Cosmetics

Your Global Business Partner

04/03/2003

Courtesy of the U.S. Commercial Service in Spain
A Pilot Partnership between the U.S. Commercial Service
and the State of California Trade Partners

Tel. (34) 91 5648976 • Fax. (34) 91 5630859
www.buyusa.com
madrid.office.box@mail.gov

U.S. Commercial Service
Your Global Business Partner

print

COSMETICS

Industry Sector Analysis [ISA] **ID: 79392**

Regions: **EUR; Europe; Western Europe; European Union**
Country: **Spain**

Industry: **Consumer Goods & Home Furnishings**
Sector: **Cosmetics/Toiletries**

by: **Carmen Adrada**
approver: **N/A**

Report Date: **04/03/2003**
Expires: **N/A**

Summary

The cosmetic industry in Spain is an extremely lucrative market with a growth rate of 8.7% since 1998 following Denmark and Finland in increased sales. Spain, which is one of the ten largest economies in the world, is a member of the European Union and is the fastest growing major industrialized country in the world. The general population of Spain has shown increased interest in this market over the past few years. It is expected to keep with the upward trend well into the future. This market is very receptive to imports.

A. Market Highlights

The cosmetics industry, according to the European Cosmetic Trade Association, refers to a myriad of products, the largest five being perfumes and fragrances, decorative cosmetics, skin and hair products, and various toiletries. Toiletries lead this market at 26.1% of total sales, followed by hair care, skincare, perfumes/fragrances, and decorative cosmetics respectively.

Overall, the United States holds a steady market share, remaining since 1998 as number five in overall cosmetic imports, with France, Germany, Italy, and the United Kingdom in the lead. Cosmetics directives for the EU as well as a separate Royal decree exist for Spain. The import tariff for a majority of cosmetic products from the U.S., including decorative cosmetics, hair care, skin products and perfumes is currently 0%.

Spanish cosmetics market continues to gain strength and is not one that should be ignored by American businesses. American cosmetic products and its sub-sectors enjoy a very high reputation internationally, and are well received in Spain. The European cosmetic retail market as a whole has increased 5.2% over the year 1999.

American companies can count on steady market increases that have characterized cosmetics in Spain over the last few years. As a whole, the cosmetic sector has experienced a noticeable increase. Certain products, however, have experienced exponential gains and toiletries in general have proven to be both lucrative and popular since 1998.

This report analyzes the total cosmetic market, especially that which includes specialty make-up, perfume and the sub- sector of cremes and lotions including moisturizers, anti-age and anti-cellulite and bath gels, all of which fall under the following Harmonized Codes:

PRODUCT	HS CODE	SECTOR
Perfumes	3303	cosmetic
All preparations of beauty	3304	cosmetic
Lip cosmetics	3304.10.00.00	sub-sector - cosmetic
Eye cosmetics	3304.20.00.00	sub-sector - cosmetic
Manicure or pedicure preparations	3304.30.00.00	sub-sector - cosmetic
Powders	3304.91.00.00	sub-sector - cosmetic
All other preparations	3304.99.00.00	sub-sector - cosmetic
Hair care	3305	cosmetic
Toiletries	3307	cosmetic

Market Overview:

The table below shows the Spanish cosmetic market statistics between 1998 and 2000, including local production, imports/exports, U.S. imports and total market, in USD million.

*STATISTICAL DATA: SPANISH COSMETIC MARKET (USD MILLIONS)

	1998	1999	2000
Local Production	2,932	3,045	2,833
Total Imports	705	750	742
Imported U.S. Goods	42	38	61
Total Spanish Exports	624	694	528
Total Market	3,012	3,102	3,046
Exchange Rate Used	149.4	156.33	180.68

***Source: Spanish Cosmetic, Toiletry and Perfumery Association and Spanish Customs**

Please note that due to the exchange rate used, the real growth of the market is not shown in the table. Local production increased 8% in 1999 from previous year's real statistics in Pesetas and 7% in 2000. Total imports to Spain also increased from 1998 through 2000, (slightly over 10% in 1999, and 12.6% in 2000). Imports of U.S. goods almost doubled in 2000 (46%) from previous year imports. Exports increased in 1999 and decreased to almost same figures as of 1998 exports in 2000. Total market also increased through the three years (7% in 1999 and 11.9% in 2000).

Market Profile

The Spanish cosmetics market differs greatly from that of the United States, not in product type, but in the manner in which products are sold. Cosmetics are not only sold in department stores or large super markets, but are more likely to be found in a store that specializes only in the sale of make-up, perfumes, toiletries and related products, called “Perfumerias“. These small privately owned stores account for a considerable portion of the market share in sales. However, there are a few major stores that sell various products as well as cosmetics. Examples are El Corte Ingles, the largest department store in Spain, Carrefour, and Alcampo. El Corte Ingles sells a wide variety of products, from clothing and shoes to appliances and, of course, cosmetics. They distribute a sizable amount of American brand name products in a manner similar to that of department stores in the United States. Carrefour and Alcampo tend to concentrate on the same sort of products, but at a lower price. Consequently, the products sold at these stores reach a greater portion of the population. This type of “hyper market” is usually located in an urban area and enjoys high popularity.

The cosmetic market also is closely integrated with that of pharmaceuticals. The to were once considered to be one market being that the line between skin care and health care was blurred and thus it was prudent to keep them under the same category. Perfume also accounts for a large section of this vast market, enjoying about 23% of sales within this industry and most of the competitive cosmetic producers have some form of perfume or cologne to sell along side their beauty products. Fragrances are an integral part of the cosmetic market and are best known for their quality and variety in imports. Spain has participated in the Fifi awards since the emergence of these awards worldwide in 1993.

Spain has a fair amount of internal industry activity. Concerning this market, Antonio Puig is the number one Spanish manufacturer and distributor among the various regions in Spain and grew by 12% this year in total sales. The second most important company, Myrurgia, was a highly profitable company but has recently merged with Puig Beauty and Fashion. Three French companies exist which are highly recognized in the broader region of European cosmetics, L’Oreal, Guerlain and Sephora. These companies have shown noticeable impacts on the Spanish cosmetic/toiletries market. Germany, (Henkel, Benkshire and Nivea) and the U.S (Procter and Gamble) dominate domestic production. The U.K. has also a significant share of domestic production represented by Lancaster.

Sub-sectors in the market: The newly emerging sub-sectors in the cosmetic sector include anti-aging cremes, anti-cellulite cremes and the new bath and body products. As Spain’s economic status has increased over the past ten years, so has interest in things that were once considered luxury items. These included almost all products in the cosmetic industry and were even more focused on cremes, lotions and bath amenities. This market has begun to show a promising upward trend in demand and has piqued the interest of today’s consumers. Products containing the herbal or aromatic scents or claiming to be of “natural” derivation have proven to sell very well, especially those scents mixed with a fruit or flower aroma.

Another emerging market here in Spain is that of the bath and body products. This market is in the beginning stage and has not yet reached full market maturity. The demand for this market includes all things that can be considered “skin protection” products due to an increased interest in health and it’s relation to beauty. Herbal aroma products which boast the ability of having a double use, to help protect the skin as well as the obvious use of the scent itself, are the most popular in this sector and have enjoyed high sales. Also, men’s toiletries, colognes and skin products are of increasing importance.

Future potential: Throughout the past 10 years, Spain has enjoyed a rising economic status as well as considerable growth in the GDP. GDP has consistently been on an upward trend since 1990, and has a projected increase of 3.5% for this year. The growth of the national domestic product and the general economic high standing has led to an overall increase in demand for consumer products. In the cosmetic industry, as a whole, products purchased have accounted for over 3 billion USD in the consumer market this year alone. Specialty cosmetics have risen 13% since 1998 and the sub-sector of skin cremes has shown an increase of 19%. Perfumes, as well, show great promise in regards to the U.S. companies that have put their product on the market and have been greatly received and are producing high returns. Their sales have risen 20% and demand appears to be rising. The market is very accommodating to new products and is extremely tolerant of imports, which account for 51% of total sales. As mentioned before, U.S. products have a reputation for good quality and enjoy high marketability.

Market Trends:

The market demand is currently increasing in all aspects of this sector. However, these products do fluctuate around a need basis during economic recessions and have a tendency to lower in demand with decreased economic activity. In 1998, Spain experienced a slight recession and, subsequently, sales in the cosmetic sector were slightly less than total sales for the prior period. However, Spain's economy is once again expanding and will soon enjoy the same high economic status of its European counter-parts.

Overall demand growth has shown impressive strides during recent years and has shown improvement in all aspects of the cosmetic sector, save the short period in 1998 which involved a short-lived recession. Spanish men and women spend millions of dollars on cosmetic items in the pursuit of personal enhancement. The desire to improve upon one's appearance through the use of cosmetic means has only heightened and perhaps caused a larger gray area between strictly pharmaceutical agents and cosmetic ones. America has coined the term "cosmeceuticals" as a way of defining these new products to the market. These items boast the ability to stop aging and deter skin maladies of all kinds. Using certain chemicals such as Retin-A and nutrients such as vitamin E, these cosmetics have proven themselves to be very lucrative in the U.S. market and are also having a large impact on the Spanish cosmetic market.
The market is currently being propelled by two main factors – all products that have the ability to stop or slow the effects of aging, protect from UV rays, pollution, cellulite and the fragrance market which appears to be dominated by the "youth movement" in the U.S. and Europe. This target group, age 15-25 years of age, spends on average 9 billion U.S. dollars in the industry as a whole and makes up the largest group that purchases fragrances. This new "youth" generation is expected to grow by 11% by the year 2005. The anti-aging/UV protection/anti-pollution products are driven by all age groups and include men and women in the quest to appear younger and healthier. A brief survey of name brands and their web sites revealed that all had a featured product which combated the above undesirable characteristics.

Men's lines have made impressive strides as well within the past few years. Companies have taken notice to the fact that men have a heightened interest in skin care and the prospect of keeping their skin looking healthier for a longer period of time. Products are emerging on the market that are packaged and advertised with a more masculine edge to attract consumers and appease the resurgence of the health and fitness craze. These products include mostly items that contain skin-enhancing or anti-aging elements rather than real “make-up”. According to Datamonitor, an expert market analysis web page, European markets have shown significant increases since 1995, and the Spanish market will become increasingly lucrative in the years to come.

Market concentration among the Spanish sector is at a state of equilibrium, indicating that no one company has a strong hold or is monopolizing the market at this time. Although there are certain players that hold a number one place in the sales margin, many dominant companies own shares of this lucrative market. In the field of Spanish origin companies, companies such as Puig Beauty and Fashion and Myrurgia hold comparable shares in total market income. Puig and Myrurgia do distribute products and include such familiar brands as Calvin Klein, Christian Dior and Armani in their collection, but do not currently distribute many American companies. More broadly, L’Oreal and the emerging company of Sephora have made important impacts on the Spanish cosmetic community. The American companies also prosper here, with such companies as Estee Lauder, Avon and Revlon taking a stronghold within the import market and accounting for a large portion of total sales. Avon, appearing in Spain in 1966, is a prime example of an American company succeeding in the European market. A large portion of their net sales, 16%, can be attributed to purchases made by the European community.

The means of advertising a product is slowly evolving and becoming more diversified in Spain. While magazines offer the most accessibility to a more varied public, television reaches a significant portion of the population as well. Every household in Spain has on average at least one television and the convenience of mail order or direct television offers has proven to be a successful avenue of advertisement. Ever on the increase is the internet advertisement and accessibility to web sites solely dedicated to a particular product. The Spanish foundation for marketing suggests that e-mail and internet advertisements will quadruple in the next five years within the Spanish society.

Import Market:

The U.S. continues to hold a steady market in Spanish imports, and has a definitive place at number five in the import market. Due to the simple fact of proximity and the ability of the EU countries to move consumer products without any hindrance, allows for a slight benefit in their favor. However, U.S. products are highly sought after and as the tables indicate, these imports continue to be a growing market. The only countries that have obtained a more lucrative stance are those countries included in the EU, thereby making the United States the number one supplier of imported cosmetics outside of Europe.

It is important to highlight that the demand for toiletries (HS 3307) imported from the U.S. 2000 increased over 88% from previous year’s imports. All beauty preparations (HS 3304) imports from the U.S. also increased slightly in 2000. Overall imports of U.S. goods (cosmetics, perfumes and toiletries) between 1998 and 2000 increased over 40%. Given the large scale of increase of the value of U.S. goods in the Spanish market, sales opportunities appear to be good.

The countries that do hold the number one through four spots are as follows: France, the United Kingdom, Germany, and Italy. Currently, no third countries have proven to be much competition in the market, although Japan has made some notables strides.

Cosmetics are distributed through five main channels in Spain. These include mass market, pharmacies, selective vendors, hairdressers and the direct selling of cosmetic products. A majority of these products are sold in the mass market that includes distributors such as El Corte Ingles, Carrefour, and Alcampo.

B. Competition:

Within the country of Spain, two major cosmetic companies exist. These two large businesses account for a large part of the internal market in the Spanish cosmetic realm. The current number one company, Puig Beauty and Fashion, was founded by Antonio Puig in 1914 and has continued to be a family oriented business for over 80. The Myrurgia company, the second largest business in internal cosmetic sales, recently was bought out by the Puig company. Although the products carry its past name, the company is included under the umbrella of the Puig group, which includes various name brands of cosmetic as well as non-cosmetic products. Puig also has a distribution agreement with Bristol Myers. The only other major corporations are non-Spanish companies, both of which are based in Europe. The L'Oreal company, importing from France, had a market increase of 12.7% this year in the country of Spain alone and continues have a large impact on the European cosmetic industry. L'Oreal is well adapted to the Spanish market, offering a complete line of make-up and hair products. Sephora, an emergent company also from France, has also begun to create a large market for itself among Spanish consumers. Formed in 1993, acquired by LVMH in 1997, Sephora is currently the leading chain of perfume and cosmetics stores in France and the second largest in Europe. Sephora has 143 stores in France, one in Luxembourg, eight in Spain, eight in Italy, three in Portugal, ten in Poland, four in Germany, one in the United Kingdom, four in Japan and is opening new stores across the Asia-Pacific region. Gaining popularity, Sephora offers numerous well-known products, including it's own brand of cosmetics.

These main competitors share a common market, but the factors that make their products so successful are extremely different. The companies of Puig and Myrurgia, and the conglomeration therein, take advantage of the long-standing reputation as a family owned business which has roots in the country itself. These companies thereby use their name and a long history of quality products as a main selling point. L'Oreal and Sephora are large corporations that use the vastness of their goods to enhance the marketability of their product. Sephora offers a large store base with numerous products which includes their own name brand which is noticeably less expensive than that of the other name brands which are sold also in the store. L'Oreal uses its buying power to attain high distribution and can be found in almost every store that includes cosmetics or perfumes. It also has a competitive edge with the inclusion of hair products.

Major European companies selling in Spain are: L'Oreal, Sephora and Guerlain from France; Elizabeth Arden (Unilever) Dutch-British; Lancaster from the U.K.; and, Nivea, Henkel and Benkshire from Germany. Japan's Shiseido has also entered the Spanish market, but in a more selective way.

C. End Users:

The consumer is the beneficiary of the cosmetics market and the source of all sales, thereby making this vast group, which consists of both men and women of various ages, the single most important driving factor of the industry. However, the sector mainly deals with women. The Spanish Ministry of Health and Consumption states that most women in Spain consider themselves to be healthy and in good physical shape, which is interesting, considering 15% of the population is *under* weight. Given these concerns and the new awareness of skin cancer leads to the conclusion that products that offer protection against the cellulite and harmful UV rays would almost certainly appeal to these health conscience consumers. There has also been resurgence in products that help enhance this prevailing feeling of health and well being and more women are searching for a beauty product that will solve all problems in one simple lotion, fragrance or make-up.

Best Prospects:

The cosmetic market in Spain is extremely dynamic, with the influx of new products as well as the constant new product offerings of imports from fellow EU member and third country participators. While France holds an extremely large part of the total market, the Spanish market is one that needs to be explored by U.S. corporations and businesses as an open and penetrable market. There are no barriers to trade and all avenues remain open. American strides made in technology and its relation to cosmetics would be especially attractive. Perfumes should not be overlooked either, considering that they hold the largest portion of the market, even over toiletries here in Spain. Companies such as Tommy Hillifiger, Avon and Revlon have all benefited from this impressive market and have been highly successful.
America's market share in Spanish toiletries has increased significantly since 1998. While demand in Spain has increased, American products have begun to occupy a greater proportion of the overall market. American products are becoming increasingly more evident and should continue to do so according to sales projections.

D. Market Access:

Market accessibility is very high, considering no taxes apply when importing cosmetic goods into this country. The fact that the labeling requirements that exist are similar to those of the United States makes it much easier to produce a product in the U.S. that is shippable to Spain. U.S. companies should inform themselves on the specific labeling requirements for each product, through the Spanish importer/distributor, prior to sending the products to Spain, to avoid problems in the Spanish customs.

As stated in the summary, all tariffs against imports from the United States currently stand at zero for perfumes and cosmetics which include skin cremes, sun screen and sun block, and products relating to manicures and pedicures. These fall under the following HS codes:

PRODUCT	HS CODE	SECTOR
Perfumes	3303	Cosmetic
All preparations of beauty	3304	Cosmetic
Lip cosmetics	3304.10.00.00	sub-sector – cosmetic
Eye cosmetics	3304.20.00.00	sub-sector – cosmetic
Manicure or pedicure preparations	3304.30.00.00	sub-sector – cosmetic
Powders	3304.91.00.00	sub-sector – cosmetic
All other preparations	3304.99.00.00	sub-sector – cosmetic

Laws do exist, however, which may hinder the expansion and distribution of U.S. products if they are not attended to before shipping. The EU has passed a Cosmetic Directive which all companies, including those in the EU, must adhere to. A summary of the labeling requirements is as follows:

- must indicate name and address of the manufacturer or importer or distributor of production within the EU
- content in weight or volume at the time of packaging
- date of expiration if the shelf life is less than thirty months
- precautions to be observed in use
- reference for identifying goods (batch number)
- function of product if unclear from presentation
- list of ingredients in descending order of weight at time they were added according to INCI (International Nomenclature for Cosmetic Ingredients)

Spain also has its own set of laws surrounding the cosmetic industry that is referred to as the Royal Decree of 1997. These laws include specifications on imported cosmetics as follows:

- the importer must have approval from the "Direccion General de Farmacia y Productos Sanitarios" (Spanish Directorate General for Pharmaceutical and Health Products – Ministry of Health), and this approval occurs when the quality of the product itself and manufacture can be proven

- must include an approval of the activities of the importer, and this approval can be obtained by a procedure outlined in a document named La Circular 2/99 from the D.G.F.P.S

- to commercialize the goods, two requirements must be met which are information about possible medical effects and a contact within Spain, either a head office or a corporation in which products are imported and the ways in which to contact them.

Labeling and advertising regulations are in strict conformance with that of the Cosmetics Directive of the EU, and include the following, which are specified again in the Spanish cosmetic Royal Decree:

- if animal experimentation was used, the experiments and the medical effects must be clearly indicated

- the item cannot be placed in an area where it could possibly be confused with medical treatment or foodstuffs.

Animal testing and experimentation has become a hot topic within the EU and COPILA, which sets standards for the EU cosmetic sector. A report concerning the animal experimentation was submitted in 1994 to COPILA, which concentrated primarily on alternatives. Countries were required to estimate how much of their research actually depends on animal testing and turn the estimate in to COPILA. The numbers were startling. It was thus decided that all animal experimentation had to be included in the labeling for companies that use animal experimentation.

Information concerning these laws and regulations can be obtained by contacting the Spanish Ministry of Health and Consumption, or Ministerio de Sanidad y Consumo, which is the Spanish equivalent of the U.S. Food and Drug Administration. Contact information is follows:

Direccion General de Farmacia y Productos Sanitarios

Del Ministerio de Sanidad y Consumo
Paseo del Prado, 18-20
28014, Madrid
SPAIN
Telephone: (34) 91.596.1089
Fax: (34) 91.596.4480

For information on the EU market:

COPILA
The European Cosmetic, Toiletry and Perfumery Association
www.copila.com

CTPA
Cosmetic, Toiletry and Perfumery Association
(based in Britain – offers information on many European countries)
www.ctpa.org.uk

Additional detailed information on Custom's duties may be obtained from following website: www.taric.es. Information is available in English and Spanish.

Spain, like other EU countries, has a market economy. American companies will find an open economy and free movement of capital and where business profits can be transferred without restriction.

In general, foreign products are imported by irrevocable letter of credit. When there is a continued relationship between exporter and importer/distributor, other forms of payment can be negotiated.

Contract Agreement: In general a Representation/distribution Agreement is governed by the conditions agreed upon between the parties. Spain applies the " freedom of contract theory" by which the contracting parties may establish any stipulation, condition or undertaking provided that it does not violate Spanish law, morals or public policy.

Additional information on marketing U. S. products and services in Spain is contained in the "Country Commercial Guide" report for Spain, which is available through the U.S. Export Assistance Centers and at the website www.usatrade.com.

Currency: U.S. companies should be aware that from January 1, 1999 to January 1, 2002, the Euro has been going through a transitory phase during which only financial transactions that do not require the physical use of bills and coins –- mainly bank operations -- are done in Euros. Circulation of Euro bills and coins is expected to begin on January 1, 2002. Spain, and 11 EU counterparts, will have a period from January 1, 2002 to February 28, 2002, in which both their country's currency and the Euro will be allowed to be used simultaneously. On March 1, 2002, individual currencies will disappear and the Euro will become the official currency of these countries. Additional information on the Euro can be found in the following web page: http://www.europa.eu.int/euro

BuyUSA

BuyUSA is an e-marketplace sponsored by the U.S. Commercial Service. This service can help bring suppliers of U.S. products and services together with international buyers outside the United States. In addition, this dynamic program maximizes your international exposure while minimizing the cost of finding reputable international partners and reduces the time needed to identify international opportunities. BuyUSA is yet another example of how the Commercial Service provides real-world assistance to help U.S. exporters move into international markets.

For more information on the products and services provided by BuyUSA, we invite you to contact us or our new website http://www.buyusa.com.

Trade Promotion Opportunities

Commercial Service Spain offers a wide range of products and services for U.S. companies seeking business partners in Spain. These services include up-to-date market information, assessment of a U.S. firm's product sales potential, identification of potential representatives, individual counseling, trade missions, setting up appointments with screened firms, etc.

For additional information on the products and services provided by CS Spain, we invite you to contact our new website www.usatrade.gov.

For cosmetics sector related questions and information, feel free to contact:

Carmen Adrada, Commercial Specialist
Tel: 34-915 64 8 976, ext. 2606
Fax: 34-915 630 859
E-mail: carmen.adrada@mail.doc.gov

For U.S mail inquires, write:

Stephen K. Morrison
Commercial Attache
American Embassy Madrid
PSC#61, Box 21
APO AE 09642

For additional information regarding market research specific to your products and services, ask about our Flexible Market Research and Customized Market Analysis programs by contacting us at 1-800-USA-TRAD(E) or www.usatrade.gov. Both reports provide timely, customized, reliable answers to your inquiries about a market and its receptivity to your products and services.

ISA Customer Satisfaction Survey

U.S. Department of Commerce

International Trade Administration
The Commercial Service

The U.S. Department of Commerce would appreciate input from U.S. businesses that have used this ISA report in conducting export market research. Please review the privacy statement / disclaimers at the bottom of this Web site. Please take a few moments to complete the attached survey and fax it to 202/482-0973, mail it to QAS, Rm. 2002, U.S. Department of Commerce, Washington, D.C. 20230, or Email: Internet [Robert.Opfer@mail.doc.gov].

----

* * * About Our Service * * *

1. Country covered by report: ___________

Industry/title: ____________

Commerce domestic office that assisted you (if applicable):

2. How did you find out about the ISA service?
__Direct mail
__Recommended by another firm
__Recommended by Commerce staff
__Trade/state/private newsletter
__Department of Commerce newsletter
__Other (specify): ________________________________

3. Please indicate the extent to which your objectives were satisfied:
1-Very satisfied
2-Satisfied
3-Neither satisfied nor dissatisfied
4-Dissatisfied
5-Very dissatisfied
6-Not applicable

__Overall objectives
__Accuracy of information
__Completeness of information
__Clarity of information
__Relevance of information
__Follow-up by Commerce representative

4. In your opinion, did using the ISA service facilitate any of the following?
__Decided to enter or increase presence in market
__Developed an export marketing plan
__Added to knowledge of country/industry
__Corroborated market data from other sources
__Decided to bypass or reduce presence in market
__Other (specify): ________________________________

5. How likely would you be to use the ISA service again?
__Definitely would
__Probably would

__Unsure
__Probably would not
__Definitely would not

6. Comments:

---

* * * About Your Firm * * *

1. Number of employees: __1-99 __100-249 __250-499
__500-999 __1,000+

2. Location (abbreviation of your state only):______

3. Business activity (check one):
__Manufacturing
__Service
__Agent, broker, manufacturer's representative
__Export management or trading company
__Other (specify):_______________________________

4. Value of export shipments over the past 12 months:

__Less than $10K
__$11K-$100K
__$101K-$500K
__$501K-$999K
__$$1M-$5M
__More than $5M

May we call you about your experience with the ISA service?
Contact name: ____
Phone: ____
Fax number: ____
Email: ____

Thank you--we value your input!

This report is authorized by law (15 U.S.C. 1512 et seq., 15 U.S.C. 171 et seq.). While you are not required to respond, your cooperation is needed to make the results of this evaluation comprehensive, accurate, and timely. Public reporting burden for this collection of information is estimated to average ten minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Reports Clearance Officer, International Trade Administration, Rm. 4001, U.S. Dept. of Commerce, Washington, D.C. 20230, and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Paperwork Reduction Project (0625-0217), Washington, D.C. 20503.

FORM ITA 4130P-I (rev. 5/95)
OMB. No. 0625-0217; Expires 05/31/02

For additional information regarding market research specific to your products and services, ask about our **Flexible Market Research** and **Customized Market Analysis** programs by contacting us at **1-800-USA-TRAD(E)** or www.export.gov or www.buyusa.com. Both reports provide timely, customized, reliable answers to your inquiries about a market and its receptivity to your products and services.

close window print