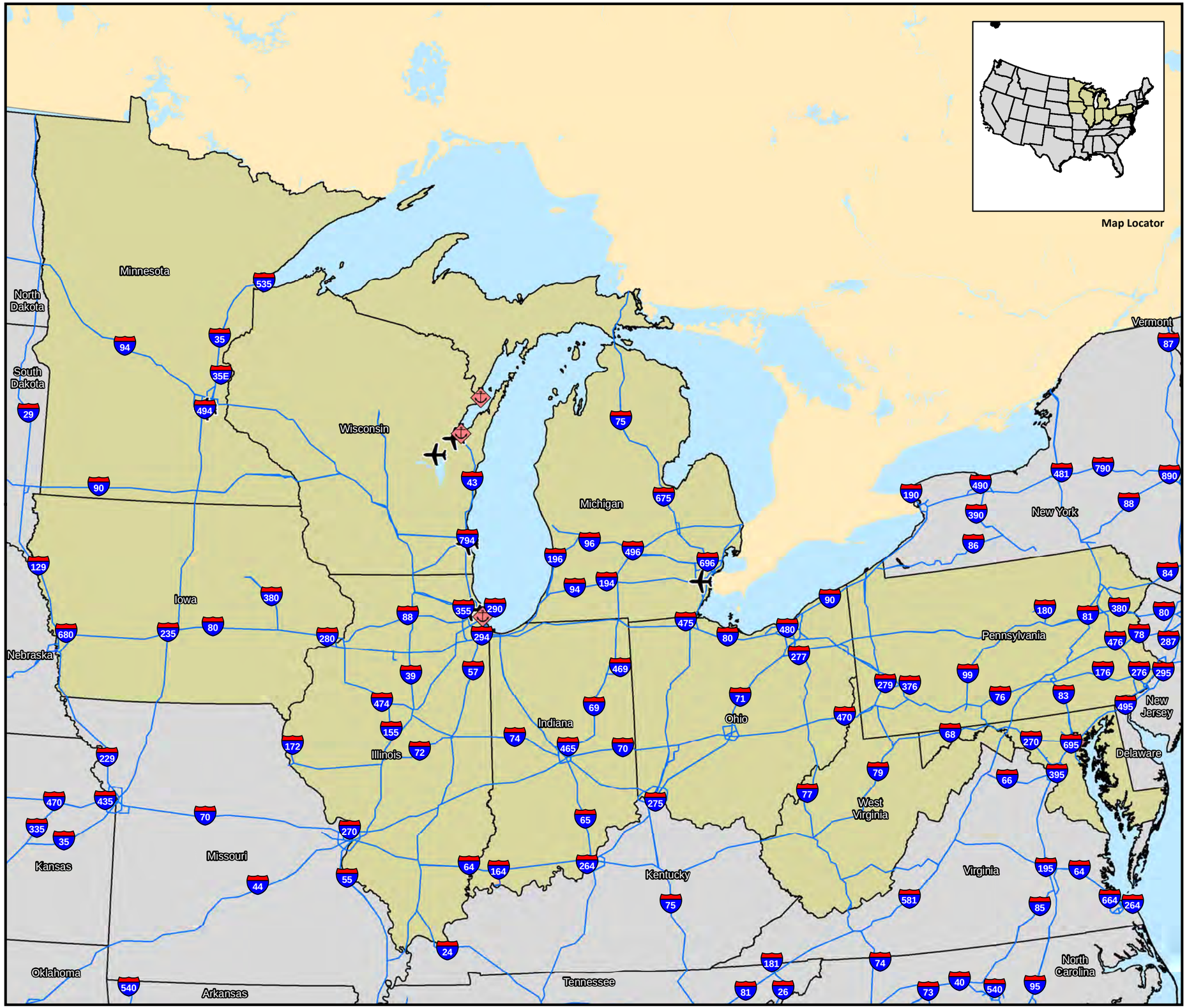
NEW Global Trade Strategy Transportation Network



Port

Airport

Interstates

Water

Outside Region

Trade Corridor

Canada

N

0 50 100

Scale in Miles

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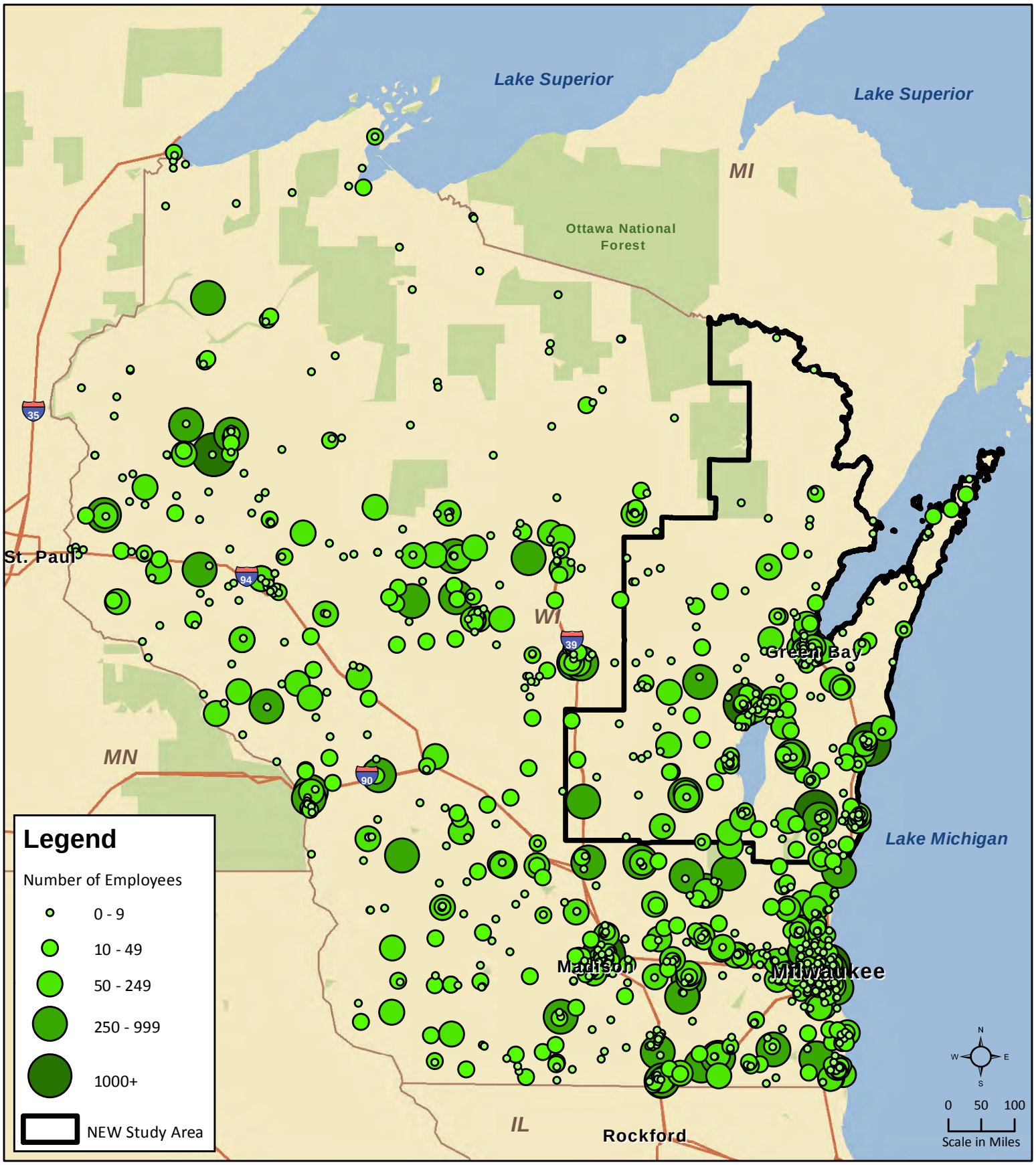
NAICS Code 311 - Food Manufacturing



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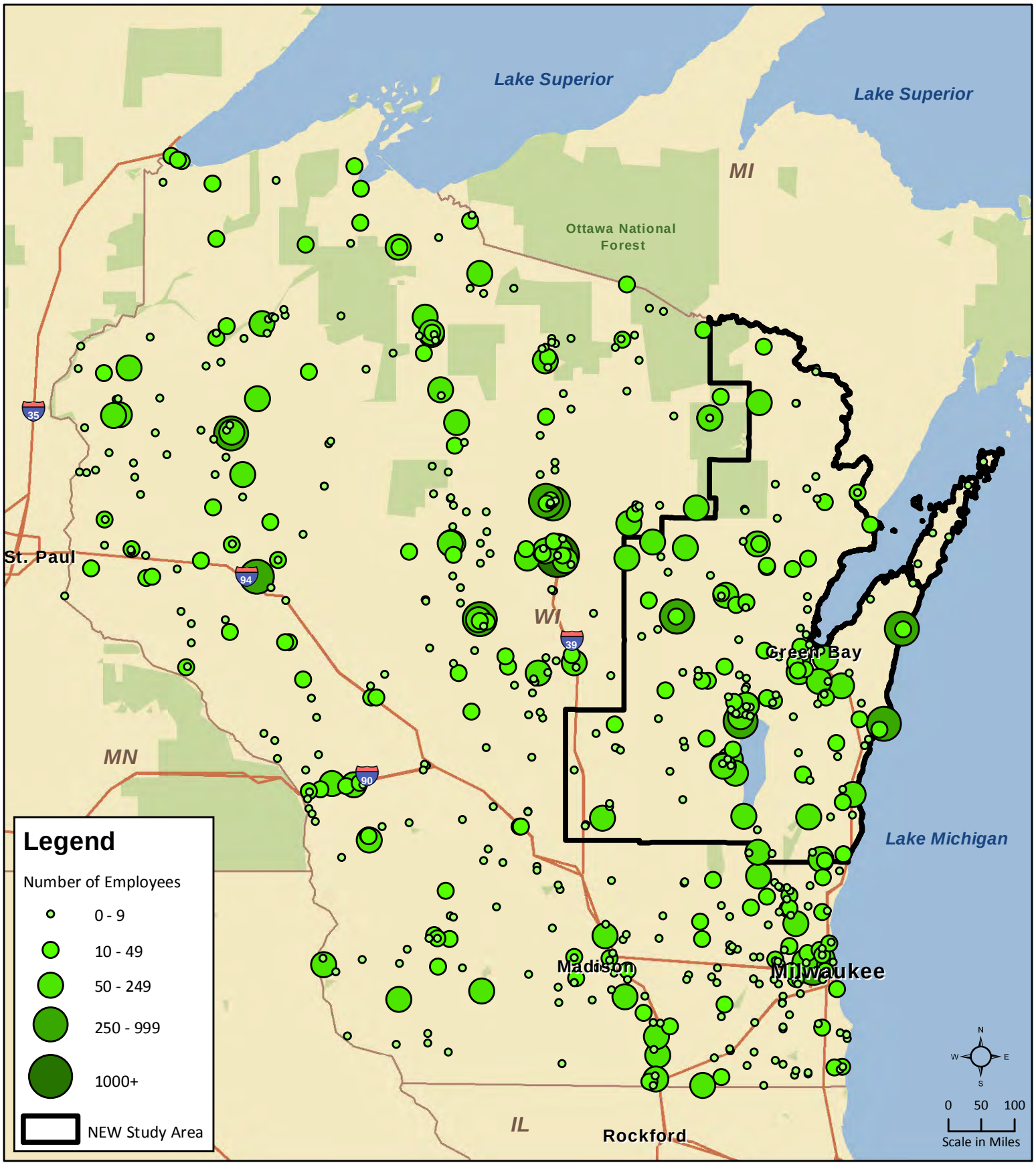
AP P:\15XX-EDA\1560_CTAAGlobal Trade Grant\AssettMapping\NAICS311_Employees.mxd
Data Source: Esri Business Analyst 10

56,662 total employees in the state.
13,110 in NE Wisconsin or 23.1%

NAICS Code 321 - Wood Product Manufacturing



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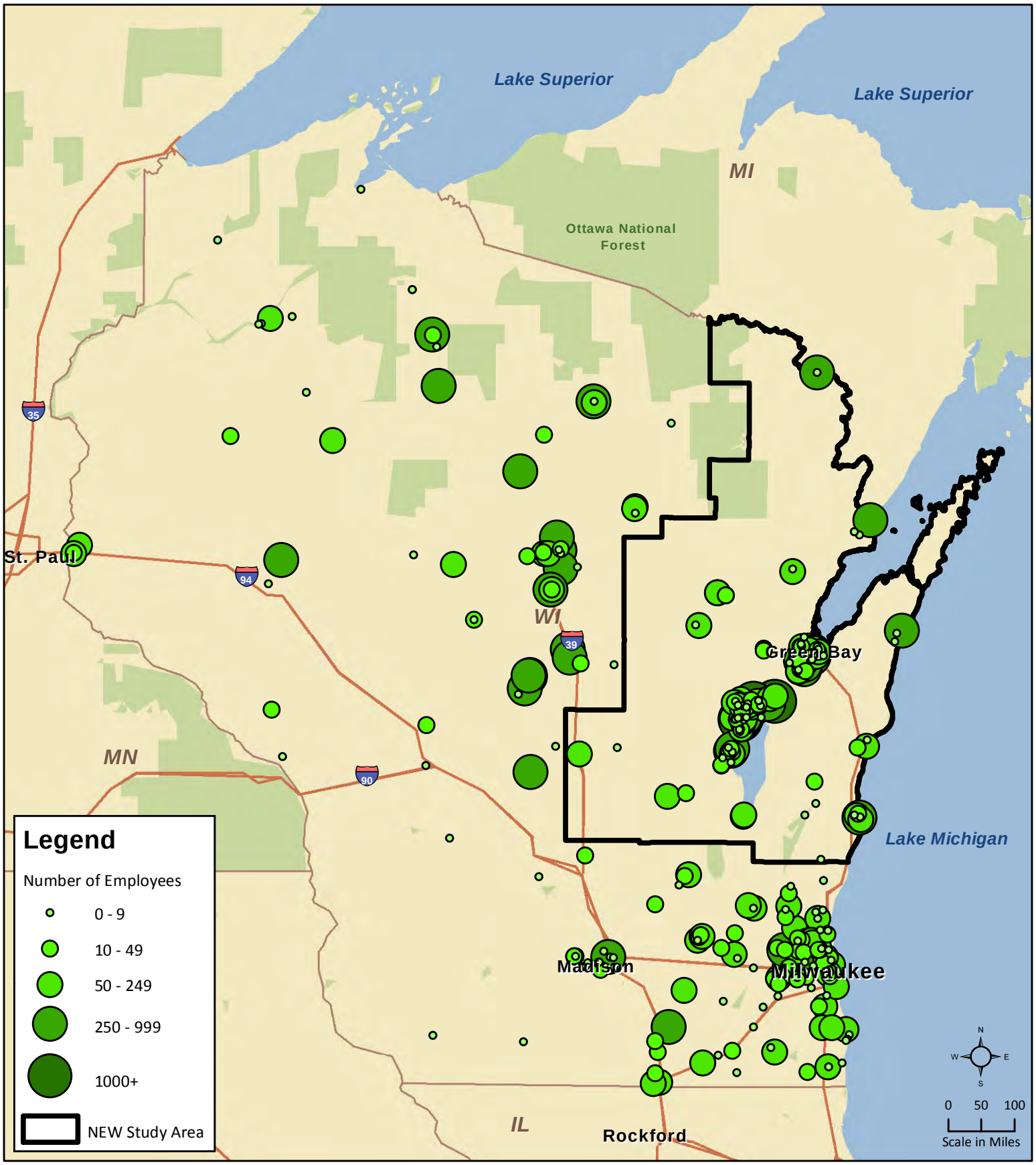
Data Source: Esri Business Analyst 10

16,302 total employees in the state.
5,032 in NE Wisconsin or 30.9%

NAICS Code 322 - Paper Manufacturing



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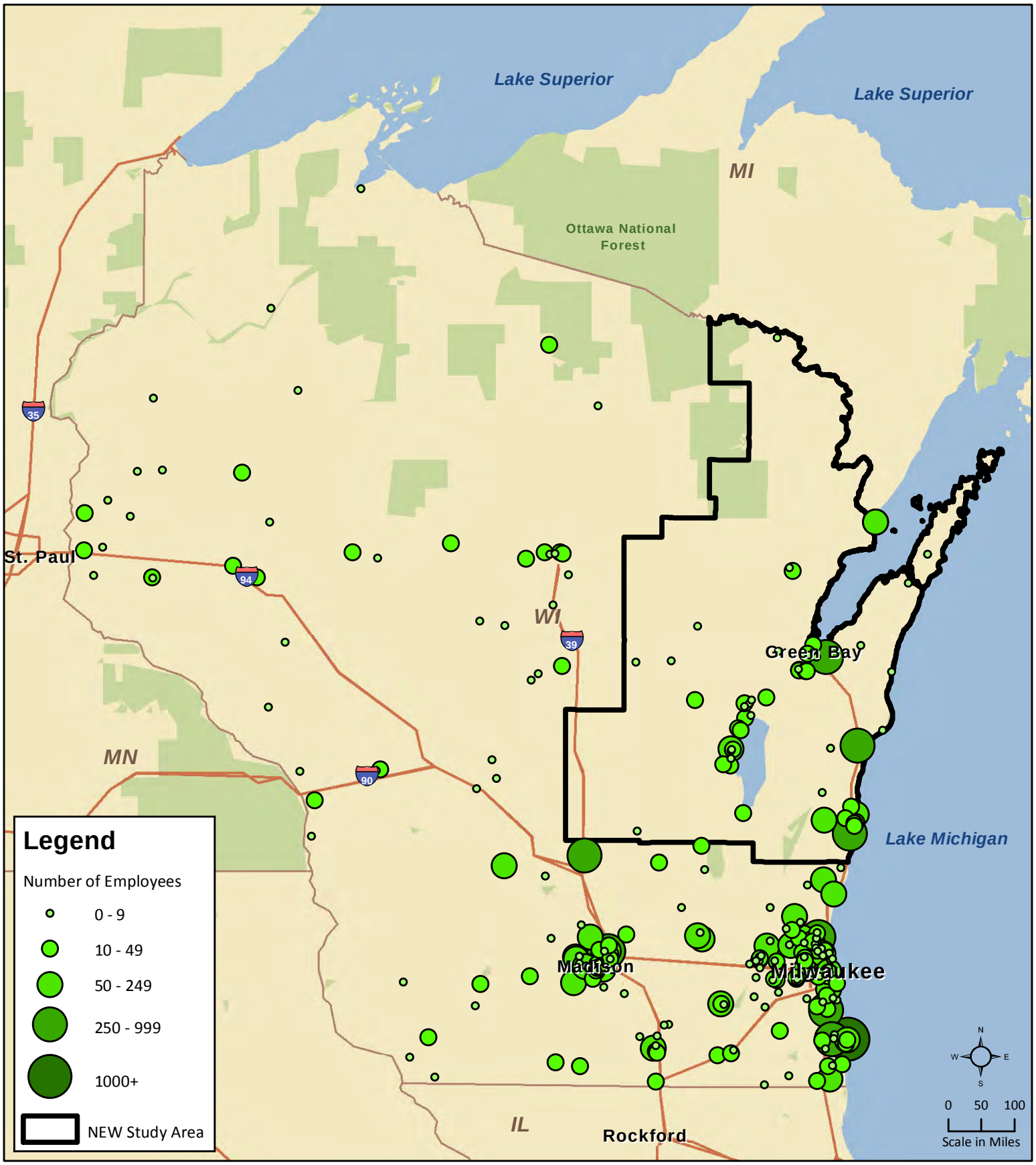
Data Source: Esri Business Analyst 10

34,967 total employees in the state.
20,007 in NE Wisconsin or 57.2%

NAICS Code 325 - Chemical Manufacturing



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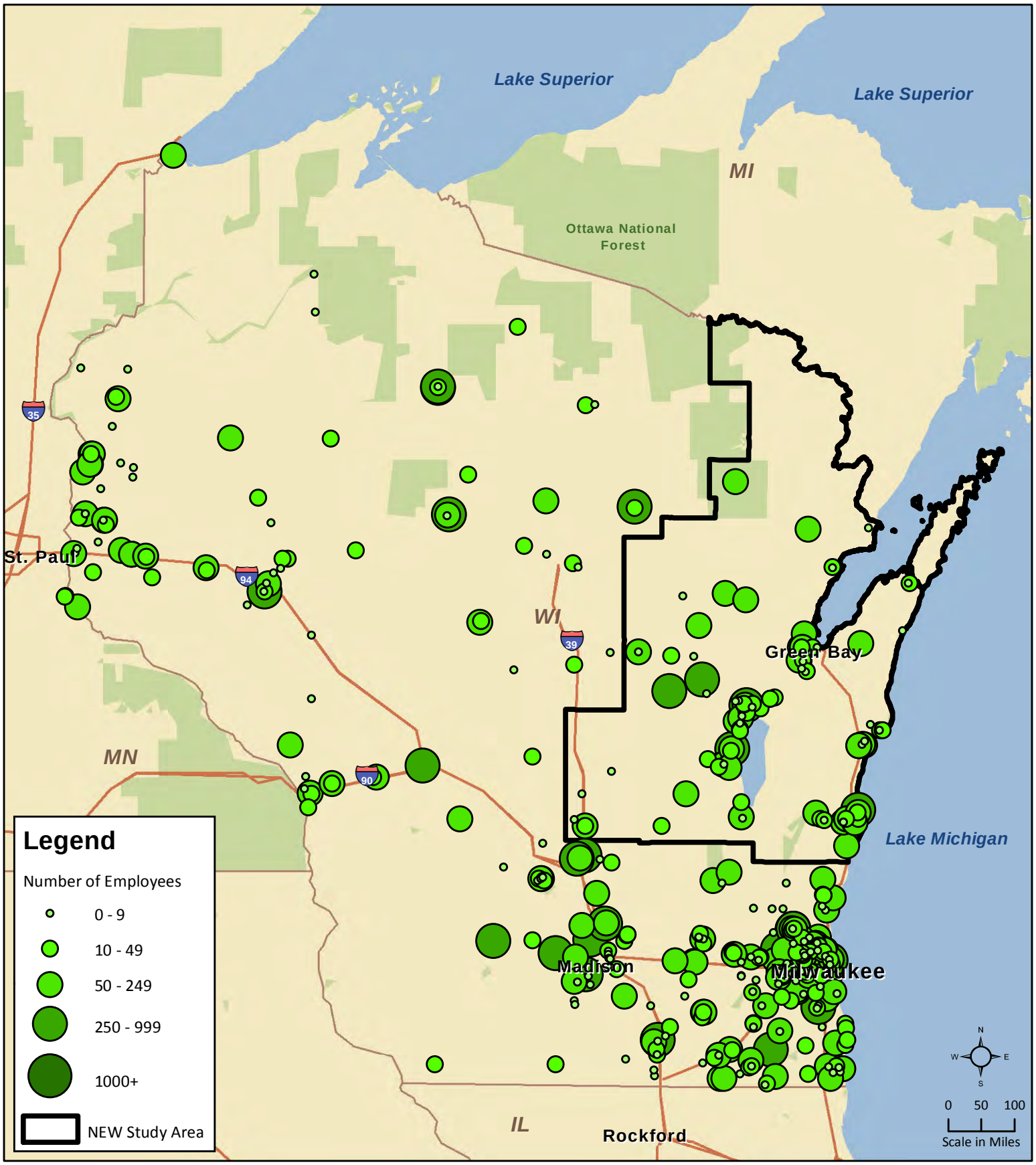
Data Source: Esri Business Analyst 10

12,865 total employees in the state.
2,020 in NE Wisconsin or 15.7%

NAICS Code 326 - Plastic & Rubber Product Manufacturing



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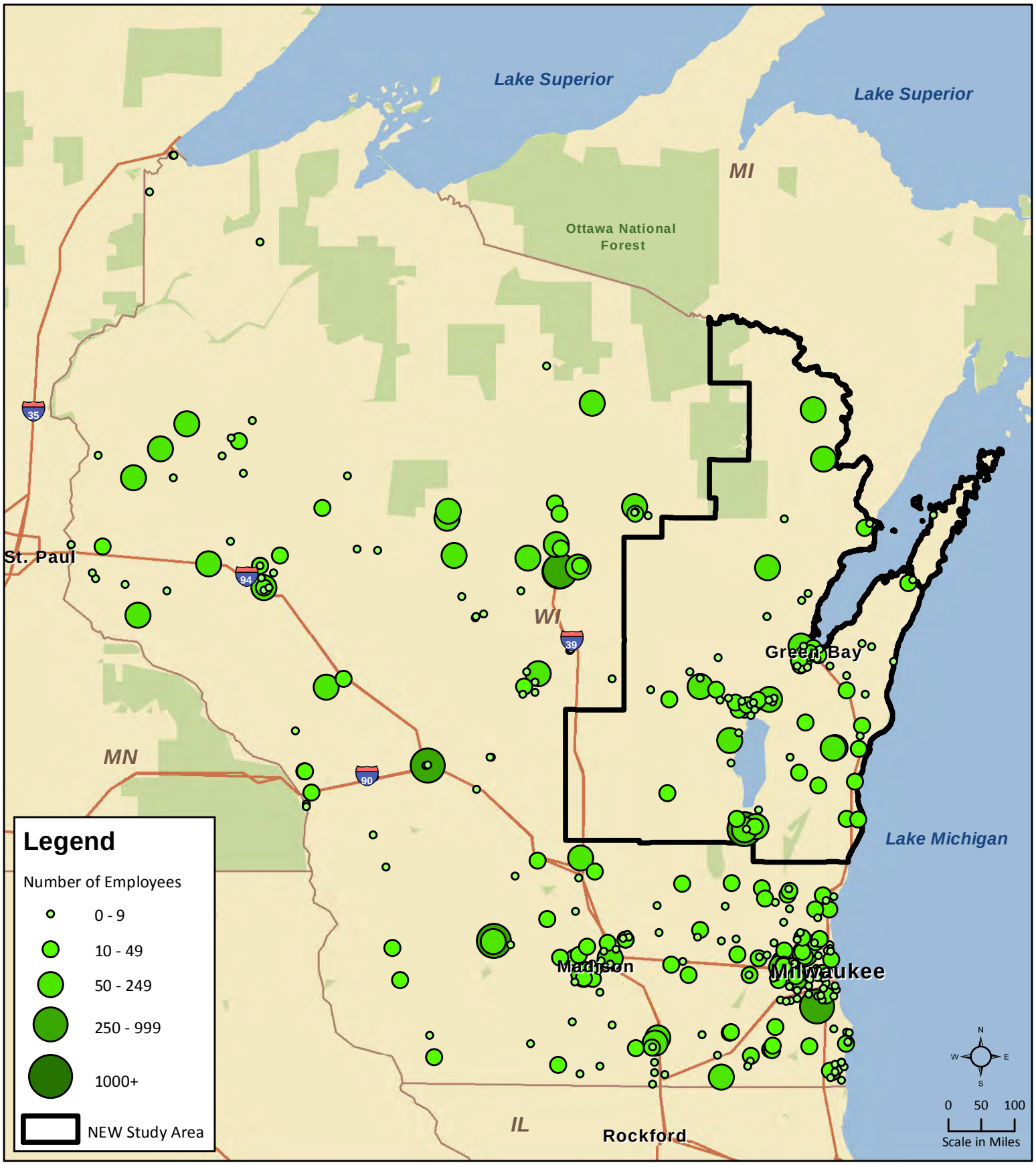
Data Source: Esri Business Analyst 10

26,732 total employees in the state.
6,757 in NE Wisconsin or 25.3%

NAICS Code 327 - Nonmetallic Mineral Product Manufacturing



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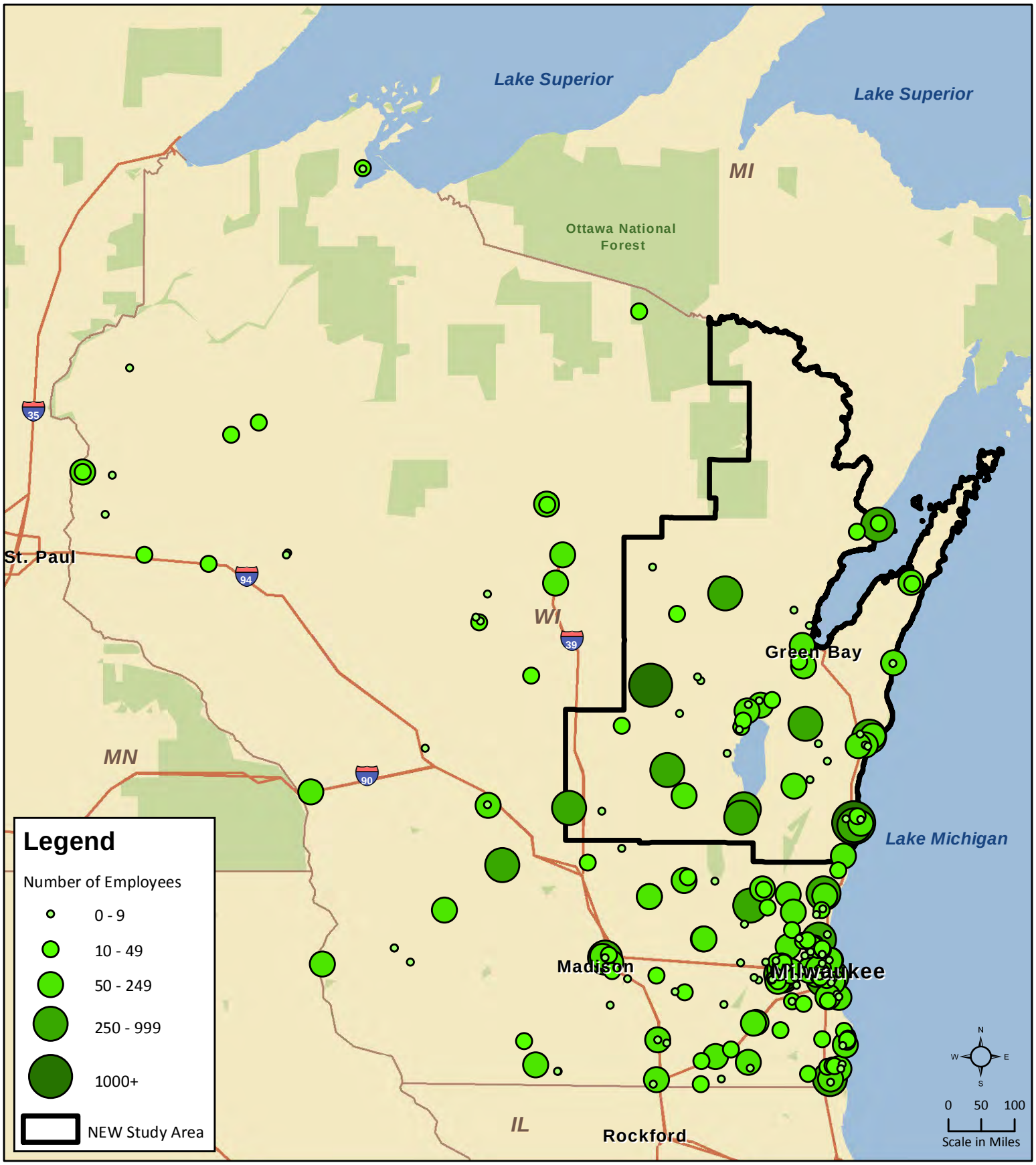
Data Source: Esri Business Analyst 10

8,229 total employees in the state.
1,913 in NE Wisconsin or 23.2%

NAICS Code 331 - Primary Metal Manufacturing



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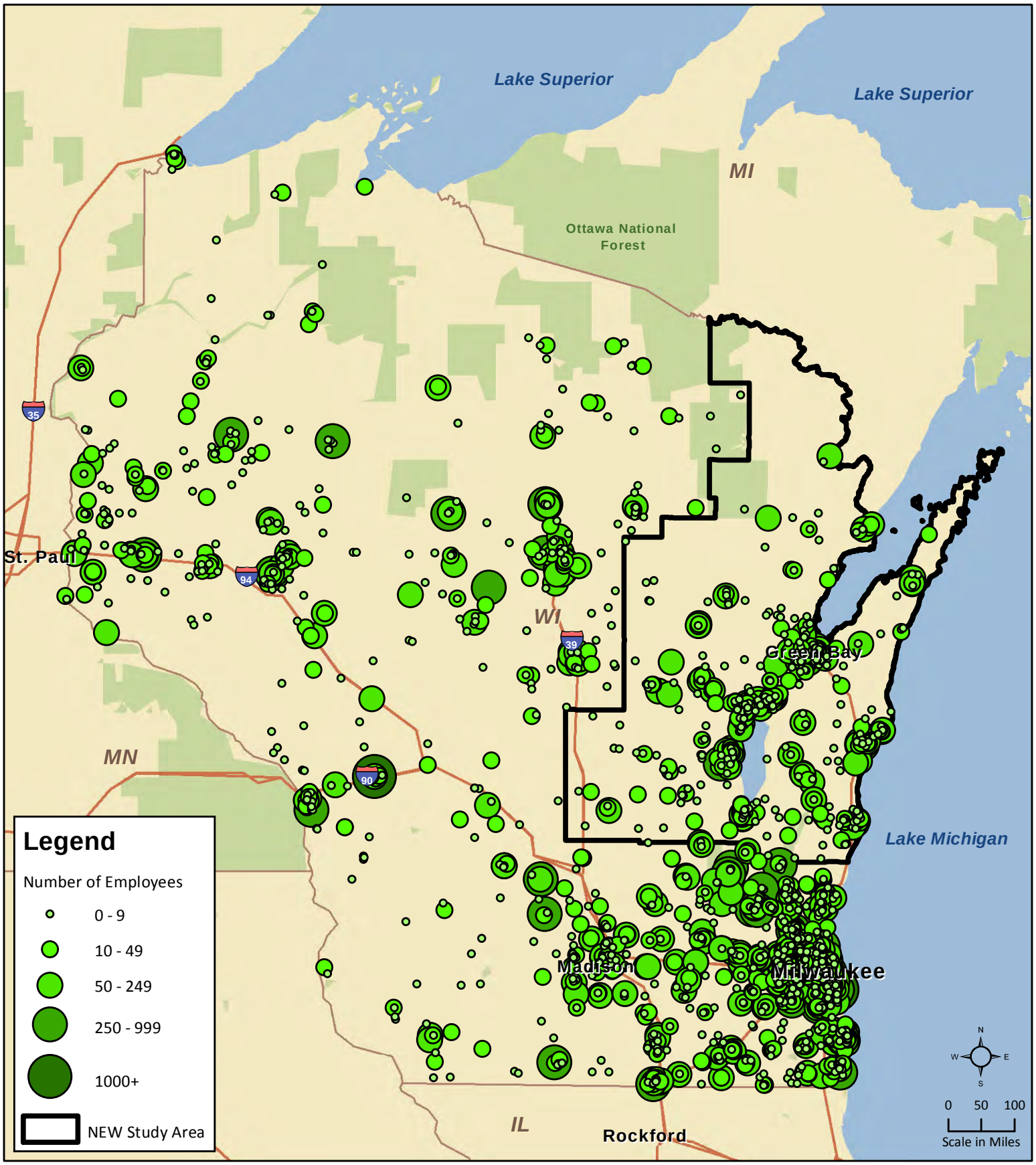
Data Source: Esri Business Analyst 10

18,958 total employees in the state.
8,226 in NE Wisconsin or 43.4%

NAICS Code 332 - Fabricated Metal Product Manufacturing



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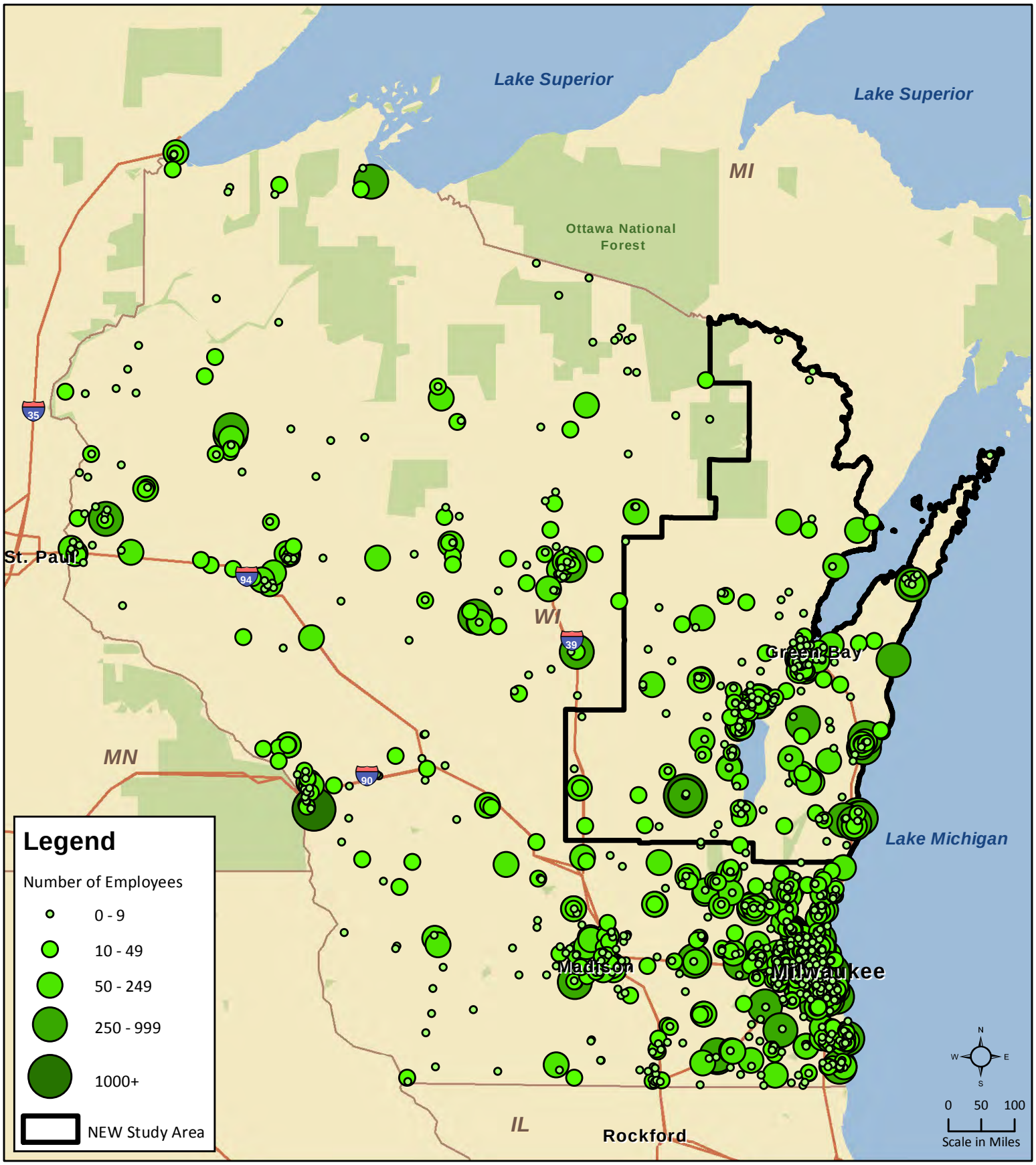
Data Source: Esri Business Analyst 10

65,277 total employees in the state.
12,952 in NE Wisconsin or 19.8%

NAICS Code 333 - Machinery Manufacturing



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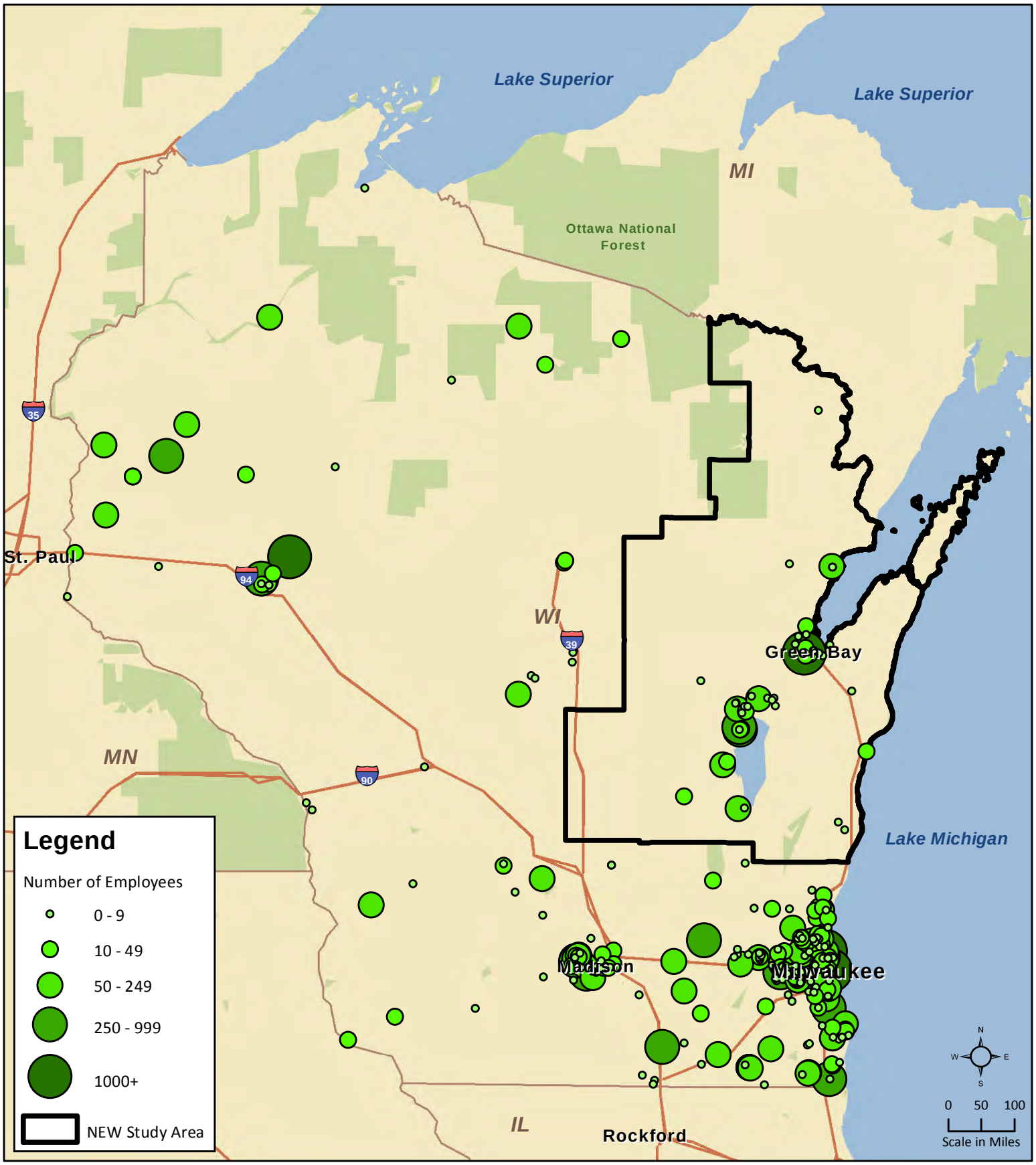
Data Source: Esri Business Analyst 10

60,256 total employees in the state.
15,389 in NE Wisconsin or 25.5%

NAICS Code 334 - Computer & Electronic Product Manufacturing



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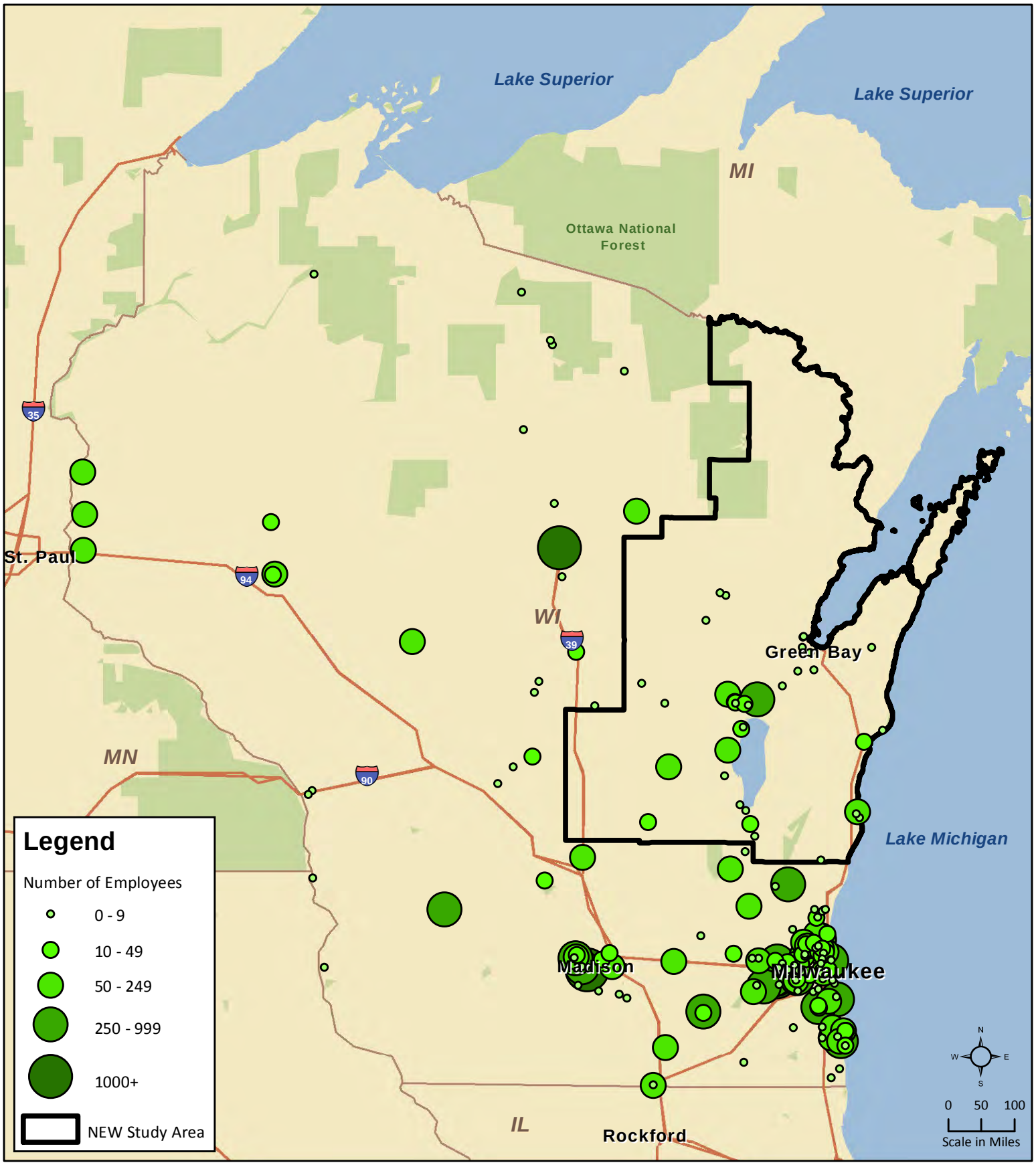
Data Source: Esri Business Analyst 10

20,311 total employees in the state.
3,935 in NE Wisconsin or 19.4%

NAICS Code 335 - Elec. Equip., Appliance & Component Mfg



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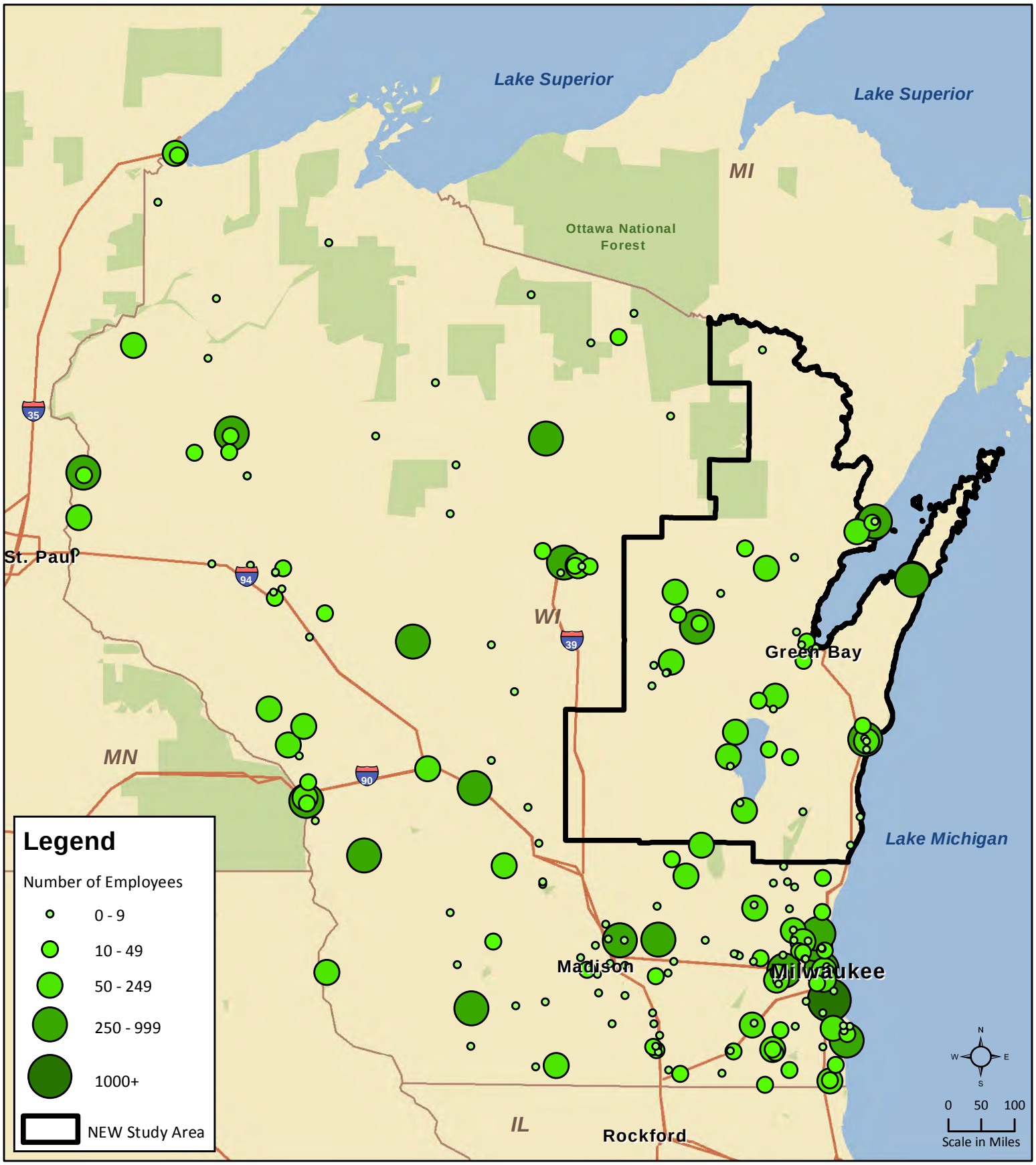
Data Source: Esri Business Analyst 10

15,939 total employees in the state.
913 in NE Wisconsin or 5.7%

NAICS Code 336 - Transportation Equipment Manufacturing



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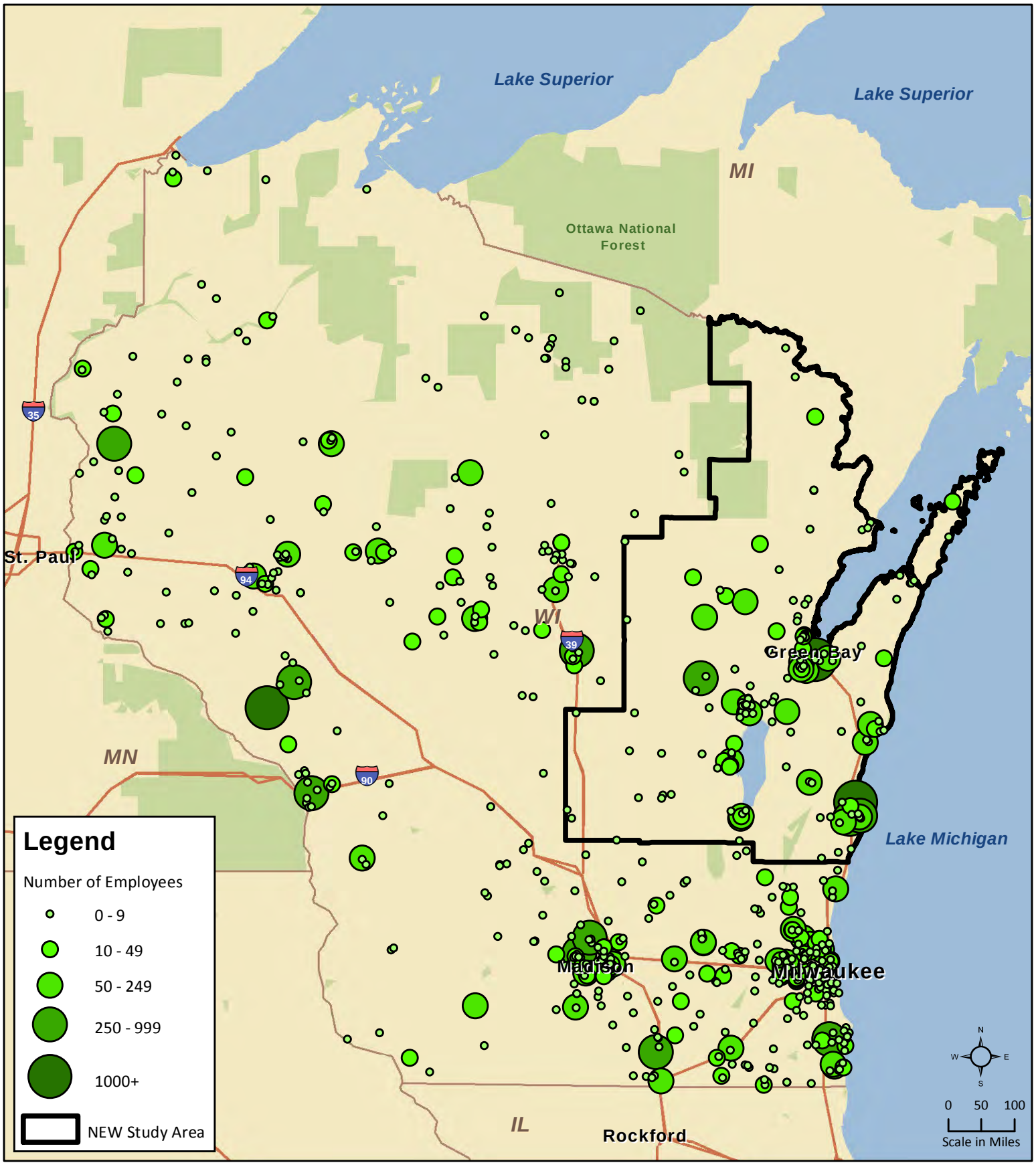
Data Source: Esri Business Analyst 10

17,355 total employees in the state.
4,426 in NE Wisconsin or 25.5%

NAICS Code 337 - Furniture & Related Product Manufacturing



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AP P:\15XX-EDA\1560_CTAAGlobal Trade Grant\AssettMapping\NAICS337_Employees.mxd
Data Source: Esri Business Analyst 10

17,243 total employees in the state.
6,759 in NE Wisconsin or 39.2%

Introduction to the Inventory & Analysis

Newmark Knight Frank

Bay-Lake Regional Planning Commission

East Central Wisconsin Regional Planning Commission

Process Overview

Industry Driver Analysis

- Identify subsectors most important to regional economy –drivers of employment & output

Analysis of Global Trade Activity (Quantitative)

- Benchmark existing global trade activity – most active sectors & most common destinations

Analysis of Global Trade Activity (Qualitative)

- Context &understanding of quantitative research – stakeholder interviews & corporate insight

Local Asset Mapping (completed by ECWRPC)

Survey of Local Businesses (completed by ECWRPC)

Five Sectors For Global Market Research

- Identify sectors with best mix of global trade opportunity and impact on the regional economy
- Focus efforts and resources in the areas where you will see results

Global Market Research, Needs Analysis & Implementation Planning

Industry Driver Analysis

- 13 Industry Clusters That Incorporate the Three Digit NAICS Code Production Sectors

- Analysis Variables:
  - Employment
  - Output
  - Growth of Employment
  - Growth of Output
  - Output / Employee

- Geographies of Analysis:
  - 18 County Study Region
  - Wisconsin
  - United States

Industry Cluster	Primary Production Sectors
Agribusinesses, Food Processing & Tech.	311 - Food mfg. 312 - Beverage & tobacco product mfg.
Apparel & Textiles	313 - Textile mills 314 - Textile product mills 315 - Apparel mfg.
Forest & Wood Products	321 - Wood product mfg. 322 - Paper mfg. 337 - Furniture & related product mfg.
Printing & Publishing	323 - Printing & related support activities
Energy	324 - Petroleum & coal products mfg. 325 - Chemical mfg.
Chemicals	325 - Chemical mfg. 326 - Plastics & rubber products mfg. 327 - Nonmetallic mineral product mfg.
Advanced Materials	325 - Chemical mfg. * 331 - Primary metal mfg. * 334 - Computer & electronic product mfg. * 332 - Fabricated metal product mfg. * 326 - Plastics & rubber products mfg. 327 - Nonmetallic mineral product mfg. 333 - Machinery mfg.
Primary Metal Mfg.	331 - Primary metal mfg. *
Fabricated Metal Product Mfg.	332 - Fabricated metal product mfg. *
Machinery Mfg.	333 - Machinery mfg.
Computer & Electric Product Mfg.	334 - Computer & electronic product mfg. *
Electrical Equip., Appliance & Component Mfg.	335 - Electrical equip., appliance, & compone
Transportation Equipment Mfg.	336 - Transportation equipment mfg.

Understanding the Analysis Process

- **This is a directional analysis.** No single component of the quantitative or qualitative process will solely determine the final targets for global research.

- **Data is always incomplete.** Everything must be tempered with broader industry trends and local insight.

Inventory

Newmark Knight Frank

Bay-Lake Regional Planning Commission

East Central Wisconsin Regional Planning Commission

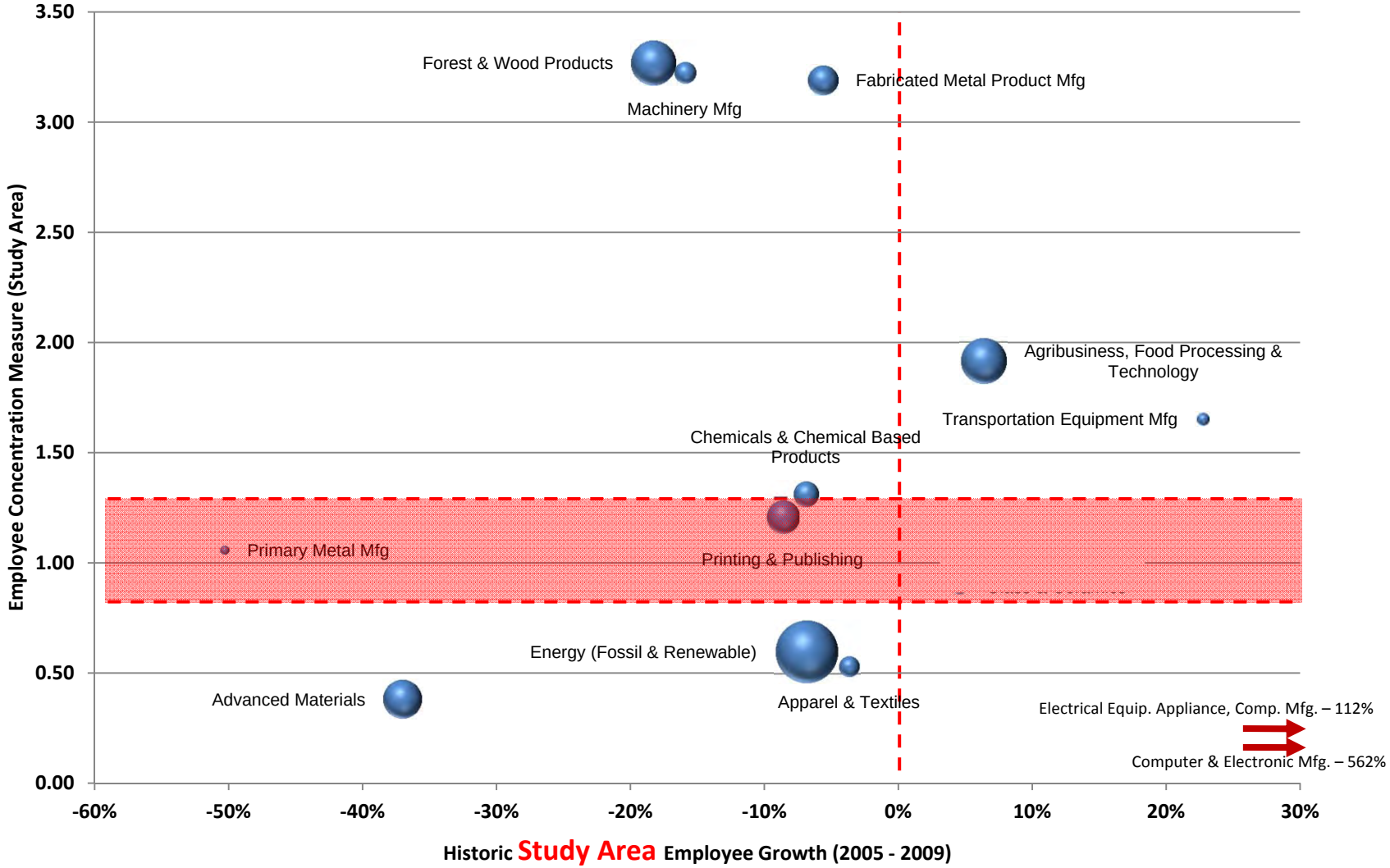
Snapshot: Key Industry Clusters

Leading clusters in key metrics of industry environment

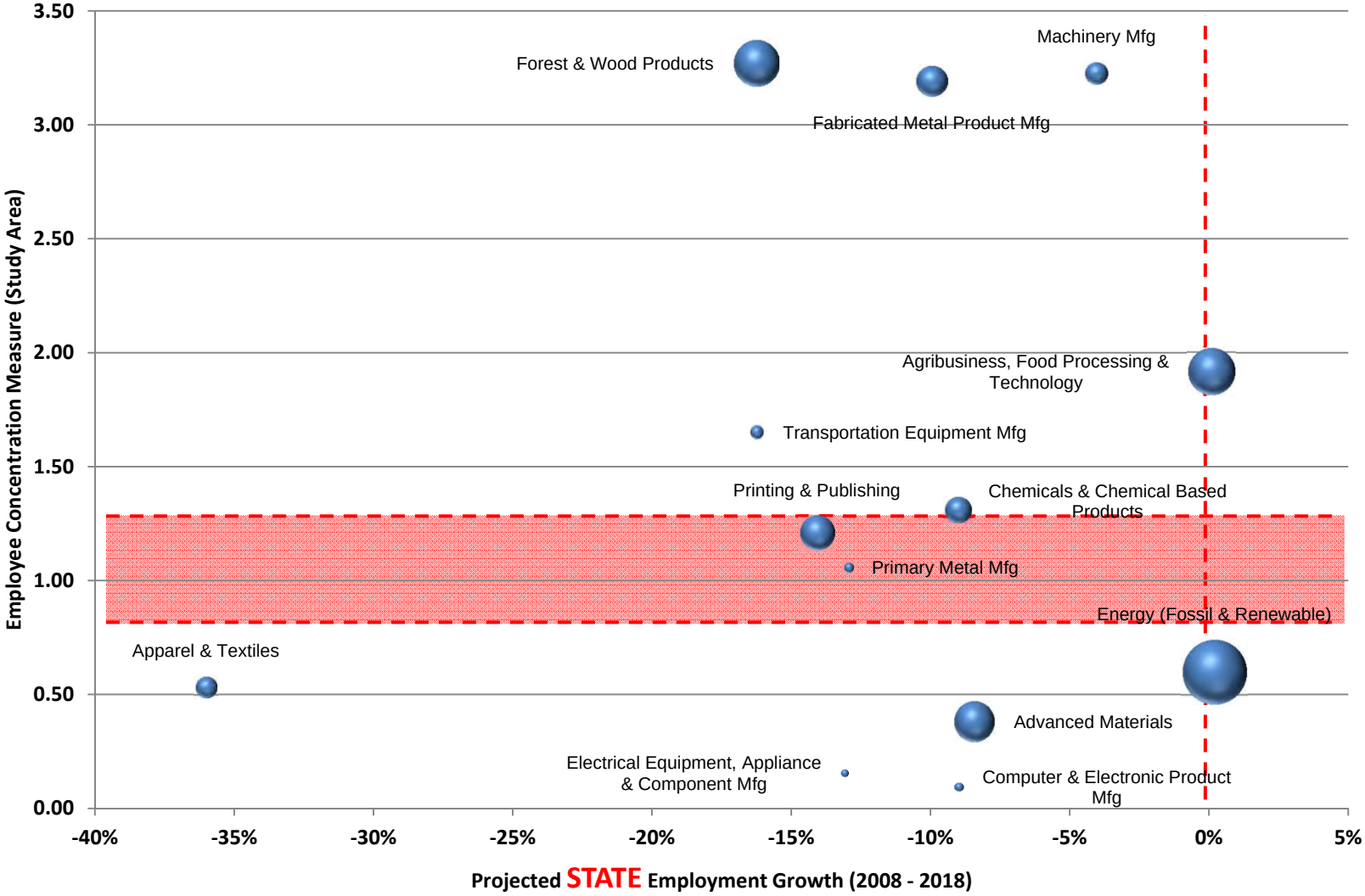
	Employment Leaders		Wage Leaders		Specilizations	
	State	Study Area	State	Study Area	State	Study Area
Agribusinesses, Food Processing & Technology						
Apparel & Textiles						
Forest & Wood Products						
Printing & Publishing						
Energy						
Chemicals						
Advanced Materials						
Primary Metal Manufacturing						
Fabricated Metal Product Manufacturing						
Machinery Manufacturing						
Computer & Electric Product Manufacturing						
Electrical Equipment, Appliance & Component Manufacturing						
Transportation Equipment Manufacturing						

The variation between the state and the study area is minimal. This allows state level data to be used with relative confidence when study area specific data is not available.

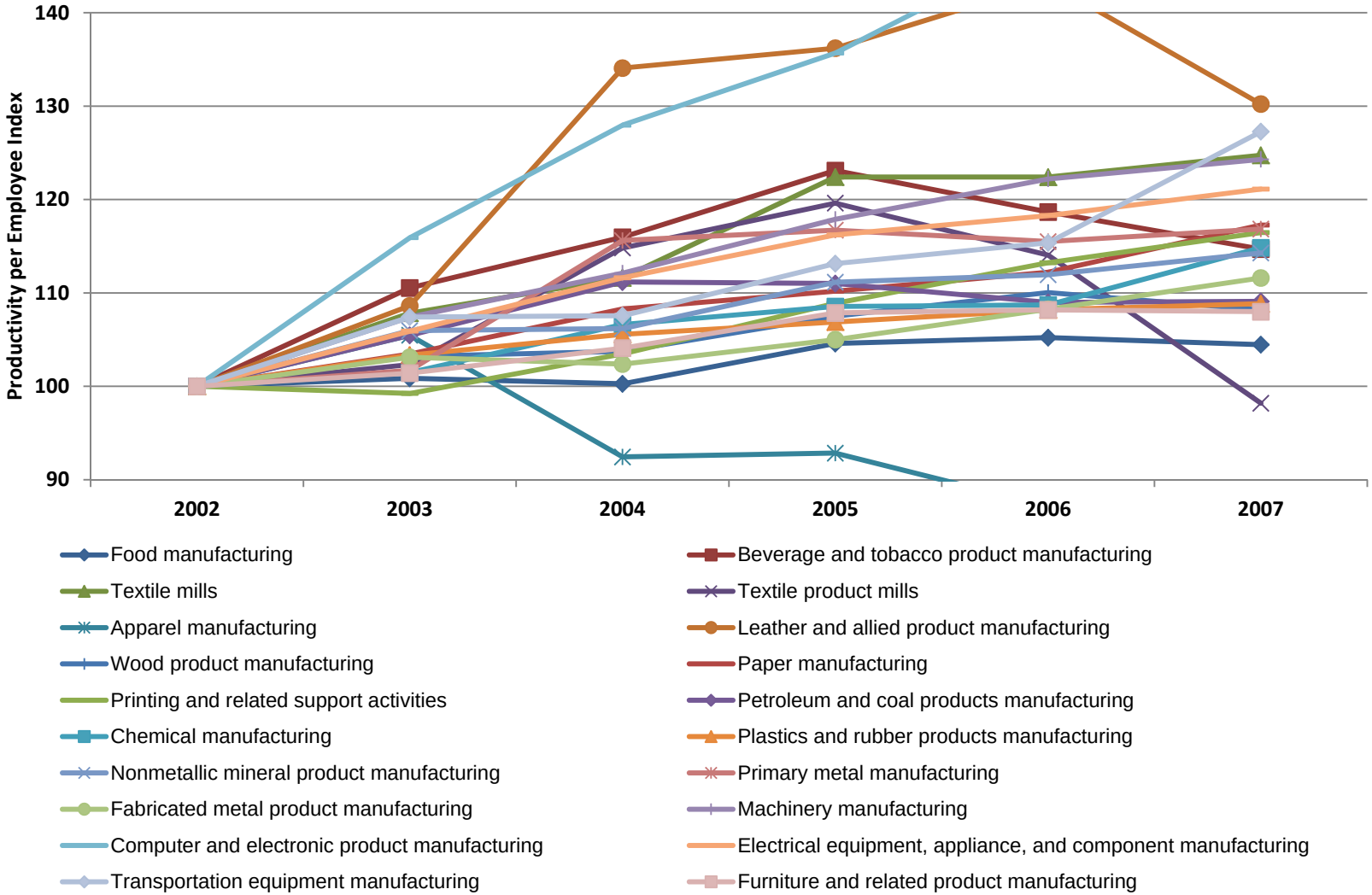
Historical Cluster Growth



Projected Employment Growth



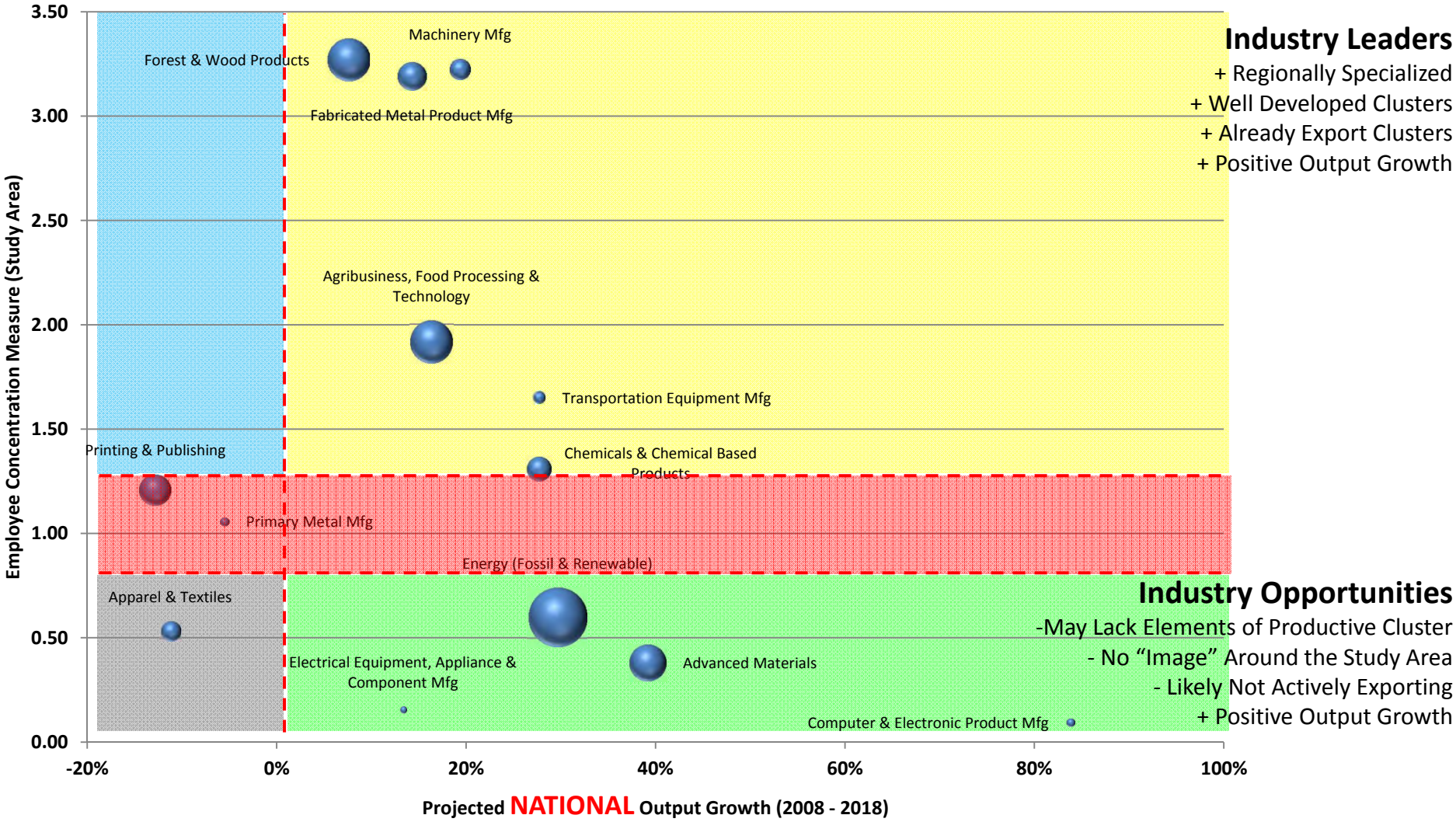
Trends in Industry Efficiency



What Does this Mean?

- Production firms must do more with less in order to compete globally; the recession has accelerated this reality
- To foster employment growth in production sectors they must grow “basic production”
- Basic production is the production of goods to meet demands outside of the local area (study region) = EXPORTS
- The development of a Global Trade Strategy should be focused on sectors with anticipated output growth
- The development of a Global Trade Strategy should be focused on markets where demand is growing and/or industry cluster supply chains are being developed

Projected Output Growth



Clusters Warranting Further Analysis

- Industry Leaders
  - Forest & Wood Product Manufacturing
  - Fabricated Metal Product Manufacturing
  - Machinery Manufacturing
  - Agribusiness, Food Processing and Technology
  - Transportation Equipment Manufacturing
  - Chemicals & Chemical Based Products
- Industry Opportunities
  - Electrical Equipment, Appliance and Component Manufacturing
  - Energy
  - Advanced Materials
  - Computer and Electric Product Manufacturing

Clusters Warranting Further Analysis

Component Clusters	Production Components
Forest & Wood Products	321 - Wood product mfg.
	322 - Paper mfg.
	337 - Furniture and related product mfg.
Agribusinesses, Food Processing & Technology	311 - Food mfg.
	312 - Beverage and tobacco product mfg.
Chemicals & Chemical Based Products	325 - Chemical mfg.
	326 - Plastics and rubber products mfg.
	327 - Nonmetallic mineral product mfg.
Energy	324 - Petroleum and coal products mfg.
	~~325 - Chemical mfg.~~
Advanced Materials	~~325 - Chemical mfg. *~~
	331 - Primary metal mfg. *
	~~334 - Computer and electronic product mfg. *~~
	~~332 - Fabricated metal product mfg. *~~
	~~326 - Plastics and rubber products mfg.~~
	~~327 - Nonmetallic mineral product mfg.~~
	~~333 - Machinery mfg.~~
	332 - Fabricated metal product mfg.
	333 - Machinery mfg.
	336 - Transportation equipment mfg.
	335 - Electrical equip, appliance, and component mfg.
	334 - Computer and electronic product mfg.

- Filter #1: Remove Non-Core Redundant Production Sectors
  - **---IMPORTANT---**
- This is not the final say on the inclusion/exclusion of these sectors. All streams of initial research will be combined to determine the target sectors
- Final sectors will go beyond the three digits NAICS level.

Clusters Warranting Further Analysis

Component Clusters	Production Components
Forest & Wood Products	321 - Wood product mfg.
	~~322 - Paper mfg.~~
	337 - Furniture and related product mfg.
Agribusinesses, Food Processing & Technology	311 - Food mfg.
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	~~327 - Nonmetallic mineral product mfg.~~
	~~333 - Machinery mfg.~~
	332 - Fabricated metal product mfg.
	333 - Machinery mfg.
	336 - Transportation equipment mfg.
	335 - Electrical equip, appliance, and component mfg.
	334 - Computer and electronic product mfg.

- Filter #2: Remove Production Components Not Contributing to Overall Cluster Growth

Clusters Warranting Further Analysis

Component Clusters	Production Components
Forest & Wood Products	321 - Wood product mfg.
	~~322 - Paper mfg.~~
	337 - Furniture and related product mfg.
Agribusinesses, Food Processing & Technology	311 - Food mfg.
	~~312 - Beverage and tobacco product mfg.~~
Chemicals & Chemical Based Products	325 - Chemical mfg.
	326 - Plastics and rubber products mfg.
	327 - Nonmetallic mineral product mfg.
Energy	~~324 - Petroleum and coal products mfg.~~
	~~325 - Chemical mfg.~~
Advanced Materials	~~325 - Chemical mfg. *~~
	~~331 - Primary metal mfg. *~~
	~~334 - Computer and electronic product mfg. *~~
	~~332 - Fabricated metal product mfg. *~~
	~~326 - Plastics and rubber products mfg.~~
	~~327 - Nonmetallic mineral product mfg.~~
	~~333 - Machinery mfg.~~
	332 - Fabricated metal product mfg.
	333 - Machinery mfg.
	336 - Transportation equipment mfg.
	~~335 - Electrical equip, appliance, and component mfg.~~
	334 - Computer and electronic product mfg.

- Filter #3: Remove Production Components That Have Little Presence in the Region

Analysis

Newmark Knight Frank

Project Analysis

- Quantitative Analysis of Existing Trade Flows
  - What sectors are currently exporting?
  - Can we be more specific than the three digit NAICS code?
  - What is the approximate percentage of total output exported?

- Qualitative Analysis of Existing Trade Flows
  - What existing businesses have had success breaking into the trade market?
  - What sectors are growing or thriving in a way that is contrary to the data?
  - What opportunities for expansion are there in existing industry?

External Dynamics – Controllable/Uncontrollable

Uncontrollable

- State business climate
- New state economic development initiatives
- Federal industry cluster initiative
- International trade policy
- Changes in international relationships

Start thinking about others!

Controllable

- Business expertise and preparedness
- Infrastructure quality and availability
- Labor preparation
- Local trade incentives

Prepare now to control the controllable and mitigate, to the extent possible, the uncontrollable.

What Are Your Goals?

- What are your Regional Economic Development KPIs?
- Jobs
- Wages
- Output/volume
- Number of New Businesses
- Quality of Life Metrics
- Technology Transfer/Commercialization
- Competitive Benchmark
- Etc.

How does the Global Trade Strategy impact regional KPIs?

AND

How will you measure success?

Industry Driver Analysis

Newmark Knight Frank

East Central Wisconsin Regional Planning Commission

What We Did

1. Industry impact & potential analysis for each production sector
   → Identify the general sectors that demonstrate potential as an export sector target

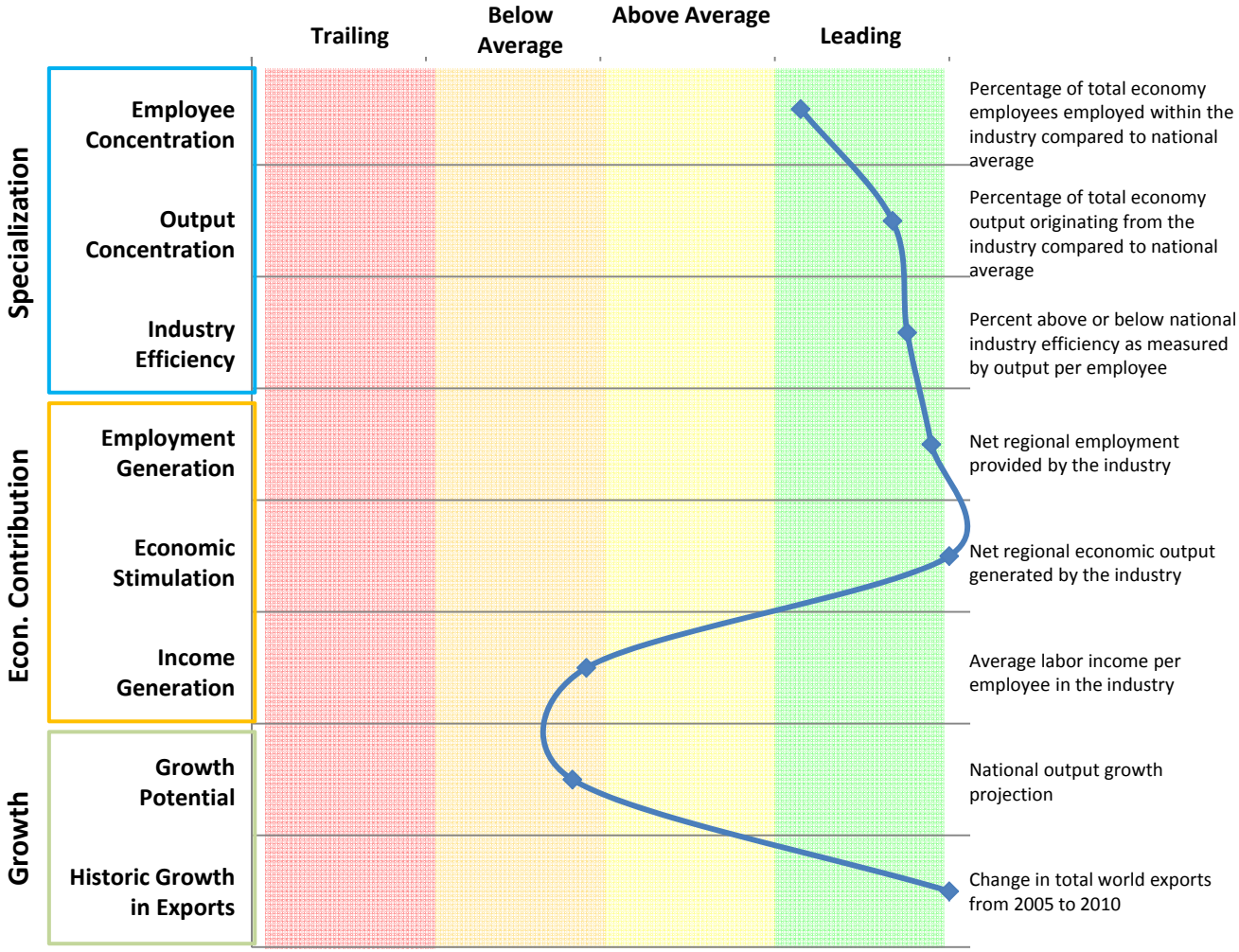
2. Industry impact & potential analysis at the detailed subsector level
   → Identified the specific production segments in the region that drive the economy and have export growth potential

3. Researched trends in export activity at the industry and subsector level
   → Highlighted opportunity present in the global market place based on demand trends

4. Conducted interviews with key global trade "support professionals"
   → Identified common trends, opportunities and barriers

Analysis of Study Area Production Sectors

311 – Food Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

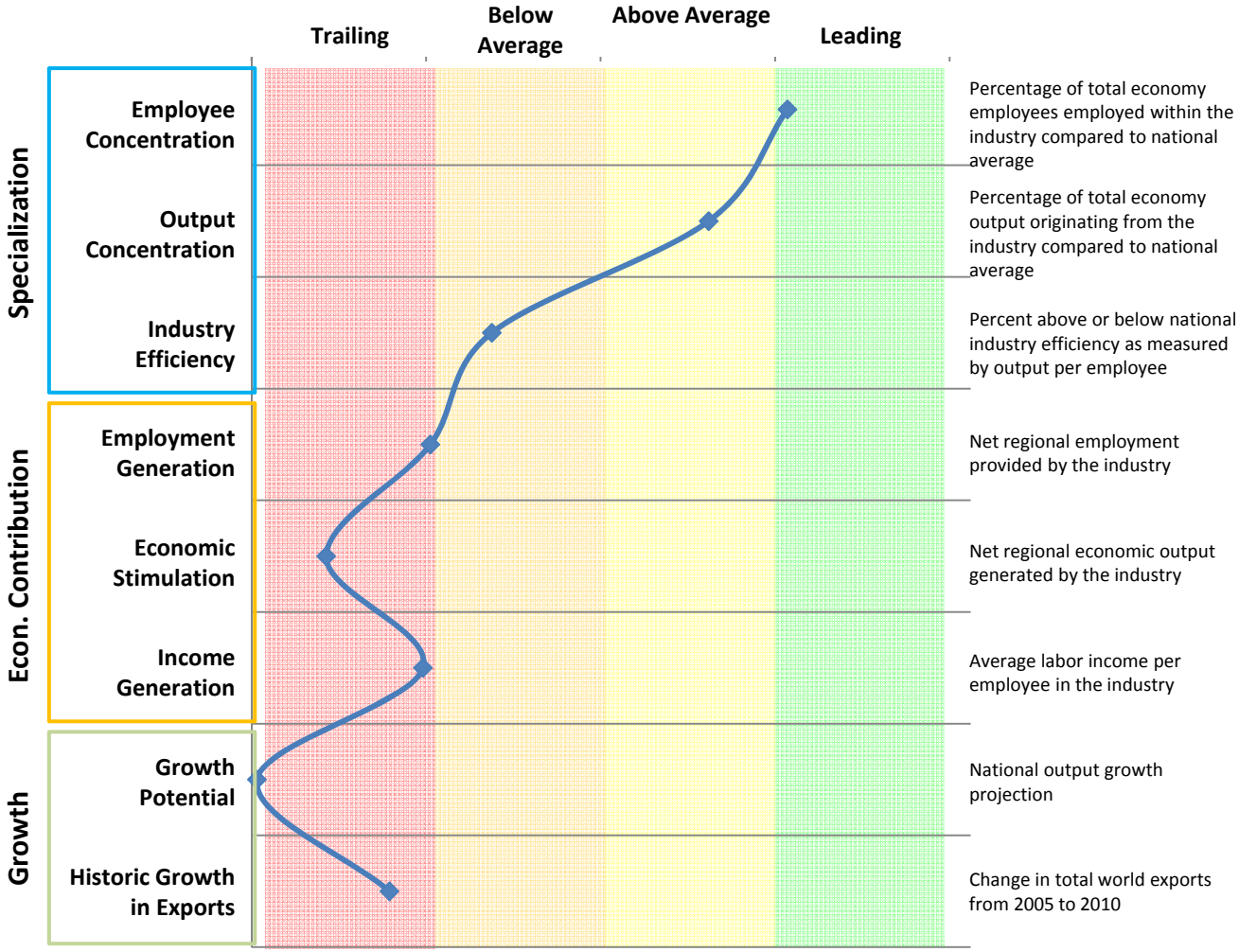
$35.7

Top 5 Export Destination Countries for WI Food Products	
Canada	$611.2 M
Mexico	$123.9M
South Korea	$81.8M
Japan	$74.0M
China	$46.9M

Top 5 Export Growth Countries for WI Food Products	
Djibouti	25,564% ($6.6M)
Egypt	7,939% ($10.8M)
Jordan	6,770% ($1.8M)
Dominican Rep.	2,670% ($25.1M)
Peru	1,841% ($2.6M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

321 – Wood Product Manufacturing



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Export Gap

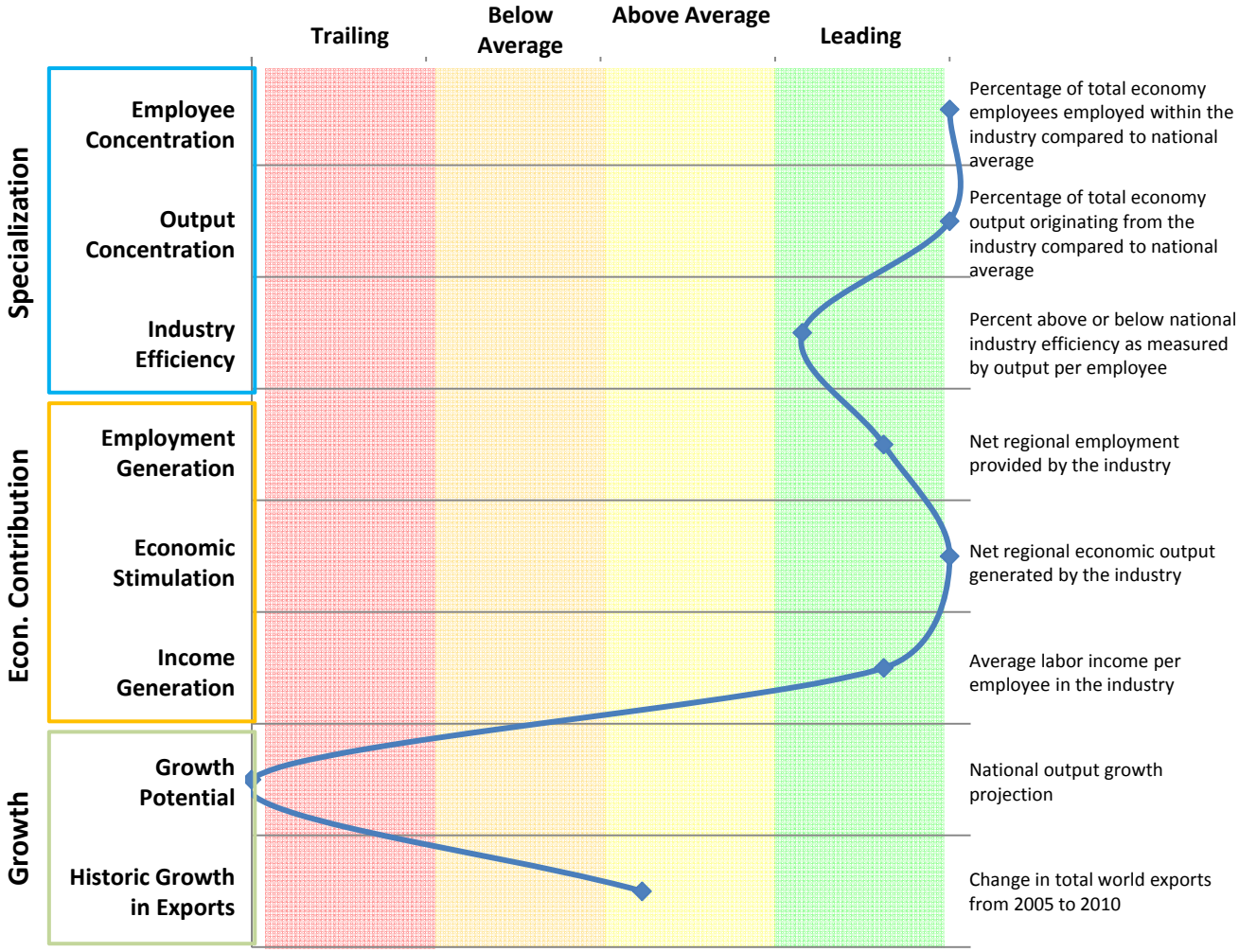
$3.4 M

Top 5 Export Destination Countries for WI Wood Products	
Canada	$116.6M
China	$11.6M
United Kingdom	$6.4M
Mexico	$5.2M
Japan	$5.0M

Top 5 Export Growth Countries for WI Wood Products		
Russian Fed.	4,182%	($1.1M)
Netherlands	2,686%	($1.4M)
Viet Nam	819%	($1.5M)
South Korea	742%	($2.1M)
Italy	252%	($4.7M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

322 – Paper Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

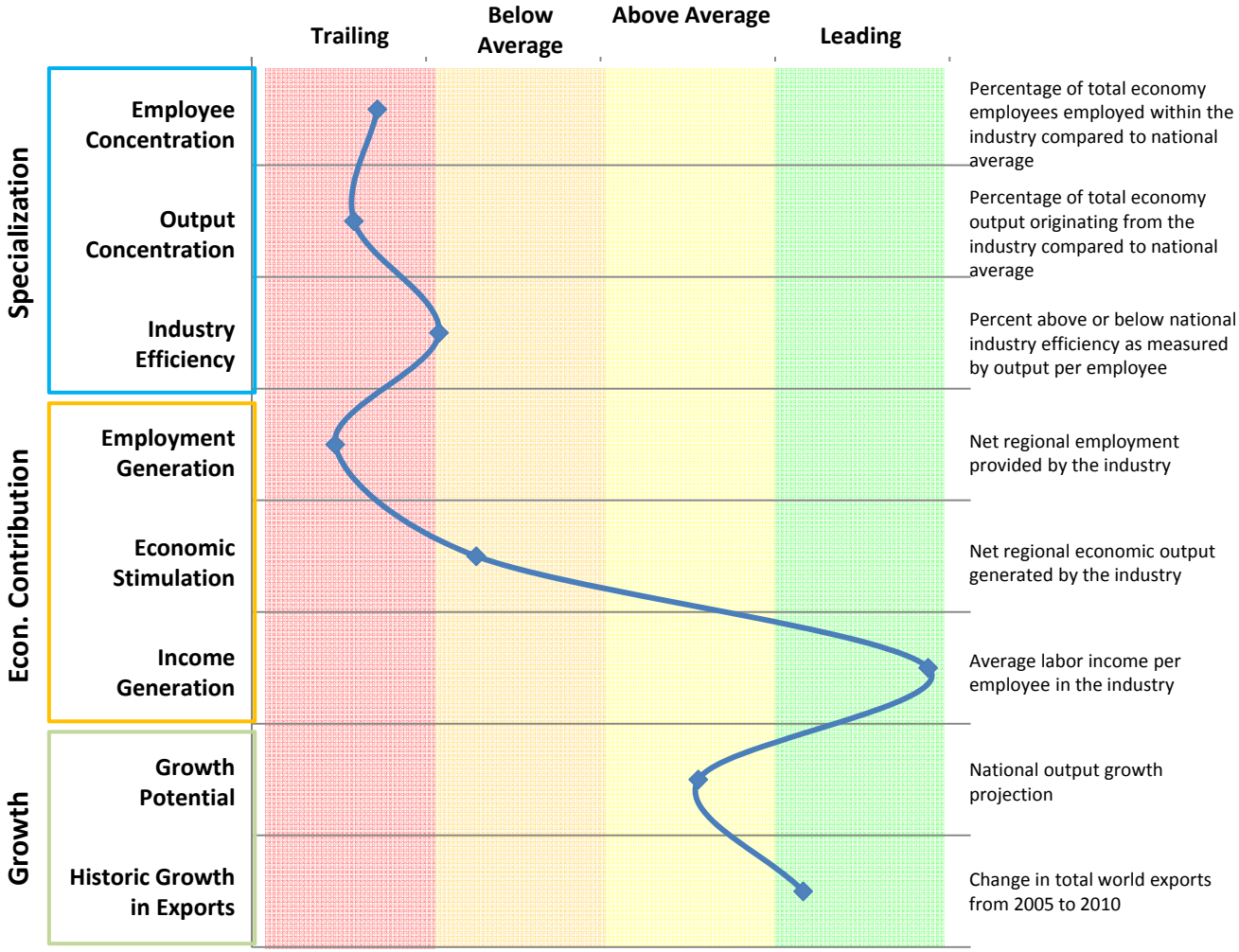
$175.6 M

Top 5 Export Destination Countries for WI Paper Products	
Canada	$512.0M
Mexico	$102.8M
China	$29.1M
Germany	$15.8M
Taiwan	$13.9M

Top 5 Export Growth Countries for WI Paper Products		
Austria	6,962%	($1.3M)
Bahrain	2,771%	($1.6M)
UAE	706%	($3.3M)
Peru	453%	($1.3M)
Saudi Arabia	430%	($2.1M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

325 – Chemical Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

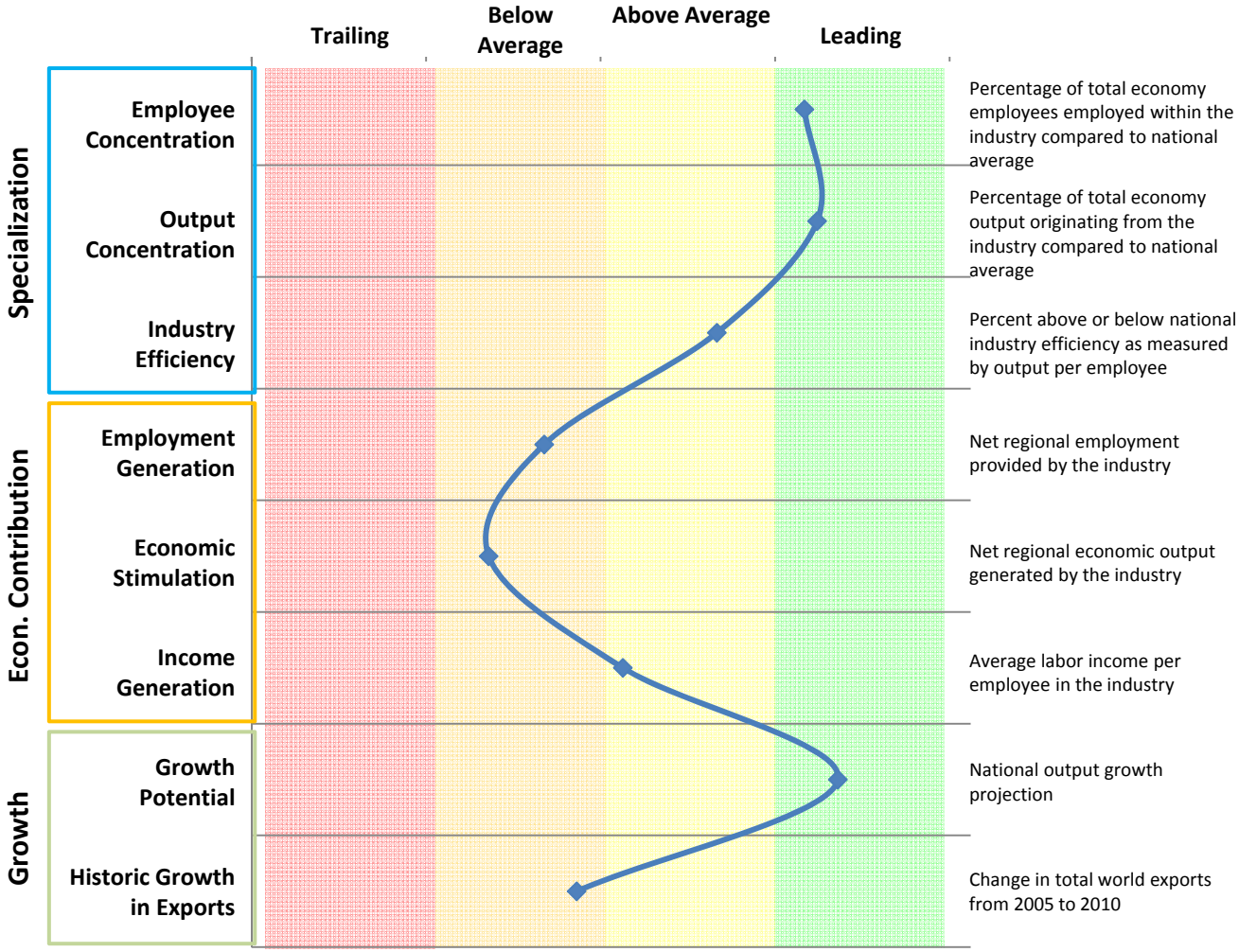
$6.8 M

Top 5 Export Destination Countries for WI Chemical Products	
Canada	$321.2M
France	$153.5M
Germany	$141.2M
Mexico	$94.4M
China	$58.5M

Top 5 Export Growth Countries for WI Chemical Products		
Austria	1,467%	($2.1M)
Egypt	519%	($1.7M)
India	363%	($11.0M)
Germany	312%	($141.0M)
Brazil	251%	($26.4M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

326 – Plastics & Rubber Products Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

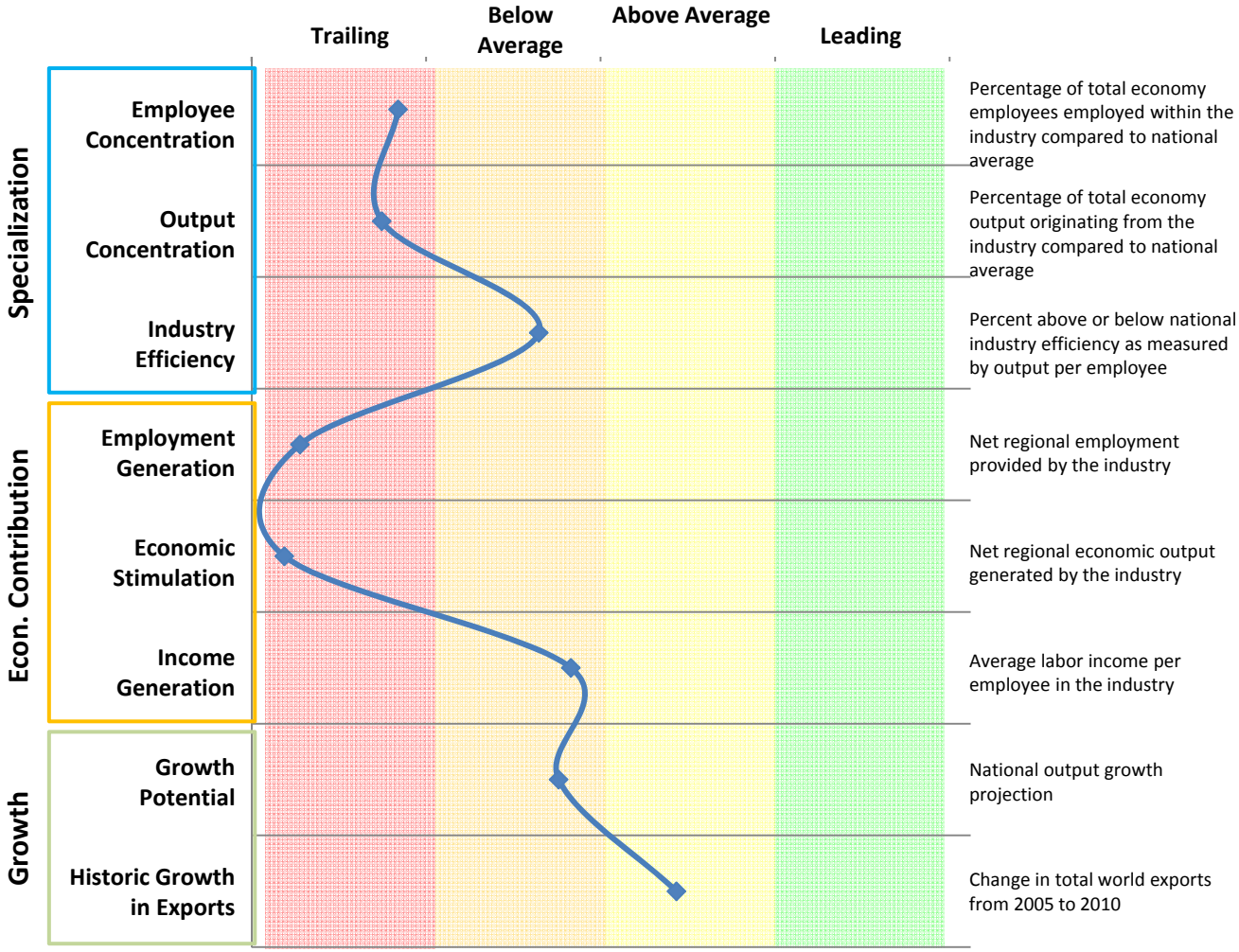
$11.2 M

Top 5 Export Destination Countries for WI Plastics & Rubber Products	
Canada	$277.5M
Mexico	$103.1M
China	$28.3M
Germany	$17.5M
Belgium	$15.9M

Top 5 Export Growth Countries for WI Plastics & Rubber Products		
Poland	1,187%	($3.0M)
Czech Rep.	741%	($6.0M)
India	506%	($2.3M)
Indonesia	489%	($1.4M)
Hungary	397%	($1.5M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

327 – Nonmetallic Mineral Product Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

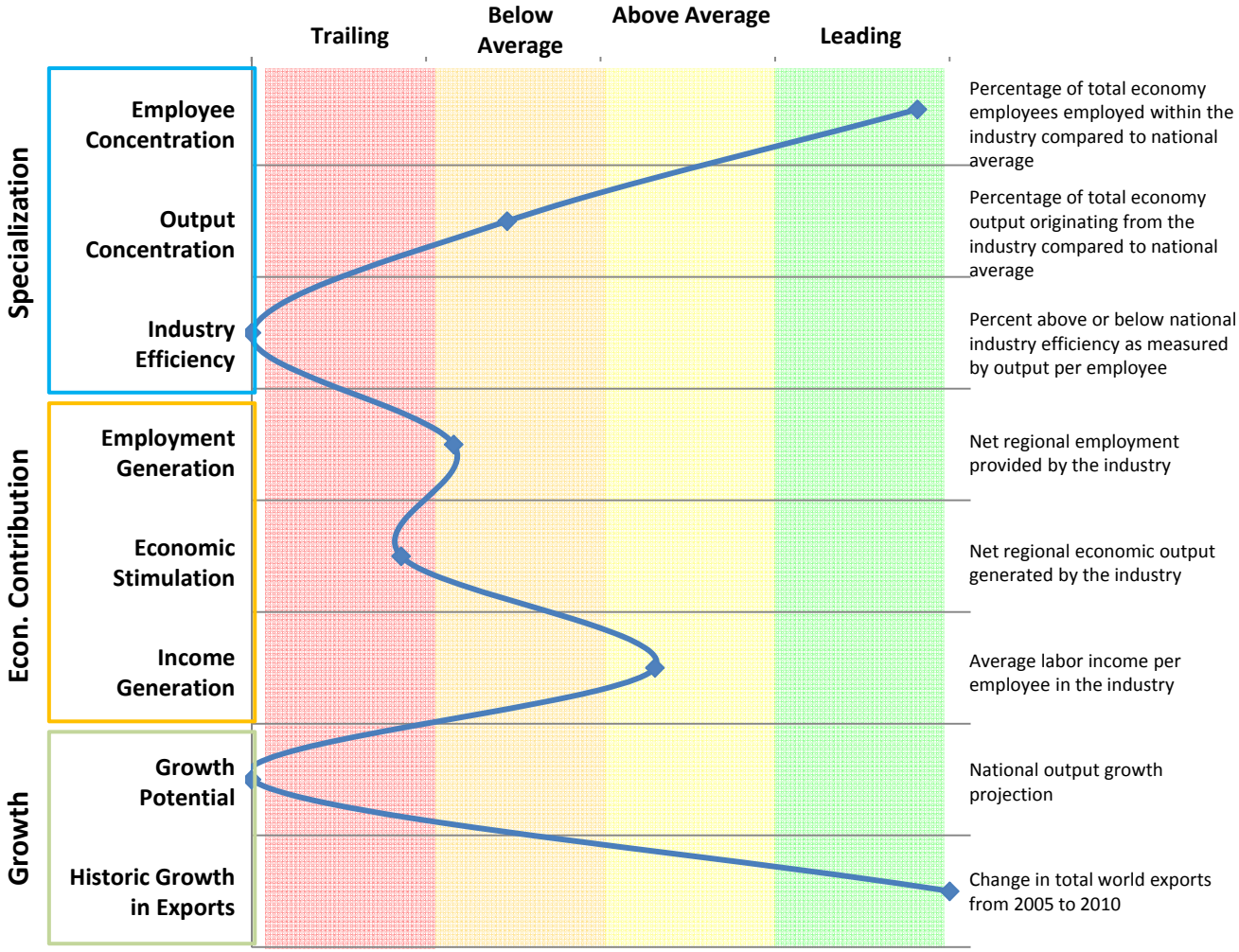
$0.8 M

Top 5 Export Destination Countries for WI Nonmetallic Mineral Products	
Canada	$55.8M
Mexico	$17.0M
Germany	$8.7M
China	$5.2M
France	$4.8M

Top 5 Export Growth Countries for WI Nonmetallic Mineral Products		
India	2,002%	($1.3M)
Malaysia	305%	($1.0M)
Mexico	304%	($17.0M)
Saudi Arabia	262%	($2.8M)
Singapore	195%	($1.0M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

331 – Primary Metal Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

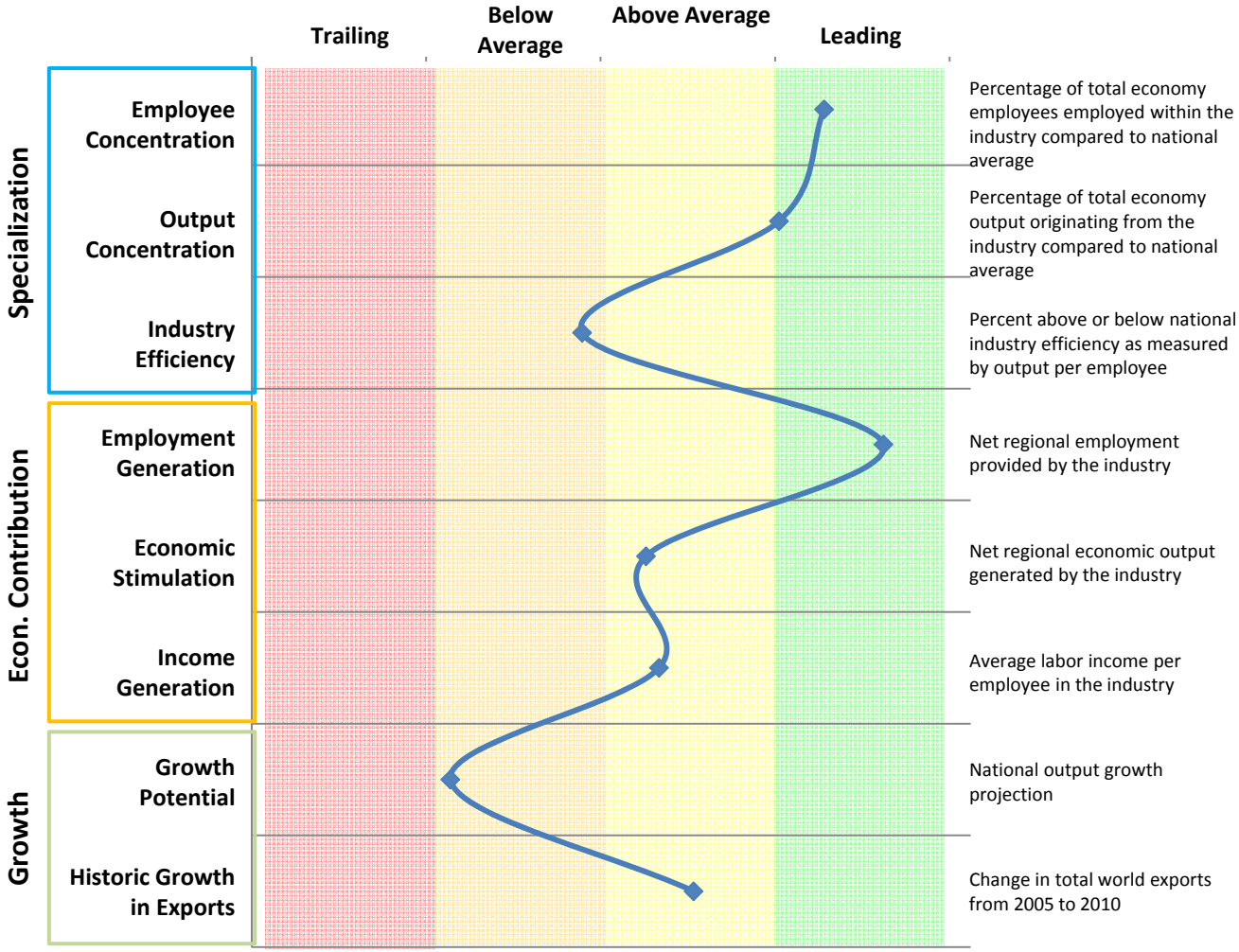
$12.4 M

Top 5 Export Destination Countries for WI Primary Metal Products	
Canada	$67.3M
Mexico	$63.5M
China	$16.1M
Singapore	$11.0M
Germany	$170M

Top 5 Export Growth Countries for WI Primary Metal Products		
Costa Rica	2,304%	($1.7M)
Philippines	2,203%	($1.9M)
Thailand	916%	($1.4M)
Saudi Arabia	786%	($1.5M)
Singapore	451%	($11.0M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

332 – Fabricated Metal Product Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

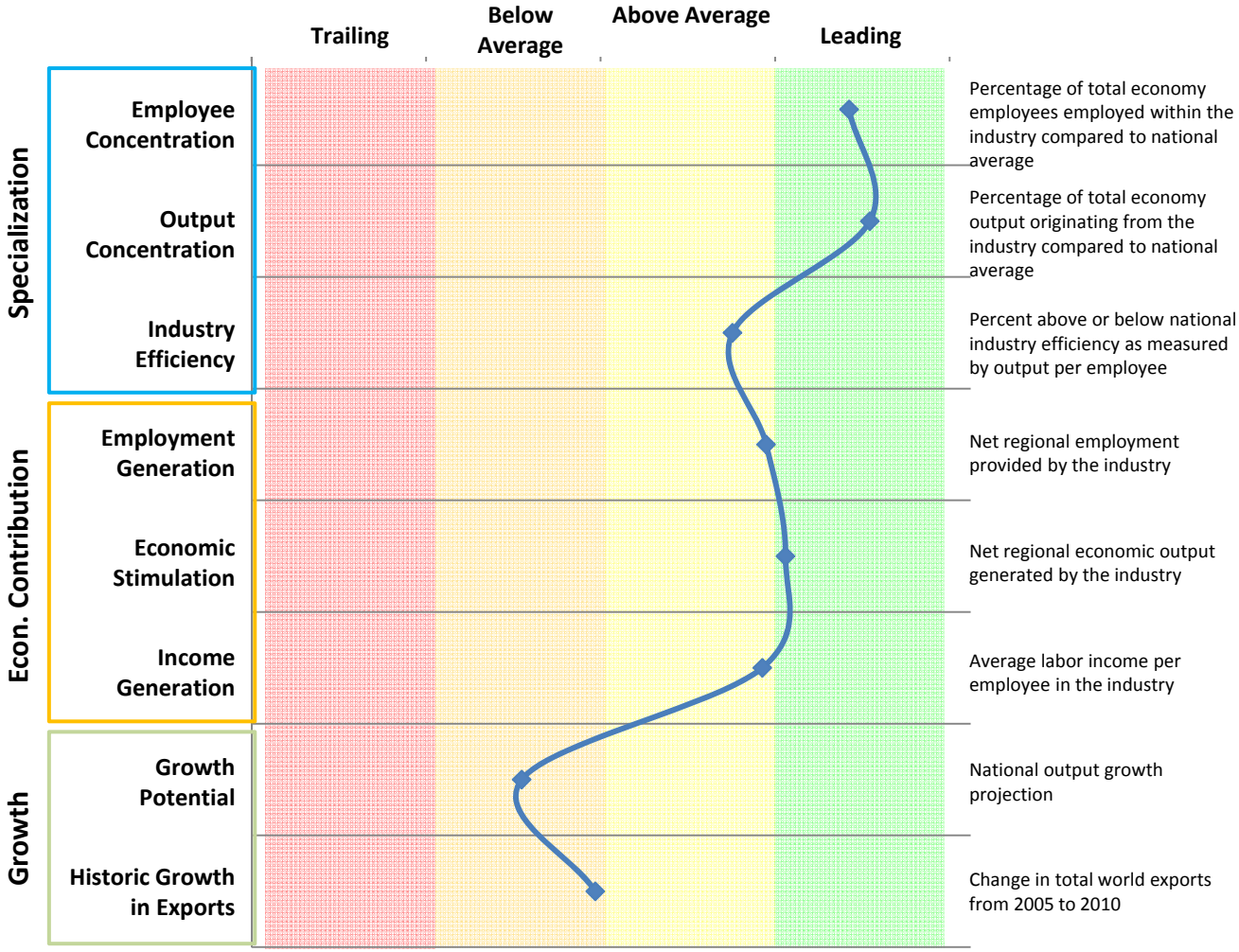
$4.8 M

Top 5 Export Destination Countries for WI Fabricated Metal Products	
Canada	$194.3M
Mexico	$140.0M
China	$69.6M
United Kingdom	$20.3M
Germany	$15.3M

Top 5 Export Growth Countries for WI Fabricated Metal Products		
Mauritania	6,393%	($1.1M)
Kuwait	758%	($2.4M)
Peru	601%	($4.0M)
Saudi Arabia	594%	($9.3M)
Chile	589%	($14.6M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

333 – Machinery Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

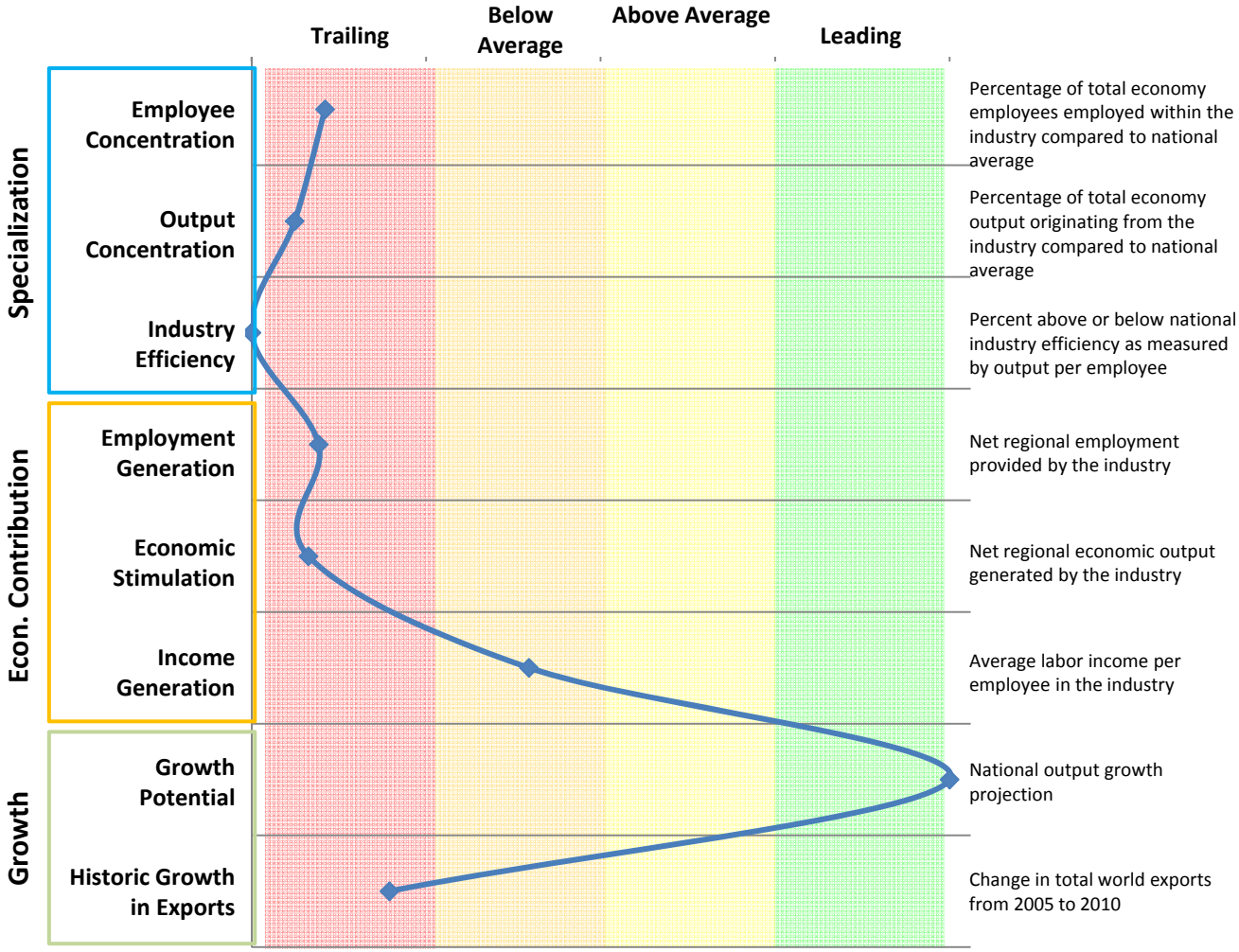
$16.1 M

Top 5 Export Destination Countries for WI Machinery Products	
Canada	$1,381.3M
China	$424.0M
Chile	$331.2M
Mexico	$317.1M
Australia	$294.7M

Top 5 Export Growth Countries for WI Machinery Products	
Uzbekistan	12,009% ($11.5M)
Libya	3,648% ($1.5M)
Ethiopia	1,898% ($1.1M)
Haiti	1,178% ($1.7M)
Romania	1,032% ($22.4M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

334 – Comp. & Electronic Product Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

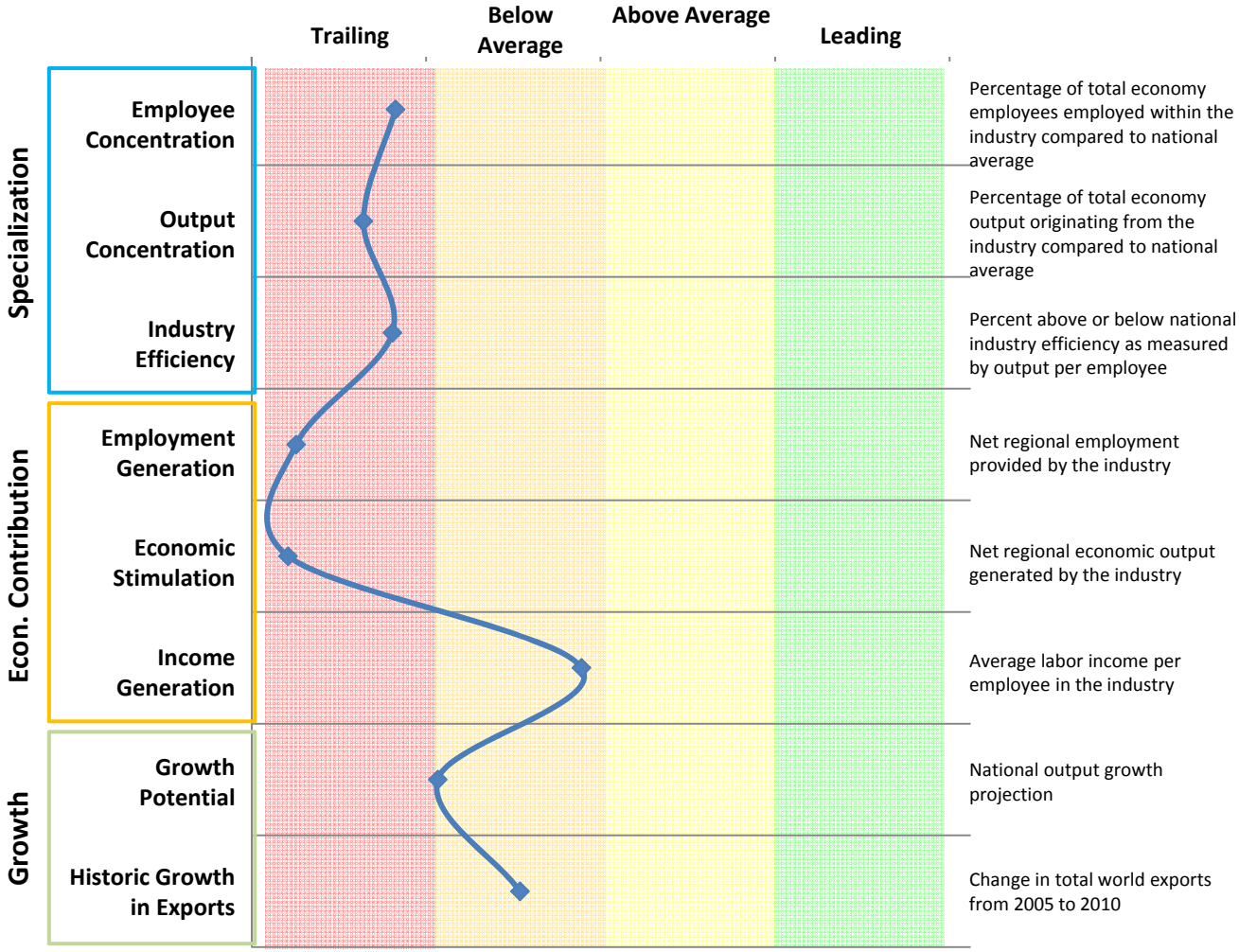
$4.1 M

Top 5 Export Destination Countries for WI Comp & Electronic Products	
China	$342.2M
Japan	$308.0M
Canada	$306.0M
France	$235.2M
Mexico	$204.3M

Top 5 Export Growth Countries for WI Comp & Electronic Products	
Luxembourg	18,374% ($30.1M)
Afghanistan	4,174% ($1.4M)
Latvia	2,565% ($2.9M)
Morocco	1,868% ($3.2M)
Thailand	1,229% ($132.4M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

335 – Elect. Equip, Appliance & Product Manufacturing Component



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

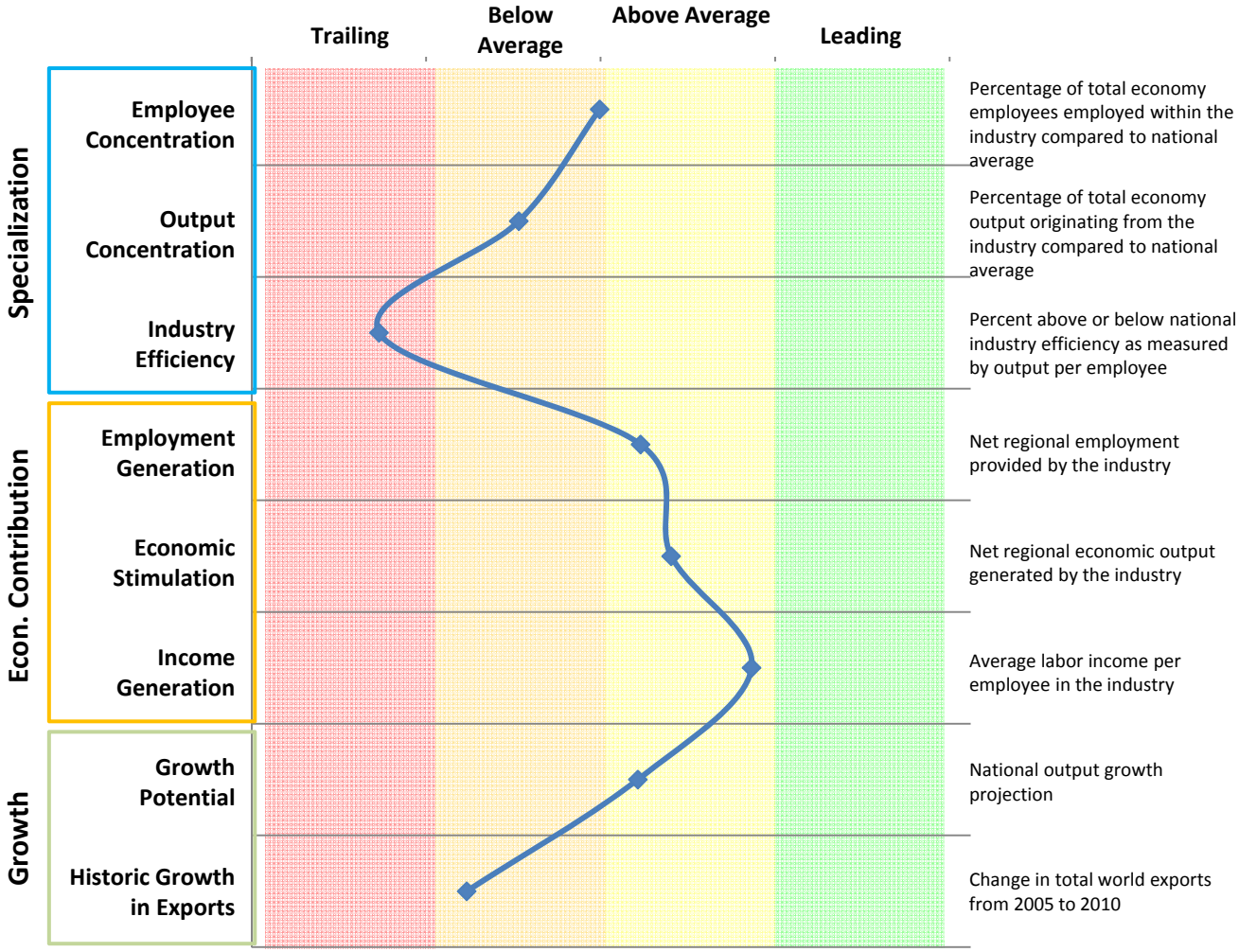
$8.7 M

Top 5 Export Destination Countries for WI Elect. Equip., Appliance & Component Products	
Canada	$299.3M
Mexico	$219.9M
China	$58.3M
Australia	$48.4M
United Kingdom	$44.1M

Top 5 Export Growth Countries for WI Elect. Equip., Appliance & Component Products		
Afghanistan	20,463%	($1.6M)
Luxembourg	9,896%	($5.2M)
Peru	2,000%	($6.2M)
Russian Fed	517%	($2.8M)
Philippines	328%	($11.4M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

336 – Transportation Equipment Manufacturing



Note: The distinction between Trailing, Below Average, Above Average and Leading industries is made by comparing regional production industries to each other. For example, a trailing industry may still have positive growth potential, but compared to the other production industries it may be the lowest.

Export Gap

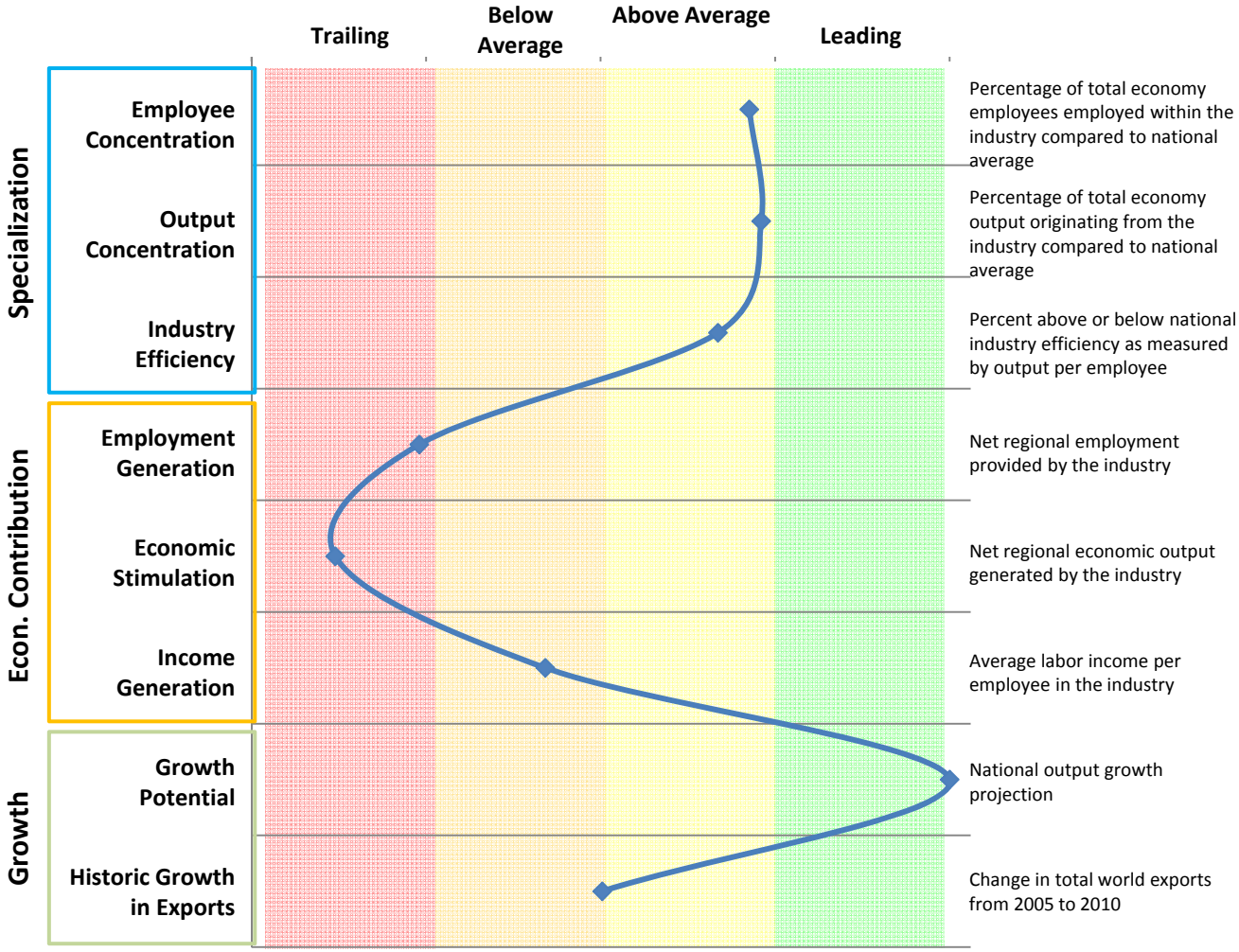
$42.6 M

Top 5 Export Destination Countries for WI Transportation Equipment	
Canada	$785.8M
Mexico	$324.5M
Germany	$71.5M
United Kingdom	$61.0M
Australia	$56.0M

Top 5 Export Growth Countries for WI Transportation Equipment		
Paraguay	6,976%	($1.4M)
Senegal	6,790%	($1.2M)
Afghanistan	5,678%	($9.8M)
Bangladesh	2,940%	($10.7M)
Bahamas	2,021%	($1.4M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

337 – Furniture & Related Product Manufacturing



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Export Gap

$0.8 M

Top 5 Export Destination Countries for WI Furniture Products	
Canada	$92.3M
Saudi Arabia	$9.0M
Mexico	$7.8M
United Kingdom	$5.0M
China	$3.0M

Top 5 Export Growth Countries for WI Furniture Products		
France	1,139%	($1.5M)
Belgium	774%	($1.4M)
Brazil	737%	($1.4M)
Italy	373%	($1.8M)
Australia	211%	($1.1M)

Constrained to countries that received more than $1.0M in exports in 2010. (2010 export value)

Industry Analysis Summary

	Specialization	Economic Contribution	Growth Potential	Export Gap
311 - Food Mfg				$35.7 Million
321 - Wood Product Mfg				$3.4 Million
322 - Paper Mfg				$175.6 Million
325 - Chemical Mfg				$6.8 Million
326 - Plastics & Rubber Products Mfg				$11.2 Million
327 - Nonmetallic Mineral Product Mfg				$0.8 Million
331 - Primary Metal Mfg				$12.4 Million
332 - Fabricated Metal Product Mfg				$4.8 Million
333 - Machinery Mfg				$16.1 Million
334 – Comp. & Electronic Product Mfg				$4.1 Million
335 – Elec. Equip., Appliance & Component Mfg				$8.7 Million
336 - Transportation Equipment Mfg				$42.6 Million
337 - Furniture & Related Product Mfg				$0.8 Million

Clusters for further research and disaggregation

Detailed Industry Disaggregation

311 – Food Manufacturing

Exports Trends in Food Manufacturing Industry

- Exports of consumer food products is growing three times faster than US sales
- Urbanization and income drive growth in emerging markets (China, India, Turkey, Thailand, etc.)
- Dry whey was the largest dairy export from the US in 2009, followed by nonfat dry milk and lactose. Cheese manufacturers could dry sweet whey to produce dry whey. Local milk producers/processers cannot keep up with explosive demand in emerging markets; US can fill the demand gap
- Because of recent programs to engender trust, the perception of US beef in South Korea continue to improve, making it one of the fastest growing markets
- Six of the top 12 US consumer food export markets are also the top frozen food markets
- Top frozen food exports include prepared meals of meat and seafood, potato products (French fries), bakery goods, fruits/vegetables, poultry and orange juice
- Project highest growth markets through 2015: Morocco, India Viet Nam, China, Thailand, Argentina, Brazil, Indonesia, Saudi Arabia, Columbia

Markets of Interest

- **Canada:** Beverages, Dry Grocery, Frozen Foods, Perishables, Prepared Foods
- **Mexico:** Poultry, Meat, Fresh Vegetables, Processed Fruit and Vegetables, Breakfast Cereals, Processed Meat, Wine and Beer; Dry Whey
- **Japan:** Pork, Beef, Cheese, Snack Food, Frozen Vegetables, Fruit Juice, Berries, Nuts, Wine, Pet Food, Cakes, Waffles, Pie, Salmon
- **China:** Nuts/Dried Fruit, Seafood, Poultry, Red Meat, Frozen Vegetables, Infant Formula, Baby Food, Fresh Fruit, Mexican Food, Milk Powder and Whey
- **Korea:** Beef, Pork, Poultry, Citrus, Chocolate, Whey, Wine, Seafood, Bread, Cakes, Pastry, Nuts
- **South East Asia:** Dry Whey, Frozen Food Products
- **Middle East:** Cheese
- **Columbia:** Frozen Food Products

311 – Food Manufacturing

Key Food Manufacturing Segments in Study Area		
Sector	**NAICS Code**	**Key Attributes**
Dairy Products (esp. Cheese)	3115	• Leading employer and output generator (second highest in all production segments) • Region is highly specialized & efficient • Above average wages • Large export gap due to quantity of product produced in the region • Regional focus is cheese products
Animal Products	31161	• Leading employer and output generator • Region is highly efficient • Output generation per employee is much lower than other food sectors • Average wages • Regional export levels are on par with national averages • Regional focus is animal processing excluding poultry
Preserved Foods (frozen & canned)	3114	• Leading employer and output generator • Region is highly specialized, but with industry efficiency below national average • Output generation per employee is much lower than other food sectors • Average wages • Regional export levels are on par with national averages • Regional focus is frozen foods and fruit and vegetable canning/preserving
Grain Based Products	3112	• Not as large employer as other food manufacturing segments, but still significant • Region is highly efficient • Below average wages • Modest export gap • Regional focus is bread and bakery, and cookie, cracker and pasta products
Animal Food	31111	• Not as large employer as other food manufacturing segments, but still significant • Region is highly specialized, but with industry efficiency below national average • Leading output generator despite fewer employees • Average wages • Regional export levels are on par with national averages • Regional focus is “other animal foods” – not cat or dog

322 – Paper Manufacturing

Exports Trends in Paper Manufacturing Industry

- The paper industry is continuing to grow through a globalization process
    - Producers are expanding their raw materials holdings, improving product manufacturing, and streamlining order procedures to foreign markets
- China has tripled production in its paper industry over the past decade fueled by government subsidies. **BUT**, China has no natural competitive advantage and lack the natural resources to fuel the industry. Consequently making it the world's largest importer of pulp and recycled paper; exports of scrap and waste paper to China is booming.

Markets of Interest

- **China:** Export of pulp and scrap paper to fuel their paper manufacturing industry.
- **Korea:** Korea is the 6th largest importer of US paper products WITHOUT the FTA in place. Current Korean paper tariffs range from 0 to 7 percent (average is 0.2%). The passage of the FTA would eliminate all tariffs on paper. Wisconsin is not currently one of the top 10 states in terms of paper export to Korea. *Tariffs on imported paper from Korea are already 0%, so the FTA should not impact demand for WI made paper.*

322 – Paper Manufacturing

Key Paper Manufacturing Segments in Study Area		
Sector	**NAICS Code**	**Key Attributes**
Paper Mills	32212	• Leading employer and output generator (largest of all production sectors) • Region is highly specialized but less efficient than national averages • Above average wages • Large export gap because the region exports a much smaller percentage of output than national averages; room for growth
Paperboard Products	32221	• Not as large employer as other paper manufacturing segments, but still significant • Overall output generation is low • Above average wages • Regional export levels are on par with national averages
Coated &Treated Paper Products	32222-6	• Leading employer and output generator • Region is highly specialized and efficient • Output generation per employee is much lower than other paper sectors • Average Wages • Modest export gap • Regional focus is coated and laminated paper and packaging
Sanitary Paper Products	322291	• Not as large employer as other paper manufacturing segments, but still significant • Leading output generator • Region is highly specialized but less efficient than national averages • Above average ages • Modest export gap • Large export gap due to quantity of product produced in the region

325/326 – Chemical, Plastics & Rubber Mfg.

Exports Trends in Chemical, Plastic and Rubber Manufacturing Industry

- Although long-term growth outlook has been overwhelming positive for the chemical industry, global demand has been weak during the economic recession (excluding pharmaceuticals)
- Germany has the largest demand for drug-preparation chemicals
- The value of U.S. plastics goods shipped declined in 2009 as did the number of employees and facilities.
- Large opportunity to export further to developing industrial countries such as China, Brazil, India, Vietnam, and Eastern Europe. As countries standard of living and purchasing power increases so to does the consumption of plastic products
- Organic Chemicals was the 3rd largest trade surplus for the US during the first half of 2010 and one of the fastest growing chemical export opportunities
- The United States exported $1.8 paint and coating products in 2010 up by 24 percent from 2009

Markets of Interest

- **Germany** : has the largest demand for drug-preparation chemicals
- **Belgium/Port -Antwerp**: World's second largest chemical cluster. Chemicals account for the largest sector of imports in Belgium from U.S. This cluster is importing "component chemicals," developing finished products and re-exports. 80% of local production is re-exported through the Port of Antwerp.
- **Columbia**: National consumption of plastic products increases twofold every ten years. If the FTA is enacted this opportunity will increase substantially.
- **India, Egypt and Austria**: All markets which have shown export activity growth of at least 10%

325 – Chemical Manufacturing

***None of the chemical segments are high in employment (250 to 500), but, they offer very high wages and growth potential.*

Key Chemical Manufacturing Segments in Study Area		
Sector	**NAICS Code**	**Key Attributes**
Sanitary Chemicals	3256	• Efficiency 20% higher than national average • Highest wages of any production sector ($114,00/employee) • Regional export levels are on par with national averages • Regional focus is soap and cleaning compounds
Basic Organic Chemicals	32519	• Not a regional specialization • Above average wages • Regional export levels are on par with national averages • This is a catch all category which includes, among other things, Gum and Wood Chemicals, Cyclic Crude, Ethyl Alcohol; local research will be needed to verify the specific products
Paint & Coating Products	32551	• Region is somewhat specialized (more than any other key chemical segment) • Above average Wages • Regional export levels are on par with national averages
Pharmaceutical Preparation	325412	• Not a regional specialization • Above average wages • Modest export gap
All other Chemical Products	32599*	• Not a regional specialization • Above average wages • Largest export gap of any chemical segment • This is a catch all category, local research will be needed to verify the specific products

326 – Plastics & Rubber Manufacturing

***None of the chemical segments are high in employment (250 to 500), but, they offer very high wages and growth potential.*

Key Plastics & Rubber Manufacturing Segments in Study Area		
Sector	**NAICS Code**	**Key Attributes**
Miscellaneous Products*	32169	• Leading employer • Region is specialized • Below average wages • Fairly large export gap • This is a catch all category, local research will be needed to verify the specific products
Packaging Material, Film/Sheet	32611	• Leading employer and output generator • Region is highly specialized and efficient • Above average wages • Regional export levels exceed national averages

333 – Machinery Manufacturing

Exports Trends in Machinery Manufacturing Industry

- There was a 12 % gain in 2010 of US exports for Agricultural Equipment
- Machinery to Canada is the largest single export relationship of any WI product.

Markets of Interest

- Large opportunity to export further to developing industrial countries such as **China, Brazil, India, Vietnam**, and **Eastern Europe**
- Farming equipment is a robust and growing machinery export. The following markets have exhibited the greatest growth in 2010:
    - **Brazil**: 85%
    - **Venezuela**: 62%
    - **Netherlands**: 44%
    - **Mexico**: 35%
    - **China**: 35%
- Developing countries in **South and Central America** recorded largest increased gains of global trade for US Ag Equipment
- **Columbia:** If the FTA is ratified expect increases in the export of oil and gas equipment, construction and mining equipment, food and beverage processing equipment, information technology equipment, remanufactured goods, pollution control equipment, power generation question and radiology equipment are expected to benefic.

Discussion Point:

Generalizing trends in this sector is very difficult because each company produces a specific product with its own demand characteristics. For example Mercury Marine and Appleton Steel (hoof trimming chute) would be represented in this category.

Who are the leading machinery manufacturers in the area?

333 – Machinery Manufacturing

Key Food Manufacturing Segments in Study Area		
Sector	**NAICS Code**	**Key Attributes**
General Purpose Machinery*	3339	• Leading employer and output generator • Region is specialized • Above average wages • Modest export gap • This is a catch all category, local research will be needed to verify the specific products
Industrial Machinery	3332	• Leading employer • Region is highly specialized and below national averages in efficiency • Above average wages • Regional export levels are on par with national averages • Regional specialization includes paper manufacturing machinery and food product manufacturing; additional segmentation will require local research
Engine & Power Transmission	33361	• Leading employer and output generator • Region is highly specialized and efficient • Above average wages
Ag, Construction & Mining	3331	• Leading employer and output generator • Above average wages • Fairly large export gap • Regional specialization in farm machinery, lawn and garden equipment and construction machinery
Metalworking Machinery	33351	• Leading employer • Regional industries are much more efficient than national averages • Output is not very high for the number of employees • Modest export gap • Regional specialization in metal cutting and forming machinery and special toll, die, jig and fixture manufacturing

336 – Transportation Equip. Manufacturing

General Exports Trends in Transportation Equipment Manufacturing Industry

- The four main subsectors are: Heavy Truck Manufacturing, Motor Vehicle Bodies, Motor Vehicle Parts, Shipbuilding
- **Motor Vehicle Bodies/Parts:** Top U.S. product imported to Canada & Mexico is transportation equipment (motor vehicle parts and bodies). Demand for these are tied to activity of auto manufactures. It is likely difficult to "generate" additional export opportunities through intervention.
- **Shipbuilding:** Manitowoc recently sold their Marine division to an Italian firm. Unlikely there are "missed opportunities" in ship building
- **Heavy Truck Manufacturing:** Lead by Oshkosh truck. See discussion point below:

Discussion Point:

How does Oshkosh Truck fit in this scenario? Given their military contracts is their opportunity for them to export? Are they already exporting?

336 – Transportation Equip. Manufacturing

Key Food Manufacturing Segments in Study Area		
Sector	**NAICS Code**	**Key Attributes**
Motor Vehicle Bodies	336211	• Leading employer and output generator • Region is highly specialized • Above average wages • Modest export gap
Motor Vehicle Parts	3363	• Leading employer and output generator • Above average wages • Regional export levels are on par with national averages • Large export gap because the region exports a smaller percentage of output than national averages; room for growth
Heavy Trucks	336120	• Leading employer and output generator • Above average wages • Large export gap due to quantity of product produced in the region
Ship and Boat Building	33661	• Leading employer • Output is not very high for the number of employees • Above average wages • Regional export levels are on par with national averages • Regional specialization in ship building and repair

Interview Findings

Stakeholder Interview Subjects

1. Trade Insurance Provider
2. International Banking Specialist
3. International Trade Business Councilor
4. Port of Green Bay
5. Austin Straubel Airport
6. Outagamie County Regional Airport
7. County EDC
8. Logistics/Freight Forwarder (x2)
9. Green Bay Container Study

Key Interview Findings Summary

Trends

- Fewer companies seem to have prepared international business plans; **IF** they are getting involved they are doing so out of necessity.
- Companies aren't investing in international business – sink or swim

Which Sectors/Company Types are Most Aligned with Trade Opportunity

- Food Manufacturing
- "Heavy" Industry (e.g. machinery manufacturing)

What Companies are not Capitalizing on Opportunity

- Small Companies and New Companies

What are the Biggest Barriers to Entering Global Trade Market

- Knowledge, Knowledge, Knowledge
- Fear

How Can those Barriers be Overcome

- Marketing – the resources already exist

Opportunities for Global Market Research

Newmark Knight Frank
Economic Development Strategies

BAY-LAKE REGIONAL PLANNING COMMISSION

East Central Wisconsin Regional Planning Commission
An Economic Development District and Metropolitan Planning Organization - Serving the East Central Wisconsin Region for over 30 years

Cutting Edge Opportunities

United States-Korea Free Trade Agreement (KORUS FTA)

- Awaiting congressional ratification
- If passed, 95% of bilateral trade would become duty free within three years
- Currently Korea's average import tariff on US goods is 8%. US average import tariff on Korean goods is 2%.
- US International Trade Commission estimates an increase of $10 billion to annual merchandise exports to Korea; an increase of 25%.
- Currently South Korea is the 7th largest export destination nationally and 12th largest from the state of Wisconsin.
- **If Wisconsin can capture their portion of the increase it would account for almost $100 million of export opportunity**

- **Opportunities by select sectors:**
  - **Grain** – the FTA would likely increase grain exports, specifically corn, but other factors, including increased demand for beef would limit the impact
  - **Animal Feed -** The FTA is unlikely to significantly increase feed exports to Korea, but, the increase in meat exports will drive demand for feed domestically
  - **Dairy Products –** Although the phase out of tariffs is relatively long, it is anticipated that the eventual impact will be substantial. Primarily in cheese, whey, lactose and infant formula.
  - **Meat –** Beef exports are expected to increase substantially after the elimination of what is a high tariff. Pork and Poultry also have very positive outlooks. Access to the Korean market for meat products is very attractive because they demand products that are less popular in the United States.
  - **Processed Foods –** Depends on long-term implementation of the FTA
  - **Machinery, Electronics & Transportation Equipment –** Positive impacts are expected because of the immediate elimination of tariffs. Information technology related goods will be impacted less because of the WTO's existing Information Technology Agreement.

Cutting Edge Opportunities

US-Columbia Trade Promotion Agreement

- Awaiting congressional ratification
- If passed, 80% of US exports would become duty free immediately, with the remaining tariffs phased out over 10 years
- Currently Korea's average import tariff on US goods is 8%. US average import tariff on Korean goods is 2%.
- US International Trade Commission estimates an increase of $1.1 billion to annual merchandise exports to Korea; an increase of 10%.
- **If Wisconsin can capture their portion of the increase it would account for $16 million of export opportunity**

- **Opportunities by select sectors:**
  - **Grain** – the FTA would likely increase grain exports, but, the increase will largely be in the rice category with smaller gains in corn and wheat.
  - **Animal Feed -** The FTA is expected to increase feed exports to Columbia
  - **Rubber, Plastics and Chemicals –** Increase in exports of all products in these sectors is expected as a result of the FTA
  - **Meat –** Beef and Pork exports are expected to increase as a result of the FTA
  - **Machinery, Electronics & Transportation Equipment –** Positive impacts are expected because these will represent new market access opportunities. In particular motor vehicle parts, oil and gas equipment, **construction and mining equipment**, **food and beverage processing equipment**, information technology equipment, remanufactured goods, pollution control equipment, power generation question and radiology equipment are expected to benefic.

Opportunities for Global Research

- **Wisconsin products for Korean consumption:** dairy products, prepared foods, meat, machinery
- **Wisconsin products for Columbia consumption:** feed products, meat, machinery
- **Food products for foreign consumption:** Dry whey, processed foods specific to market demand, etc.
- **Industrial/Agricultural Machinery:** Rapidly growing in markets around the world as they industrialize. What segments would the opportunity be present?.
- **"Chemical Components" for Chemical Products and Plastics Industry:** Antwerp is the world's largest chemical cluster. They import product and produce specialty chemicals and plastics. This approach of assembling components seems to fit well with study area's chemical industry: organic chemicals, resins, pharmaceutical prep and cleaning compounds. There is already chemical tankers connecting the Great Lakes and the Port of Antwerp.
- **Marine Manufacturing?**
- **Aerospace?**
- **Wisconsin – Israel Global Venture?**

Global Briefing Reports

Newmark Knight Frank

BAY-LAKE REGIONAL PLANNING COMMISSION

East Central Wisconsin Regional Planning Commission

An Economic Development District and Metropolitan Planning Organization - Serving the East Central Wisconsin Region for over 30 years

Background Information

Newmark Knight Frank
Economic Development Strategies

Opportunities for Research

- **Wisconsin products for Korean consumption:** dairy products, prepared foods, meat, machinery
- **Wisconsin products for Columbia consumption:** feed products, meat, machinery
- **Food products for foreign consumption:** Meats, Dairy, processed foods specific to market demand, etc.
- **Agriculture Implement Machinery**
- **Aerospace Cluster (supply chain)**
- **Chemicals:** Agricultural chemicals, industrial chemicals

Measuring Capacity to Participate in Trade

The data analysis found in each global briefing report is intended to identify the locations that have the best mix of product demand and underlying drivers to support future demand growth. However, Regardless of the underlying trends or drivers which may indicate opportunity, the markets of opportunity must also possess economic infrastructure which can support and encourage the trade and movement of goods. To account for this trade capacity, the quantitative findings derived from the demand findings were filtered through data from the World Bank World Economic Forum. Two criteria were incorporated into the capacity assessment:

1. **Prevalence of trade barriers**

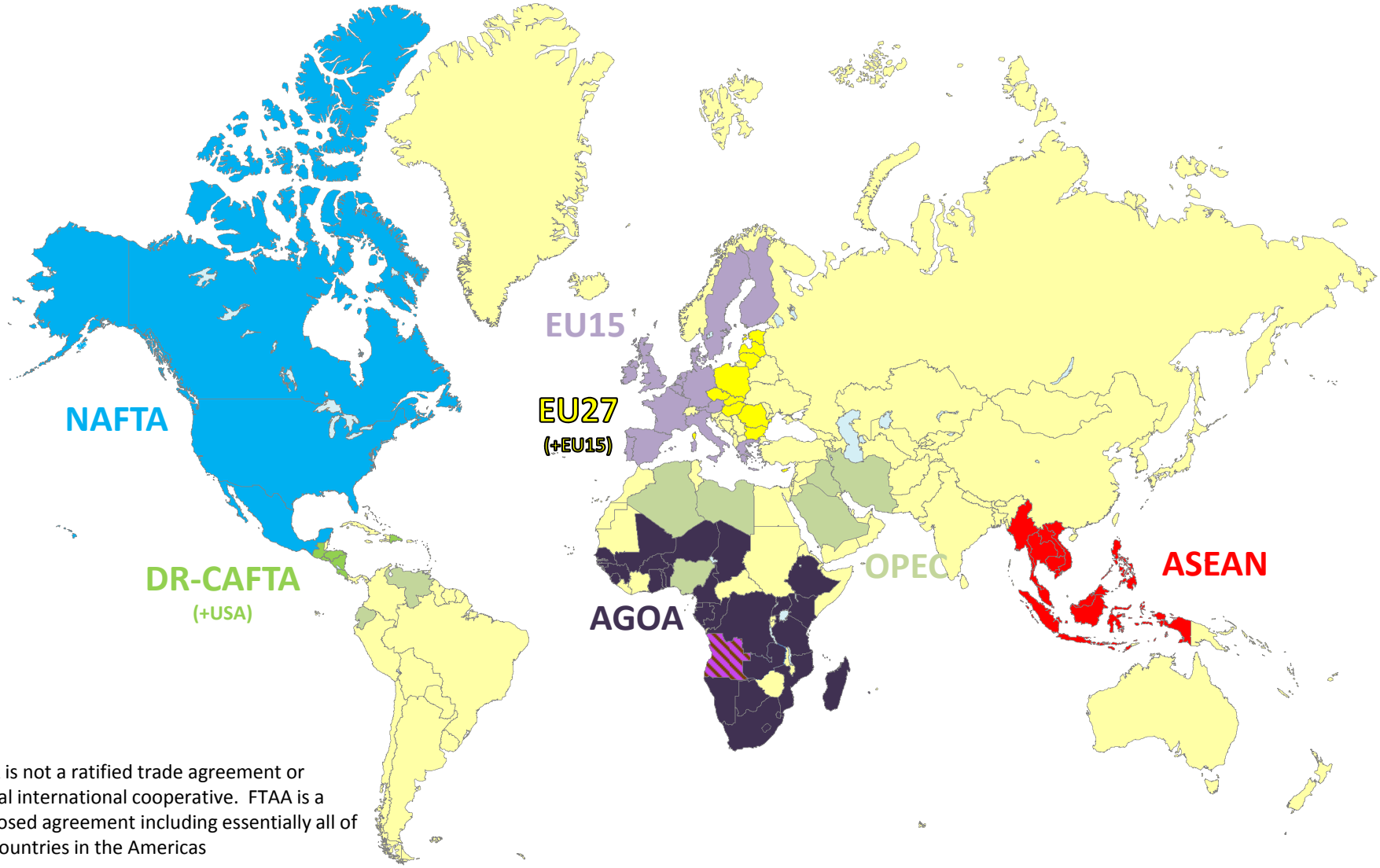
   In your country, to what extent do tariff and non-tariff barriers limit the ability of imported goods to compete in the domestic market? (1 = strongly limit; 7 = do not limit).

2. **Burden of customs procedures**

   How would you rate the level of efficiency of customs procedures (related to the entry and exit of merchandise) in your country? (1 = extremely inefficient; 7 = extremely efficient).

To measure each nations capacity to participate in efficient trade each criteria was equally weighted to produce a score between zero and 14. The median value for all nations in the analysis is 8.7. The upper bound for the lower quartile is 7.75. **For much of the analysis presented in this document countries with capacity scores in the lower quartile were removed as potential markets of opportunity.**

World Trade Regions and International Cooperatives



FTAA is not a ratified trade agreement or formal international cooperative. FTAA is a proposed agreement including essentially all of the countries in the Americas

Global briefing reports by industry

Newmark Knight Frank

BAY-LAKE Regional Planning Commission

East Central Wisconsin Regional Planning Commission

Food Manufacturing

Global Briefing Report

Newmark Knight Frank

Economic Development Strategies

Food Products: Local Overview

Reason for Selection

- Region is highly specialized in this industry; making it a environment favorable for global competition.
- Growth in this industry will have a significant impact on thousands of Wisconsin employees and employers.
- Growth potential moving forward is high as countries around the world urbanize and alter their diet.

Specific Sector Areas of Interest

- **Dairy Manufacturing:** primarily cheese and related manufacturing
- **Animal Products:** animal slaughtering, rendering and processing (focus on processed foods)
- **Grain Based Products:** all

Details

- Although US products are increasing in popularity, much of the opportunity still exists in products that would not be typically sold in the United States. Niche foreign market opportunities may be difficult to identify but could offer sustained sources of demand.
- Because of constraints on food production in growing consumer markets, like China, there is opportunity in this market to attract foreign direct investment into the study region with the sole purpose of exporting the finished product to foreign markets.
- The demand for imported or processed foods products is largely driven by urbanization and income.
- US produced food products benefit from a highly desirable place in consumer consciousness across the world.

	Employment	Overall Foreign Exports	Exports as % of Output	Compared to National Average
Dairy Manufacturing	6,300	$92.0 million	1.5%	Below Expected Export Level
Animal Products	5,900	$221.9 million	8.7%	Equal to Expected Export Level
Grain Based Products	1,628	$9.2 million	2.3%	Equal to Expected Export Level

Source: United States of America International Trade Administration

Food Products: Benchmark Trade Activity

Benchmark Clusters	
Sioux City, IA Top Food Export Destinations *(# of firms Exporting)*	1. FTAA (29) 2. NAFTA (27) 3. ASEAN (6) 4. DR-CAFTA (4) 5. OPEC (4) 6. EU15 (3) 7. EU27 (3) 8. AGOA (2)
Greeley, CO Top Food Export Destinations *(# of firms Exporting)*	1. FTAA (11) 2. NAFTA (9) 3. ASEAN (2) 4. OPEC (2) 5. DR-CAFTA (1) 6. EU15 (1) 7. EU27 (1) 8. AGOA (1)
Fayetteville, AR Top Food Export Destinations *(# of firms Exporting)*	1. FTAA (24) 2. NAFTA (15) 3. ASEAN (6) 4. OPEC (6) 5. DR-CAFTA (4) 6. EU15 (5) 7. EU27 (4) 8. AGOA (1)

These benchmark clusters were selected not because they export the most total food product, but, because their international trade activity is dominated by food products. In each of these cases food products account for over 55 percent of the MSA's total exports. These three locations should be viewed as potential best practices in supporting companies in international trade and leverage the presence of top industry companies.

Sioux City, IA (MSA)	
Total Food Exports	$1,010 million
Food % of Total Exports	83%
Major Companies/Sectors	Cargill, Con Agra, Global Foods, IAMS, Tyson, Blue Bunny

Greeley, CO (MSA)	
Total Food Exports	$573 million
Food % of Total Exports	81%
Major Companies/Sectors	Con Agra, Numerous Beef Processing

Fayetteville, AR (MSA)	
Total Food Exports	$482 million
Food % of Total Exports	59%
Major Companies/Sectors	Poultry Processing, Preserved Foods, Grain Based Products

Source: United States of America International Trade Administration; NKF Research

Food Products: General Food Global Trade

	Total US Food Exports (millions)
Mexico	7,343
Japan	4,520
China	2,584
South Korea	1,942
Russian Fed	1,394
Hong Kong	1,060
Taiwan	828.9
Netherlands	716.0
Venezuela	612.9
United Kingdom	593.9
Australia	571.1
Canada	571.1
Saudi Arabia	562.0
Turkey	555.9
Columbia	463.8
Thailand	446.3
Germany	380.7
Singapore	344.1
Malaysia	330.6
Italy	293.1
UAE	267.6
Israel	234.7
Belgium	232.4
Brazil	228.6
Ireland	193.3

Yellow = Top importers not among top US export destinations	Top Importers of Food Products (excl. Fish (millions)
Germany	59,918
USA	51,448
China	47,409
United Kingdom	42,124
Japan	40,123
France	37,611
Netherlands	36,826
Italy	31,680
Belgium	26,980
Russian Federation	23,530
Spain	21,785
Mexico	18,609
Canada	17,820
South Korea	12,742
Saudi Arabia	11,097
Hong Kong	9,693
Austria	9,448
UAE	9,123
Poland	9,030
Malaysia	8,736
Sweden	8,121
Denmark	7,946
Egypt	7,754
Portugal	7,558
Iran	7,049

These two tables juxtapose the top destinations for US food exports with the world's top importers of food. Of interest are the locations highlighted in the table to the right. These are the countries that fall within the world's top importers, but not among the United States top export destinations.

Six of the nine highlighted countries are western European and, do to certain trade barriers, are likely importing primarily from within the euro zone due to consumer demands.

Primarily do to bio-tech labeling requirements (identifying food products that have some level of bio engineering) countries in the European Union do not represent favorable opportunities for US companies despite the presence of demand drivers.

Source: United States of America International Trade Administration; United Nations Department of Economic and Social Affairs

Food Products: Data Analysis Methodology

A quantitative scoring model for every country in the world was created to identify markets of opportunity for food exports. The scoring model incorporated data variables that describe trends in food importation by country, as well as the underlying drivers of food demand. Each data variable was scored and weighted based on its impact on overall market opportunity. The model provides a single, aggregate score for each country that is a blend of all the factors which define market opportunity. The criteria used in the model are explained below, as is the various classifications of food items. The food classifications were selected to mirror the unique strengths of Wisconsin's food manufacturing industry. **In addition to the use of the criteria below, all countries in the lower quintile for trade capacity were removed regardless of opportunity score (as described on page 5).**

This research is not intended to identify opportunities for any specific company or product type. Any company interested in entering the global market will still have to engage in market research. However, the analysis conducted here should give companies confidence in the presence of underlying market demand, and help focus their efforts. All support data can be found in the Data Appendix.

Import Trends and Growth Opportunity		
Total Imports	5%	Measures the magnitude of the import economy as a proxy for the scale of opportunity.
Growth of Imports	35%	Growth in imports from 2000 – 2008.
Growth in Production	10%	Growth of national industry production. Countries that are able to increase local production at or above the rate of import growth may be able to develop an economy that limits the need for imports.
Per Capita Growth Opportunity	15%	Import dollars per person. Provides insight into the potential to grow imports in a market.

Underlying Drivers		
Urbanization	15%	Projected annual rate of urbanization through 2050.
GDP per Capita Growth	20%	Proxy of income growth (2000 – 2009).

All Sources for Model: World Bank, United Nations Department of Economic and Social Affairs, Food and Agriculture Organization of the United Nations

Food Classifications

- **Total Food**
- **Total Meat**
  - Meat – Fresh and Frozen
  - Meat – Prepared
- **Total Dairy**
  - Cheese
  - Dry Milk
  - Dry Whey
- **Cereals**

Food Products: Results Summary (Meat)

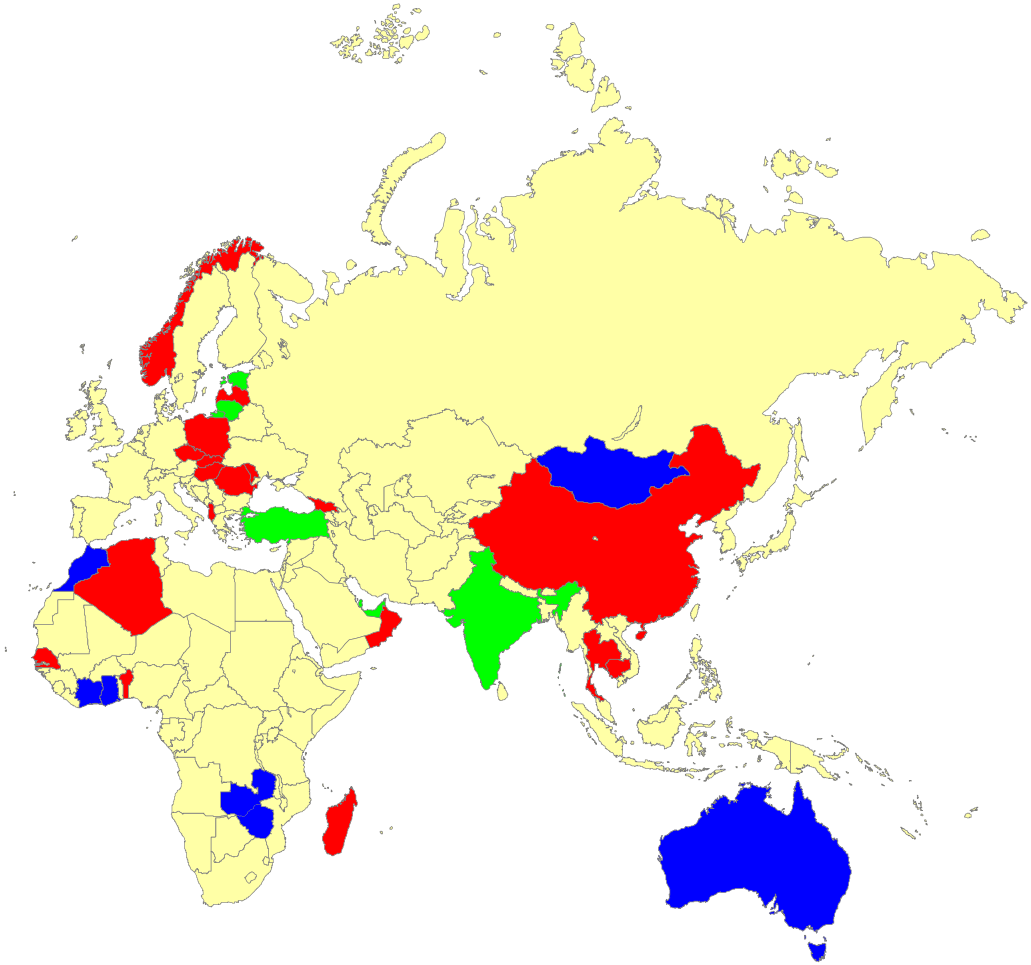
Meat – Fresh and Frozen

	Overall Opportunity Score	Capacity for Trade Score
Zambia	89	9
Cambodia	87	7.9
Mongolia	86	7.8
Ghana	83	8.7
Moldova	80	7.8
Madagascar	80	8.3
Georgia	79	9.7
China	78	9.1
Romania	78	8.8
Benin	77	8.4
Algeria	77	7.9
Côte d'Ivoire	76	8.4
Senegal	75	9.2
Hungary	74	9.9
Thailand	74	8.7
Czech Republic	73	10.3
Poland	73	9.1
Australia	73	10.3
Morocco	72	8.4
Norway	72	9.4
Slovakia	71	9.9
Zimbabwe	70	8
Albania	69	8.8
Latvia	69	9.3
Oman	69	10.4

Meat – Prepared

	Overall Opportunity Score	Capacity for Trade Score
Cambodia	86	7.9
Norway	81	9.4
Albania	80	8.8
Qatar	80	11.3
Czech Republic	79	10.3
India	79	8.2
Madagascar	79	8.3
Benin	78	8.4
Hungary	77	9.9
China	77	9.1
Algeria	76	7.9
Senegal	76	9.2
Georgia	75	9.7
Latvia	74	9.3
Lithuania	74	9.5
Oman	74	10.4
Poland	73	9.1
Thailand	73	8.7
Turkey	72	8.4
UAE	72	11.7
Slovakia	71	9.9
Estonia	70	10.9
Romania	70	8.8
Moldova	69	7.8

- Top Performing in Fresh and Frozen Only
- Top Performing in Prepared Only
- Top Performing Both Segments



Food Products: Results Summary (Dairy)

Cheese

	Overall Opportunity Score	Capacity for Trade Score
Cambodia	84	7.9
India	77	8.7
Mongolia	77	8.7
China	74	9.3
Zambia	74	9.7
Romania	74	10.3
Morocco	73	8.6
Georgia	73	8.7
Indonesia	73	9.0
Czech Republic	71	9.4
Poland	71	9.9
Lithuania	71	8.7
Madagascar	71	8.4
Brunei	69	8.2
Thailand	69	10.4
Hungary	68	8.5
Slovakia	67	9.2
Senegal	66	7.8
Latvia	66	9.1
Albania	65	7.8
Burkina Faso	64	8.3
Moldova	63	11.7
Luxembourg	63	12.0

** Not on map

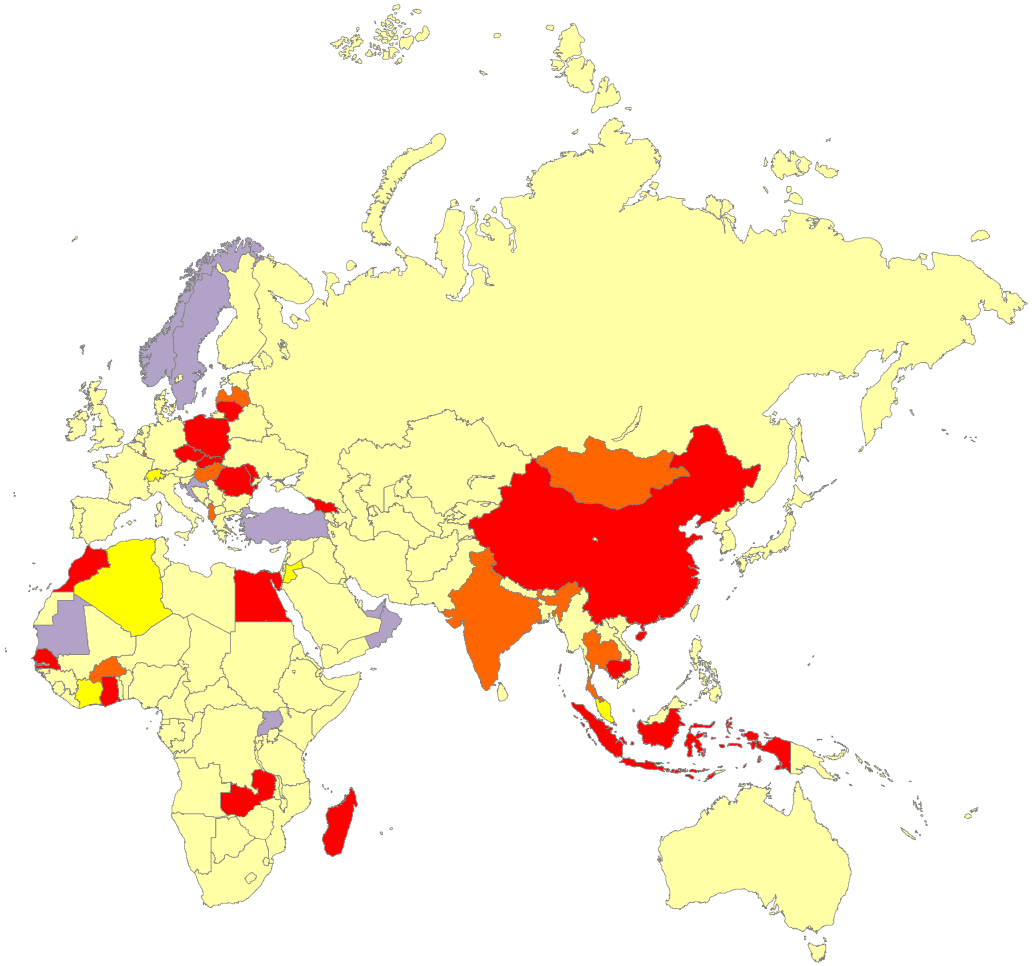
Dry Milk

	Overall Opportunity Score	Capacity for Trade Score
Cambodia	84	7.9
Uganda	77	8.7
Ghana	77	8.7
Latvia	74	9.3
Georgia	74	9.7
Czech Republic	74	10.3
Indonesia	73	8.6
Mauritania	73	8.7
Zambia	73	9.0
Norway	71	9.4
Slovakia	71	9.9
Croatia	71	8.7
Turkey	71	8.4
Costa Rica**	69	8.2
Oman	69	10.4
Egypt	68	8.5
Senegal	67	9.2
China	66	9.1
Moldova	65	7.8
Madagascar	64	8.3
UAE	63	11.7
Sweden	63	12.0

Dry Whey

	Overall Opportunity Score	Capacity for Trade Score
Cambodia	83	7.9
Algeria	79	7.9
Jordan	78	8.9
Romania	76	8.8
Côte d'Ivoire	76	8.4
China	76	9.1
Czech Republic	73	10.3
Lithuania	72	9.5
Poland	69	9.1
Malaysia	69	9.1
Ghana	65	8.7
Slovakia	64	9.9
Egypt	62	8.5
Indonesia	61	8.6
Jamaica**	60	8.5
Morocco	60	8.4
Switzerland	59	9.3

- Top Performing in Cheese Only
- Top Performing in Dry Milk
- Top Performing in Dry Whey
- Top Performing in Two or Three Segments



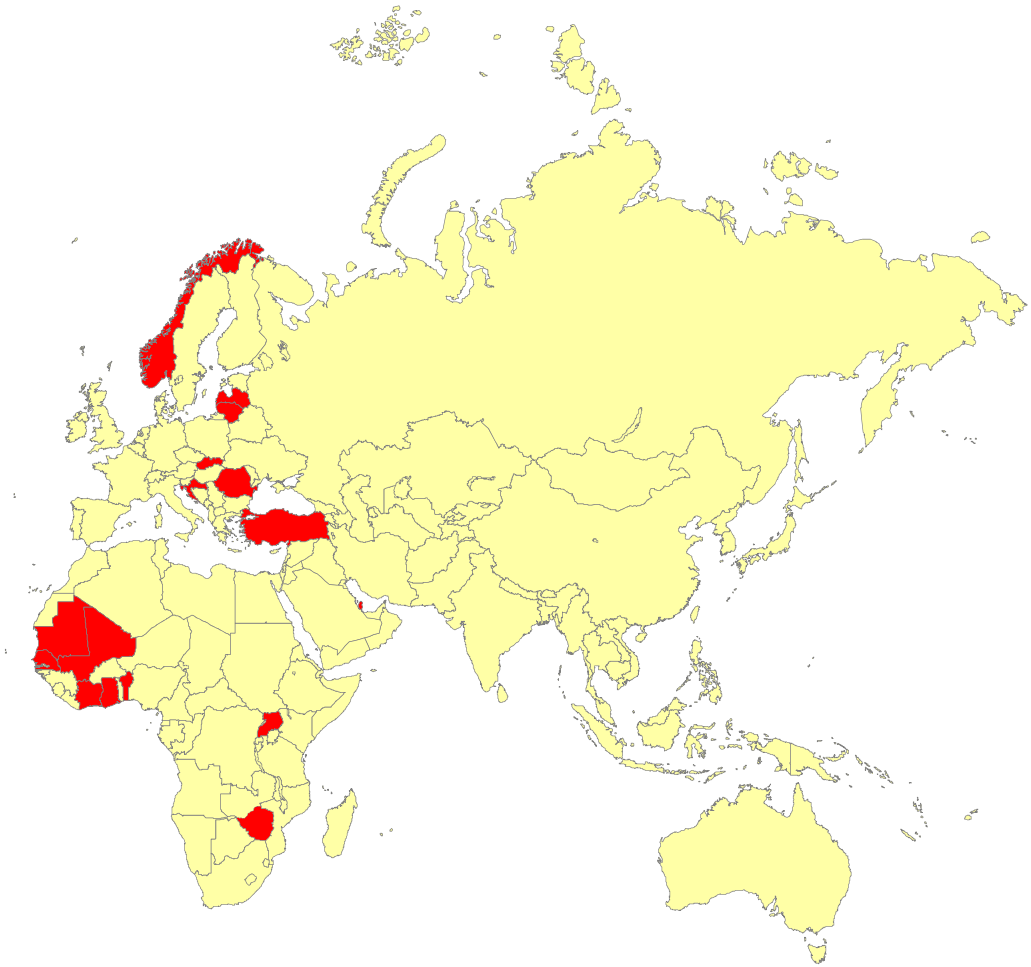
Food Products: Results Summary (Cereals)

Cereals

	Overall Opportunity Score	Capacity for Score
Benin	78	8.4
Turkey	74	8.4
Mali	74	8.1
Zimbabwe	73	8
Ghana	71	8.7
Senegal	71	9.2
Lithuania	71	9.5
Romania	70	8.8
Croatia	69	8.7
Mauritania	69	8.7
Qatar	65	11.3
Guatemala**	64	8.8
Côte d'Ivoire	64	8.4
Norway	63	9.4
Trinidad & Tobago**	62	8
Uganda	62	8.7
Latvia	62	9.3
Slovakia	61	9.9

** Not on map

Top Performing in Cereals



Food Products: Potential Barriers to Entry

Although the model used to identify top performers in each of the food product categories has already been filtered for capacity to participate in trade, it is still necessary to consider potential barriers to new companies wishing to enter the market. These barriers consist of the level of expected tariff and the potential tax on goods. In most cases the added cost of tariffs and taxes will be passed onto the customer. However, because a challenge in international trade is receiving payment, a high level of tax and tariff may increase the upfront cost to a company new to international trade; potentially a barrier to first time exporters. It should be noted that the countries below represent the top performers in the capacity analysis, so they are all predisposed to more favorable trade environments.

Country	Trade-Weighted Avg Tariff Rate	Limitations of Trade Barriers (1 = Strongly Limit)	FTA With US?	Lowest Potential Tax	Highest Potential Tax	Potential for Barrier
Albania	3.3%	4.8		n/a	n/a	
Algeria	13.3%	4.7		11%	21%	
Australia	4.3%	5.3	Yes	10%	10%	
Benin	7.8%	4.2		17%	32%	
Brunei Darussalam	5.3%	4.8		n/a	n/a	
Burkina Faso	9.8%	4.9		17%	32%	
Cambodia	12.4%	4.4		0%	10%	
China	13.3%	4.6		15%	26%	
Costa Rica	3.0%	4.2	Yes	14%	14%	
Côte d'Ivoire	10.6%	4.6		17%	32%	
Croatia	2.9%	4.6		n/a	n/a	
Czech Republic	0.9%	5.7		5%	19%	
Egypt	13.8%	4		n/a	n/a	
Estonia	0.9%	5.6		0%	18%	
Georgia	0.7%	5		n/a	n/a	
Ghana	10.0%	4.9		12.50%	12.50%	
Guatemala	3.3%	4.6	Yes	12%	12%	
Hungary	0.9%	5.6		12%	25%	
India	14.4%	4.2		n/a	n/a	
Indonesia	3.8%	4.7		10%	10%	
Jamaica	9.1%	4.7		n/a	n/a	
Jordan	9.8%	4.4	Yes	13%	13%	
Latvia	0.9%	5.2		0%	18%	
Lithuania	0.9%	4.7		18%	18%	

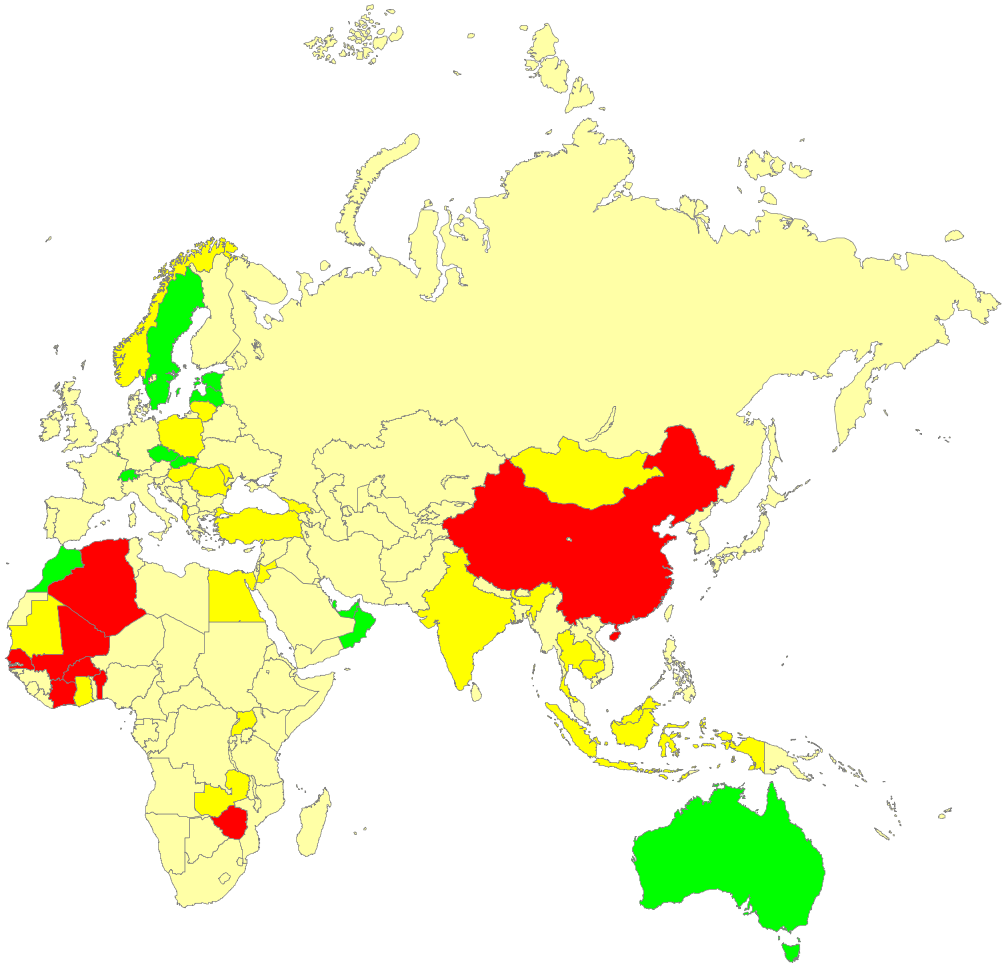
Country	Trade-Weighted Avg Tariff Rate	Limitations of Trade Barriers (1 = Strongly Limit)	FTA With US?	Lowest Potential Tax	Highest Potential Tax	Potential for Barrier
Luxembourg	0.9%	6.1		3%	15%	
Madagascar	9.0%	4.4		20%	20%	
Malaysia	6.0%	4.3		5%	10%	
Mali	9.8%	4		17%	32%	
Mauritania	8.0%	4.2		n/a	n/a	
Mongolia	5.0%	4.5		15%	15%	
Morocco	15.4%	4.1	Yes	0%	20%	
Norway	2.8%	4.2		12%	24%	
Oman	4.4%	5.2	Yes	5%	100%	
Poland	0.9%	4.8		7%	22%	
Qatar	4.4%	6.4		0%	0%	
Republic of Moldova	-	4.4		n/a	n/a	
Romania	0.9%	4.9		n/a	n/a	
Senegal	9.8%	4.5		17%	32%	
Slovakia	0.9%	5.5		10%	19%	
Sweden	0.9%	6.2		6%	20%	
Switzerland	2.1%	4.2		2.4%	7.6%	
Thailand	5.7%	4.6		7%	7%	
Trinidad and Tobago	10.8%	4.9		n/a	n/a	
Turkey	4.4%	4.6		8%	18%	
Uganda	12.2%	4.6		n/a		
United Arab Emirates	4.4%	5.9		0%	5%	
Zambia	11.0%	4.8		n/a		
Zimbabwe	19.9%	4.4		15%	25%	

Source: World Bank Global Competitiveness Report 2010-2011; Export.gov

Food Products: Potential Barriers to Entry

The map shows the potential for barriers to entry. None of the countries in red should be discounted. This assessment is based only on average tariffs, taxes and general attitude towards trade. The realities on the ground can often be much different depending on the product being imported. To understand nuances it will be necessary to work with each potential company and identify the harmonized system codes (HS codes) which determine tariff and, sometimes, tax rates. Also, it will be necessary to understand the attitude towards the US good in question to fully understand how barriers to the trade process might impact efficiency and cost for the Wisconsin company.

- Potential Barriers Limited
- Potential Barriers
- Concern over Potential Barriers



Food Products: Primary Zones of Opportunity

Based on all of the analysis presented in this section, the following pages highlight the zones of opportunity that should be at the forefront of efforts to encourage global trade amongst food producers in the study area. Other opportunities undoubtedly exist; but, it is believed that these clusters of countries will offer the easiest and potentially most fruitful first time entries into the global trade market. However, there are other factors that are not captured in the data that must be considered. Those factors are outlined below, and should be used to color and interpret the opportunity findings on the following pages.

- **European Union:** Although EU countries show strong market drivers, labeling laws that require companies identify foods with engineered ingredients significantly limit opportunity for US prepared foods; most of which have engineered ingredients.

- **China:** Opportunity abounds in China. But, it is not a good first time destination market because of challenging rules and regulations. It is recommended that companies use Vietnam, Thailand, Taiwan, Indonesia and the Philippines. Japan has also shown increased interest following the recent earthquake and tsunami. The Philippines should be viewed as a strong ingredients market to supply their domestic food manufacturing sector.

- **Africa:** Primary zones of opportunity exist in Northern Africa. The remainder of the continent is only a viable option for low value, shelf stable food products. Africa is pushing the growth of their own food manufacturing industry, so long-term processed food opportunities are unknown.

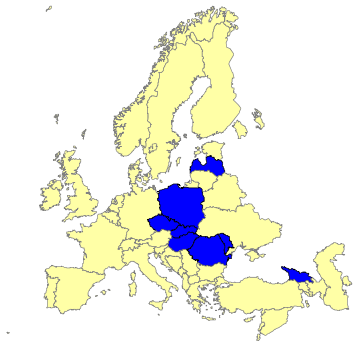
- **Korea:** Opportunity across the board with a focus on convenience products, the health market and food service.

- **Columbia:** Columbia is very receptive to US dairy products. However, there seems to be a mental barrier amongst US companies about Columbia stemming from its history of drug cartels and the illegal economy. In realty current day Columbia is nothing like the general perception.

- **Middle East:** Dubai is a market strong in local distributors. Companies have an opportunity to import into Dubai for distribution to North Africa and the remainder of the Middle East.

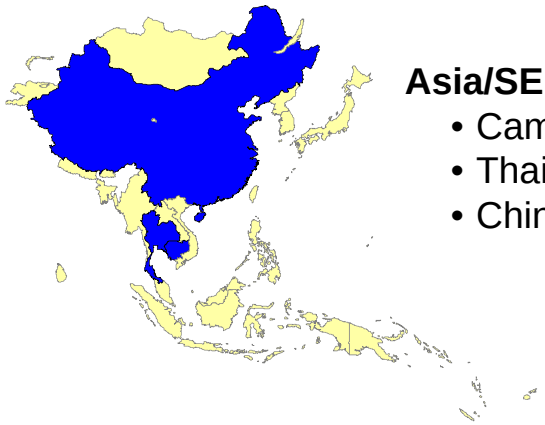
Food Products: Primary Zones of Opportunity

Meat



Eastern European Cluster:

- Czech Republic (EU)
- Georgia
- Hungary (EU)
- Latvia (EU)
- Poland (EU)
- Republic Moldova
- Romania (EU)
- Slovakia (EU)



Asia/SE Asia Cluster:

- Cambodia
- Thailand
- China

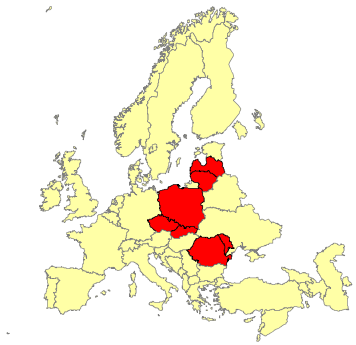
Other Opportunities:

- Albania
- Australia
- Norway
- Oman

*** All supporting data for the food opportunity analysis can be found in the Data Appendix on pages ___ to __.*

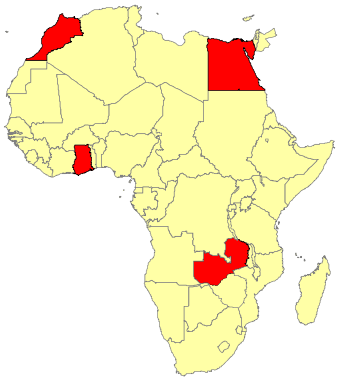
Food Products: Primary Zones of Opportunity

Dairy



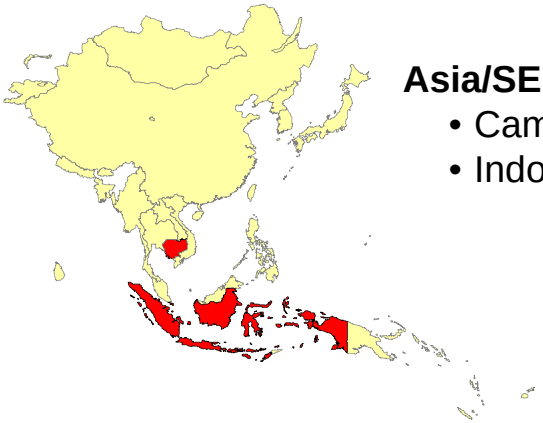
Eastern European Cluster:

- Czech Republic (EU)
- Georgia
- Latvia (EU)
- Lithuania (EU)
- Poland (EU)
- Republic Moldova
- Romania (EU)
- Slovakia (EU)



Africa Cluster:

- Egypt
- Ghana
- Morocco
- Zambia



Asia/SE Asia Cluster:

- Cambodia
- Indonesia

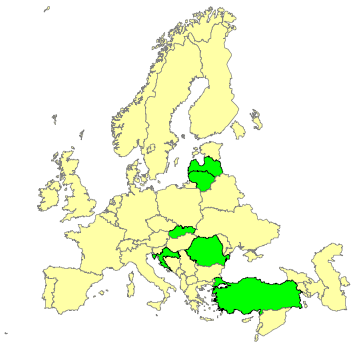
Other Opportunities:

- Albania

*** All supporting data for the food opportunity analysis can be found in the Data Appendix on pages ___ to __.*

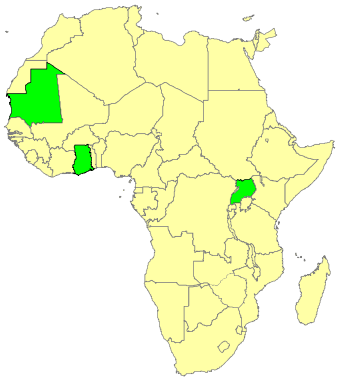
Food Products: Primary Zones of Opportunity

Cereals



Eastern European Cluster:

- Croatia
- Latvia (EU)
- Lithuania (EU)
- Romania (EU)
- Slovakia (EU)
- Turkey



Africa Cluster:

- Ghana
- Mauritania
- Uganda

Other Opportunities:

- Guatemala
- Norway
- Qatar
- Trinidad and Tobago

*** All supporting data for the food opportunity analysis can be found in the Data Appendix on pages ___ to __.*

Agriculture Machinery

Global Briefing Report

Newmark Knight Frank

Economic Development Strategies

Agriculture Machinery: Local Overview

Reason for Selection

- The region as is highly specialized in machinery manufacturing in general, but Agriculture and related machinery manufacturing is a leader in employment, output, and wealth creation.
- Although the region already exports nearly 26% of ag machinery production, there is still almost $3.0 million of gap if the region was to reach national averages. Given the concentration, it is reasonable to expect the region to become a leader in export.
- Could potentially leverage the Port of Green Bay for products that would be shipped as break bulk.

Details

- See section titled "Agriculture Machinery: Trends and Details in Global Trade"

	Employment	Overall Foreign Exports	Exports as % of Output	Compared to National Average
Farm Machinery & Equipment	508	$68.4 million	26%	Below Expected Export Level
Lawn and Garden Equipment	802	$5.5 million	2%	Equal to Expected Export Level

Source: United States of America International Trade Administration

NOTE: The sector of opportunity is titled "Agriculture Machinery," however, the sectors listed above include Lawn and Garden Equipment. The focus of the opportunity analysis is agricultural related equipment. Lawn and Garden Equipment is included because there are many cross-over companies that might be involved in agriculture equipment manufacturing but get classified in the closely related industry sector.

Agriculture Machinery: Benchmark Trade Activity

Peoria, IL (MSA)	
Total Machinery Exports	$6,025 million
Machinery % of Total Exports	77%
Major Companies/Sectors	Caterpillar, Komatsu Mining Systems

Davenport-Moline-Rock Island, IA-IL (MSA)	
Total Machinery Exports	$2,650 million
Machinery % of Total Exports	75%
Major Companies/Sectors	Deere & Company

Racine, WI (MSA)	
Total Machinery Exports	$1,130 million
Machinery % of Total Exports	73%
Major Companies/Sectors	CNH Global (Case)

Source: United States of America International Trade Administration; NKF Research

These benchmark clusters were selected not because they export the most total machinery products, but, because their international trade activity is dominated by machinery products. In each of these cases machinery products account for over 70 percent of the MSA's total exports.

These three locations should be viewed as potential best practices in supporting companies in international trade and leverage the presence of top industry companies. It should be noted that the data is inclusive of ALL machinery products (NAICS 333), not just agricultural machinery.

Agriculture Machinery: Trends and Details in Global Trade

Agriculture Machinery Overview

- Global Market ($ M) - $70,000
- US Industry Shipments ($ M) – $32,700
- Companies - 1,000

International Overview

- Top International Markets
  - North America
  - European Union (EU-27)
  - Other OECD Countries (Australia, Japan, New Zealand)
  - Eurasia (Russia, Ukraine, Kazakhstan)
  - South America (Brazil and Argentina)
- **Top International Issues**
  - Protectionist Measures in Russia
  - Tariffs and Domestic Content Requirements (India, Brazil, Argentina)
  - Status of EU Off-Road Engine Emission Standards
  - Intellectual Property

Top 5 US Companies	Top 5 Foreign Companies
Deere & Company	CNH Global (Italy)
AGCO Corporation	Claas KGAA (Germany)
The Toro Company	Kubota Corporation (Japan)
Rain Bird Corporation	Mahindra & Mahindra, Ltd. (India)
Bou-Matic	Jai

US Agricultural related machinery exports rose 12% compared to the previous year

- South America grew 59%
- Central America grew 36%
- Asia grew 24%
- Africa grew 16%

Source: United States of America International Trade Administration

Agriculture Machinery: Data Analysis Methodology

A quantitative scoring model for every country in the world was created to identify markets of opportunity for Agriculture Machinery. The scoring model incorporated data variables that describe trends in ag machinery importation by country, as well as the underlying drivers of ag machinery demand. Each data variable was scored and weighted based on its impact on overall market opportunity for machinery The model provides a single, aggregate score for each country that is a blend of all the factors which define market opportunity.

This research is not intended to identify opportunities for any specific company or product type. Any company interested in entering the global market will still have to engage in market research. However, the analysis conducted here should give companies confidence in the presence of underlying market demand, and help focus their efforts. All support data can be found in the Data Appendix.

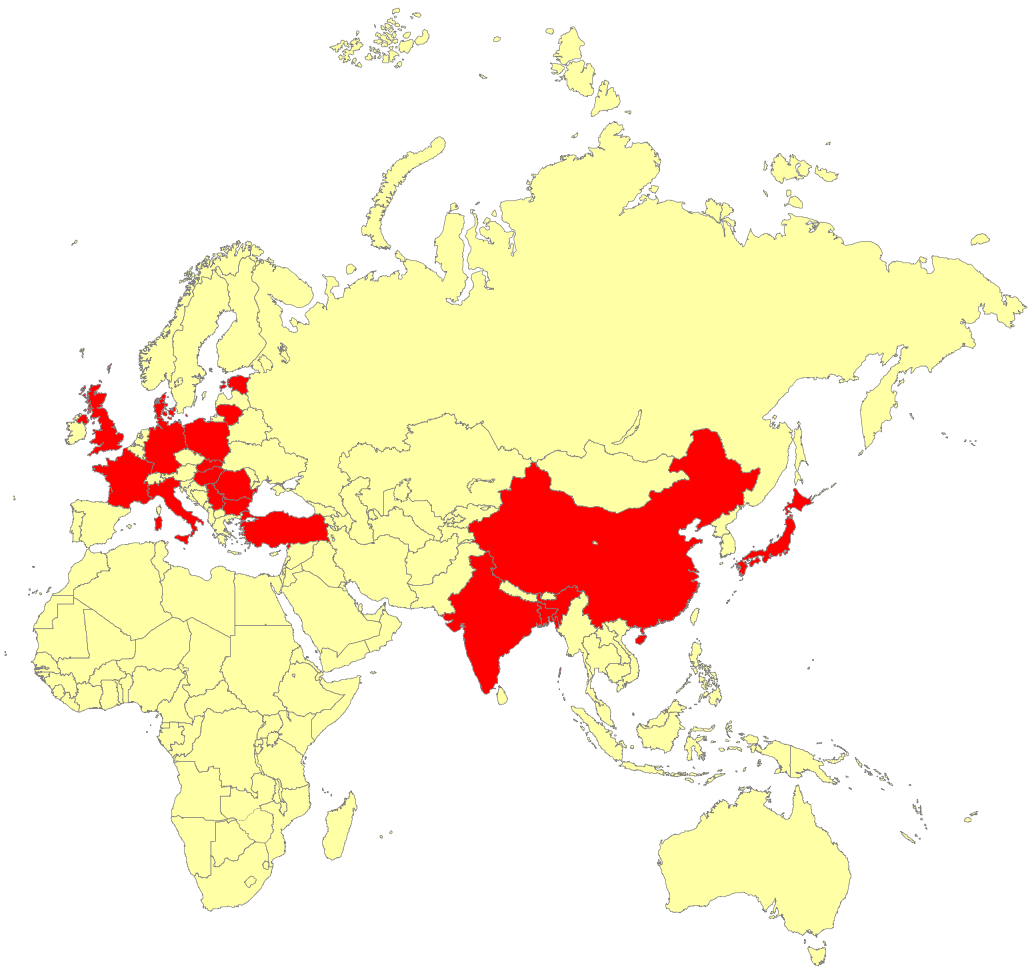
Import Trends and Growth Opportunity		
Total Imports	25%	Measures the magnitude of the import economy as a proxy of the scale of opportunity.
Growth of Imports	25%	Growth in imports from 2001 – 2010.

Underlying Drivers		
% Arable Land to Total Land	25%	Total Arable Land / Total Land in Country. Arable Land includes land under temporary crops, temporary meadows for mowing or pasture, land under market or kitchen gardens, and land temporarily fallow.
Number of Ag Machinery per 1000 Acres of Arable Land	25%	Total Number of Ag Machinery Specifically tractors per 1000 Acres of Arable Land.

Source: United States of America International Trade Administration, World Bank Development Indicators

Agriculture Machinery: Results Summary

Country	Total Score	Capacity for Trade Score
Germany	56	10
Estonia	55	11.2
Canada	52	9.8
India	51	8.4
Nigeria	50	7.2
Bangladesh	50	8.2
Mexico	49	9.6
Ukraine	48	7.2
Denmark	47	10.2
Japan	47	8.8
Hungary	46	11.2
China	46	9.2
France	42	10.4
United Kingdom	42	10.8
Romania	42	9.8
Czech Republic	41	11.4
Italy	41	9.8
Poland	40	9.6
Slovakia	40	11
Turkey	38	9.2
El Salvador	38	9.6
Serbia	38	8.8
Bulgaria	38	8.2
Lithuania	37	9.4



Agriculture Machinery: Potential Barriers to Entry

Although the model used to identify top performers in the agriculture machinery sector has already been filtered for capacity to participate in trade, it is still necessary to consider potential barriers to new companies wishing to enter the market. These barriers consist of the level of expected tariff and the potential tax on goods. In most cases the added cost of tariffs and taxes will be passed onto the customer. However, because a challenge in international trade is receiving payment, a high level of tax and tariff may increases the upfront cost to a company new to international trade; potentially a barrier to first time exporters. It should be noted that the countries below represent the top performers in the capacity analysis, so they are all predisposed to more favorable trade environments.

Country	Trade-Weighted Avg Tariff Rate	Limitations of Trade Barriers (1 = Strongly Limit)	FTA With US?	Lowest Potential Tax	Highest Potential Tax	Potential for Barrier
Armenia	2%	4.2		0%	0%	
Azerbaijan	7%	3.5		N/A	N/A	
Bangladesh	13%	4.1		3%	10%	
Belarus				5%	15%	
Belize				10%	10%	
Brazil	12%	3.9		14%	35%	
Bulgaria	1%	4.1		4%	19%	
Cambodia	12%	4.4		15%	15%	
Canada	3%	4.9	Yes	0%	6%	
China	13%	4.6		6%	9%	
Croatia	3%	4.6		5%	14%	
Czech Republic	1%	5.7		4%	5%	
Denmark	1%	5.1		N/A	N/A	
Dominican Republic	6%	3.8		0%	0%	
El Salvador	3%	4.8		0%	0%	
Estonia	1%	5.6		0%	0%	
France	1%	5.2		3%	16%	
Germany	1%	5		3%	16%	
Ghana	10%	4.9		0%	5%	
Greece	1%	5.2		3%	16%	
Guatemala	3%	4.6	Yes	0%	0%	
Hungary	1%	5.6		7%	9%	
India	14%	4.2		10%	12%	
Indonesia	4%	4.7		5%	15%	
Italy	1%	4.9		3%	16%	

Country	Trade-Weighted Avg Tariff Rate	Limitations of Trade Barriers (1 = Strongly Limit)	FTA With US?	Lowest Potential Tax	Highest Potential Tax	Potential for Barrier
Jamaica	9%	4.7		0%	0%	
Japan	2%	4.4		0%	0%	
Kenya	8%	4.3		5%	10%	
Latvia	1%	5.2		3%	16%	
Lithuania	1%	4.7		3%	16%	
Mexico	8%	4.8	Yes	0%	0%	
Netherlands	1%	5.4		3%	16%	
Nicaragua	4%	4		0%	0%	
Nigeria	11%	3.6		0%	5%	
Pakistan	17%	4.1		10%	30%	
Philippines	4%	4.3		1%	5%	
Poland	1%	4.8		3%	16%	
Portugal	1%	5.6		3%	16%	
Romania	1%	4.9		3%	16%	
Serbia	5%	4.4		1%	20%	
Slovakia	1%	5.5		3%	16%	
Spain	1%	5		3%	16%	
Sri Lanka	12%	4.2		0%	6%	
Thailand	6%	4.6		5%	20%	
Trinidad and Tobago	11%	4.9		0%	3%	
Tunisia	15%	4.7		10%	36%	
Turkey	4%	4.6		0%	16%	
Ukraine	3%	3.6		0%	10%	
United Kingdom	1%	5.4		3%	16%	
Viet Nam	8%	4		0%	30%	

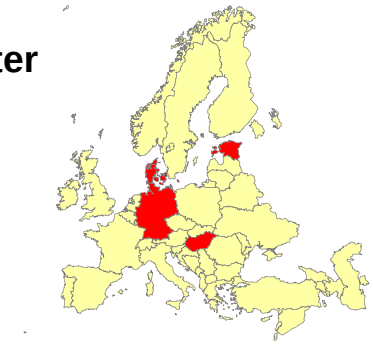
Source: World Bank Global Competitiveness Report 2010-2011; Export.gov

Agriculture Machinery: Primary Zones of Opportunity

Based on all of the analysis presented in this section, the following pages highlight the zones of opportunity that should be at the forefront of efforts to encourage global trade amongst agriculture machinery producers in the study area. Other opportunities undoubtedly exist; but, it is believed that these clusters of countries will offer the easiest and potentially most fruitful first time entries into the global trade market,

Eastern European Cluster

- Germany
- Estonia
- Denmark
- Hungary



North America

- Canada
- Mexico

Asia/SE Asia Cluster

- Bangladesh
- India
- Japan
- China

Agriculture Machinery: Opportunities by Market

Kazakhstan

Positive demand drivers : Agriculture accounts for 6% of economic production; 22 M hectares are arable land; 80 percent of machinery currently in use is at the end of its lifecycle. Combine those demand drivers with insignificant local production of agriculture machinery and equipment and you get a country that relies heavily on imports. However, Kazakhstan's entrance into the Customs Union (CU) with Russia and Belarus has increased regulations on imports. Equipment in need are tractors, combines, seeders, reapers, sprayers, cleaning technology for the southern and northern regions.

Brazil

Brazil is one of few countries able to increase its planted area, it has the most unused commercially available agriculture land in the world. Brazil's farms are generally large and growing, therefore there is a demand for American agriculture machinery with efficient, sophisticated technology.

Bangladesh

Government has attached special importance to agricultural mechanization. It is encouraging the use of machines in agriculture and reducing restrictions in the free market distribution system. The use of agriculture machinery has increased significantly and has great potential. Transformation towards mechanization is taking place to encourage:

- Increasing yield per unit of land and increasing cropping intensity
- Increase yield through improved water control and better soil preparation
- Promote agro-based industries
- Reduce cost cultivation and add value to produce

Demand for New Machines

- Machines for Harvesting rice and wheat
- Machines for transplanting rice seedlings
- Equipment for corn shelling
- Low cost and effective drying systems

Source: Export.gov; United Nations Asian and Pacific Centre for Agricultural Engineering and Machinery

Aerospace

Global Briefing Report

Newmark Knight Frank
Economic Development Strategies

Aerospace: Local Overview

Reason for Selection

- The Fox Valley region of Wisconsin has put forth significant effort in developing an aerospace cluster.
- The companies currently involved in a Wisconsin aerospace cluster a typically early stage growth companies that may not be able to identify markets in which to invest resources in.

Specific Sector Areas of Interest

- **Aircraft Equipment & Parts**: Primary aircraft parts such as body assembles, power transmission, propellers, breaks, landing gear, fuel tanks and elevators.
- **Aircraft Manufacturing**: manufacturing or assembling complete aircraft, developing and making aircraft prototypes, aircraft conversion, and complete aircraft overhaul and rebuilding
- **Aircraft Instrument Manufacturing**: primarily engaged in manufacturing search, detection, navigation, guidance, aeronautical, and nautical systems and instruments.
- **Aircraft Engine Manufacturing**: manufacturing aircraft engines and engine parts, developing prototypes aircraft engines and engine parts, aircraft propulsion system conversion, aircraft propulsion systems overhaul and rebuilding

Details

- Overall Aerospace sales have continued to rise, even given the current recession and stalled recovery.
- Key growth sectors have been in both military and space, with civil aircraft remaining constant due to the domestic economy.
- Orders have been on the increase since 2004 with backlogs exceeding their 2008 peak
- With exports around $80b in 2010, Aerospace has been a continued strong export industry in the US with

Industry Segments	Companies in Wisconsin	Total Employment (Wisconsin)	Total Annual Sales (Wisconsin)	Companies in East Central Wisconsin (estimate)
Aircraft Equipment & Parts	30	600	$123 million	1
Aircraft Manufacturing	26	218	$27 million	4
Aircraft Instrument Manufacturing	21	2,200	$661 million	1
Aircraft Engine Manufacturing	8	228	$25 million	1

Source: All Business.com, U.S. Census Bureau, Aerospace Industries Association

Aerospace: Regional Competitive Trade Activity

A key in positioning East Central Wisconsin is an understanding of competitive trade activity in the region for aerospace products and parts manufacturing. The table below indicates that the region is highly competitive in all sectors of the aerospace industry

Export State	Value of Shipments	Value % Total of US	Total Exports	Number of Establishments
Ohio	$11.9 billion	5.7%	$3.9 billion	66
Illinois	$2.1 billion	1.2%	$1 billion	22
Indiana	$2.3 billion	1.3%	$603 million	25
Michigan	$905 million	.5%	$495 million	52
Missouri	N/A	N/A	$425 million	30
Minnesota	N/A	N/A	$294 million	22
Wisconsin	N/A	N/A	$246 million	85

Source: U.S. Census Bureau, Aerospace Industries Association

Aerospace: Top 20 Export Markets

Country	2011 Exports	Pct. Growth/ Decline
1 France	$ 1,983	37%
2 China	$ 1,408	31%
3 Germany	$ 1,366	61%
4 United Kingdom	$ 1,360	4%
5 Canada	$ 1,288	15%
6 Brazil	$ 1,083	83%
7 Japan	$ 1,029	-35%
8 UAE	$ 918	-25%
9 Singapore	$ 842	-4%
10 Korea	$ 823	-2%
11 Turkey	$ 768	275%
12 Hong Kong	$ 535	3%
13 Netherlands	$ 521	71%
14 Australia	$ 488	98%
15 Mexico	$ 356	5%
16 Malaysia	$ 289	-13%
17 Norway	$ 272	24%
18 Indonesia	$ 257	-24%
19 Egypt	$ 222	-10%
20 Algeria	$ 219	40%

- The table displays the top 20 export countries for the Aerospace Industry.
- The data represents total value of export with 5 year growth or decline in exports.
- The values include Civilian Aircraft, Military aircraft, Aircraft Engines and Parts, Aircraft Parts and Aircraft Navigation & Communications Equipment

Source: United States of America International Trade Administration

Aerospace: Data Analysis Methodology

A quantitative scoring model for every country in the world was created to identify markets of opportunity for the aerospace industry. The scoring model incorporated data variables that describe trends in aerospace related importation by country, as well as the underlying drivers of demand. Each data variable was scored and weighted based on its impact on overall market opportunity. The model provides a single, aggregate score for each country that is a blend of all the factors which define market opportunity. The criteria used in the model are explained below.

This research is not intended to identify opportunities for any specific company or product type. Any company interested in entering the global market will still have to engage in market research. However, the analysis conducted here should give companies confidence in the presence of underlying market demand, and help focus their efforts. All support data can be found in the Data Appendix.

Criteria	Market Driver Characteristics	Weighted Value
Growth in Exports	Growth in Exports is measured from 2005 to 2011. This data represents the growth activity in the aerospace sector	25%
GDP Per Capita (PPP)	Purchasing Price Parity is a key economic factor in air travel. Higher income countries tend to travel more then lower income. Higher income is also more likely to partake in recreational flying.	20%
Pct. GDP Real Growth	Indicates the general health of the economy. It serves as an indicator of business and consumer growth, a driver for air travel/recreational flying.	10%
Pct. Population Growth	Indicator representing the growth in the population. This factor is also an indicator of economic health	5%
Pct. Urban Population	Greater urbanization is a sign of economic growth, development of metro areas that drive the need for travel.	5%
Pct. Rate of Urbanization	Urbanization rates give a dimension to areas that are less urbanized. It is an indicator of the movement towards greater urbanization	5%
Number of Airports	Provides an indicator on the amount of current and future air travel	5%
Limitations of Trade Barriers	Provides an indicator on weather a market is open or closed to trade	15%
Customs Efficiency	Provides an indicator on the level of trade complexity between two countries	10%

Sources: trade.gov – Top 20 Aerospace Export Markets, CIA The World Fact Book, Aerospace Industries Association, NKF Globe

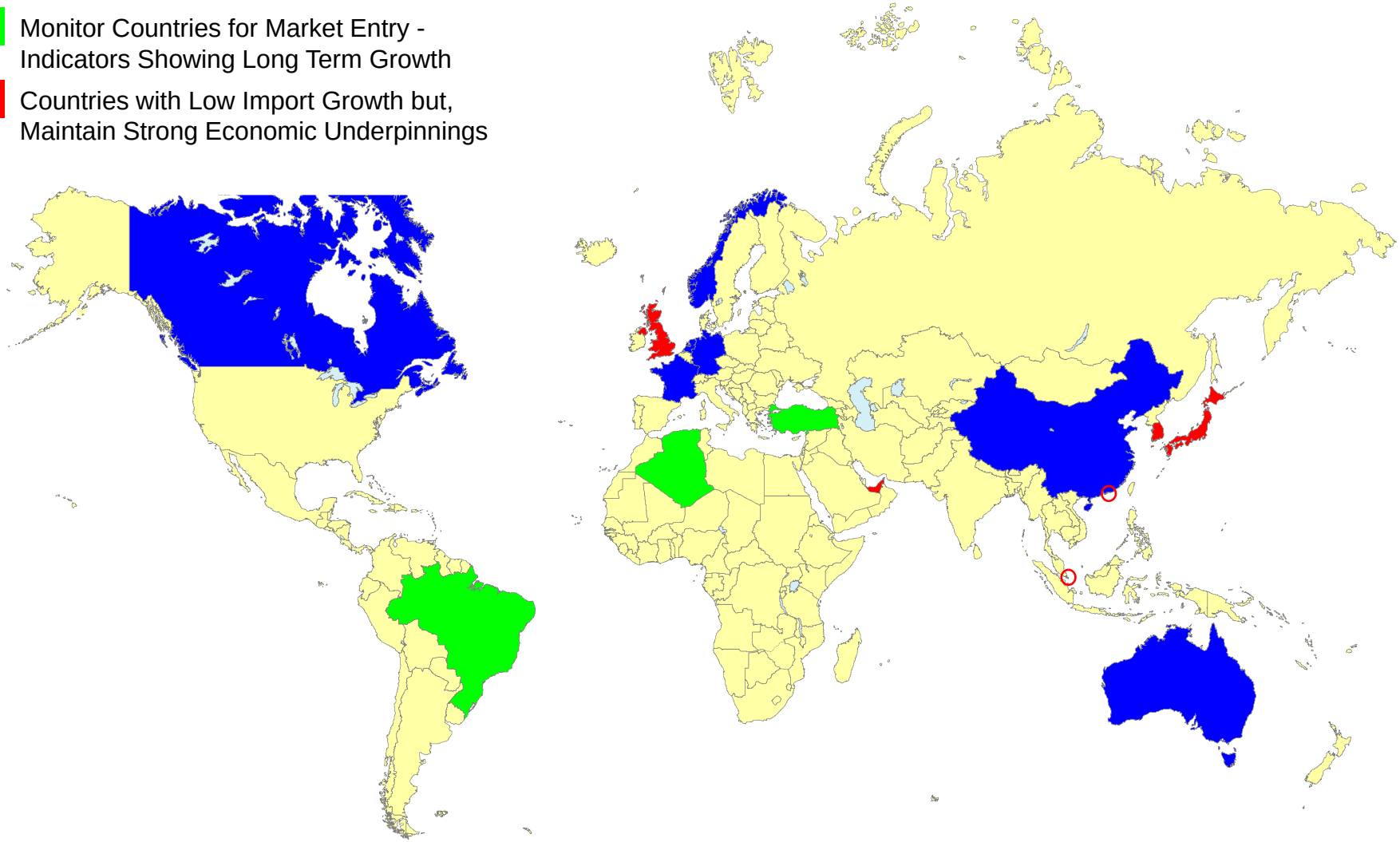
Aerospace: Results Summary

Based on the criteria analysis, the following is a strategy for approaching the target export markets.

Recommended Target Countries that Scored the Highest on All Key Criteria	Monitor Countries for Market Entry - Indicators Showing Long Term Growth	Countries with Low Import Growth but, Maintain Strong Economic Underpinnings
France – 37% increase in Imports with high PPP and stagnant GDP growth	**Algeria** - 40% increase in Imports with low PPP and moderate GDP growth	**UAE** - 25% decline in Imports with high PPP and moderate GDP growth
Australia – 98% increase in imports with high PPP and moderate GDP growth	**Turkey** - 275% increase in Imports with low PPP and strong GDP growth	**Singapore** - 4% decline in Imports with high low PPP and strong GDP growth
Germany – 61% increase in imports with high PPP and moderate GDP growth	**Brazil** - 83% increase in Imports with low PPP and strong GDP growth	**Korea** - 2% decline in Imports with high PPP and strong GDP growth
Netherlands - 11% increase in imports with high PPP and stagnant GDP growth		**Hong Kong** - 3% increase in Imports with high PPP and strong GDP growth
China - 31% increase in imports with low PPP and strong GDP growth		**United Kingdom** - 4% increase in Imports with high PPP and stagnant GDP growth
Canada - 15% increase in imports with high PPP and moderate GDP growth		**Japan** - 35% decline in Imports with high PPP and moderate GDP growth
Norway - 24% increase in imports with high PPP and stagnant GDP growth		

Aerospace: Results Summary

- Recommended Target Countries
- Monitor Countries for Market Entry - Indicators Showing Long Term Growth
- Countries with Low Import Growth but, Maintain Strong Economic Underpinnings



Aerospace: Opportunities by Target Market

- **Recommended Target Countries –** France, Australia, Germany, Netherlands, China, Canada and Norway represent markets that have strong growth for aerospace product categories over the past five years. The growth has been a mix of orders for new and replacement fleets for these developed countries. The key will be to monitor for downturn in new orders or migration towards parts and new technologies. Though the economies range from stagnant to strong growth, the GDP per Capita remains strong which is a good indicator for increased travel and related industries. These countries also represent the origin of many major light aircraft manufacturers.

- **Monitor Countries for Market Entry –** Algeria, Turkey and Brazil have shown significant growth in aerospace product categories. This most likely represents the growth of these economies as each build the infrastructure to compete on that global platform. Brazil in particular has become a hub for major manufacturing of Boeing and Embraer aircraft. Areas to watch are as these economies continue to grow, the GDP per Capital will grow as well increasing the amount of air travel. Another country, although not identified by the data, to monitor is Mexico. Mexico is actively trying to establish themselves as an aerospace cluster.

- **Countries with Low Import Growth but, Maintain Strong Economic Underpinnings** – UAE, Singapore, Korea, Hong Kong, United Kingdom and Japan have seen declines in aerospace orders in all product categories. Each county maintains moderate economic growth and high GDP per Capita. These countries should be monitored for upswings in aerospace orders.

- **Capacity to Participate in Trade –** As indicated earlier in the report, the surrounding states offer strong competition in the aerospace industry. Though the region has over 80 establishments that service all product categories, East Central Wisconsin is limited in the capacity to serve these markets. Most of the establishment in the region are small business with less then 10 people. A key factor is that this region does have the capability to service all product categories. A key strategy will be to build capability and capacity in the region.

Chemical Manufacturing

Global Briefing Report

Newmark Knight Frank

Economic Development Strategies

Chemicals: Local Overview

Reason for Selection

- Growth in this industry will result in high wage jobs.
- Although the region is not overly specialized or concentrated in the chemical industry, it is a growing sector that shows opportunity for increased exports.
- The movement of bulk chemicals is tailored to the abilities of the Port of Green Bay.

Specific Sector Areas of Interest

- **Fertilizers and Agriculture Chemicals:** The fertilizer sector, while not the largest of the chemical subsectors in Wisconsin, offers solid opportunities for export if growing markets can be identified.
- **Industrial Chemicals:** The collection of product sectors that make up the industrial chemicals sector are a large contributor to the overall chemical industry in Wisconsin.

Details

- The chemicals industry is included in this analysis for reasons that differ from the others. The State of Wisconsin is not known as a specialized concentration of chemical producers. However, the use of a global trade strategy can be beneficial to not only the further development of highly concentrated industries, but also to industries that can be fostered in place because of potential that exists in the global market. The chemicals industries is an example of the latter. The inclusion of the chemicals industry in this analysis should be viewed as a template for other potential growth industries that show potential in the study area.

	Employment	Overall Foreign Exports	Exports as % of Output	Compared to National Average
Basic, Organic Chemicals*	530	$281.3 million	36%	**Equal** to Expected Export Level
Plastics Materials and Resins*	230	$105.9 million	32%	**Above** Expected Export Level
Paint and Coating*	345	$17.4 million	8%	**Equal** to Expected Export Level
Fertilizers	33	$6.24 million	11%	**Equal** to Expected Export Level

Source: United States of America International Trade Administration

**Sub-Sectors that make up Industrial Chemicals*

Chemicals: Benchmark Trade Activity

Victoria, TX (MSA)	
Total Chemical Exports	$727 million
Chemical % of Total Exports	87%
Major Companies/Sectors	Formosa Plastic, DOW, INVISTA

Kingsport-Bristol-Bristol, TN-VA (MSA)	
Total Chemical Exports	$1,815 million
Chemical % of Total Exports	83%
Major Companies/Sectors	Eastman Chemical Company, BAE Systems, Excel Polymers

Parkersburg-Marietta-Vienna, WV-OH (MSA)	
Total Chemical Exports	$564 million
Chemical % of Total Exports	80%
Major Companies/Sectors	DuPont, National Plastic & Chemical Company

Source: United States of America International Trade Administration; NKF Research

These benchmark clusters were selected not because they export the most total chemical products, but, because their international trade activity is dominated by chemical products. In each of these cases machinery products account for over 80 percent of the MSA's total exports.

These three locations should be viewed as potential best practices in supporting companies in international trade and leverage the presence of top industry companies. It should be noted that the data is inclusive of ALL chemical products (NAICS 325), not just fertilizers and industrial chemicals.

Chemicals: Data Analysis Methodology

A quantitative scoring model for every country in the world was created to identify markets of opportunity for food exports. The scoring model incorporated data variables that describe trends in food importation by country, as well as the underlying drivers of food demand. Each data variable was scored and weighted based on its impact on overall market opportunity for food. The model provides a single, aggregate score for each country that is a blend of all the factors which define market opportunity. The criteria used in the model are explained below, as is the various classifications of food items. The food classifications were selected to mirror the unique strengths of Wisconsin's food manufacturing industry. **In addition to the use of the criteria below, all countries in the lower quintile for trade capacity were removed regardless of opportunity score (as described on page 5).**

This research is not intended to identify opportunities for any specific company or product type. Any company interested in entering the global market will still have to engage in market research. However, the analysis conducted here should give companies confidence in the presence of underlying market demand, and help focus their efforts. All support data can be found in the Data Appendix.

Fertilizer Criteria		
Total Imports from the US	5%	Measures the magnitude of the import economy as a proxy for scale of demand.
Growth in Imports from the US	17.5%	Growth in imports from 2006 – 2010
Total Fertilizer Use	17.5%	Total kilograms of fertilizer used annually by country.
Change in Fertilizer Use	40%	Change in total fertilizer use from 2004 – 2008.
Percent of Agriculture Land	20%	Measures the percent of total land in a country comprised of agriculture land. This is intended to gauge the scale of the local production economy.

Source: United States of America International Trade Administration, World Bank Development Indicators

Industrial Chemical Criteria		
Total Imports from the US in Resins and Synthetic Rubber	10%	Measures the magnitude of the import economy as a proxy for scale of demand for Resins.
Growth in Imports from the US in Resins and Synthetic Rubber	20%	Growth in imports of Resins from 2006 – 2010
Total Imports from the US in Basic Chemicals	10%	Measures the magnitude of the import economy as a proxy for scale of demand for Basic Chemicals.
Growth in Imports from the US in Basic Chemicals	20%	Growth in imports of Basic Chemicals from 2006 – 2010
Growth of Industry Value Added	40%	Measures the growth of total value added in "Industry" (manufacturing, mining, construction, electricity, water and gas). This measure is intended to identify economies that will be demanding more chemicals that are typically found in these processes.

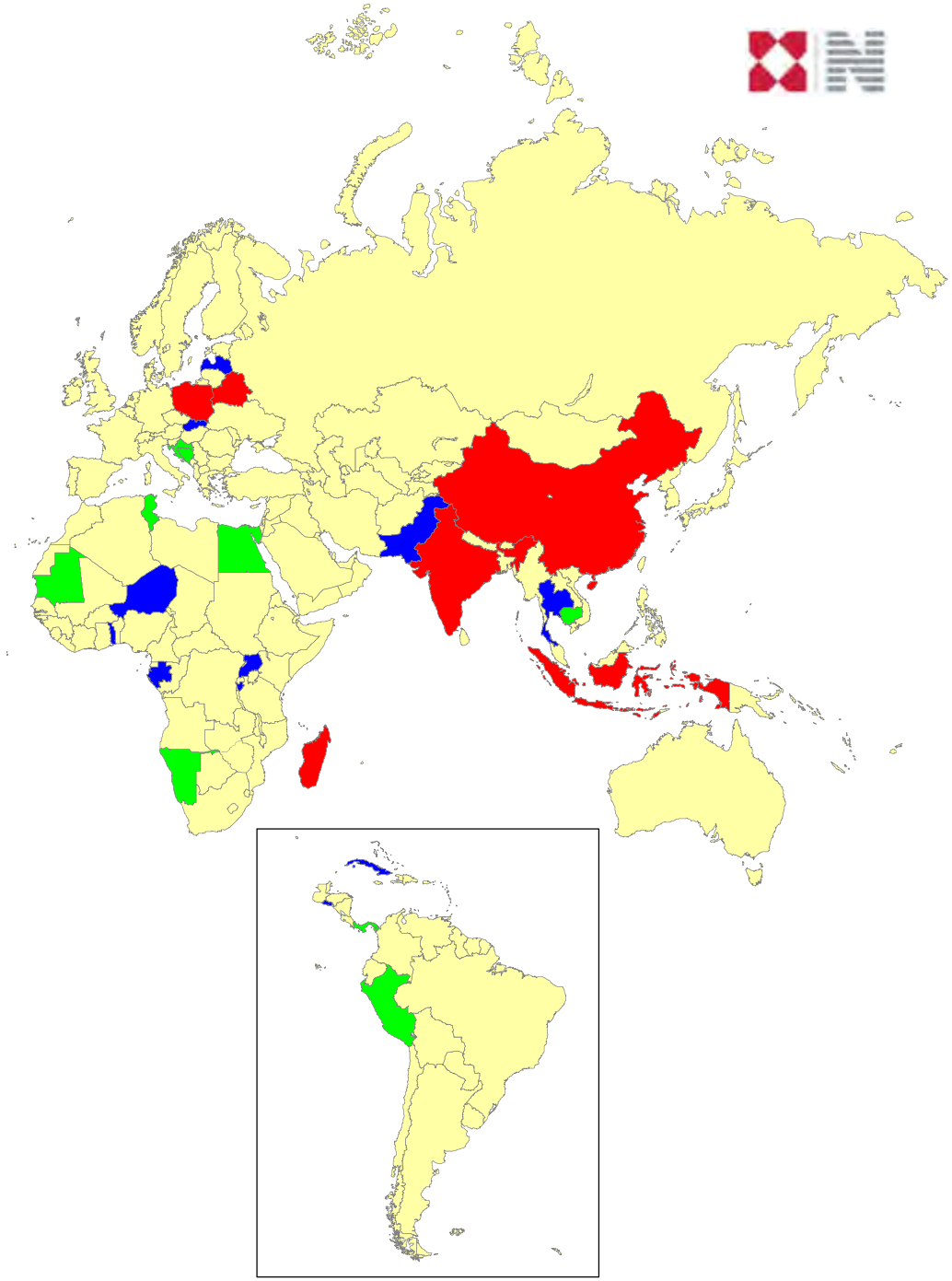
Chemicals: Results Summary

Fertilizers

	Overall Opportunity Score	Capacity for Trade Score
India	61	8.2
China	60	9.1
Poland	60	9.1
Rwanda	57	8.4
Slovakia	55	9.9
Indonesia	55	8.6
Madagascar	55	8.3
Uganda	55	8.7
Cuba	54	N/A
Belarus	48	N/A
Latvia	47	9.3
El Salvador	45	9
Gabon	44	N/A
Trinidad & Tobago**	44	8
Pakistan	43	7.7
Togo	43	N/A
Niger	42	N/A
Thailand	41	8.7

Industrial Chemicals

	Overall Opportunity Score	Capacity for Trade Score
Madagascar	59	8.3
Croatia	57	8.7
Belarus	52	
Tunisia	52	9.4
China	51	9.1
Cambodia	50	7.9
Brunei	50	9.3
India	49	8.2
Namibia	48	8.7
Peru	47	9.5
Egypt	47	8.5
Panama	44	9.2
Mauritius**	43	9.6
Poland	43	9.1
Indonesia	42	8.6
Jordan	41	8.9
Bosnia and Herzegovina	41	7.9
Singapore	41	12.5
Mauritania	41	8.7



- Top Performing in Fertilizer, Pesticides & Ag Only
- Top Performing in Industrial Only
- Top Performing Both Segments

Chemicals: Potential Barriers to Trade

Although the model used to identify top performers in each of the food product categories has already been filtered for capacity to participate in trade, it is still necessary to consider potential barriers to new companies wishing to enter the market. These barriers consist of the level of expected tariff and the potential tax on goods. In most cases the added cost of tariffs and taxes will be passed onto

Country	Trade-Weighted Avg Tariff Rate	Limitations of Trade Barriers (1 = Strongly Limit)	FTA With US?	Lowest Potential Tax	Highest Potential Tax	Potential for Barrier
Belarus	n/a	n/a		n/a	n/a	
Bosnia and Herzegovina	5%	4.3		n/a	n/a	
Brunei Darussalam	5.3%	4.8		n/a	n/a	
Cambodia	12.4%	4.4		0%	10%	
China	13.3%	4.6		15%	26%	
Croatia	2.9%	4.6		n/a	n/a	
Egypt	13.8%	4		n/a	n/a	
India	14.4%	4.2		n/a	n/a	
Indonesia	3.8%	4.7		10%	10%	
Jordan	9.8%	4.4	Yes	13%	13%	
Madagascar	9.0%	4.4		20%	20%	
Mauritania	8.0%	4.2		n/a	n/a	
Mauritius	1%	5		15%	15%	

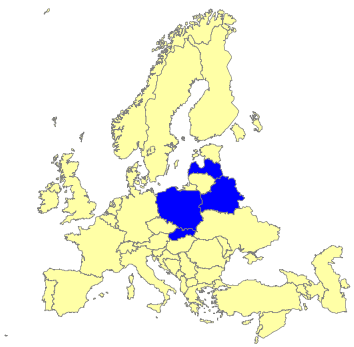
Country	Trade-Weighted Avg Tariff Rate	Limitations of Trade Barriers (1 = Strongly Limit)	FTA With US?	Lowest Potential Tax	Highest Potential Tax	Potential for Barrier
Namibia	6%	4.5		n/a	n/a	
Panama	5%	4.8		n/a	n/a	
Peru	3%	5		19%	19%	
Poland	0.9%	4.8		7%	22%	
Singapore	0%	6.2	Yes	7%	7%	
Tunisia	15%	4.7		n/a	n/a	
Cuba	n/a	n/a		n/a	n/a	
El Salvador	3%	4.8		13%	13%	
Gabon	n/a	n/a		n/a	n/a	
Latvia	1%	5.2		0%	18%	
Niger	n/a	n/a		17%	22%	
Pakistan	17%	4.1		15%	15%	
Rwanda	16%	3.6		18%	18%	
Slovakia	0.9%	5.5		10%	19%	
Thailand	5.7%	4.6		7%	7%	
Togo	n/a	n/a		17%	22%	
Trinidad and Tobago	10.8%	4.9		n/a	n/a	
Uganda	12.2%	4.6		n/a	n/a	

Source: World Bank Global Competitiveness Report 2010-2011; Export.gov

Chemicals: Primary Zones of Opportunity

Based on all of the analysis presented in this section, the following pages highlight the zones of opportunity that should be at the forefront of efforts to encourage global trade amongst food producers in the study area. Other opportunities undoubtedly exist; but, it is believed that these clusters of countries will offer the easiest and potentially most fruitful first time entries into the global trade market,

Fertilizers



Eastern European Cluster:

- Poland
- Slovakia
- Belarus
- Latvia

Other Opportunities:

- Rwanda
- Uganda
- El Salvador

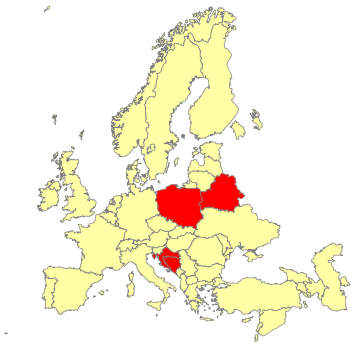
South Asia/SE Asia Cluster:

- China
- Thailand
- Indonesia
- India
- Pakistan

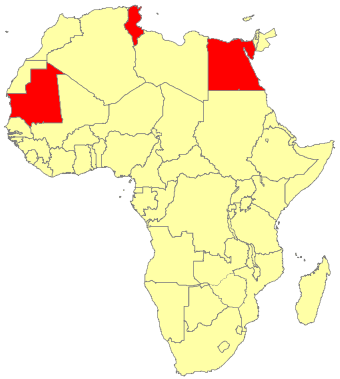
*** All supporting data for the food opportunity analysis can be found in the Data Appendix on pages ___ to __.*

Chemical Products: Primary Zones of Opportunity

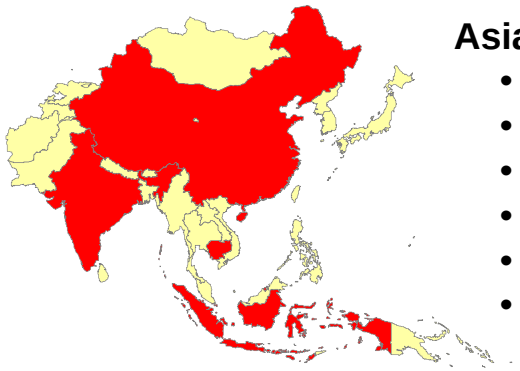
Industrial Chemicals



Eastern European Cluster:
- Croatia
- Belarus
- Poland
- Bosnia & Herzegovina



Africa Cluster:
- Tunisia
- Egypt
- Mauritania



Asia/SE Asia Cluster:
- China
- India
- Indonesia
- Singapore
- Cambodia
- Brunei

Other Opportunities:
- Peru
- Panama
- Jordan

*** All supporting data for the food opportunity analysis can be found in the Data Appendix on pages ___ to __.*

Global briefing reports by areas of the world

Newmark Knight Frank

Bay-Lake Regional Planning Commission

East Central Wisconsin Regional Planning Commission

South Korea

Global Briefing Report

Newmark Knight Frank
Economic Development Strategies

Markets of Interest: Korea

Segment	Current Activity	FTA Impact (current tariff → FTA tariff)	Outlook & Opportunity
Animal Feed	US is currently leading exporter of animal feed to Korea	• Soybean Meal: 1.8% → 0% • Animal Feed: Varied → 0%	Demand for animal feed is driven by demand for domestic livestock and poultry. Because of increased affluence and shifting consumption patterns the USDA projects Korea's consumption of meats to increase from 14 to 47% by_____. Although imported meat will continue to play a large role, demand for domestic meat production is increasing.
Dairy Products	US exports account for approximately one-third of the dairy products imported by Korea	• Milk, Cream and Yogurt: 36% → 0% over 10 years • Lactose: 49.5% → 0% over 5 years • Ice Cream: 8%→ 0% over seven years • Modified Whey for Animal Feed: Varied → 0%	Although all of the fluid dairy demand is supplied by domestic production, the Korean dairy industry is unable to meet demand for non-fluid milk products. Currently over 50 percent of non-fluid products are imported from foreign markets. However, the opportunity in Korea will be slow to expand as tariffs are phased out over a period of years.
Grain	Based on current trends, US exports to Korea would likely continue to be focused primarily on yellow corn with some wheat and barley. Currently 75 percent of corn imported into Korea is used for animal feed.	• Yellow corn and wheat would become immediately duty free	The likelihood of an increase in demand for grains in the domestic population in Korea is unclear. The largest driver of grain demand is domestic livestock. It appears that demand for domestic meat production is increasing, likely driving demand for grain in the future.
Meat	Despite high tariffs, over half of all meat imports into Korea come from the United States. Chile is the largest competitor in meat importation for the US in Korea.	• Beef: 40% → 0% over 15 years • Pork: 25-30%→ 0% period TBD • Poultry: 18-20% → 0% over 10 to 12 years	Demand for meat in general is projected to increase and perception of US meat products is at an all time high. The long-term opportunity for imported meat will be dependent on the successful growth of domestic meat production. However, the eventual removal of the high tariffs should make imported meat much more competitive.

Markets of Interest: Korea

Segment	Current Activity	FTA Impact (current tariff → FTA tariff)	Outlook & Opportunity
Processed Foods	Changing consumption patterns in Korea have driven recent increases in demand for processed foods. The US, EU, China and Japan are leading importers of processed foods into Korea.	• Tariffs on processed foods eliminated in five to 10 years and none will be subject to tariff rate quotas or safeguards	Korea's large urban population, rising affluence and lifestyle changes should continue to drive demand for processed foods. The domestic processing industry does not have sufficient capacity to meet rising demand.

Machinery, Electronics & Transportation Equipment	Korea is the 5th largest market for US machinery exports. The top exports to Korea include are pumps, compressors, valves, energy equipment, machine tools, mining machinery, piston engines and engine parts and machinery for the production of textiles, chemicals, rubber and plastics	• Machinery Tariffs average 7.5 percent, ranging from 0 – 13 percent
		  • 48 percent of machinery exports would by duty-free immediately upon implementation of trade agreement
		  • 38 percent of machinery exports would be eliminated over three years , 3 percent in five years, and 10 percent in 10 years
		• Energy Equipment would receive elimination of tariffs 53 percent of US energy equipment upon implementation and 45 percent of exports over three years (1)
		• Tools would receive elimination of tariffs on 66 percent of U.S. exports immediately upon implementation and 29 percent would be eliminated over three years (1)
			Korea is experiencing heavy investment in plants and equipment related to the semi conductor and automotive industries. In addition, substantial spending increases in public and private spending on infrastructure and public works project will drive demand for large earth moving and related machinery.

Columbia

Global Briefing Report

Newmark Knight Frank
Economic Development Strategies

Markets of Interest: Columbia

Segment	Current Activity	FTA Impact (current tariff → FTA tariff)	Outlook & Opportunity
Animal Feed	US exported $57 million of Animal to Columbia in 2010	• US feed products are currently subject to tariffs ranging from 5 to 20%, as well as imposed price bands • Animal Feed: Immediate elimination of tariffs. Tariff Rate Quotas will be in place that grow 5% annually and are eliminated by year 12 • Soybean, Soybean meal, soybean flour will have immediate duty free and quota free access	Elimination of Tariffs and Price Bands will put US on equal ground with other South American competing countries. The Columbia economy is projected to grow 4 percent annually over next 3 years with strong per capita income growth over the last decade, and a middle class with buying power for meat and other high value products. This growth in the economy drives up the demand for soybeans and feed grains.
Grain	Yellow corn is by far the largest grain export to Columbia for the United States at nearly $600 million. Followed by white corn a $34million. Rice and sorghum, while important, are considerably lower in overall value.	• Yellow Corn: 194% → 0% up to 2.1 million ton quota with 5% annual growth • White Corn: 194% → 0% up to 136,000 ton quota with 5% annual growth • Rice: 5-80% → 0% up to 79,000 ton quota with 4.5% annual growth • Sorghum: 132% → 0% up to 21,000 ton quota with 5% annual growth • All out of quota tariffs will be phased out over 12+ years	All grains will become immediately completive and likely see spikes in imports equal to the tariff rate quotas.

Markets of Interest: Columbia

Segment	Current Activity	FTA Impact (current tariff → FTA tariff)	Outlook & Opportunity
Rubber, Plastics and Chemicals	Columbia has a large plastics industry. As such, they demand the component chemicals and resins needed in the production process. One of the most important imports into Columbia is propylene , used in the production of polypropylene.	• Tariffs vary significantly but should largely be eliminated	The plastics industry in Columbia is vital and growing because it supplies many other Columbian industry sectors. Polypropylene is a particularly important growth industry. To that end, component chemicals, raw materials, resins and propylene should all continue to grow in demand as imports.
Meat	Columbia imports approximately $55 million of meat products annually. Of that, the US exports about $900,000 of beef products, $12.9 million of pork and $15.1 million of poultry.	• Beef Products: 5-8% → 0% over 10 years, with a TBD tariff rate quota • Pork Products: 70-108% → 0% over a five to 10 year period • Poultry Products: 5-20% → 0% over 18 years with a grace period over the first six years	Local incomes are rising in Columbia driving higher demand for grain fed beef among the upper and middle class consumers. USDA Prime and Choice meats will likely be in highest demand.
Machinery, Electronics and Transportation	*See following page*	• Ag Equipment: 97% immediately duty free • Construction Equipment: 98% immediately duty free • Electrical Equipment: 60% immediately duty free • Machinery: 65% immediately duty free • Medical Equipment: 97% immediately duty free • Transportation Equipment: 87% immediately duty free • All other products will become duty free within 5 to 10 years	Colombia government is increasing efforts to improve road and networks and developing new mining projects. Foreign investors are acquiring mining rights and developing exploration plans. Although tariff reduction not as dramatic in this area as others, Columbia as an economy will likely continue to increase in need for this sector.

Infrastructure Needs

Infrastructure Needs for Foreign Trade

Products are shipped internationally in one of three ways:

- ***Containerization***: Product is packaged and shipped in steel intermodal containers (ISO Containers). These containers can be transferred between tractor-trailer trucks, rail or ship; allowing for efficient intermodal movement. Every product that can be effectively packaged and fit into a container is shipped in this fashion. The Port of Green Bay is not equipped to ship containerized cargo. Container product leaving Wisconsin will travel to a coastal port (likely Long Beach, Vancouver or Baltimore) via truck or train and then be shipped overseas.

- ***Bulk:*** Products shipped in bulk are typically liquids or a uniform mass of small solids (e.g. grain, coal). These products are poured directly into the cargo holds of ships. The Port of Green Bay regularly handles bulk shipments. Midwestern companies moving bulk products east can utilize the Great Lakes shipping network.

- ***Break Bulk:*** Large products that cannot be containerized are shipped individually on ships as break bulk (e.g. wind turbines, vehicles). The Port of Green Bay is capable of handling some types of break bulk cargo. Midwestern companies moving break bulk products east can utilize the Great Lakes shipping network.

Of the industry sectors examined in this document, food products will be shipped by container, chemicals primarily by bulk, aerospace products by container or break bulk depending on size, and machinery by break bulk. The determination of port of origin for international trade is often not be made by the company. Third party logistics providers (and/or freight forwarders) are typically enlisted by companies to handle the movement of their goods from factory to port and beyond. These providers will often utilize a route that aligns with other customer needs to ensure each truck or rail car leaves and returns full. After interviewing some major third party logistics providers that work with Wisconsin companies it is clear that the vast majority product is being trucked to Chicago and then leaving via rail to a coastal port. This network does not disadvantage Wisconsin companies and therefore there is little incentive to change. **Ultimately, there is no real need for infrastructure improvement in NE Wisconsin in order to achieve the goal of encouraging companies to engage in international trade. The typical movement routes may not leverage or benefit the nearby Port of Green Bay, but they also do not prevent companies from doing what they need to do.**

Data Appendix

Food Manufacturing Data

Model Criteria

Import Trends and Growth Opportunity		
Total Imports	5%	Measures the magnitude of the import economy as a proxy for the scale of opportunity.
Growth of Imports	35%	Growth in imports from 2000 – 2008.
Growth in Production	10%	Growth of national industry production. Countries that are able to increase local production at or above the rate of import growth may be able to develop an economy that limits the need for imports.
Per Capita Growth Opportunity	15%	Import dollars per person. Provides insight into the potential to grow imports in a market.

Underlying Drivers		
Urbanization	15%	Projected annual rate of urbanization through 2050.
GDP per Capita Growth	20%	Proxy of income growth (2000 – 2009).

All Sources for Model: World Bank, United Nations Department of Economic and Social Affairs, Food and Agriculture Organization of the United Nations

Meat: Fresh and Frozen - Model Detail Scores (excl. capacity filter)

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Growth in Production Score	Per Capita Growth Score	TOTAL SCORE
Afghanistan	3.6	100.0	100.0	100.0	83.3	99.2	93.4
Angola	28.0	95.7	100.0	100.0	61.3	89.9	90.4
Zambia	0.1	100.0	88.2	100.0	68.1	99.9	89.5
Sudan	0.3	92.9	100.0	100.0	45.7	99.9	88.5
Equatorial Guinea	2.0	100.0	100.0	100.0	58.9	79.8	88.0
Cambodia	0.2	100.0	73.3	100.0	70.9	99.9	86.8
Mongolia	0.3	41.8	100.0	100.0	100.0	99.3	86.2
Kyrgyzstan	4.9	54.5	93.4	100.0	68.7	94.1	83.1
Ghana	11.7	85.6	75.1	100.0	46.8	96.7	82.6
Republic of Moldova	3.3	14.1	100.0	100.0	91.0	93.8	80.4
Ukraine	80.8	-	100.0	100.0	77.6	88.2	80.0
Madagascar	0.3	100.0	43.2	100.0	62.9	99.9	79.9
Pakistan	0.6	93.1	59.3	100.0	35.8	100.0	79.4
Nigeria	0.5	100.0	48.9	100.0	45.2	100.0	79.3
Viet Nam	29.5	75.8	84.0	100.0	-	97.8	79.3
Syrian Arab Republic	0.4	67.9	74.4	100.0	37.2	99.9	78.8
Georgia	7.7	0.6	100.0	100.0	100.0	88.0	78.7
Sierra Leone	0.5	100.0	53.0	100.0	28.3	99.5	78.4
United Republic of Tanzania	0.3	100.0	42.7	100.0	41.3	100.0	77.7
China	100.0	42.1	100.0	78.5	41.2	98.2	77.7
Romania	95.7	8.1	100.0	100.0	61.0	70.0	77.6
Kazakhstan	12.0	32.5	100.0	100.0	27.2	94.9	77.4
Venezuela (	100.0	34.8	78.6	100.0	57.0	70.8	77.3
Benin	18.0	100.0	56.4	100.0	20.3	86.6	77.2
Algeria	22.3	48.2	70.2	100.0	52.8	95.7	77.0
Bulgaria	36.6	-	100.0	100.0	100.0	67.5	77.0
Russian Federation	100.0	-	100.0	100.0	60.8	68.0	76.3
Côte d'Ivoire	7.1	92.8	37.0	100.0	47.2	97.7	76.1
Congo	10.3	71.4	87.3	100.0	-	81.5	75.9
Iran (Islamic Republic of)	36.2	38.1	78.1	100.0	26.6	96.8	75.3
Senegal	1.8	96.5	51.3	89.6	39.9	99.0	75.0
Kenya	0.1	100.0	46.0	100.0	7.3	100.0	74.9
Hungary	33.4	6.6	77.0	100.0	96.4	77.7	74.4
Thailand	2.8	54.0	53.2	100.0	47.5	99.7	73.6
Czech Republic	74.7	9.7	85.9	100.0	82.2	52.1	73.4
Comoros	1.2	97.8	49.1	81.1	64.9	89.9	72.9
Poland	100.0	1.2	73.3	100.0	67.0	74.7	72.7
Australia	37.1	28.8	56.4	97.5	77.4	88.4	72.6
Morocco	3.8	48.2	56.8	100.0	36.6	99.2	72.3
Norway	13.3	27.0	61.5	100.0	72.5	81.6	71.5
Slovakia	36.7	11.0	81.6	100.0	84.7	54.7	71.5
Ecuador	1.8	41.7	74.9	100.0	-	99.1	71.2
Belarus	15.7	-	100.0	95.4	32.4	89.0	70.8
Zimbabwe	0.2	91.0	-	100.0	66.0	99.9	70.2
Cape Verde	1.5	50.9	66.9	100.0	19.9	80.0	70.1
Albania	6.4	38.3	92.2	73.1	63.8	86.6	69.4
Libyan Arab Jamahiriya	13.4	44.2	42.7	100.0	54.6	86.1	69.2
Armenia	8.3	13.0	100.0	92.6	18.8	82.2	69.0

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Growth in Production Score	Per Capita Growth Score	TOTAL SCORE
Latvia	15.6	-	100.0	100.0	51.1	52.7	68.8
Oman	23.3	56.2	70.1	100.0	32.7	44.5	68.6
Botswana	0.8	52.5	43.9	92.1	41.3	97.3	67.6
Qatar	24.8	42.2	79.4	100.0	90.9	-	67.5
Lithuania	28.4	-	95.9	100.0	50.9	42.6	67.1
Croatia	18.7	10.7	79.4	100.0	27.9	71.6	67.0
China, Macao SAR	4.6	7.9	82.0	100.0	75.0	43.5	66.8
Jordan	19.6	47.4	68.7	89.3	16.1	79.3	66.6
Trinidad and Tobago	5.8	81.8	78.0	72.7	14.3	70.2	65.6
Cyprus	5.4	37.3	61.4	84.2	76.2	60.3	64.3
Lebanon	13.4	19.1	46.3	100.1	39.1	78.7	63.5
Togo	1.1	97.4	38.6	62.8	40.5	98.9	63.3
Djibouti	2.6	52.5	39.4	100.0	1.8	80.0	63.1
Dominican Republic	3.6	41.2	49.6	88.2	11.7	97.7	63.0
Indonesia	21.2	51.6	93.1	54.3	14.2	99.4	62.8
United Arab Emirates	100.0	55.4	45.3	100.0	50.0	-	62.4
Slovenia	21.0	20.2	60.2	100.0	65.6	30.0	62.2
Costa Rica	2.3	47.1	37.2	77.7	43.4	96.7	60.7
Mozambique	1.6	100.0	44.0	35.9	90.0	99.5	60.4
Iceland	0.9	21.3	20.6	100.0	58.2	79.0	60.0
Papua New Guinea	7.1	100.0	46.8	48.7	42.3	92.9	59.9
Maldives	1.7	84.0	52.3	51.2	91.2	64.9	59.9
Namibia	5.7	87.3	62.7	39.3	77.9	82.8	59.9
Tunisia	2.5	34.1	51.1	62.6	63.9	98.4	58.5
Kuwait	42.1	46.6	72.0	88.6	25.9	6.5	58.1
Sweden	100.0	16.2	34.5	92.7	83.5	17.7	57.8
Turkmenistan	0.9	54.4	100.0	41.3	-	98.9	57.5
Guinea	0.4	100.0	9.2	66.6	12.5	99.8	56.4
Yemen	13.1	100.0	73.4	31.7	4.7	96.3	56.3
Guatemala	6.7	86.9	39.9	44.0	50.6	96.8	56.3
South Africa	30.0	31.7	49.4	60.3	44.1	96.0	56.1
Ireland	61.5	46.5	52.7	74.0	82.2	8.8	56.0
Honduras	3.8	72.2	60.8	48.0	11.7	96.6	55.6
Netherlands	100.0	12.7	49.3	89.0	75.0	-	55.4
Philippines	37.1	67.1	42.6	42.6	38.2	97.3	53.8
Saint Vincent and the Grenac	1.2	38.6	45.3	78.4	63.2	33.0	53.6
Suriname	1.9	30.0	89.5	42.5	42.7	74.3	52.8
Liberia	0.9	97.3	30.8	33.7	54.0	98.4	52.8
The former Yugoslav Republ	11.0	22.8	69.3	62.4	35.1	63.2	52.7
Democratic Republic of the (	6.9	100.0	47.3	15.3	75.0	99.4	52.6
Swaziland	0.7	82.4	44.3	36.2	39.1	96.0	52.2
Bosnia and Herzegovina	7.4	-	94.4	56.3	-	86.9	52.0
Iraq	24.7	72.4	77.5	-	92.7	95.3	51.2
Spain	100.0	20.0	56.9	38.5	64.5	78.3	51.1
Mauritania	0.5	87.1	52.3	18.9	52.0	99.0	50.2

*List limited to countries with total score above 50.

Meat: Fresh and Frozen - Capacity for Trade Scores

	Capacity for Trade Score	Total Score
Afghanistan		93.4
Angola	6.5	90.4
Zambia	9	89.5
Sudan		88.5
Equatorial Guinea		88.0
Cambodia	7.9	86.8
Mongolia	7.8	86.2
Kyrgyzstan	6.6	83.1
Ghana	8.7	82.6
Republic of Moldova	7.8	80.4
Ukraine	6.6	80.0
Madagascar	8.3	79.9
Pakistan	7.7	79.4
Nigeria	6.7	79.3
Viet Nam	7.6	79.3
Syrian Arab Republic	6.7	78.8
Georgia	9.7	78.7
Sierra Leone		78.4
United Republic of Tanzania	7.6	77.7
China	9.1	77.7
Romania	8.8	77.6
Kazakhstan	7.4	77.4
Venezuela	5.4	77.3
Benin	8.4	77.2
Algeria	7.9	77.0
Bulgaria	7.6	77.0
Russian Federation	6.4	76.3
Côte d'Ivoire	8.4	76.1
Congo		75.9
Iran (Islamic Republic of)	6.9	75.3
Senegal	9.2	75.0
Kenya	7.6	74.9
Hungary	9.9	74.4

	Capacity for Trade Score	Total Score
Thailand	8.7	73.6
Czech Republic	10.3	73.4
Comoros		72.9
Poland	9.1	72.7
Australia	10.3	72.6
Morocco	8.4	72.3
Norway	9.4	71.5
Slovakia	9.9	71.5
Ecuador	6.1	71.2
Belarus		70.8
Zimbabwe	8	70.2
Cape Verde	6.8	70.1
Albania	8.8	69.4
Libyan Arab Jamahiriya	7.8	69.2
Armenia	6.8	69.0
Latvia	9.3	68.8
Oman	10.4	68.6
Botswana	9.5	67.6
Qatar	11.3	67.5
Lithuania	9.5	67.1
Croatia	8.7	67.0
China, Macao SAR		66.8
Jordan	8.9	66.6
Trinidad and Tobago	8	65.6
Cyprus	10.3	64.3
Lebanon	8.2	63.5
Togo		63.3
Djibouti		63.1
Dominican Republic	8.5	63.0
Indonesia	8.6	62.8
United Arab Emirates	11.7	62.4
Slovenia	10.3	62.2
Costa Rica	8.2	60.7

Counties highlighted in orange were removed from the analysis because they did not meet the threshold of necessary trade capacity.

	Capacity for Trade Score	Total Score
Mozambique	7.6	60.4
Iceland	9.4	60.0
Papua New Guinea		59.9
Maldives		59.9
Namibia	8.7	59.9
Tunisia	9.4	58.5
Kuwait	9.1	58.1
Sweden	12	57.8
Turkmenistan		57.5
Guinea		56.4
Yemen		56.3
Guatemala	8.8	56.3
South Africa	9.1	56.1
Ireland	10.8	56.0
Honduras	8.6	55.6
Netherlands	10.6	55.4
Philippines	7.3	53.8
Saint Vincent and the Grenadines		53.6
Suriname		52.8
Liberia		52.8
The former Yugoslav Republic	8.8	52.7
Democratic Republic of the Congo		52.6
Swaziland	7.3	52.2
Bosnia and Herzegovina	7.9	52.0
Iraq		51.2
Spain	9.6	51.1
Mauritania	8.7	50.2

*List limited to countries with total score above 50.

Meat: Prepared - Model Detail Scores (excl. capacity filter)

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Growth in Production Score	Per Capita Growth Score	TOTAL SCORE
Angola	29.0	95.7	100.0	98.3	61.3	97.8	91.0
Cambodia	1.6	100.0	70.9	100.0	70.9	99.8	86.3
Norway	13.6	100.0	44.3	100.0	72.5	95.9	81.2
Albania	7.0	38.3	91.5	100.0	63.8	96.9	80.3
Qatar	7.9	42.2	77.5	99.2	90.9	92.0	79.8
Czech Republic	95.2	9.7	84.7	100.0	82.2	86.9	79.4
India	1.0	73.3	72.4	100.0	37.2	100.0	79.2
Madagascar	1.2	100.0	38.1	100.0	62.9	99.9	78.9
Ukraine	26.1	-	100.0	100.0	77.6	99.2	78.9
Syrian Arab Republic	6.6	67.9	72.1	100.0	37.2	99.6	78.6
Viet Nam	5.6	75.8	82.5	100.0	-	99.9	78.1
Papua New Guinea	9.0	100.0	42.0	100.0	42.3	98.1	77.8
Sierra Leone	4.0	100.0	48.7	100.0	28.3	99.1	77.6
Benin	2.2	100.0	52.5	100.0	20.3	99.6	77.6
Hungary	57.9	6.6	74.9	100.0	96.4	91.7	77.3
China	34.0	42.1	100.0	84.2	41.2	100.0	76.6
Algeria	4.0	48.2	67.5	100.0	52.8	99.8	76.2
Senegal	1.6	96.5	46.9	94.4	39.9	99.8	75.9
Maldives	1.2	84.0	48.0	84.1	91.2	94.6	75.0
Georgia	9.7	0.6	100.0	100.0	45.6	96.8	74.7
Latvia	16.3	-	100.0	100.0	51.1	89.4	74.3
Lithuania	17.4	-	95.5	100.0	50.9	92.5	73.9
Belarus	12.9	-	100.0	100.0	32.4	98.1	73.6
Oman	12.6	56.2	67.4	96.4	32.7	93.5	73.6
Poland	42.5	1.2	70.8	100.0	67.0	98.4	72.9
Thailand	4.2	54.0	49.0	100.0	47.5	99.9	72.8
Haiti	6.2	75.1	22.3	100.0	64.2	99.1	72.3
Samoa	2.6	54.5	53.3	100.0	61.6	79.3	72.0
Turkey	1.5	36.7	56.0	100.0	50.5	100.0	71.8
Russian Federation	100.0	-	100.0	73.8	60.8	98.6	71.7
United Arab Emirates	86.1	55.4	40.3	100.0	50.0	73.3	71.7
Ecuador	5.1	41.7	72.6	100.0	-	99.5	70.9
Slovakia	51.6	11.0	79.9	82.7	84.7	86.4	70.6
Cape Verde	3.8	50.9	63.9	98.3	19.9	89.2	70.4
Estonia	15.8	4.8	92.8	93.1	49.7	82.6	70.0
Romania	35.0	8.1	100.0	74.1	61.0	97.7	69.6
Republic of Moldova	2.1	14.1	100.0	63.9	91.0	99.2	68.5
Cameroon	3.0	78.9	38.1	76.7	65.7	99.8	68.0
Finland	80.4	8.4	41.5	100.0	69.7	78.3	67.3
Republic of Korea	82.4	0.2	42.4	95.3	63.9	97.6	67.0
Pakistan	2.8	93.1	55.6	65.2	35.8	100.0	66.6
Sweden	100.0	16.2	28.5	100.0	83.5	65.7	66.3
Cyprus	19.9	37.3	57.9	84.5	76.2	68.4	65.6
Nicaragua	5.2	51.2	26.9	100.0	21.2	98.7	65.2
Côte d'Ivoire	2.5	92.8	31.2	69.7	47.2	99.8	64.4
Congo	7.9	71.4	86.1	59.8	-	97.0	63.8
Bulgaria	8.5	-	100.0	52.2	100.0	98.4	63.5

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Growth in Production Score	Per Capita Growth Score	TOTAL SCORE
Kazakhstan	11.9	32.5	100.0	56.0	27.2	98.9	62.6
South Africa	9.4	31.7	44.8	80.5	44.1	99.7	61.7
Azerbaijan	3.0	38.4	100.0	54.8	16.6	99.5	61.7
Spain	100.0	20.0	53.0	63.5	64.5	93.0	61.2
Greece	79.1	17.7	62.8	61.5	69.6	89.9	61.2
Guyana	1.9	23.3	77.5	72.6	9.8	96.6	60.0
DR Congo	14.6	100.0	42.6	35.6	75.0	99.7	59.1
Denmark	100.0	6.4	39.0	100.0	67.1	21.4	58.7
Ghana	4.0	85.6	72.9	32.3	46.8	99.8	58.6
Afghanistan	1.6	100.0	100.0	-	83.3	99.9	58.4
Austria	100.0	16.2	39.8	68.0	82.3	71.8	58.2
Jordan	14.6	47.4	65.8	55.3	16.1	96.7	56.5
Morocco	4.2	48.2	52.9	56.0	36.6	99.8	56.2
Egypt	17.6	67.8	40.1	51.4	38.1	99.7	55.8
Portugal	81.9	17.8	41.9	58.0	67.6	89.1	55.6
Australia	36.1	28.8	52.4	45.5	77.4	97.6	54.9
Italy	100.0	10.3	36.9	54.8	76.2	92.2	54.5
France	100.0	15.4	37.9	51.8	82.2	87.7	54.4
Netherlands	100.0	12.7	44.7	81.2	75.0	10.8	53.4
Philippines	31.8	67.1	37.4	43.8	38.2	99.5	53.2
Ireland	100.0	46.5	48.4	65.2	82.2	-	52.7
Bosnia and Herzegovin	19.0	16.2	93.8	42.8	-	92.9	51.0
Slovenia	29.6	20.2	56.6	47.3	65.6	78.9	50.8
Antigua and Barbuda	1.1	62.7	27.1	51.8	54.4	81.1	50.6
Iraq	6.7	72.4	75.5	-	92.7	99.7	50.5
Colombia	25.6	37.6	62.9	37.3	28.9	99.2	50.3

*List limited to countries with total score above 50.

Meat: Prepared - Capacity for Trade Scores

	Capacity for Trade Score	Total Score
Angola	6.5	91.0
Cambodia	7.9	86.3
Norway	9.4	81.2
Albania	8.8	80.3
Qatar	11.3	79.8
Czech Republic	10.3	79.4
India	8.2	79.2
Madagascar	8.3	78.9
Ukraine	6.6	78.9
Syrian Arab Republic	6.7	78.6
Viet Nam	7.6	78.1
Papua New Guinea		77.8
Sierra Leone		77.6
Benin	8.4	77.6
Hungary	9.9	77.3
China	9.1	76.6
Algeria	7.9	76.2
Senegal	9.2	75.9
Maldives		75.0
Georgia	9.7	74.7
Latvia	9.3	74.3
Lithuania	9.5	73.9
Belarus		73.6
Oman	10.4	73.6
Poland	9.1	72.9
Thailand	8.7	72.8
Haiti		72.3
Samoa		72.0
Turkey	8.4	71.8
Russian Federation	6.4	71.7
United Arab Emirates	11.7	71.7
Ecuador	6.1	70.9

	Capacity for Trade Score	Total Score
Slovakia	9.9	70.6
Cape Verde	6.8	70.4
Estonia	10.9	70.0
Romania	8.8	69.6
Republic of Moldova	7.8	68.5
Cameroon	8.8	68.0
Finland	11.6	67.3
Republic of Korea	8.5	67.0
Pakistan	7.7	66.6
Sweden	12	66.3
Cyprus	10.3	65.6
Nicaragua	7.6	65.2
Côte d'Ivoire	8.4	64.4
Congo		63.8
Bulgaria	7.6	63.5
Kazakhstan	7.4	62.6
South Africa	9.1	61.7
Azerbaijan	7	61.7
Spain	9.6	61.2
Greece	9.3	61.2
Guyana	7.7	60.0
DR Congo		59.1
Denmark	10.7	58.7
Ghana	8.7	58.6
Afghanistan		58.4
Austria	10.8	58.2
Jordan	8.9	56.5
Morocco	8.4	56.2
Egypt	8.5	55.8
Portugal	10.5	55.6
Australia	10.3	54.9
Italy	9.1	54.5

Counties highlighted in orange were removed from the analysis because they did not meet the threshold of necessary trade capacity.

	Capacity for Trade Score	Total Score
France	10.1	54.4
Netherlands	10.6	53.4
Philippines	7.3	53.2
Ireland	10.8	52.7
Bosnia and Herzegovina	7.9	51.0
Slovenia	10.3	50.8
Antigua and Barbuda		50.6
Iraq		50.5
Colombia	7.6	50.3

*List limited to countries with total score above 50.

Cheese - Model Detail Scores (excl. capacity filter)

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Per Capita Growth Score	TOTAL SCORE
Angola	6.0	100.0	100.0	100.0	98.0	90.2
Nigeria	0.6	100.0	100.0	100.0	100.0	90.1
Turkmenistan	0.4	65.2	100.0	100.0	99.5	84.7
Cambodia	0.5	100.0	70.9	100.0	99.8	84.2
Iraq	9.0	86.9	75.5	100.0	98.5	83.7
Kyrgyzstan	1.3	65.4	92.8	100.0	98.6	83.2
India	1.5	88.7	72.4	100.0	100.0	82.9
Mongolia	0.8	50.2	100.0	100.0	98.2	82.2
Russian Federation	100.0	-	100.0	100.0	84.8	82.0
Azerbaijan	1.2	46.1	100.0	100.0	99.2	81.9
Syrian Arab Republic	1.9	81.4	72.1	100.0	99.5	81.7
Kazakhstan	34.8	39.0	100.0	100.0	86.6	81.7
China	51.0	50.5	100.0	78.3	99.8	80.0
Sierra Leone	0.5	100.0	48.7	100.0	99.5	79.7
Viet Nam	5.9	90.9	82.5	81.5	99.6	79.2
Pakistan	1.4	100.0	55.6	92.8	100.0	78.7
DR Congo	0.4	100.0	42.6	100.0	100.0	78.5
Zambia	0.4	100.0	87.1	73.8	99.8	78.3
Romania	40.6	9.7	100.0	100.0	88.6	78.2
Ecuador	0.8	50.1	72.6	100.0	99.6	77.0
Armenia	1.5	15.6	100.0	100.0	97.2	76.9
Ukraine	17.7	-	100.0	100.0	97.7	76.3
Morocco	19.8	57.9	52.9	100.0	96.3	75.5
Georgia	1.3	0.7	100.0	100.0	98.1	74.9
Belarus	5.1	-	100.0	100.0	96.8	74.9
Bulgaria	8.9	-	100.0	100.0	92.9	74.5
Cape Verde	1.5	61.1	63.9	100.0	82.3	73.6
Indonesia	18.2	62.0	92.5	68.1	99.5	73.4
Czech Republic	94.6	11.6	84.7	100.0	45.4	72.2
Poland	40.5	1.4	70.8	100.0	93.6	72.2
Lithuania	9.4	-	95.5	100.0	83.0	71.6
Madagascar	1.1	100.0	38.1	82.1	99.7	71.4
Brunei Darussalam	1.0	63.3	47.0	100.0	84.6	70.9
Thailand	8.6	64.8	49.0	85.5	99.2	70.2
Hungary	54.3	7.9	74.9	100.0	67.4	70.1
Slovakia	34.2	13.2	79.9	100.0	62.0	68.8
Senegal	3.8	100.0	46.9	68.7	98.2	68.4
Congo	0.5	85.7	86.1	51.6	99.2	68.0
Latvia	17.2	-	100.0	100.0	53.2	67.4
Albania	2.1	46.0	91.5	64.0	96.0	67.0
Burkina Faso	0.4	100.0	51.5	61.8	99.9	66.9
Republic of Moldova	3.0	16.9	36.4	100.0	95.0	64.1
Luxembourg	100.0	47.9	56.6	100.0	-	63.5
Yemen	10.6	100.0	71.0	37.4	97.3	62.8
Ghana	0.5	100.0	72.9	34.9	99.9	61.8
Venezuela	41.7	41.7	76.7	50.3	91.2	61.6
Croatia	19.0	12.9	77.5	76.1	74.1	60.8
Egypt	37.6	81.3	40.1	45.7	97.3	59.4
Côte d'Ivoire	1.4	100.0	31.2	51.4	99.6	59.3

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Per Capita Growth Score	TOTAL SCORE
Slovenia	23.1	24.2	56.6	100.0	30.7	58.4
Namibia	3.4	100.0	59.4	35.4	90.7	57.7
Bolivia	0.6	62.1	40.4	57.5	99.7	57.5
Malaysia	15.8	56.6	50.6	50.4	96.6	57.1
Guatemala	7.9	100.0	34.4	42.5	96.6	56.9
Colombia	0.9	45.1	44.5	57.8	99.9	56.0
Afghanistan	1.6	100.0	100.0	-	99.7	55.1
Papua New Guinea	0.7	100.0	42.0	32.3	99.4	54.6
Honduras	6.9	86.7	57.3	30.1	94.5	54.6
Australia	100.0	34.6	52.4	44.0	66.2	54.3
Jordan	26.8	56.9	65.8	42.7	74.5	54.2
Philippines	30.5	80.5	37.4	34.0	98.0	54.1
New Zealand	9.5	27.4	48.9	61.7	86.7	53.8
China, Macao SAR	1.0	9.5	80.4	51.4	89.0	53.4
Norway	26.5	32.4	58.0	59.3	66.8	53.2
Cameroon	1.1	94.7	38.1	31.9	99.7	53.1
Algeria	28.3	57.9	67.5	23.8	95.1	52.4
Tunisia	6.6	40.9	46.7	48.1	96.1	52.2
Sri Lanka	2.0	83.9	65.3	17.6	99.4	51.9
Qatar	11.2	50.6	77.5	49.1	52.0	51.8
Bahrain	16.1	51.5	37.1	100.0	-	51.8
Mozambique	1.1	100.0	38.9	25.4	99.7	51.7
Libyan Arab Jamahiriya	28.9	53.1	37.5	52.5	72.9	51.3
Maldives	1.5	100.0	48.0	32.1	71.7	50.3
Estonia	6.1	5.7	92.8	45.3	72.0	50.3
Mexico	100.0	27.9	34.6	28.8	93.9	50.0

*List limited to countries with total score above 50.

Cheese - Capacity for Trade Scores

	Capacity for Trade Score	Total Score
Angola	6.5	90.2
Nigeria	6.7	90.1
Turkmenistan		84.7
Cambodia	7.9	84.2
Iraq	6.9	83.7
Kyrgyzstan	6.6	83.2
India	8.2	82.9
Mongolia	7.8	82.2
Russian Federation	6.4	82.0
Azerbaijan	7.0	81.9
Syrian Arab Republic	6.7	81.7
Kazakhstan	7.4	81.7
China	9.1	80.0
Sierra Leone		79.7
Viet Nam	7.6	79.2
Pakistan	7.7	78.7
DR Congo		78.5
Zambia	9.0	78.3
Romania	8.8	78.2
Ecuador	6.1	77.0
Armenia	6.8	76.9
Ukraine	6.6	76.3
Morocco	8.4	75.5
Georgia	9.7	74.9
Belarus		74.9
Bulgaria	7.6	74.5
Cape Verde	6.8	73.6
Indonesia	8.6	73.4
Czech Republic	10.3	72.2
Poland	9.1	72.2
Lithuania	9.5	71.6
Madagascar	8.3	71.4

	Capacity for Trade Score	Total Score
Brunei Darussalam	9.3	70.9
Thailand	8.7	70.2
Hungary	9.9	70.1
Slovakia	9.9	68.8
Senegal	9.2	68.4
Congo		68.0
Latvia	9.3	67.4
Albania	8.8	67.0
Burkina Faso	9.3	66.9
Republic of Moldova	7.8	64.1
Luxembourg	11.8	63.5
Yemen		62.8
Ghana	8.7	61.8
Venezuela	5.4	61.6
Croatia	8.7	60.8
Egypt	8.5	59.4
Côte d'Ivoire	8.4	59.3
Slovenia	10.3	58.4
Namibia	8.7	57.7
Bolivia (Plurinational State of)		57.5
Malaysia	9.1	57.1
Guatemala	8.8	56.9
Colombia	7.6	56.0
Afghanistan		55.1
Papua New Guinea		54.6
Honduras	8.6	54.6
Australia	10.3	54.3
Jordan	8.9	54.2
Philippines	7.3	54.1
New Zealand	12.1	53.8
China, Macao SAR		53.4
Norway	9.4	53.2

Counties highlighted in orange were removed from the analysis because they did not meet the threshold of necessary trade capacity.

	Capacity for Trade Score	Total Score
Cameroon	8.8	53.1
Algeria	7.9	52.4
Tunisia	9.4	52.2
Sri Lanka	8.4	51.9
Qatar	11.3	51.8
Bahrain	11.1	51.8
Mozambique	7.6	51.7
Libyan Arab Jamahiriya	7.8	51.3
Maldives		50.3
Estonia	10.9	50.3
Mexico	8.7	50.0

*List limited to countries with total score above 50.

Dry Milk - Model Detail Scores (excl. capacity filter)

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Per Capita Growth Score	TOTAL SCORE
Sudan	64.3	100.0	100.0	100.0	86.1	93.7
Afghanistan	3.5	100.0	100.0	100.0	99.2	90.2
Laos	3.1	100.0	96.2	100.0	100.0	89.6
Cambodia	6.0	100.0	70.9	100.0	97.3	84.2
Kazakhstan	27.3	39.0	100.0	100.0	88.3	81.2
Nepal	3.7	100.0	53.5	100.0	99.2	80.9
Comoros	1.1	100.0	62.9	97.9	91.2	80.2
Uganda	1.7	100.0	47.3	93.2	99.7	77.2
Ghana	31.7	100.0	72.9	74.3	91.1	77.0
Togo	2.9	100.0	33.0	97.8	97.1	75.5
Nigeria	100.0	100.0	100.0	32.4	93.6	75.1
Latvia	1.5	-	100.0	100.0	95.4	74.2
Georgia	5.3	0.7	100.0	100.0	91.8	74.0
Chad	3.6	100.0	88.1	61.3	97.9	74.0
Czech Republic	4.6	11.6	84.7	100.0	97.1	73.5
Indonesia	100.0	62.0	92.5	49.4	90.8	73.2
Mauritania	21.1	100.0	47.9	100.0	57.3	73.2
Zambia	4.7	100.0	87.1	59.0	97.6	73.1
Bulgaria	29.8	-	100.0	100.0	73.5	72.7
Guinea-Bissau	1.2	100.0	83.4	59.3	95.1	71.6
Norway	0.7	32.4	58.0	100.0	99.0	71.3
Slovakia	11.8	13.2	79.9	100.0	85.4	71.2
Croatia	8.7	12.9	77.5	100.0	86.8	70.7
Turkey	32.0	44.9	56.2	85.8	97.1	70.6
Costa Rica	2.3	56.5	31.4	100.0	96.7	69.3
Oman	100.0	67.4	67.4	100.0	-	68.6
Ethiopia	3.6	100.0	87.5	44.6	99.7	68.4
Iraq	100.0	86.9	75.5	53.5	56.2	68.1
Egypt	95.2	81.3	40.1	56.2	92.4	67.9
Senegal	55.8	100.0	46.9	67.0	70.3	67.5
Venezuela	100.0	41.7	76.7	93.1	15.5	67.3
Liberia	2.2	100.0	24.6	77.3	96.2	66.4
Syrian Arab Republic	64.1	81.4	72.1	48.4	80.5	66.1
Yemen	83.2	100.0	71.0	37.6	76.5	66.0
Libyan Arab Jamahiriya	41.7	53.1	37.5	100.0	56.5	66.0
China	100.0	50.5	100.0	24.2	98.6	65.8
Niger	14.3	100.0	44.3	61.6	93.8	65.6
Republic of Moldova	0.7	16.9	36.4	100.0	98.6	64.6
Iran	27.1	45.7	76.1	57.0	97.6	64.3
Madagascar	5.1	100.0	38.1	60.1	98.3	63.8
United Arab Emirates	100.0	66.5	40.3	100.0	-	63.0
Viet Nam	99.5	90.9	82.5	12.6	92.5	63.0
Sweden	15.4	19.5	28.5	100.0	88.8	62.9
Congo	15.5	85.7	86.1	48.1	72.0	62.9
Albania	1.6	46.0	91.5	48.7	96.8	61.8
Burkina Faso	10.6	100.0	51.5	46.4	95.5	61.7
Cameroon	15.9	94.7	38.1	54.7	94.6	61.5
DR Congo	18.6	100.0	42.6	44.5	98.3	60.6
Morocco	18.8	57.9	52.9	57.9	96.1	60.6
India	1.7	88.7	72.4	35.2	100.0	60.3

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Per Capita Growth Score	TOTAL SCORE
Benin	5.2	100.0	52.5	41.4	96.1	59.7
Angola	0.6	100.0	100.0	13.0	99.8	59.6
Australia	24.3	34.6	52.4	64.3	92.4	59.1
Sri Lanka	100.0	83.9	65.3	30.8	54.3	57.3
Mali	15.0	100.0	69.9	20.9	92.3	56.2
Hungary	7.7	7.9	74.9	55.5	94.9	55.3
United Kingdom	100.0	25.5	22.8	54.1	88.3	55.0
Jordan	57.2	56.9	65.8	54.5	39.4	54.4
Zimbabwe	1.4	100.0	-	54.6	99.3	54.1
New Zealand	5.4	27.4	48.9	59.2	91.7	53.5
Pakistan	13.4	100.0	55.6	16.7	99.5	53.2
Côte d'Ivoire	26.6	100.0	31.2	30.6	91.6	52.9
Malawi	3.1	100.0	51.3	21.5	98.6	52.8
Philippines	100.0	80.5	37.4	20.3	79.7	52.6
Thailand	100.0	64.8	49.0	15.8	83.4	51.7
Bangladesh	58.1	100.0	38.2	9.0	97.6	51.1
Republic of Korea	12.8	0.2	42.4	61.9	98.2	51.1
Gabon	9.5	59.5	47.6	57.3	57.8	51.0
Spain	100.0	24.0	53.0	28.2	80.9	50.3
Azerbaijan	0.5	46.1	100.0	9.2	99.6	50.1
Germany	100.0	-	32.0	49.2	82.4	50.1

*List limited to countries with total score above 50.

Dry Milk - Capacity for Trade Scores

	Capacity for Trade Score	Total Score
Sudan		93.66
Afghanistan		90.19
Laos		89.55
Cambodia	7.90	84.24
Kazakhstan	7.40	81.25
Nepal	7.40	80.91
Comoros		80.17
Uganda	8.70	77.19
Ghana	8.70	76.97
Togo		75.52
Nigeria	6.70	75.05
Latvia	9.30	74.24
Georgia	9.70	74.00
Chad	6.10	73.99
Czech Republic	10.30	73.54
Indonesia	8.60	73.23
Mauritania	8.70	73.16
Zambia	9.00	73.06
Bulgaria	7.60	72.68
Guinea-Bissau		71.59
Norway	9.40	71.33
Slovakia	9.90	71.22
Croatia	8.70	70.68
Turkey	8.40	70.64
Costa Rica	8.20	69.32
Oman	10.40	68.59
Ethiopia	7.60	68.40
Iraq		68.12
Egypt	8.50	67.87
Senegal	9.20	67.45
Venezuela	5.40	67.27
Liberia		66.42

	Capacity for Trade Score	Total Score
Syrian Arab Republic	6.70	66.08
Yemen		65.97
Libyan Arab Jamahiriya	7.80	65.95
China	9.10	65.78
Niger		65.62
Republic of Moldova	7.80	64.61
Iran (Islamic Republic of)	6.90	64.26
Madagascar	8.30	63.82
United Arab Emirates	11.70	63.04
Viet Nam	7.60	63.00
Sweden	12.00	62.94
Congo		62.88
Albania	8.80	61.76
Burkina Faso	9.30	61.70
Cameroon	8.80	61.48
DR Congo		60.60
Morocco	8.40	60.60
India	8.20	60.28
Benin	8.40	59.74
Angola	6.50	59.56
Australia	10.30	59.07
Sri Lanka	8.40	57.28
Mali	8.10	56.24
Hungary	9.90	55.35
United Kingdom	10.20	54.98
Jordan	8.90	54.40
Zimbabwe	8.00	54.10
New Zealand	12.10	53.48
Pakistan	7.70	53.21
Côte d'Ivoire	8.40	52.93
Malawi	7.70	52.80
Philippines	7.30	52.60

Counties highlighted in orange were removed from the analysis because they did not meet the threshold of necessary trade capacity.

	Capacity for Trade Score	Total Score
Thailand	8.70	51.73
Bangladesh	7.50	51.14
Republic of Korea	8.50	51.11
Gabon		51.00
Spain	9.60	50.27
Azerbaijan	7.00	50.10
Germany	10.10	50.10

*List limited to countries with total score above 50.

Dry Whey - Model Detail Scores (excl. capacity filter)

	Total Important Score	Urbanization Score	GDP/Capita Growth Score	Growth Imports Score	Per Capita Growth Score	TOTAL SCORE
Viet Nam	29.6	100.0	82.5	100.0	93.3	88.1
Cambodia	5.1	100.0	70.9	100.0	93.1	83.3
Kazakhstan	1.9	48.7	100.0	100.0	97.5	82.0
Pakistan	9.1	100.0	55.6	100.0	99.0	81.8
Algeria	2.8	72.3	67.5	100.0	98.4	79.3
Russian Federation	47.9	-	100.0	100.0	93.2	78.4
Jordan	1.3	71.1	65.8	100.0	95.8	78.1
Romania	7.0	12.1	100.0	100.0	93.5	76.2
Côte d'Ivoire	1.1	100.0	31.2	100.0	99.0	76.2
China	100.0	63.1	100.0	50.0	95.3	76.0
Czech Republic	3.8	14.5	84.7	100.0	92.7	73.0
Lithuania	1.7	-	95.5	100.0	89.7	72.2
Nigeria	2.1	100.0	100.0	100.0	-	70.2
Poland	24.4	1.7	70.8	100.0	87.2	69.3
Malaysia	64.2	70.7	50.6	90.0	53.3	69.3
Bulgaria	6.3	-	100.0	89.1	83.1	68.4
Ghana	6.8	100.0	72.9	100.0	-	65.3
Slovakia	2.5	16.6	79.9	76.9	90.8	63.8
Egypt	11.0	100.0	40.1	52.2	97.4	61.9
Indonesia	77.2	77.4	92.5	65.5	-	60.8
Jamaica	1.4	32.0	22.5	93.7	89.7	60.2
Morocco	3.0	72.3	52.9	53.6	98.1	60.1
Venezuela	17.5	52.2	76.7	47.8	87.7	59.2
Switzerland	20.0	29.7	38.1	100.0	47.5	58.6
New Zealand	14.9	34.2	48.9	100.0	30.8	57.6
Estonia	6.1	7.1	92.8	100.0	6.0	56.4
Saudi Arabia	5.2	76.3	38.1	49.3	96.0	56.0
Philippines	50.8	100.0	37.4	29.1	89.0	55.5
South Africa	20.4	47.5	44.8	53.7	91.8	55.3
Belarus	3.0	-	100.0	100.0	-	55.3
Peru	8.2	54.5	57.4	39.8	94.4	53.3
Portugal	9.0	26.8	41.9	64.7	83.2	52.6
Sri Lanka	1.6	100.0	65.3	9.5	98.4	51.2

*List limited to countries with total score above 50.

Dry Whey - Capacity for Trade Scores

Counties highlighted in orange were removed from the analysis because they did not meet the threshold of necessary trade capacity.

	Capacity for Trade Score	Total Score
Viet Nam	7.6	88.1
Cambodia	7.9	83.3
Kazakhstan	7.4	82.0
Pakistan	7.7	81.8
Algeria	7.9	79.3
Russian Federation	6.4	78.4
Jordan	8.9	78.1
Romania	8.8	76.2
Côte d'Ivoire	8.4	76.2
China	9.1	76.0
Czech Republic	10.3	73.0
Lithuania	9.5	72.2
Nigeria	6.7	70.2
Poland	9.1	69.3
Malaysia	9.1	69.3
Bulgaria	7.6	68.4
Ghana	8.7	65.3
Slovakia	9.9	63.8
Egypt	8.5	61.9
Indonesia	8.6	60.8
Jamaica	8.5	60.2
Morocco	8.4	60.1
Venezuela	5.4	59.2
Switzerland	9.3	58.6
New Zealand	12.1	57.6
Estonia	10.9	56.4

	Capacity for Trade Score	Total Score
Saudi Arabia	10.2	56.0
Philippines	7.3	55.5
South Africa	9.1	55.3
Belarus		55.3
Peru	9.5	53.3
Portugal	10.5	52.6
Sri Lanka	8.4	51.2

*List limited to countries with total score above 50.

Agriculture Machinery Data

Model Criteria

Import Trends and Growth Opportunity		
Total Imports	25%	Measures the magnitude of the import economy as a proxy of the scale of opportunity.
Growth of Imports	25%	Growth in imports from 2001 – 2010.

Underlying Drivers		
% Arable Land to Total Land	25%	Total Arable Land / Total Land in Country. Arable Land includes land under temporary crops, temporary meadows for mowing or pasture, land under market or kitchen gardens, and land temporarily fallow.
Number of Ag Machinery per 1000 Acres of Arable Land	25%	Total Number of Ag Machinery Specifically tractors per 1000 Acres of Arable Land.

Source: United States of America International Trade Administration, World Bank Development Indicators

Agriculture Machinery- Model Detail Scores (excl. capacity filter)

	Import Score	Growth Score	% Arable Land Score	Ag Machine per Land Score	Total Score
Germany	73.16	0.90	55.80	94.90	56.19
Estonia	0.06	100.00	22.72	96.91	54.92
Canada	100.00	0.81	8.11	98.96	51.97
India	12.94	4.89	87.86	99.03	51.18
Nigeria	0.01	46.64	54.75	99.94	50.33
Bangladesh	0.00	0.11	100.00	99.96	50.02
Mexico	75.62	1.30	21.17	99.23	49.33
Ukraine	0.17	2.44	91.64	99.24	48.37
Denmark	4.51	1.86	86.25	96.51	47.28
Japan	94.85	0.74	19.48	72.76	46.96
Hungary	1.03	1.59	83.98	98.47	46.27
China	59.28	5.87	18.05	99.52	45.68
France	16.75	0.48	55.00	95.81	42.01
United Kingdom	34.05	0.60	38.68	94.53	41.97
Romania	0.33	1.39	66.06	98.89	41.67
Czech Republic	1.40	0.95	64.50	98.21	41.26
Italy	30.45	0.58	43.02	89.93	40.99
Poland	1.31	1.53	64.81	93.79	40.36
Slovakia	0.33	11.58	47.26	100.00	39.79
Turkey	3.55	1.65	50.61	97.57	38.35
El Salvador	0.00	0.55	52.06	99.73	38.09
Serbia	0.00	0.55	56.18	94.37	37.78
Bulgaria	0.08	3.04	47.74	99.56	37.60
Lithuania	0.01	1.84	49.71	97.78	37.33
Spain	5.85	1.79	44.84	96.64	37.28
Thailand	0.43	0.86	45.20	99.21	36.42
Pakistan	0.01	0.32	45.10	99.05	36.12
Belarus	0.00	0.12	42.96	99.39	35.62
Nicaragua	0.02	16.62	25.87	99.93	35.61
Netherlands	6.74	0.83	43.79	89.72	35.27
Viet Nam	0.22	7.28	34.76	98.56	35.20
Dominican Republic	0.12	2.36	36.99	99.92	34.85
Azerbaijan	0.00	0.16	36.42	98.97	33.89
Cambodia	0.00	0.55	34.22	99.96	33.68
Philippines	0.51	2.68	31.21	99.93	33.58
Croatia	0.03	1.38	32.40	99.83	33.41
Belize	0.02	28.52	4.91	99.16	33.15
Ghana	0.00	1.96	30.01	99.96	32.98
Greece	0.02	0.62	33.27	95.71	32.40

	Import Score	Growth Score	% Arable Land Score	Ag Machine per Land Score	Total Score
Sri Lanka	0.40	6.08	23.10	99.64	32.30
Tunisia	0.02	0.32	29.31	99.55	32.30
Latvia	0.01	2.27	28.60	98.09	32.24
Jamaica	0.00	2.90	26.21	99.27	32.10
Brazil	16.13	1.63	11.30	99.20	32.06
Armenia	0.00	0.55	28.64	98.35	31.89
Trinidad and Tobago	0.03	4.38	23.84	98.56	31.70
Guatemala	0.01	5.22	21.64	99.85	31.68
Indonesia	0.96	4.96	20.69	99.82	31.61
Portugal	0.03	3.03	27.36	95.95	31.59
Kenya	0.01	12.74	13.27	99.82	31.46
Niger	0.00	6.79	18.61	100.00	31.35
Sweden	15.34	0.95	10.68	96.04	30.75
Honduras	0.00	6.50	15.53	99.76	30.45
Cameroon	0.00	0.55	20.87	100.00	30.36
South Africa	1.41	0.41	19.79	99.73	30.33
Israel	0.80	0.33	23.89	96.20	30.30
Austria	7.02	1.02	27.44	85.43	30.23
Ireland	0.85	0.41	28.78	90.45	30.12
Afghanistan	0.00	0.55	19.76	99.99	30.08
Ethiopia	0.00	0.55	18.00	99.98	29.63
Georgia	0.00	0.08	18.79	98.66	29.38
Argentina	0.47	1.11	16.58	99.29	29.36
Australia	3.26	1.05	10.42	99.60	28.58
Sierra Leone	0.00	1.13	12.93	99.99	28.51
Kazakhstan	0.00	0.55	13.45	99.85	28.46
Russian Federation	0.42	0.90	12.06	99.70	28.27
Uruguay	0.00	1.35	12.71	98.40	28.12
Malaysia	1.25	2.32	8.86	99.63	28.01
Finland	4.66	0.72	11.89	94.26	27.88
Panama	0.01	0.25	11.94	99.20	27.85
New Zealand	1.44	1.79	9.06	98.50	27.70
Eritrea	0.00	0.55	8.99	99.94	27.37
Madagascar	0.00	0.55	8.19	99.93	27.17
Ecuador	0.01	0.51	7.86	99.68	27.02
Equatorial Guinea	0.01	0.55	7.47	99.95	27.00

*List limited to top 75 countries in analysis

Agriculture Machinery- Capacity for Trade Scores

	Capacity for Trade Score	Total Score
Germany	10	56.2
Estonia	11.2	54.9
Canada	9.8	52.0
India	8.4	51.2
Nigeria	7.2	50.3
Bangladesh	8.2	50.0
Mexico	9.6	49.3
Ukraine	7.2	48.4
Denmark	10.2	47.3
Japan	8.8	47.0
Hungary	11.2	46.3
China	9.2	45.7
France	10.4	42.0
United Kingdom	10.8	42.0
Romania	9.8	41.7
Czech Republic	11.4	41.3
Italy	9.8	41.0
Poland	9.6	40.4
Slovakia	11	39.8
Turkey	9.2	38.3
El Salvador	9.6	38.1
Serbia	8.8	37.8
Bulgaria	8.2	37.6
Lithuania	9.4	37.3
Spain	10	37.3
Thailand	9.2	36.4
Pakistan	8.2	36.1
Belarus	0	35.6
Nicaragua	8	35.6
Netherlands	10.8	35.3
Viet Nam	8	35.2
Dominican Republic	7.6	34.8
Azerbaijan	7	33.9
Cambodia	8.8	33.7
Philippines	8.6	33.6
Croatia	9.2	33.4
Belize	0	33.2
Ghana	9.8	33.0
Greece	10.4	32.4

	Capacity for Trade Score	Total Score
Sri Lanka	8.4	32.3
Tunisia	9.4	32.3
Latvia	10.4	32.2
Jamaica	9.4	32.1
Brazil	7.8	32.1
Armenia	8.4	31.9
Trinidad and Tobago	9.8	31.7
Guatemala	9.2	31.7
Indonesia	9.4	31.6
Portugal	11.2	31.6
Kenya	8.6	31.5
Niger	0	31.4
Sweden	12.4	30.8
Honduras	8.8	30.4
Cameroon	10	30.4
South Africa	9.4	30.3
Israel	11	30.3
Austria	11	30.2
Ireland	11.2	30.1
Afghanistan	0	30.1
Ethiopia	8	29.6
Georgia	10	29.4
Argentina	5.6	29.4
Australia	10.6	28.6
Sierra Leone	0	28.5
Kazakhstan	7.8	28.5
Russian Federation	7	28.3
Uruguay	9.4	28.1
Malaysia	8.6	28.0
Finland	11.8	27.9
Panama	9.6	27.8
New Zealand	12.6	27.7
Eritrea	0	27.4
Madagascar	8.8	27.2
Ecuador	5.2	27.0
Equatorial Guinea	0	27.0

*List limited to top 75 countries in analysis

Aerospace Data

Criteria	Market Driver Characteristics	Weighted Value
Growth in Exports	Growth in Exports is measured from 2005 to 2011. This data represents the growth activity in the aerospace sector	25%
GDP Per Capita (PPP)	Purchasing Price Parity is a key economic factor in air travel. Higher income countries tend to travel more then lower income.	20%
Pct. GDP Real Growth	Indicates the general health of the economy. It serves as an indicator of business and consumer growth, a driver for air travel	10%
Pct. Population Growth	Indicator representing the growth in the population. This factor is also an indicator of economic health	5%
Pct. Urban Population	Greater urbanization is a sign of economic growth, development of metro areas that drive the need for travel.	5%
Pct. Rate of Urbanization	Urbanization rates give a dimension to areas the are less urbanized. It is an indicator of the movement towards greater urbanization	5%
Number of Airports	Provides an indicator on the amount of current and future air travel	5%
Limitations of Trade Barriers	Provides an indicator on weather a market is open or closed to trade	15%
Customs Efficiency	Provides an indicator on the level of trade complexity between two countries	10%

Sources: trade.gov – Top 20 Aerospace Export Markets, CIA The World Fact Book, Aerospace Industries Association, NKF Globe

Aerospace: Data

	Pct. Growth/ Decline	GDP Per Capita (PPP)	Pct. GDP Real Growth	Pct. Population Growth	Pct. Urban Population	Pct. Rate of Urbanization	Number of Airports	Limitations of Trade Barriers (1 = Strongly Limit)	Customs Efficiency (7 = Extremely Efficient)	Total Score
France	1.25	1.4	0.3	0.05	0.25	0.15	0.25	0.75	0.3	4.7
Australia	1.25	1	0.5	0.25	0.25	0.15	0.25	0.75	0.3	4.7
Germany	1.25	1	0.5	0.05	0.15	0.15	0.25	0.75	0.3	4.4
Netherland	1.25	1	0.3	0.05	0.25	0.05	0.15	0.75	0.3	4.1
China	1.25	0.2	0.7	0.15	0.15	0.25	0.25	0.75	0.3	4
Canada	0.75	1	0.5	0.05	0.25	0.15	0.25	0.75	0.3	4
Norway	1.25	1	0.1	0.05	0.25	0.15	0.15	0.75	0.3	4
UAE	0.25	1	0.5	0.25	0.25	0.25	0.15	0.75	0.5	3.9
Singapore	0.25	1	0.5	0.05	0.25	0.25	0.05	0.75	0.5	3.6
Algeria	1.25	0.2	0.5	0.15	0.15	0.25	0.15	0.75	0.1	3.5
Turkey	1.25	0.2	0.5	0.15	0.15	0.15	0.15	0.75	0.1	3.4
Korea	0.25	1	0.5	0.05	0.25	0.05	0.25	0.75	0.3	3.4
Hong Kong	0.25	1	0.5	0.05	0.25	0.05	0.05	0.75	0.5	3.4
United King	0.25	1	0.3	0.05	0.25	0.05	0.25	0.75	0.3	3.2
Japan	0.25	1	0.5	0.05	0.15	0.05	0.15	0.75	0.3	3.2
Malaysia	0.25	0.6	0.5	0.15	0.15	0.25	0.25	0.75	0.3	3.2
Brazil	1.25	0.2	0.5	0.15	0.25	0.05	0.25	0.45	0.1	3.2
Mexico	0.25	0.2	0.5	0.15	0.15	0.15	0.25	0.75	0.1	2.5
Egypt	0.25	0.2	0.5	0.15	0.05	0.15	0.15	0.75	0.3	2.5
Indonesia	0.25	0.2	0.5	0.15	0.05	0.15	0.25	0.75	0.1	2.4

Chemical Manufacturing Data

Fertilizer Criteria		
Total Imports from the US	5%	Measures the magnitude of the import economy as a proxy for scale of demand.
Growth in Imports from the US	17.5%	Growth in imports from 2006 – 2010
Total Fertilizer Use	17.5%	Total kilograms of fertilizer used annually by country.
Change in Fertilizer Use	40%	Change in total fertilizer use from 2004 – 2008.
Percent of Agriculture Land	20%	Measures the percent of total land in a country comprised of agriculture land. This is intended to gauge the scale of the local production economy.

Source: United States of America International Trade Administration, World Bank Development Indicators

Industrial Chemical Criteria		
Total Imports from the US in Resins and Synthetic Rubber	10%	Measures the magnitude of the import economy as a proxy for scale of demand for Resins.
Growth in Imports from the US in Resins and Synthetic Rubber	20%	Growth in imports of Resins from 2006 – 2010
Total Imports from the US in Basic Chemicals	10%	Measures the magnitude of the import economy as a proxy for scale of demand for Basic Chemicals.
Growth in Imports from the US in Basic Chemicals	20%	Growth in imports of Basic Chemicals from 2006 – 2010
Growth of Industry Value Added	40%	Measures the growth of total value added in "Industry" (manufacturing, mining, construction, electricity, water and gas). This measure is intended to identify economies that will be demanding more chemicals that are typically found in these processes.

Chemical: Fertilizer- Model Detail Scores (excl. capacity filter)

	Total Exports from US	Growth in Exp (06-10)	Total Fert Use	Change in Fert Use (04 - 08)	% Ag Land to Total Land	TOTAL SCORE
Ukraine	8.1	100.0	76.9	99.8	79.1	87.1
Nigeria	3.1	-	17.1	100.0	95.8	62.3
India	100.0	16.1	100.0	55.3	67.2	60.9
China	100.0	0.5	100.0	61.4	65.9	60.3
Poland	1.2	23.9	100.0	65.0	59.1	59.5
Burundi	-	-	0.1	96.7	99.3	58.5
Rwanda	-	-	0.6	100.0	86.7	57.4
Slovakia	2.8	100.0	7.4	69.1	44.6	55.5
Indonesia	52.0	23.5	100.0	62.7	29.7	55.3
Madagascar	0.0	-	0.1	97.6	78.0	54.7
Uganda	0.0	-	0.8	100.0	72.2	54.6
Cuba	-	-	6.2	100.0	67.0	54.5
Belarus	-	-	48.8	74.4	49.0	48.1
Angola	1.3	11.3	0.1	89.0	51.3	47.9
Latvia	0.1	8.4	5.1	95.8	32.8	47.3
Azerbaijan	-	-	1.1	83.2	64.0	46.3
El Salvador	13.4	2.1	3.8	66.2	83.4	44.9
Bangladesh	3.0	-	100.0	29.2	77.2	44.8
Gabon	-	-	0.0	100.0	22.3	44.5
DR of Congo	0.0	12.5	0.0	100.0	11.1	44.4
Trinidad and Tobago	2.9	3.4	5.2	100.0	11.7	44.0
Bulgaria	0.8	98.2	13.8	34.1	52.3	43.8
Brazil	100.0	15.2	94.1	31.5	34.6	43.6
Colombia	100.0	8.0	5.1	68.9	42.5	43.4
Pakistan	68.3	-	100.0	35.7	39.3	43.1
Togo	0.0	-	0.7	69.3	74.2	42.7
Niger	-	-	0.0	87.1	38.2	42.5
Iraq	0.2	5.9	4.0	100.0	-	41.7
Thailand	78.6	8.3	81.5	32.9	43.0	41.4
Suriname	0.7	6.9	0.0	100.0	0.6	41.4
France	87.8	-	100.0	12.8	59.7	39.0
Turkey	15.9	13.9	91.6	19.7	57.0	38.5
Morocco	5.2	28.7	12.4	39.9	74.6	38.4

	Total Exports from US	Growth in Exp (06-10)	Total Fert Use	Change in Fert Use (04 - 08)	% Ag Land to Total Land	TOTAL SCORE
Viet Nam	44.6	69.9	56.1	14.0	36.1	37.1
Fiji	2.8	100.0	0.2	35.3	26.0	37.0
Sri Lanka	2.3	79.1	9.6	32.7	40.6	36.8
Romania	0.4	21.2	22.7	38.0	65.5	36.0
Oman	0.3	-	0.0	85.8	6.5	35.6
Kazakhstan	1.3	100.0	0.7	-	85.6	34.8
South Africa	61.7	2.5	11.9	27.4	90.9	34.7
Mongolia	-	-	0.0	45.3	83.0	34.7
Germany	25.0	4.1	82.3	16.4	54.0	33.7
Italy	20.9	16.0	55.6	24.0	52.5	33.7
United Kingdom	81.1	9.2	36.5	11.8	81.0	33.0
Zambia	0.8	12.5	2.3	55.7	38.2	32.6
Saudi Arabia	12.6	35.6	0.6	14.4	96.5	32.0
Ethiopia	0.5	3.4	1.1	57.5	39.0	31.6
New Zealand	27.7	-	39.5	31.8	51.0	31.2
Denmark	1.0	20.1	19.4	25.7	69.7	31.2
Kenya	18.7	-	1.5	46.8	52.7	30.5
Russian Federation	1.4	1.4	18.7	59.4	14.6	30.3
Venezuela	62.8	10.3	2.9	48.4	26.9	30.2
Spain	16.9	3.5	66.5	10.2	63.8	30.0

*List limited to countries with total score above 30.

Chemical: Fertilizer- Capacity for Trade Scores

	Capacity for Trade Score	TOTAL SCORE
Ukraine	6.6	87.1
Nigeria	6.7	62.3
India	8.2	60.9
China	9.1	60.3
Poland	9.1	59.5
Burundi	6.6	58.5
Rwanda	8.4	57.4
Slovakia	9.9	55.5
Indonesia	8.6	55.3
Madagascar	8.3	54.7
Uganda	8.7	54.6
Cuba		54.5
Belarus		48.1
Angola	6.5	47.9
Latvia	9.3	47.3
Azerbaijan	7	46.3
El Salvador	9	44.9
Bangladesh	7.5	44.8
Gabon		44.5
Democratic Republic of Congo		44.4
Trinidad and Tobago	8	44.0
Bulgaria	7.6	43.8
Brazil	7.2	43.6
Colombia	7.6	43.4
Pakistan	7.7	43.1
Togo		42.7
Niger		42.5
Iraq	6.9	41.7
Thailand	8.7	41.4
Suriname		41.4
France	10.1	39.0
Turkey	8.4	38.5
Morocco	8.4	38.4

	Capacity for Trade Score	TOTAL SCORE
Viet Nam	7.6	37.1
Fiji		37.0
Sri Lanka	8.4	36.8
Romania	8.8	36.0
Oman	10.4	35.6
Kazakhstan	7.4	34.8
South Africa	9.1	34.7
Mongolia	7.8	34.7
Germany	10.1	33.7
Italy	9.1	33.7
United Kingdom	10.2	33.0
Zambia	9	32.6
Saudi Arabia	10.2	32.0
Ethiopia	7.6	31.6
New Zealand	12.1	31.2
Denmark	10.7	31.2
Kenya	7.6	30.5
Russian Federation	6.4	30.3
Venezuela	5.4	30.2
Spain	9.6	30.0

Counties highlighted in yellow were removed from the analysis because they did not meet the threshold of necessary trade capacity.

*List limited to countries with total score above 30.

Chemical: Industrial - Model Detail Scores (excl. capacity filter)

	Total Exports from US (Resins & Rubbers)	Growth in Exp (Resins & Rubbers)	Total Exports from US (Basic/Industrial)	Growth in Exp (Basic/Industrial)	Growth of Industry Value Added (05 - 09)	TOTAL SCORE
Ethiopia	1.9	91.2	0.7	100.0	59.5	62.3
Madagascar	1.2	100.0	0.0	100.0	48.0	59.3
Azerbaijan	2.2	65.5	2.8	37.9	91.4	57.7
Croatia	7.7	100.0	13.7	100.0	38.1	57.4
Congo	3.8	62.6	9.4	100.0	48.5	53.3
Belarus	2.4	100.0	0.4	32.8	62.6	51.9
Russian Federation	100.0	76.0	100.0	17.6	32.6	51.8
Tunisia	29.2	40.1	25.4	100.0	45.2	51.6
Armenia	1.0	100.0	0.2	100.0	28.4	51.5
China	100.0	8.8	100.0	14.9	65.1	50.8
Cambodia	1.5	48.0	0.1	100.0	51.3	50.3
Brunei	1.0	100.0	1.6	88.8	30.1	50.1
India	100.0	22.4	100.0	13.3	55.8	49.5
Namibia	1.0	100.0	2.6	62.3	38.9	48.4
Peru	100.0	22.3	100.0	13.6	49.6	47.0
Egypt	100.0	27.5	81.5	5.4	54.5	46.5
Papua New Guinea	0.6	29.6	1.7	100.0	48.7	45.7
Viet Nam	100.0	3.6	73.4	21.9	54.5	44.2
Panama	43.6	3.3	100.0	26.7	58.2	43.7
Mauritius	3.4	100.0	1.1	25.7	44.3	43.3
Poland	64.1	6.0	83.8	30.7	51.7	42.8
Argentina	100.0	10.7	100.0	7.4	46.6	42.3
Indonesia	100.0	4.4	100.0	16.0	44.3	41.8
Iraq	0.9	100.0	11.6	100.0	-	41.2
Mozambique	0.7	100.0	0.7	10.0	47.3	41.1
Jordan	13.4	37.6	100.0	7.5	51.6	41.0
Bosnia & Herzegovin	0.1	12.5	0.4	100.0	45.7	40.9
Singapore	100.0	12.5	100.0	5.8	42.8	40.8
Mauritania	0.4	16.7	0.5	100.0	43.3	40.8
Burkina Faso	2.0	100.0	0.6	100.0	-	40.3
Martinique	0.1	23.2	21.4	100.0	33.3	40.1
Uruguay	79.1	30.2	42.3	13.6	47.8	40.0
Saudi Arabia	100.0	10.8	100.0	19.4	34.7	39.9
Fiji	1.1	100.0	0.6	42.5	27.8	39.8
Colombia	100.0	6.2	100.0	5.8	43.5	39.8
Ireland	100.0	10.4	100.0	15.8	36.3	39.7
United Arab Emirates	100.0	13.1	100.0	18.0	33.3	39.5
Thailand	100.0	6.3	100.0	11.2	39.5	39.3
Uzbekistan	0.1	100.0	0.1	-	47.9	39.2
South Korea	100.0	3.2	100.0	8.1	42.3	39.2
Turkey	100.0	15.8	100.0	5.8	36.8	39.0
Costa Rica	100.0	3.8	92.6	10.9	41.4	38.8
Spain	100.0	8.8	100.0	29.1	27.9	38.7
Chile	100.0	13.1	100.0	11.4	34.3	38.6
Brazil	100.0	10.1	100.0	10.5	36.3	38.6
Ukraine	84.5	78.2	4.2	12.9	28.7	38.6

	Total Exports from US (Resins & Rubbers)	Growth in Exp (Resins & Rubbers)	Total Exports from US (Basic/Industrial)	Growth in Exp (Basic/Industrial)	Growth of Industry Value Added (05 - 09)	TOTAL SCORE
Dominican Republic	100.0	3.8	100.0	10.4	39.0	38.4
Venezuela	100.0	-	100.0	1.8	45.1	38.4
Cuba	-	-	10.2	80.2	53.4	38.4
Ecuador	100.0	11.9	99.4	11.3	34.4	38.3
Georgia	2.8	100.0	0.7	-	44.8	38.3
Australia	100.0	2.4	100.0	5.3	41.6	38.2
Guatemala	100.0	2.5	90.1	7.9	39.7	37.0
Malaysia	100.0	1.9	100.0	8.2	34.3	35.7
Japan	100.0	1.6	100.0	7.8	34.5	35.7
New Zealand	97.8	13.2	100.0	9.5	28.3	35.6
Angola	3.1	5.1	48.7	15.9	65.5	35.6
Paraguay	33.6	46.3	10.4	33.4	38.0	35.5
Lithuania	11.3	100.0	21.9	0.5	30.2	35.5
Romania	5.6	94.9	2.8	8.1	34.3	35.2
Mexico	100.0	2.0	100.0	7.0	33.1	35.0
Belgium	100.0	0.1	100.0	8.1	32.0	34.4
South Africa	86.3	0.2	100.0	7.5	35.5	34.4
Netherlands	100.0	1.2	100.0	3.0	33.6	34.3
Philippines	57.1	-	100.0	8.3	42.0	34.2
Bhutan	0.0	-	0.1	14.3	77.3	33.8
Morocco	36.6	-	19.3	56.0	42.0	33.6
Honduras	100.0	0.6	55.7	10.9	38.9	33.4
Vatican City	0.2	-	0.2	100.0	33.3	33.4
Hong Kong	100.0	0.4	100.0	9.2	28.6	33.3
Cameroon	6.0	63.3	1.9	26.8	35.5	33.0
Guinea	5.9	56.9	6.7	2.0	49.7	32.9
Uganda	0.5	24.2	1.0	22.3	58.5	32.9
Bolivia	4.9	8.4	15.6	42.5	51.4	32.8
France	100.0	1.5	100.0	6.0	28.0	32.7
Oman	18.7	37.3	100.0	66.5	-	32.6
El Salvador	100.0	11.6	36.8	9.4	35.5	32.1
Germany	100.0	1.3	100.0	6.5	26.0	31.9
Canada	100.0	-	100.0	5.6	24.6	31.0
United Kingdom	100.0	0.8	100.0	3.0	25.2	30.8
Italy	100.0	0.3	100.0	4.1	24.5	30.7
Zambia	0.1	-	4.3	32.0	59.1	30.5
Equatorial Guinea	4.8	16.0	12.5	9.3	58.5	30.2
Lebanon	12.6	13.2	5.5	33.7	46.9	30.0

*List limited to countries with total score above 30.

Chemical: Industrial - Capacity for Trade Scores

	Capacity for Trade Score	TOTAL SCORE
Ethiopia	7.6	62.3
Madagascar	8.3	59.3
Azerbaijan	7	57.7
Croatia	8.7	57.4
Congo		53.3
Belarus		51.9
Russian Federation	6.4	51.8
Tunisia	9.4	51.6
Armenia	6.8	51.5
China	9.1	50.8
Cambodia	7.9	50.3
Brunei	9.3	50.1
India	8.2	49.5
Namibia	8.7	48.4
Peru	9.5	47.0
Egypt	8.5	46.5
Papua New Guinea		45.7
Viet Nam	7.6	44.2
Panama	9.2	43.7
Mauritius	9.6	43.3
Poland	9.1	42.8
Argentina	5.5	42.3
Indonesia	8.6	41.8
Iraq		41.2
Mozambique	7.6	41.1
Jordan	8.9	41.0
Bosnia and Herzegovina	7.9	40.9
Singapore	12.5	40.8
Mauritania	8.7	40.8
Burkina Faso	9.3	40.3
Martinique		40.1
Uruguay	8.7	40.0
Saudi Arabia	10.2	39.9
Fiji		39.8
Colombia	7.6	39.8
Ireland	10.8	39.7
United Arab Emirates	11.7	39.5
Thailand	8.7	39.3
Uzbekistan		39.2
South Korea	8.5	39.2
Turkey	8.4	39.0
Costa Rica	8.2	38.8

	Capacity for Trade Score	TOTAL SCORE
Spain	9.6	38.7
Chile	12	38.6
Brazil	7.2	38.6
Ukraine	6.6	38.6
Dominican Republic	8.5	38.4
Venezuela	5.4	38.4
Cuba		38.4
Ecuador	6.1	38.3
Georgia	9.7	38.3
Australia	10.3	38.2
Guatemala		37.0
Malaysia	9.1	35.7
Japan	9	35.7
New Zealand	12.1	35.6
Angola	6.5	35.6
Paraguay	8.2	35.5
Lithuania	9.5	35.5
Romania	8.8	35.2
Mexico	8.7	35.0
Belgium	10.5	34.4
South Africa	9.1	34.4
Netherlands	10.6	34.3
Philippines	7.3	34.2
Bhutan		33.8
Morocco	8.4	33.6
Honduras	8.6	33.4
Vatican City		33.4
Hong Kong	12.8	33.3
Cameroon	8.8	33.0
Guinea		32.9
Uganda	8.7	32.9
Bolivia	6.3	32.8
France	10.1	32.7
Oman	10.4	32.6
El Salvador	9	32.1
Germany	10.1	31.9
Canada	9.8	31.0
United Kingdom	10.2	30.8
Italy	9.1	30.7
Zambia	9	30.5
Equatorial Guinea		30.2
Lebanon	8.2	30.0

Counties highlighted in yellow were removed from the analysis because they did not meet the threshold of necessary trade capacity.

*List limited to countries with total score above 30.

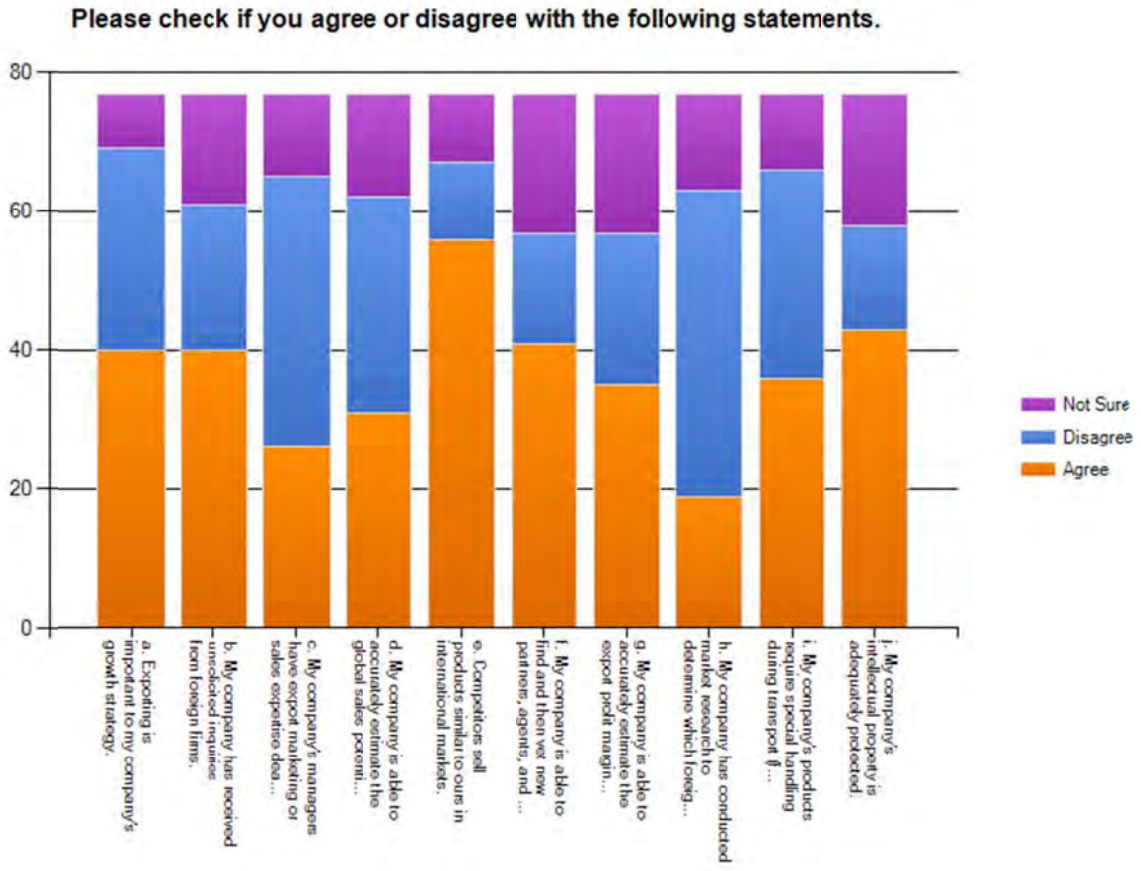
Surveys Sent: 388
Total Started Survey: 97
Total Completed Survey: 85 (87.6%)

Business Type/Audience:
Most businesses that responded have 10 employees or less –33 or 34.7% of responses, followed second by 23 or 24.2% of businesses with 11-24 employees, and a close third with businesses having more than 100 employees at 23.2% or 22 responses.
54 or 57.4% of the responses indicated that their business was primarily Miscellaneous Manufacturing (NAICS 339).

Exporting History:
41.1% or 39 respondents are not sure what the current domestic market share of their company's total product line is.
61 or 64.9% of the businesses have a product that could be sold to a customer outside of the U.S. and 64.7% or 55 of the respondents have done so in the past 10 years.
26.8% or 15 businesses have been exporting products for over 20 years. 23.2% of respondents have been exporting for 6-10 years and only 16.1% or 9 respondents have been exporting products for less than 5 years.
36.8% or 21 respondents reported that their annual percentage of the total value of gross sales that comes from exporting is from 1-10% and 29.8% or 17 respondents said that they are not sure. 48.2% or 27 out of 56 of the respondents reported that in the last 5 years they have experienced an increase in the gross sales of products their company exports.

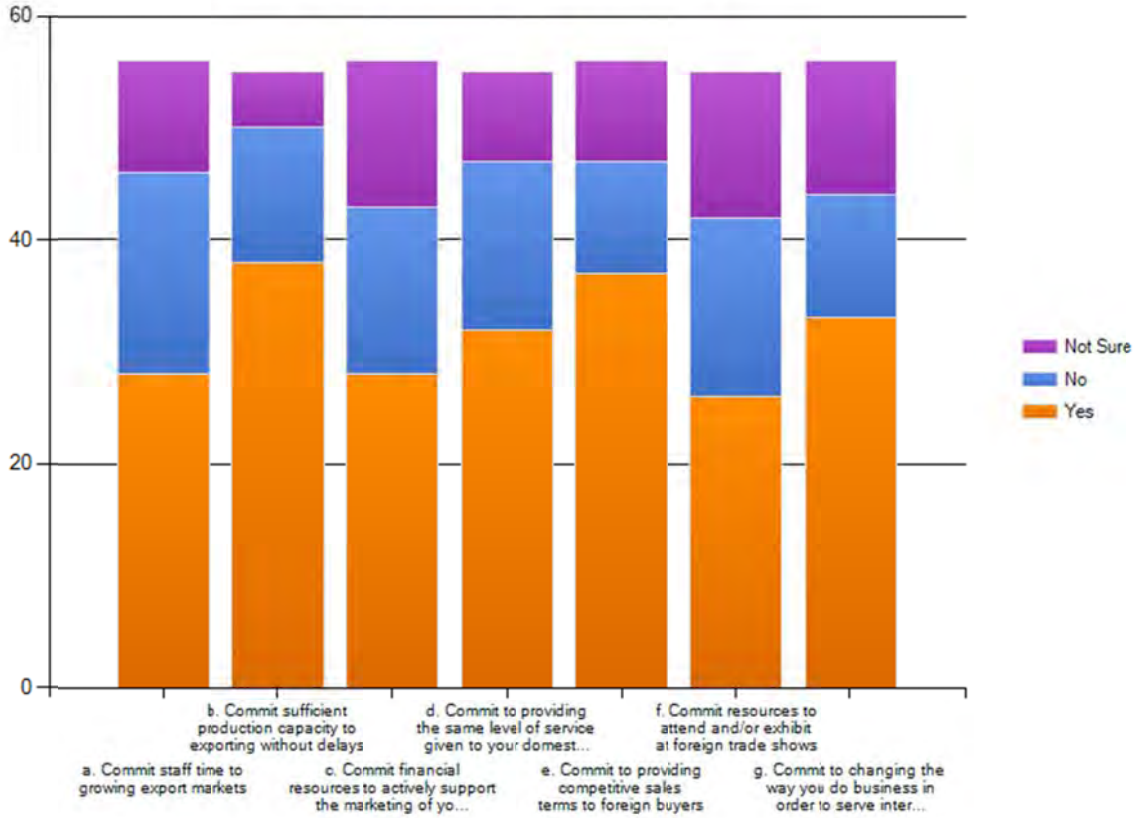
Exporting Audience:
60% or 30 out of 50 respondents reported that they currently export products or services to Canada, and secondly 56.0% or 28 reported exporting to Mexico. 43.2% or 16 of 37 respondents said that the CEO/President/Owner manages the bulk of their exporting activities and 40.5% or 15 respondents said that an export management company manages the bulk of their exporting activities. 51.5% or 35 out of 68 respondents said that they were not sure what their primary methods of financing their export operations are, and 39.7% or 27 out of 68 said that business earnings/savings was the primary method of financing their export operations.

Challenges:
18 out of 40 or 45% said that the single largest challenge to selling products to a customer outside of the U.S. was "It is very costly", and 30% or 12 respondents reported "I have limited good/services to that are exportable". Of the exporting assistance resources listed in the survey, 9 out of the 17 were reported as having a higher percentage of businesses not aware of these resources, as opposed to only 8 out of 17 having a higher percentage of businesses being aware of these resources.

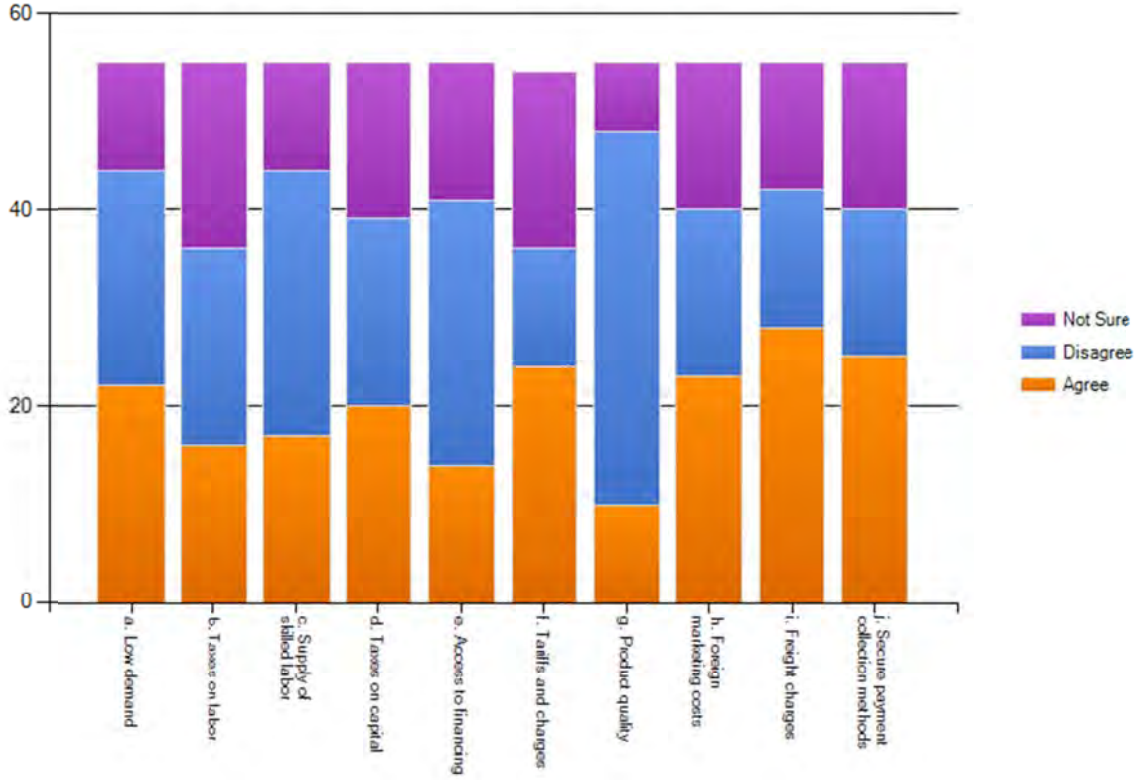


56.5% or 13 would like to learn more about International shipping procedures and documentation and the same amount of respondents (56.5% or 13) would like to learn more about International payment terms. 47.8% or 11 would like to learn about Foreign duty rates and taxes applicable to the importation of your products in a targeted foreign market and the same amount of respondents (47.8% or 11) would like to learn more about Pricing strategies in foreign countries.

Is your company able to do the following?



Please check if you agree or disagree that the following are barriers to your company's ability to develop or expand your export market.



Implementation Plan
DRAFT (2/6/12)
and Revised 3/27/12

Newmark Knight Frank

BAY-LAKE REGIONAL PLANNING COMMISSION

East Central Wisconsin Regional Planning Commission

Implementation Plan

The implementation plan identifies three levels of recommendations:

1. **Goals:** The goals are the desired, high-level outcomes that have come out of the analysis and data gathering completed for this initiative. The number of goals is very limited to ensure that resources are not diluted and actual progress can be made.

2. **Strategies:** Strategies are the initiatives that must be undertaken in order to achieve the goal. A single strategy translates into an initiative that involves numerous parties and tasks.

3. **Action Steps:** The action steps are the individual tasks that together will further the strategic initiatives. The implementation plan is primarily focused on the action steps. Each action step will be correlated to a responsible party, priority and timeline. The action steps should be viewed as the "game plan" for all stakeholders involved in the execution of this implementation plan.

Goal #1

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets.

The interviews and research conducted for this study revealed that there is a significant lack of information on, and understanding of, global trade amongst local economic development professionals in Northeast Wisconsin. Because local economic development professionals are the primary implementers of the other goals identified in this implementation plan, the process must begin by helping those professionals develop the necessary tools. The purpose of this goal is to do three things:

1. Foster buy-in among local economic developers; ensure they know the benefits of having companies actively engaged in global trade.

2. Ensure local economic developers are aware of all the existing services offered to companies interested in entering the global trade market.

3. Provide local developers with a working knowledge of the process of international trade and the barriers companies face.

Goal #1

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets.

Strategies

1.1: Incorporate all local economic development professionals in the process of unveiling this strategy.

1.2: Centralize primary expertise in the region so local developers have a consistent source of information and answers.

1.3: Develop a comprehensive database of existing services offered to businesses seeking assistance with engaging in global trade.

1.4: Make educational resources accessible to time and resource constrained local economic developers.

Goal #1

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets.

1.1: Incorporate all local economic development professionals in the process of unveiling this strategy.

Action Step		Responsible Party	Priority	Timeline
1.1a	Identify presentation sites throughout the region – urban and rural. Coverage should be such that all local economic developers and companies can attend a presentation without undue travel expectations.	Global Trade Strategy (GTS) Steering Committee	High	Immediate
1.1b	Identify a small group of local economic developers to assist at each presentation	GTS Steering Committee	High	Immediate
1.1c	Hold a half-day workshop on the results of the analysis and the implementation plan with the small group of ED professionals identified in 1.1b.	GTS Steering Committee	High	Immediate
1.1d	Aggressively market the presentation dates and sites to economic development professionals and businesses. This is the first opportunity for outreach.	GTS Steering Committee	High	Immediate
1.1e	Hold presentations.	GTS Steering Committee & Local ED	High	Immediate

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #1

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets.

1.2: Centralize primary expertise in the region so local developers have a consistent source of information and answers.

Action Step		Responsible Party	Priority	Timeline
1.2a	Create a task force on global trade	GTS Steering Committee	High	Immediate
1.2b	Empower the task force to be the driving force behind all future tasks.	GTS Steering Committee	High	Immediate
1.2c	Position the task force among local economic developers as their primary source of information and guidance	GTS Steering Committee	High	Immediate

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #1

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets.

1.3: Develop a comprehensive database of existing services offered to businesses seeking assistance with engaging in global trade.

Action Step		Responsible Party	Priority	Timeline
1.3a	Research existing service databases.	Global Trade Task Force	High	Immediate
1.3b	Compile list of services within Wisconsin. Segment into federal, state, regional and local categories. Also segment by public/private, and free/for fee. Build on existing databases to the greatest extent possible.	Global Trade Task Force	High	Immediate
1.3c	Publish database. Should be sortable by major criteria to make it easy to use. For example, it should be easy to find federal grant programs that are specific to the food processing industry.	Global Trade Task Force	High	Immediate
1.3d	Empower an existing group, department or agency to maintain the database.	Global Trade Task Force	High	On-Going

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #1

Increase capacity of economic development professionals to better assist companies seeking to expand into global markets.

1.4: Make educational resources accessible to time and resource constrained local economic developers.

Action Step		Responsible Party	Priority	Timeline
1.4a	Hold training workshops in multiple locations around the region.	Global Trade Task Force	High	Short-Term
1.4b	Use technology (web conferencing, phone conference, etc.) to make educational opportunities more easily accessible	Global Trade Task Force	High	Short-Term
1.4c	Utilize peer-to-peer education. Identify local economic developers that can be educators and resources for others in their surrounding counties.	Global Trade Task Force	Medium	Short-Term
1.4d	Develop an online library so materials on programs and general export knowledge is easily accessible.	Global Trade Task Force	High	Short-Term
1.5e	Create an online portal where local economic developers can ask question, share success stories and virtually with interact with other developers around the topic of global trade.	Global Trade Task Force	Medium	Short-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #2

Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

Any successful outreach initiative has a defined strategy to ensure resources are directed at the appropriate targets. In this instances, the limited time and resources of local economic developers make a tight strategy all the more important. Because each county economic developer will likely be undertaking their own outreach, there cannot be a single overarching strategy. Instead, a strategy framework should be created that can be used by economic developers to develop their own strategy, specific to their county and businesses. *Therefore, the strategies and action items identified for this goal are intended to be that framework; in other words, the action items are written as a suggested process for the local economic development professional. Given time and resource constraints of local economic developers the action items are designed to be simple but effective.*

Goal #2

Goal # 2: Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

Strategies

2.1: Create a database of companies and their relationship to international trade.

2.2: First priority businesses should be those that are most likely to provide short-term successes.

2.3: Long-term, focus resources on companies with the biggest potential impact on the local economy.

2.4: Recruit companies for special WMEP Expor-Tech sessions focused specifically on the sectors and markets/countries identified in this report.

2.5: Recruit companies for trade missions and trade shows focused specifically on the sectors and markets/countries identified in this report.

Goal #2

Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

2.1: Create a database of companies and their relationship to international trade.

Action Step		Responsible Party	Priority	Timeline
2.1a	Develop short survey for all manufacturing companies. Survey should seek to identify the following: • Industry • Size (employees) • Currently Engaged in Global Trade • Engaged in Global Trade Previously • Interest Level in Entering Global Market • Desire for Follow-Up Meeting with Local ED about Global Trade Resources	Local Economic Developers	High	Short-Term
2.1b	Translate survey responses to a database of manufacturers sortable by the major survey criteria.	Local Economic Developers	High	Short-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #2

Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

2.2: First priority businesses should be those that are most likely to provide short-term successes.

Action Step		Responsible Party	Priority	Timeline
2.2a	Utilize database to identify companies that expressed an interest in global trade and an interest in meeting to discuss strategy.	Local Economic Developers	High	Short-Term
2.2b	Begin outreach process by meeting with the companies identified in step 2.2. At this stage local economic developers should be equipped with the appropriate resources and knowledge to successfully engage companies. If questions arise the regional Global Trade Task Force should be the source of assistance.	Local Economic Developers	High	Short-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #2

Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

2.3: Long-term, focus resources on companies with the biggest potential impact on the local economy.

Action Step		Responsible Party	Priority	Timeline
2.3a	Based on the existing local economy identify industries that are best suite for expansion and growth in the area. For example, which industries have ample access to labor, transportation demands, suppliers, etc. These industries stand to leverage global trade opportunities.	Local Economic Developers	Medium	Mid-Term
2.3b	Identify industry sectors and businesses that are the primary driver of employment and wealth creation in the local economy. These industries will have the biggest impact on local growth if they were to benefit from new or increased global sales.	Local Economic Developers	Medium	Mid-Term
2.3c	After the early success opportunities are pursued, use the above criteria to develop a prioritized list of companies to approach about global trade. Start with those that have best potential for success and ultimate pay-off.	Local Economic Developers	Medium	Mid-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #2

Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

2.4: Recruit companies for special WMEP Expor-Tech sessions focused specifically on the sectors and markets/countries identified in the NE WI Global Trade Strategy.

Action Step		Responsible Party	Priority	Timeline
2.4a	Identify 20-25 companies with potential to grow and impact local economy through exporting from the sectors outlined in this report.	Local Economic Developers	High	Immediate
2.4b	Solicit participation from C-Level Executives, from the identified companies, to enroll in WMEP's Expor-Tech program, by utilizing market research provided in this report.	Local Economic Developers & Task Force	High	Immediate
2.4c	Work with WMEP to set-up three Expor-Tech sessions to train Executives on how to export products to the markets/countries identified in this report.	Local Economic Developers & Task Force	High	Immediate

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #2

Develop a strategy framework to identify, prioritize and engage companies that could benefit from services aimed at encouraging global trade.

2.5: Recruit companies for trade missions and trade shows focused specifically on the sectors and markets/countries identified in the NE WI Global Trade Strategy.

Action Step		Responsible Party	Priority	Timeline
2.5a	Identify 20-25 companies with potential to grow and impact local economy through exporting from the sectors outlined in this report.	Local Economic Developers	High	Short-Term
2.5b	Solicit participation from identified companies for a trade mission, in partnership with WEDC, to one of the countries identified via the market research provided in this report.	Local Economic Developers & Task Force	High	Short-Term
2.5c	Solicit participation from identified companies for one or two global trade shows that focus on the sectors identified in the research provided in this report.	Local Economic Developers & Task Force	High	Short-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #3

Goal # 3: Track, document and publicize impact of the global trade outreach initiative.

A critical, and often overlooked, component of any economic development initiative is performance tracking using agreed upon and standardized metrics. Documenting the impact of outreach efforts on the local economy using a standard set of metrics will allow for reporting at a regional level, and the ability to use concrete data as a tool when seeking funding or assistance from outside organizations.

Goal #3

Monitor the effectiveness of the global trade initiative.

<u>Strategies</u>

3.1: Utilize standard metrics to measure success.

3.2: Integrate local and regional tracking.

3.3: Develop consistent reporting techniques to publicize the initiative.

Goal #3

Monitor the effectiveness of the global trade initiative.

3.1: Utilize standard metrics to measure success.

Action Step		Responsible Party	Priority	Timeline
3.1a	Identify initiative success drivers; what will determine if this undertaking is successful.	Global Trade Task Force	High	Short-Term
3.1b	Translate success drivers into easily measurable and repeatable metrics. Metrics must be able to be gathered by local economic developers.	Global Trade Task Force	High	Short-Term
3.1c	Disseminate metrics to local economic development professionals via a series of scheduled conference calls to provide insight and answer questions (not all metrics may be appropriate at the local level).	Global Trade Task Force	High	Short-Term
3.1d	Assist local economic developers in gathering any baseline data (not all metrics will have a baseline).	Global Trade Task Force & Local ED	Medium	Short-Term
3.1e	Have local economic developers track and report metrics to the task force on an annual basis.	Global Trade Task Force	High	Short-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #3

Monitor the effectiveness of the global trade initiative.

3.2: Integrate local and regional tracking.

Action Step		Responsible Party	Priority	Timeline
3.2a	Gather completed metrics from local economic developers.	Global Trade Task Force	High	Short-Term
3.2b	Gather data for regional focused metrics.	Global Trade Task Force	High	Short-Term
3.2c	Aggregate local and regional metrics to produce an overview of the initiative from a regional level.	Global Trade Task Force	High	Short-Term
3.2d	Make regional overview available to local economic developers for use in their collateral materials.	Global Trade Task Force	Medium	Short-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #3

Monitor the effectiveness of the global trade initiative.

3.3: Develop consistent reporting techniques to publicize the initiative.

Action Step		Responsible Party	Priority	Timeline
3.3a	Create a standard annual reporting framework to aggregate regional metrics within.	Global Trade Task Force	Medium	Short-Term
3.3b	Publish an annual regional report that includes a summary of activities and results of performance metrics. The format should be maintained each year to allow for year-over-year comparison and tracking.	Global Trade Task Force	High	Short-Term
3.3c	Use the annual report to publicize the initiative to key stakeholders: • Public • Businesses • Local and State Government • Etc.	Global Trade Task Force	High	Ongoing
3.3d	Use the annual report and metrics as the foundation for a capital raising campaign to support the ongoing implementation of this project: • Grants • Private Investors • Local and State Government • Etc.	Global Trade Task Force & Local ED	High	Ongoing

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #4

Create a clearinghouse of data driven, internal market opportunity analysis for Wisconsin industries, products and businesses.

The analysis conducted as part of this study is intended to give companies some level of comfort in expending resources to identify ideal markets for their product. The market opportunity analysis was completed for only four industries and two specific destination countries. The same type of analysis should be conducted for other industries and, if warranted, specific product segments. Research conducted as part of this or a future outreach initiative will never be a complete substitute for company lead research to identify very detailed opportunity that aligns with their specific product niche. However, the basic information on underlying drivers should help overcome fear of the unknown; the number one barrier to entering the global trade market.

Goal #4

Create a clearinghouse of data driven, international market opportunity analysis for Wisconsin industries, products and businesses.

<u>Strategies</u>

4.1: Develop the capability to become a source of strategic information for regional industries and companies.

4.2: Leverage broader resources to expand data clearing house

4.3: Develop publically accessible data clearinghouse

Goal #4

Create a clearinghouse of data driven, international market opportunity analysis for Wisconsin industries, products and businesses.

4.1: Develop the capability to become a source of strategic information for regional industries and companies.

Action Step		Responsible Party	Priority	Timeline
4.1a	Identify and prioritize short-term and long-term data analysis goals: • Execution Plan • Industries • Business Support • Etc.	Global Trade Task Force	High	Short-Term
4.1b	Develop or engage capacity to execute data analysis. If capability is going to be developed within the region the organization(s) responsible for the staffing will need to be identified. Outside sources could include consultants, WEDC, export assistance center, etc.	Global Trade Task Force	High	Short-Term
4.1c	Position Task Force as a data provider to local economic developers.	Global Trade Task Force	High	Immediate
4.1d	Use data as the method for the Task Force to remain engaged with local companies as they pursue global trade opportunities.	Global Trade Task Force & Local ED	High	Ongoing

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #4

Create a clearinghouse of data driven, international market opportunity analysis for Wisconsin industries, products and businesses.

4.2: Leverage broader resources to expand data clearing house

Action Step		Responsible Party	Priority	Timeline
4.1a	Identify stakeholders with a mission similar to the global trade initiative. These stakeholders do not have to be specific to the state of Wisconsin: • WEDC • Northeast WI International Business Development Program • New North • NEWREP • Food Export Association of the Midwest • USITC • EDA • Etc.	Global Trade Task Force	High	Short-Term
4.1b	Engage stakeholders to determine if there is commonality in focus and mission.	Global Trade Task Force	High	Short-Term
4.1c	Develop a list of "partner" organizations that can provide support data on an industry or business basis.	Global Trade Task Force	High	Short-Term
4.1d	Catalogue any existing data sources before beginning and data analysis. Be sure to leverage what is already available.	Global Trade Task Force & Local ED	High	Immediate

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #4

Create a clearinghouse of data driven, international market opportunity analysis for Wisconsin industries, products and businesses.

4.3: Develop publically accessible data clearinghouse

Action Step		Responsible Party	Priority	Timeline
4.3a	Utilize the work completed for the food, aerospace and chemical industries as a template for future industry opportunity analysis.	TBD	Medium	Mid-Term
4.3b	Complete opportunity analysis for other important industry sectors. If identified as a goal, market opportunity analysis could also be completed for specific product types or businesses.	TBD	Medium	Mid-Term
4.3c	Aggregate all market opportunity analysis and make it available online.	Global Trade Task Force	Medium	Mid-Term
4.3d	Disseminate all market opportunity analysis to local economic developers for use in their outreach efforts.	Global Trade Task Force & Local ED	Medium	Mid-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #5

Actively promote infrastructure and policy initiatives at the local and state level that would benefit global trade in Northeast Wisconsin.

Although this is a regionally focused initiative there are many external factors that will impact its success. Atop the list of external factors are public policy decisions and infrastructure projects. The regional representative for the study area must be willing to actively promote the needs of this project from a policy perspective in order to ensure long-term success.

Goal #5

Actively promote infrastructure and policy initiatives at the local and state level that would benefit global trade in Northeast Wisconsin.

<u>Strategies</u>

5.1: Maintain policy/initiative priority list for the region and the state

5.2: Fill role as organizer and "partner advocate" on key issues pertinent with multiple stakeholders

Goal #5

Actively promote infrastructure and policy initiatives at the local and state level that would benefit global trade in Northeast Wisconsin.

5.1: Maintain policy/initiative priority list for the region and the state

Action Step		Responsible Party	Priority	Timeline
5.1a	Create and access point (contact person or portal) for local and state economic developers to provide information to the Task Force on key policy, infrastructure or development issues that impact global trade in the Study Area.	Global Trade Task Force	Medium	Mid-Term
5.1b	Gather input and vet each issue for impactfullness and ability of the task force to impact the decision making process.	Global Trade Task Force	Medium	Mid-Term
5.1c	Translate issues into a priority watch list and action list. Maintain list at all times.	Global Trade Task Force	Medium	Mid-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+

Goal #5

Actively promote infrastructure and policy initiatives at the local and state level that would benefit global trade in Northeast Wisconsin.

5.2: Fill role as organizer and "partner advocate" on key issues pertinent with multiple stakeholders

Action Step		Responsible Party	Priority	Timeline
5.2a	Based on the policy priority list, identify other stakeholders that have a vested interested in an outcome aligned with the goals of the global trade initiative.	Global Trade Task Force	Medium	Mid-Term
5.2b	Organize a unified voice to advocate for desired policy change or initiative: • Identify lead advocate • Coordinate issues and needs • Manage and encourage ongoing advocacy • Etc.	Global Trade Task Force	Medium	Mid-Term
5.2c	Actively leverage existing economic development policy platforms. For example WEDA	Global Trade Task Force	Low	Long-Term
5.3d	Develop and disseminate regular policy updates and reports to all stakeholders.	Global Trade Task Force	Low	Long-Term
5.3e	Identify purely local issues that local economic developers may not be able to influence on their own.	Global Trade Task Force	Medium	Mid-Term
5.3f	Offer support and assistance in addressing purely local issues.	Global Trade Task Force	Medium	Mid-Term

Immediate: within one year | Short-Term: 1-2 yrs. | Mid-Term 3-4 yrs. | Long-Term: 4+