

2023 National Export Strategy

Trade Promotion Coordinating Committee



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Message from the U.S. Secretary of Commerce



As Chair of the Trade Promotion Coordinating Committee, I am pleased to present to Congress the 2023 National Export Strategy (NES), a governmentwide strategic plan to carry out the export promotion and export financing activities of the U.S. government. As Secretary of Commerce, my top priority is helping U.S. businesses and workers to compete and win in the global economy. The Biden-Harris Administration has made transformational investments in industry, innovation, workforce training, and local economic development, creating the conditions for economic growth and opportunity for all communities. The NES doubles down on that mission, ensuring U.S. businesses can compete in challenging global markets, in which every sale can be a hard-fought achievement.

The NES is an essential element of the Department's mission to advance U.S. leadership in the industries of the future, revitalize domestic manufacturing, and create quality jobs across the country. It sets forth a cohesive strategy and a robust toolkit to support U.S. exporters and to channel the power of exports into economic progress, growth, and security on behalf of the American people. Across sectors and target markets, exports are critical to our Nation's economic health, accelerating growth and diversifying revenue streams for even the smallest businesses. This growth in turn creates opportunity for workers, with U.S. exports supporting millions of jobs, including more than one in five in manufacturing.

Even beyond growth and employment, the benefits of export-led growth resonate in communities throughout our country, driving capital investment, expanding opportunity, and substantially improving wages. When American businesses engage in international markets—where some 95% of the world’s consumers live—we profit and prosper as a global society.

This NES brings together resources and strategies from across the U.S. government to catalyze export growth across a diverse range of sectors. It focuses on long-standing areas of American strength, like higher education; fast-growing areas of opportunity, including climate and clean technologies, and industries where the Biden-Harris Administration is driving renewal, such as infrastructure and manufacturing. Consistent with its focus on diversification, this NES covers the broad range of American exports, including agricultural businesses, which export more than 20% of what they produce, with strategies to support farming, ranching, and fishing exports.

Still, for our Nation to succeed economically, simply increasing and diversifying exports is not enough. We must also expand the pool of exporters from coast to coast, including small businesses, women- and minority-owned firms, and rural businesses that historically have not benefitted from federal resources and services. Therefore, in alignment with the Executive Order 13985 on *Advancing Racial Equity and Support for Underserved Communities*, this NES will drive expanded outreach to and engagement with firms in underserved communities, as well as companies in industries hardest hit by the COVID-19 pandemic, such as travel and tourism. The Strategy envisages assisting businesses, especially small businesses, that have not typically exported by helping them to break into international markets. That means ensuring that U.S. firms of any size, regardless of sector or target market, have the support and knowledge that they need to reach consumers and compete in international markets.

Gina M. Raimondo
Secretary of Commerce

Executive Summary

The Trade Promotion Coordinating Committee was established to provide a coordinated approach to delivering export assistance to help U.S. companies take advantage of global market opportunities and to overcome challenges during their export journey. The 2023 NES provides an overarching strategic framework to leverage the trade promotion activities of the federal government to support and create opportunities for American businesses by expanding and diversifying U.S. exports. It comes at a time when complex economic forces pose challenges for global business, and at the same time, a period of tremendous opportunity as the Biden-Harris Administration and the U.S. Congress have made once-in-a-generation investments in U.S. competitiveness. Exporting provides a pathway to growth, diversification, and resiliency for businesses, large and small, to both weather global disruptions and benefit from domestic renewal. The U.S. government's export promotion efforts, when combined with worker-centered trade policy and high-road employment, is part of the President's Foreign Policy for the Middle Class.

Understanding the role of exports in the U.S. economy, including who is exporting, what is being exported and from where, the destination of exports, and the value added to our economy, is an essential starting point for the NES. These data and analysis are covered in Chapter 1 and lay the foundation upon which NES priorities and programs were developed. Ensuring equitable economic growth demands increasing U.S. exports as well as increasing the pool of exporters. Strategies to broaden and diversify the small business exporter base, with a particular focus on small businesses from underserved communities, are captured in Chapter 2. This chapter also introduces a central objective of advancing equity through enhanced accessibility and assistance, including place-based investments into programs and services for businesses in historically underrepresented and underserved communities.

Combatting the climate crisis at home and abroad has been a priority of this Administration since day one, and by advancing U.S. competitiveness in climate and clean technologies exports, we will be positioned to face this challenge. Chapter 3 focuses on actions which will marshal U.S. innovation and ingenuity to achieve global net-zero greenhouse gas emissions by mid-century.

The NES also highlights new strategies and initiatives to spur the recovery of sectors that were disproportionately impacted by the COVID-19 pandemic and its economic ramifications. We must continue to recover, grow, and innovate to strengthen our competitiveness and resiliency, and we cannot create and sustain long-term economic growth without a vibrant manufacturing sector. Chapter 4 is dedicated to manufacturing and key policy areas such as supply chain resiliency, sustainability and digital transformation, trade finance, and technical standards development in which the U.S. government will focus its efforts. The travel and tourism sector was one of the hardest hit by the COVID-19 pandemic. Chapter 5 overviews the National Travel and Tourism Strategy and how U.S. government efforts will support not only the recovery of the volume but also the value of tourism. International education exports reach beyond economic benefits, and Chapter 6 highlights novel approaches to harness these benefits and promote the United States as a leading study destination.

U.S. exports can deliver more than just goods and services to foreign markets—they can also deliver solutions to the biggest development challenges of our time. Chapter 7 highlights the role U.S. exporters can play supporting the Partnership for Global Infrastructure and Investment, a new initiative to catalyze international infrastructure financing and development while bolstering the competitiveness of U.S. companies. Regional economic engagements across the globe, such as the Indo-Pacific Economic Framework for Prosperity, the United States-European Union Trade and Technology Council, the Americas Partnership for Economic Prosperity, and our engagements in Africa are creating opportunities for U.S. businesses to make meaningful contributions to regional growth, innovation, and two-way trade and investment.

Finally, the NES highlights efforts to create more and better market opportunities for U.S. agriculture, fish, and forestry exporters, as detailed in Chapter 8, and Chapter 9 includes strategies to enhance the export competitiveness of the seafood industry.

Chapter 1

Exports and the U.S. Economy



Since the last NES in 2016, the global economy has faced unprecedented pressures and undergone marked shifts. The COVID-19 pandemic precipitated a sharp economic crisis, sapping economic activity, snarling supply chains, and hampering trade flows in the United States and globally. Even after the initial economic shock subsided, the economic ramifications of COVID-19 continued to shape the global economy, from port and shipping backlogs to supply and demand mismatches throughout critical supply chains.

On top of COVID-19, novel challenges have also emerged: devastating climate events, from intense winter storms to hurricanes; spiking energy prices, particularly in the wake of Russia's unlawful invasion of Ukraine; scarcity of semiconductors and other essential inputs; shifts in consumer spending patterns in response to the pandemic; and rising inflation. Despite this difficult and dynamic environment, U.S. trade flows have shown remarkable resilience, with many sectors approaching or surpassing pre-pandemic levels.

At the same time, the Biden-Harris Administration has made historic investments in U.S. productive capacity. The President and the U.S. Congress passed the most aggressive economic recovery package since Roosevelt's New Deal; the most substantial infrastructure investment since Eisenhower; the most significant investment in manufacturing and research and development (R&D) in history; and a historic law to accelerate U.S.-based clean energy manufacturing. By investing in infrastructure, technology, workers, and communities across the United States, the Administration is laying the foundation for American businesses to do what businesses do best—innovate, scale, and compete.

Exports are essential to the nation's growth, prosperity, and economic security. They provide growth opportunities for businesses of all sizes and across sectors by offering broader markets and diversified revenue sources; they uplift American families and communities by supporting millions of good-paying jobs. Exports can create pathways to prosperity for small- and medium-sized enterprises (SMEs), minority- and women-owned enterprises, rural communities, and regions hit hard by economic shocks. And the role that exports occupy in the nation's economy is significant, as exports' share of gross domestic product (GDP) grew from approximately 10% in the early 2000s to more than 12% over the last decade. Further, exports helped to drive the return to economic growth following COVID-19, including contributing 11.7% to GDP growth in the United States in 2022. This section examines the economic landscape specifically for U.S. exports.¹

In order to provide the appropriate support and resources to U.S. exporters and their workers to help them compete in global markets, it is vital to understand the nature of businesses that export, and where opportunities and challenges reside. The below summaries and figures across four broad sections—profiles of U.S. exporters; U.S. goods and services export trade; U.S. goods and services export markets; and goods export trade at the state and metropolitan levels—help to contextualize the priorities and programs set forth in the NES. The widespread variation in performance and resilience across industries and geographies are likewise instructive as the Biden-Harris Administration aims to forge sustainable, equitable, resilient growth in exports as in the broader economy.

¹ The analysis herein reflects data available as of October 2022. Data are subject to regular revision, and the conclusions may have changed.

Profile of U.S. Exporting Companies

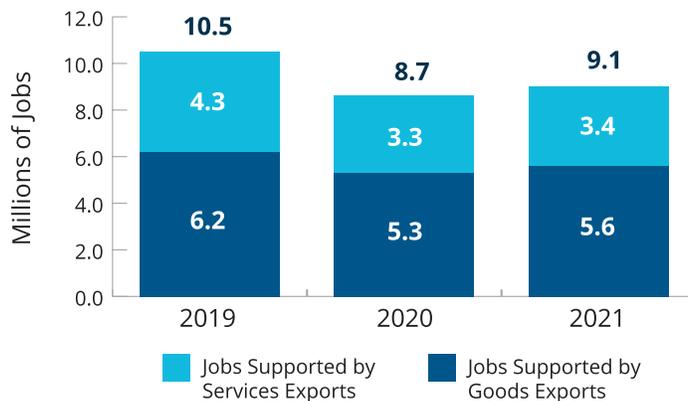
Exports are important to the U.S. economy in part because the advantages of exporting accrue to companies of all sizes across sectors and geographies. These benefits are especially significant for the over 271,000 known SMEs—including 66,000 manufacturers—that exported goods in 2021. While their \$542 billion worth of goods exported² comprises less than a third of total U.S. goods exports, SMEs make up 97.4% of goods-exporting companies, an outside presence in the landscape of exporting firms.

While the pandemic hurt exporters small and large alike, SME exporters were hit particularly hard. The number of SME exporters fell by 5.8% in 2021, while the number of large exporters fell by only 3%. Those SMEs that continued to export through the pandemic, however, showed superior resilience, as the value of SME goods exports fell 10.2% in that year, compared to a 14.4% drop for large exporters over the same period.

Employment in U.S. Export Trade

Exports also play a valuable role in U.S. employment, with more than an estimated 4,269 U.S. jobs supported per billion dollars of exports in 2021. Between 2017 and 2021, U.S. exports supported an estimated average of 9.9 million jobs per year. As the pandemic curtailed both exports and overall employment, that figure fell to 8.7 million in 2020 (Figure 1).³ With strong export performance in 2021, export-supported jobs have begun to recover, as exports

Figure 1. U.S. Jobs Supported by Exports, 2019–2021



Note: Totals in bar graph do not equal the sum due to rounding.

Source: Rasmussen, "Jobs Supported by Exports 2021 Update" (ITA)

² Preliminary data.

³ "Jobs Supported by U.S. Exports," International Trade Administration, 2020, <https://www.trade.gov/data-visualization/jobs-supported-us-exports>

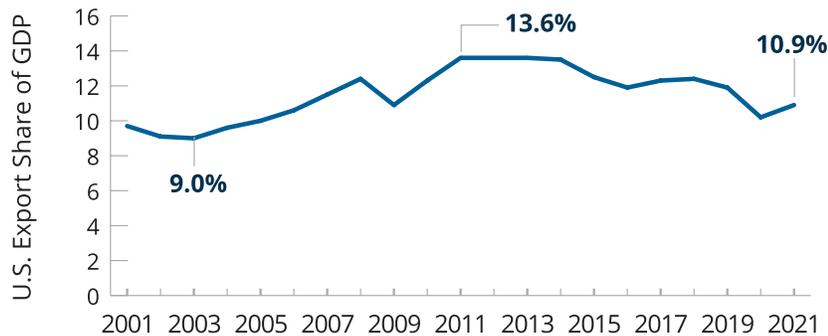
supported an estimated 9.1 million jobs. This underscores the centrality of championing export recovery to ensure a broader economic recovery, particularly in the manufacturing and agriculture sectors, in each of which exports support at least one in five jobs.

U.S. Goods and Services Export Trade

As the global economic outlook brightened in 2021, U.S. exports of goods and services rose \$398 billion from 2020 to reach \$2.6 trillion in 2021, the strongest year on record. Over the same period, the importance of exports to the U.S. economy grew, jumping from 10.2% of GDP in 2020 to 10.9% in 2021, although still below pre-pandemic levels (Figure 2).

The strength of recovery has varied among sectors and sub-sectors, reflecting broader pandemic patterns. For example, while goods exports are up \$106.3 billion over 2019 levels, services exports remain \$95.9 billion below 2019 levels (Figure 3), as examined in more detail below.

Figure 2. U.S. Export Share of Gross Domestic Product (GDP)



Source: Bureau of Economic Analysis

Figure 3. U.S. Exports of Goods and Services, 2019–2021



Notes: Totals in bar graph do not equal the sum due to rounding. Data are presented on a balance of payments (BOP) basis.

Source: Census Bureau; Bureau of Economic Analysis

U.S. Goods Trade

Exports are a critical source of revenue for U.S. goods producers, providing new markets and new sources of demand. Manufacturers, farmers, and trade intermediaries alike can engage in export trade and reap its benefits. Manufacturers that export are, on average, more successful and pay higher wages than those that do not.⁴ U.S. exporters are especially competitive in capital- and technology-intensive manufacturing sectors, like industrial supplies and capital goods, which alone accounted for more than half of all U.S. exports in 2021.

The shocks of 2020 and 2021 had significant and at times divergent impacts on goods sectors, confounding prior trends. For example, in 2021, oil supplanted mechanical machinery to become the top exported commodity by value. Meanwhile, electric machinery maintained its pre-pandemic place as the third-largest commodity, even as aircraft declined from the fourth to sixth-largest commodity, allowing vehicles and medical equipment to move up in rank.

This divergence is also evident when looking at sectors in aggregate and which have or have not recovered to pre-pandemic export levels (Figure 4). Oil, for example, has rebounded to exceed pre-pandemic levels driven by increased demand in a reopened economy, along with price jumps due to supply disruptions with weather, transport, and geopolitical roots. At the same time, pharmaceuticals received a boost, as COVID vaccines and therapeutics were produced and distributed on an unprecedented scale. Meanwhile, the need to facilitate home-based working, learning, socializing, and leisure drove consumption in the electric machinery category and strong semiconductor demand. That same overwhelming demand for semiconductors, however, has impeded recovery in sectors like automobiles, while continued obstacles to global travel have contributed to underwhelming civilian aircraft sales.

Figure 4. Net Change in Goods Export Value by Product, 2019–2021

(USD Billions)



Source: Census Bureau

⁴ Riker, David. "Export-Intensive Industries Pay More on Average: An Update," U.S. International Trade Commission, April 2015, <https://www.usitc.gov/publications/332/ec201504a.pdf>

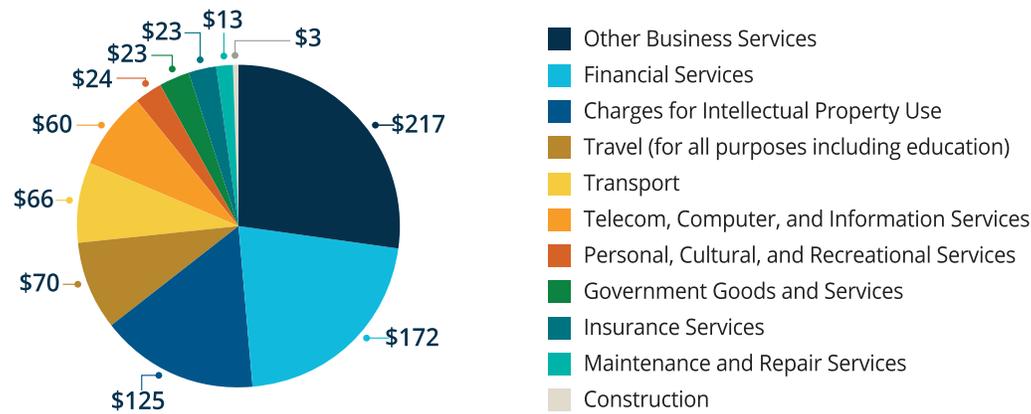
U.S. Services Trade

For the last few decades, the role of services in trade has grown, and the share of services in total exports has increased. In 2001, services accounted for 28% of total exports. By 2019, services had grown to 35% of total exports, \$607 billion higher than in 2001. This trend, however, reversed during the pandemic. The share of services in exports fell to 31% in 2021, mainly reflecting a fall in travel exports, formerly the leading U.S. services export, while other business services—including R&D, consulting, and trade services—is now the dominant sector (Figure 5).

Apart from travel, most services sectors have recovered to pre-pandemic levels, with particularly strong growth in financial and other business services. Still, topline services exports have failed to keep pace with the recovery of goods exports, largely due to continued pandemic-related disruptions to international travel (Figure 6). This includes international education spending in the United States, which has also been slow to recover. While travel exports remained as of the date of this analysis below 2020 levels, growing monthly figures are an encouraging sign that a delayed recovery is taking root.

Figure 5. U.S. Services Exports, 2021

(USD Billions)



Source: Bureau of Economic Analysis

Figure 6. Net Change in Export Value by Services Sector, 2019–2021

(USD Billions)



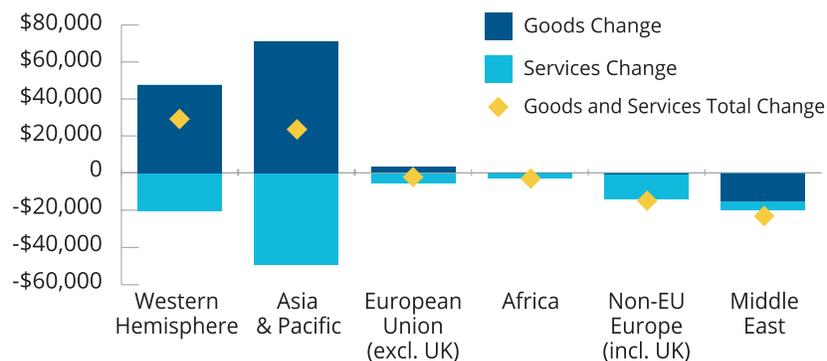
Source: Bureau of Economic Analysis

U.S. Export Markets for Goods and Services

The largest destination markets for U.S. exports are its closest neighbors, Canada and Mexico, followed by China and the United Kingdom. Together, these four countries were the destination for some 39% of U.S. exports in 2021. This represents growth in goods exports to Canada, Mexico, and China—but not the United Kingdom—for the year, even as services exports to each of the four markets remain below 2019 levels.

The variation in export recovery is also evident across regional markets. The strongest market for the resurgence of U.S. exports has been the Western Hemisphere, followed by Asia and the Pacific, where 2021 exports exceeded 2019 levels at \$26.9 billion and \$21.8 billion, respectively (Figures 7 and 8). In contrast, other regions saw overall declines in exports of goods and services, including the European Union, Middle East, and Africa. Globally, where trade has recovered, it is largely in goods exports, mostly to Asia and the Pacific and the Western Hemisphere, while services exports remain below pre-pandemic levels.

Figure 7. Net Change in Export Value by Goods and Services for Select Regions, 2019 vs 2021 (USD Millions)



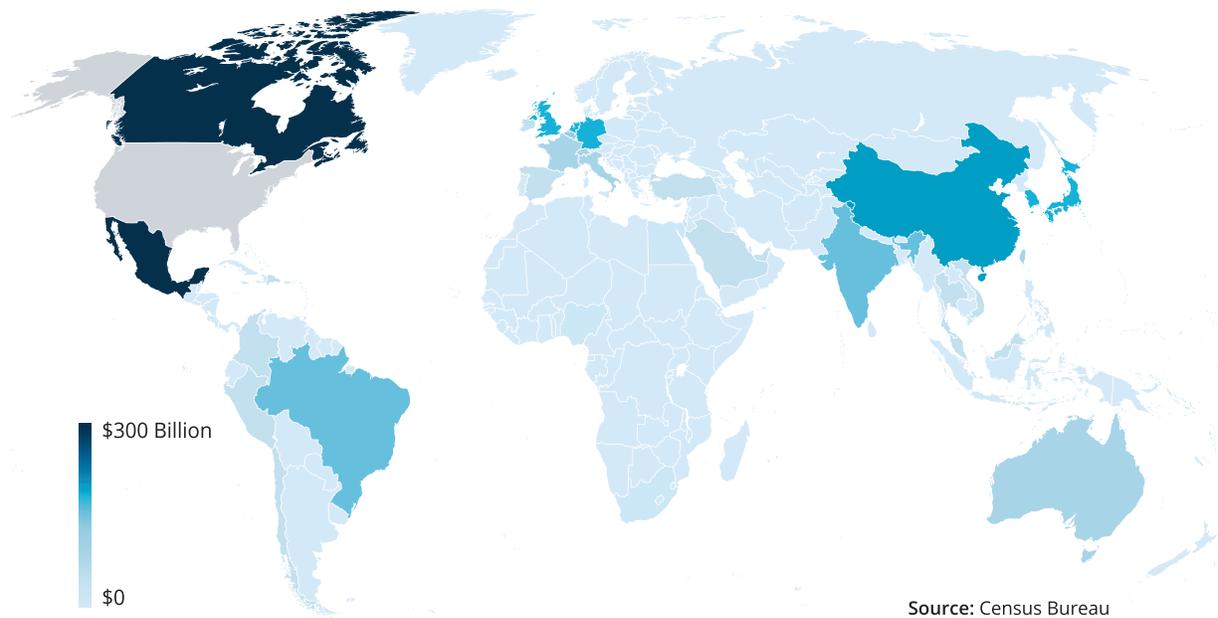
Note: Data are presented on a balance of payments (BOP) basis.

Source: Bureau of Economic Analysis, EU excludes UK and Non-EU Europe includes UK for both years.

Figure 8. Total U.S. Exports by Region (USD Millions)

	Goods			Services		
	2021 Export Value	\$ Change, 2019–2021	% Change, 2019–2021	2021 Export Value	\$ Change, 2019–2021	% Change, 2019–2021
Western Hemisphere	\$759,919	\$47,644	7%	\$214,244	-\$20,745	-9%
Asia & Pacific	\$533,509	\$71,040	15%	\$204,738	-\$49,264	-19%
European Union	\$272,646	\$3,200	1%	\$201,712	-\$5,404	-3%
Africa	\$26,780	-\$31	0%	\$12,146	-\$2,791	-19%
Non-EU Europe	\$114,926	-\$689	-1%	\$129,813	-\$13,539	-9%
Middle East	\$52,751	-\$15,257	-22%	\$29,639	-\$4,536	-13%

Note: Data are presented on a balance of payments (BOP) basis.

Figure 9. Total U.S. Goods Exports by Country, 2021

U.S. Goods Exports

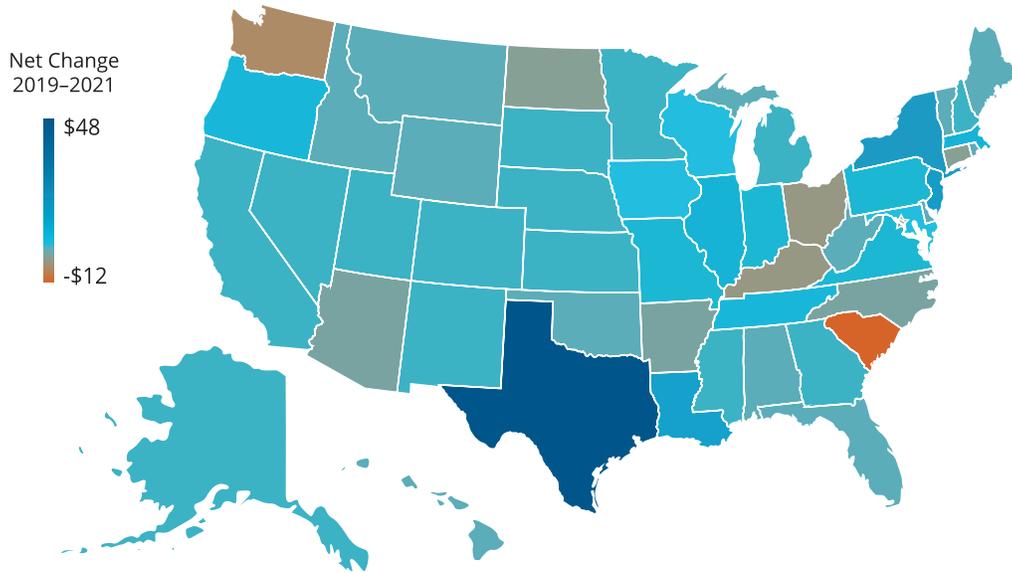
Focusing in on goods exports specifically, the top three trade partners for U.S. exporters remain the same as for total exports: Canada, Mexico, and China (Figure 9). Japan is the fourth-largest goods partner. Below these top four partners, relative rankings among other U.S. partners have varied of late. In 2021, South Korea displaced the United Kingdom and Germany to become the United States' fifth largest goods export market, driven by exports of oil and machinery. In contrast, the lagging recovery in exports of transportation equipment has hampered trade with the United Kingdom and Germany.

Goods Exports from U.S. State and Metropolitan Areas

In 2021, 37 states returned to their pre-pandemic goods export levels⁵ (Figures 10 and 11 on the next page). This variation across states reflects industry trends, as states that rely on industries facing enduring pandemic-related challenges, such as aircraft and automotive manufacturing, lag behind those states with strengths in goods industries like energy, food, and pharmaceuticals, which have outperformed other sectors.

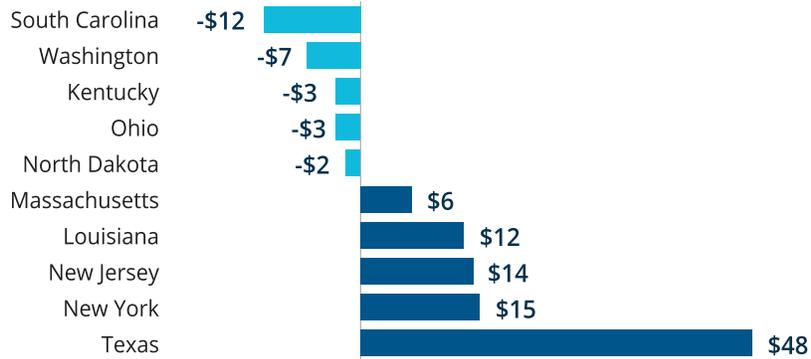
⁵ Services trade data are only available nationally.

Figure 10. 2019–2021 Goods Export Change by State
(USD Billions)



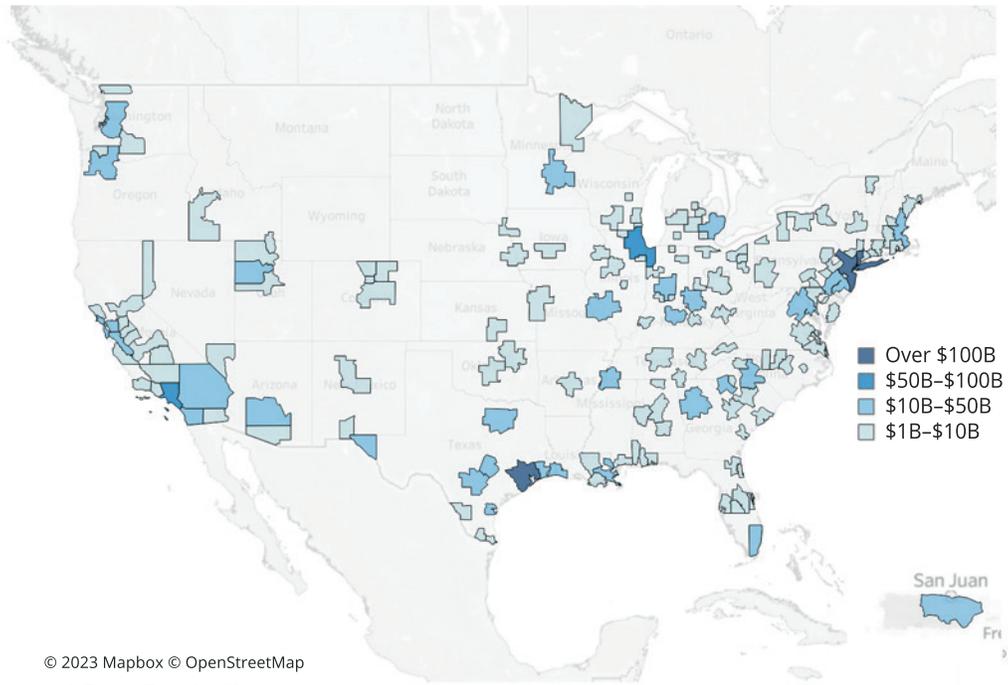
Source: Census Bureau

Figure 11. Net Change in Goods Export Value by State, 2019–2021
(USD Billions)



Source: Census Bureau.

Figure 12. 158 Metropolitan Statistical Areas Exported Over \$1 Billion in Goods in 2021



On a more local level, in 2021, 158 metropolitan areas exported over \$1 billion in goods (Figure 12), a decline from 160 areas pre-pandemic. As with state trade, the metropolitan area declines correlate with industry focus and demand trends, heavily influenced by pandemic pressures. Again, as with states, metropolitan areas with large automotive sectors tended to show large export declines from 2019.

Chapter 2

Export Assistance for Small Businesses and Underserved Communities



Small businesses are the backbone of the American economy, representing 99.7% of all U.S. firms. However, U.S. small businesses do not engage in trade at the same rate as their peers from other large economies.⁶ This represents a missed opportunity for many U.S. small businesses, as over 95% of the world’s population resides outside of the United States. Exporting is not only a growth strategy, but also has positive ripple effects on the greater economy. On average, firms that export earn higher revenues, which can be invested into employing more workers, paying higher wages,⁷ and dedicating more resources towards innovating and staying competitive on both the domestic and global stage. A top priority of the NES is to support these small businesses by raising the visibility of the resources and tools that can help them export; to coordinate and expand the scope of government assistance to reflect their changing needs; and to provide guidance to navigate any barriers along the way.

The Biden-Harris Administration is committed to ensuring that export promotion programs include support for businesses in underserved communities, as defined by [Executive Order 13985](#). Businesses in these communities tend to have less access to resources and face unique challenges. This requires new and different approaches to reaching and providing assistance to these communities. Additionally, many businesses in underserved communities have been disproportionately impacted by the pandemic.⁸ For many companies, exports can help them recover, lead to a greater equality of opportunity, and serve as a critical strategy to help communities rebuild. Increasing the number of businesses in underserved communities that engage in exporting meets two goals at once—expanding equity and economic mobility in underserved communities and driving American economic growth. New initiatives tailored to reach businesses in underserved communities will better connect firms to the export assistance ecosystem and address their specific needs.

Identify Export-Capable and Export-Ready Companies

Building an exporter pipeline will involve engaging companies that are at different stages of exporting, including those that have never exported. To date, many export assistance programs have targeted companies that are already active in international business. For example, the typical experienced exporter working with the U.S. Department of Commerce’s International Trade Administration (ITA) has been in business for 20 years, employs approximately 40 workers, exports to five countries per year, and derives 12% of total

⁶ Organisation for Economic Cooperation and Development. “Fostering greater SME participation in a globally integrated economy,” 2018.

⁷ Riker, David. “Export-Intensive Industries Pay More on Average: An Update,” U.S. International Trade Commission, April 2015, <https://www.usitc.gov/publications/332/ec201504a.pdf>

⁸ Dua, Andre, Deepa Mahajan, Ingrid Millan, and Shelley Stewart. “COVID-19’s effect on minority-owned small businesses in the United States,” McKinsey, May 2020, <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/covid-19s-effect-on-minority-owned-small-businesses-in-the-united-states>

revenue from overseas sales. In order to reach the exporters of the future, U.S. government agencies are working together to implement new strategies to connect with potential exporters and to equip them with the knowledge, tools, and connections to support their success in global business.

The U.S. Small Business Administration (SBA) commissioned a study⁹ to better understand the scale of U.S. small business exporters, including those in the services sector and those sending low value shipments. The study revealed that there are currently approximately 1.3 million small business exporters. Furthermore, the research places the potential market size, or total addressable market, at more than 2.6 million small businesses, representing 42% of all small employer businesses. The insights from this study will be used to better meet the needs of current and future small business exporters, including through programs such as the [Community Navigator Pilot Program](#), funded by the American Rescue Plan, which strengthens outreach to businesses in underserved communities by partnering with organizations that have deep community roots. SBA recently announced 51 grantee organizations that will receive a combined \$100 million, including minority chambers of commerce and similar organizations.

These trusted partners can connect small business owners in underserved communities to federal, state, and local resources and enhance SBA's existing resource partner networks by supplementing the technical assistance offered by Small Business Development Centers (SBDCs), Women's Business Centers, Service Corps of Retired Executives (SCORE) chapters, Veteran Business Outreach Centers, regional innovation clusters, and growth accelerators. U.S. government trade promotion agencies will collaborate with SBA's [Office of International Trade](#) to access Community Navigator partners and connect businesses in underserved communities to export promotion resources across the federal government.

Global Diversity Export Initiative

ITA introduced the [Global Diversity Export Initiative](#) (GDEI) to increase outreach to U.S. businesses and business organizations in underserved communities to equip them with the tools and knowledge to compete in global markets. The target businesses include minority, women, veteran, LGBTQ+, and disabled-owned businesses. A core strategy of GDEI is to initiate strategic partnerships with stakeholder organizations in target communities that can amplify information about exporting assistance provided by the federal government and direct companies to exporting resources. To date, GDEI has launched 12 strategic partnerships, with more in the pipeline. GDEI also engages collaboratively with other federal agencies, such as the Export-Import Bank of the United States (EXIM) and SBA, to offer programs that highlight successful, diverse exporters and to expand outreach efforts.

⁹ "SBA Research Sheds New Light on Small Business Exporters," U.S. Small Business Administration, 2023, <https://www.sba.gov/article/2023/mar/14/sba-research-sheds-new-light-small-business-exporters>

Under GDEI, ITA will develop tailored programs to expand participation in trade promotion events and services, such as minority business-focused trade missions. As part of this effort, ITA recently launched an ongoing community event series, “Building Bridges to Global Markets,” to share solutions to the unique exporting challenges small businesses in underserved communities face and to raise awareness of export assistance resources.

Diversity and Diaspora Connections

The United States is widely viewed as a partner of choice for global companies to conduct business, and our competitive edge is bolstered by U.S. minority-owned firms whose executives or customers have family or diaspora connections in countries of heritage. Equipping these businesses to export to countries of heritage provides a unique opportunity to accelerate their growth.

SBA’s Office of International Trade, working in collaboration with foreign embassies and consulates in the United States, launched a series of outreach programs to connect U.S. businesses in diaspora communities with counterparts in their countries of heritage and to increase awareness of the full range of federal export assistance tools.

In 2021, [Prosper Africa](#), a U.S. government initiative that connects U.S. and African businesses with buyers, suppliers, and investment opportunities, launched a strategy to engage and support African diaspora businesses and investors, including women-led firms, to expand awareness of opportunities and use of trade and investment tools to support U.S. exporters. Federal agencies will continue these activities to enhance engagement with diaspora communities.

High-Growth Small Businesses

Startups are high-growth oriented companies, largely technology-driven, transforming industries and driving job creation across the United States. The rise of this frontier business demographic is a relatively new path to economic growth. There is no single source of official government data segmenting this frontier business demographic and its national economic impact, but according to the latest publicly available data, there were approximately 84,167 early- to high-growth stage startups at the beginning of 2022 across hundreds of technology categories in the United States.

While not all startups are venture-backed, an unprecedented \$311 billion of venture capital was invested into these companies across the United States, accounting for half of global investments. In addition, the United States accounted for a record 12,281 deals, with early-stage deals accounting for 55%. Funding from venture capital and other sources, including grants, largely goes towards R&D and wages/compensation at early stages, and toward hiring and geographic expansion at the high-growth stage.

Many of today's highly successful large exporting technology firms began as innovative startups, accessing seed funding and support from federal R&D grants, contracts and services supporting their international sales. A key to supporting small business exporters is better leveraging federal resources to help these firms focus on international sales.

The [Small Business Innovation Research](#) (SBIR) program is known as "America's Seed Fund," investing in innovative R&D that will commercialize to launch America's next generation of startups. SBIR is the world's largest source of early-stage public finance, allocating more than \$4 billion of non-dilutive capital to innovative startups annually.

Significant investment in future economic growth can be made by increasing the work of the 11 agencies that fund SBIR and its university-based counterpart, the Small Business Technology Transfer program, and assisting small businesses doing R&D along their journey to commercialize through exporting. In efforts to make progress toward this goal, SBA will support prizes for business incubators and accelerators focused on exporters in high growth and R&D industries.

At the commercialization stage of their products and services, startups can also leverage support from ITA to grow their international sales through services and trade events. ITA is uniquely positioned to support companies at their high-growth stage by finding global clients and partners through its worldwide network of 100 domestic and 80 overseas offices located in U.S. embassies and consulates.

In addition to their existing range of services, ITA has increased its efforts to proactively engage with early- and late-stage high growth startups, and partner with technology ecosystem multipliers. ITA is increasingly working with incubators, accelerators, and the venture capital community to develop international pitch sessions, design more effective business-to-business platforms, and offer events for high-growth startups in technology categories to connect with potential overseas clients, partners, and foreign governments. To better prepare early-stage startups, ITA has been engaging founders and collaborating with technology ecosystem partners to educate the startup community about the benefits of international markets, export mechanics, and successful strategies for developing international sales.

Lastly, ITA hosts the [Startup Global](#) event series in partnership with the [Global Innovation Forum](#). Entrepreneurs learn insights about the benefits of building a global business from day one directly from startups that have gone global, technology providers, and government trade experts. A Startup Global Women series was spun off in 2021. The program is designed by women, features women speakers, and was developed for an audience of women entrepreneurs, business owners, and students. ITA will continue to develop programs for women entrepreneurs and business owners across the United States, delivering tailored, actionable training, business counseling, and networking opportunities to help women grow their businesses, achieve financial independence, and better support themselves and their families, workers, and communities.

Services Exporters

Wholesalers and manufacturers have long dominated small business exports; however, services represent 31% of U.S. exports overall, and the robust representation of small businesses in this sector requires specific and intensive assistance. Because they do not require shipping of a physical product, services sectors are more resilient to supply chain challenges. The leading export service sectors for U.S. small businesses are computer systems design, software publishing, and architectural and engineering services.

Services exports are different from goods exports because services are generally intangible and often require more customer involvement and customization. The U.S. government will continue to work to ensure that its programs meet the needs of services exporters, including managing intellectual property (IP) and cybersecurity risks.

Enhance Awareness and Accessibility of Export Resources

Reaching new-to-export small businesses and companies in underserved communities involves raising awareness of export assistance and resources. Across the U.S. government, federal agencies will focus on helping firms in underserved communities enter the export pipeline through the creation of targeted resources.

MBDA's Expanded Authority

The U.S. Department of Commerce's [Minority Business Development Agency](#) (MBDA) is the lead federal agency dedicated to assisting minority business enterprises in overcoming social and economic disadvantages that have limited their participation in the nation's free enterprise system. In 2021, the [Infrastructure Investment and Jobs Act](#) made MBDA permanent, elevated its Director to Under Secretary of Commerce, and gave the agency greater tools and authority. The law allows MBDA to expand its reach through a network of local business development centers. These export, business, procurement, and manufacturing centers are managed by external organizations and seek to generate increased financing, contract opportunities, and greater access to global markets for minority business enterprises.

MBDA is currently seeking to build the capacity of all its business centers to identify new-to-export minority business enterprises and to refer them to MBDA export centers for international trade counseling. These four specialty business centers, located in Miami, Houston, San Antonio, and Mesa, are focused solely on international trade, and act as the lead for the entire network of MBDA business centers to serve clients with potential export capabilities. Capacity building is being provided through internal working groups, trade events, and seminars.

In addition, MBDA collaborates closely with ITA's GDEI and local [U.S. Export Assistance Centers](#) (USEACs) to engage minority business enterprises in international trade. MBDA also works closely with EXIM, SBA, and the [U.S. International Development Finance Corporation](#) (DFC) to assist minority business enterprises with trade financing solutions. These cooperative activities will continue to engage the widest possible audience with export outreach activities.

Expand the Use of Trade Promotion Tools and Services

ITA has several trade promotion services designed to help U.S. small businesses make international sales. Businesses can contact trade specialists at any of ITA's more than 100 USEACs to get assistance connecting with ITA's overseas trade promotion staff at embassies, finding buyers or resource partners in state trade offices, freight forwarders, shipping companies, international banks, and others.

Customized services: One of the biggest concerns new exporters have when working with foreign buyers is how to manage culture and language differences. ITA's local, in-country trade specialists can help small businesses navigate new markets and identify and prepare for meetings with foreign buyers.

Data tools: The U.S. Census Bureau's [USA Trade Online](#) is a dynamic data tool that gives users access to current and cumulative U.S. export and import data. With multiple data sets and capabilities, USA Trade Online can assist small businesses to identify new markets, evaluate existing markets, and perform other market research tasks. Data are updated each month with the release of the latest U.S. International Trade in Goods and Services Report. Additionally, [Global Market Finder](#) (GMF) is an easy to use, interactive data tool for U.S. exporters that is free to the public. GMF provides commodity-level, U.S. export data by value, quantity, unit price, country of destination, and method of transportation. Manufacturers and other businesses interested in expanding their business globally can use it to identify potential export markets.

ITA's [Visual Data Center](#) provides a one-stop-shop where businesses can find visual data analysis on international trade, industries, and foreign direct investment. Industry insights and trends presented in an easy-to-understand format can simplify complex data points and deliver valuable insights for SMEs. ITA's data covers a variety of sectors including automotive, energy, manufacturing, professional business services, steel, aluminum, textiles and apparel, and travel and tourism. Businesses can interact with the data to easily view different patterns and trends or download the information at no cost for further analysis or use. ITA regularly adds new products and content that can inform international business goals and strategy.

User-friendly [tools and data visualizations](#) from ITA make finding the right trade data simple. Industry data dashboards present data curated by ITA's industry experts. [TradeStats Express](#) allows users to download and explore visualized U.S. national, state, and local-level trade in an easy-to-navigate interface—all without a login. ITA also has tools to help exporters explore new markets. The [FTA Tariff Tool](#) helps users identify the tariffs they will face under U.S. free trade agreements and the product-specific rules of origin they need to meet to take advantage of the agreements. The [Market Diversification Tool](#) uses an exporter's current trade patterns to recommend new markets. The tool uses data on the exporter's current products and export markets in an algorithm with data from 11 indicators to score and rank potential new markets.

Trade shows: Attending or exhibiting goods at a trade show is a great way to meet potential partners and buyers. Many potential foreign buyers attend trade shows in the United States. This can be an easier way to find foreign buyers than travelling internationally. While many trade shows had been postponed due to the COVID-19 pandemic, the pace of resumptions has accelerated and foreign buyers attending trade events in person are more serious. ITA can support a company's participation in a trade show and match them with potential foreign buyers at trade shows supported by ITA.

Trade missions: One of the best ways to identify potential buyers in foreign nations is to either visit the targeted country by joining a trade mission or to participate in a virtual trade mission. State and federal government agencies sponsor trade missions all over the world. When traveling as a group, participants in the trade mission, especially small businesses, can create more business opportunities than they can by themselves. On a trade mission, companies can visit markets and meet potential partners, foreign government officials, and others with first-hand insight into the business opportunities in the region. After the trade mission, ITA trade specialists will help companies follow-up with new contacts. ITA offers industry-specific trade missions, missions that target specific markets, and missions focused on minority- and women-owned businesses.

SBA will tap its nationwide network of over 1,000 centers that engage businesses in underserved communities, including Women's Business Centers, Veterans Business Outreach Centers, Community Navigators, SBDCs, SCORE, and others, to draw attention to digital tools and business strategies for exporting. These centers provide free counseling, mentoring, and low-cost training. By law, SBDCs are required to have a minimum number of certified international counselors. In addition, in the last year, the network of Women's Business Centers, which are uniquely focused on supporting women entrepreneurs and business owners, has grown to 150, an increase of 25%, and will continue to expand to 160 centers.¹⁰

¹⁰ FACT SHEET: President Biden Announces New Resources to Support Women Small Businesses Owners, Continued Commitment to Supporting America's Entrepreneurs, The White House, 2023, <https://www.whitehouse.gov/briefing-room/statements-releases/2023/03/27/fact-sheet-president-biden-announces-new-resources-to-support-women-small-businesses-owners-continued-commitment-to-supporting-americas-entrepreneurs/#:~:text=The%20President%20will%20announce%20that,business%20development%2C%20and%20financing%20opportunities>

SBA's Office of International Trade offers information and resources in Spanish, including the [Trade Tools for International Sales](#) website. SBA also offers translated fact sheets of programs and services, and the agency is currently exploring providing information in additional languages.

Facilitate Access to Export Finance Programs

Even before the pandemic, the lack of access to export financing was one of the top reasons cited by nearly a third of U.S. small businesses when explaining the obstacles that they face in exporting. While SBA and EXIM have an array of financing available for small businesses, the number of these firms taking advantage of the products is far less than the programs could ideally support.

Furthermore, access to capital for business development and entrepreneurship is a major barrier to exporting in underserved communities. Businesses in underserved communities face historic and institutional barriers to investment opportunities and can face discrimination or bias in financing and investment.¹¹ Exporting requires risk-taking and initial investments.

SBA maintains a wide array of loan programs that directly assist small businesses with financing needs ranging from equipment and facility purchases through working capital and business acquisitions. SBA's Office of International Trade has helped small businesses export throughout the pandemic with over \$4 billion in export sales from SBA's loans and grants in fiscal year (FY) 2022. In FY 2022, SBA supported \$27.5 billion in financing under the [7\(a\) program](#), which includes export loans, as well as \$23 billion under the [504 program](#). SBA also has three export loan guarantee programs for U.S. small businesses that support export needs, ranging from working capital, purchase order financing, capital expenditures to term financing needs. These export loan guarantee programs, the Export Express, Export Working Capital, and the International Trade Loan, provide lenders with a 90% guarantee, which decreases the lending risk for the bank and increases access to export financing for small businesses. SBA's core export loans help a large proportion of women-, minority-, and veteran-owned small businesses, as well as businesses in rural areas, gain much-needed access to capital. Forty-one percent of grants and 54% of loans benefitted businesses in underserved communities last year, and these programs will continue, with an emphasis on assisting businesses in underserved communities.

¹¹ Broady, Kristen, Mac McComas, and Amine Oazad. "An analysis of financial institutions in Black-majority communities: Black borrowers and depositors face considerable challenges in accessing banking services," Brookings Institution, November 2021, <https://www.brookings.edu/research/an-analysis-of-financial-institutions-in-black-majority-communities-black-borrowers-and-depositors-face-considerable-challenges-in-accessing-banking-services/>

EXIM directly supports U.S. small businesses, which comprise almost 90% of its loan and credit insurance transactions. EXIM has a dedicated group of specialists, the [MWOB Division](#), who work with minority-, women-, veteran-, LGBTQ-, and disabled-owned businesses to help them access EXIM financing. The Division engages businesses interested in exporting goods and services, educates them regarding the availability of EXIM financing, and increases the total amount of financing to support exports from these businesses. EXIM has long-standing partnerships with organizations that work with the agency to educate and raise awareness about opportunities for MWOB exporters.

ITA offers a [Trade Finance Guide](#) for U.S. businesses seeking to learn more about options to finance global sales. Recently modernized, the latest edition includes an online self-learning tool for SMEs to understand financing considerations when entering or expanding their businesses into global markets. The latest edition includes two new chapters on SMEs in their recovery from the COVID-19 pandemic and financial innovation through digitalization. The online guide features short video resources as well. The tool was created in collaboration with EXIM, SBA, and the U.S. Department of Agriculture (USDA) and will be continually updated to help SMEs learn about and access financing programs to help grow their businesses internationally.

Foster IP-Savvy Small Businesses

U.S. small businesses may lack the knowledge, expertise, or resources necessary to protect their valuable IP assets. According to the U.S. Department of Commerce's U.S. Patent and Trademark Office (USPTO), only 15% of small businesses that conduct business overseas know that they need to file for IP protection abroad. Many small businesses also may not have personnel and operations overseas, so they lack the "eyes and ears" needed to be vigilant globally, and the theft of their IP can often go undetected. In addition, small businesses generally do not have the same resources, such as specialized legal counsel, that may be available to larger companies.

Recognizing this disadvantage, the U.S. government has developed several free tools and resources for small businesses to help them more effectively tackle IP protection and enforcement at home and abroad. These include USPTO's [IP Awareness Tool](#), which is designed to help manufacturers, small businesses, entrepreneurs, and independent inventors easily assess their knowledge of IP. The tool provides a set of training resources tailored to specifically identified needs. In addition, SBA's [State Trade Expansion Program](#) (STEP) can be used to cover some costs related to IP protection in foreign markets.

In addition, ITA manages the [STOPfakes](#) program, which provides resources designed to help small business exporters address IP-related issues before they export, including country and sector toolkits, as well as online training.

Modernize Resource Delivery

ITA has innovated service delivery to provide export assistance in a virtual environment, in addition to serving as an online source of information for U.S. companies and entrepreneurs interested in exporting.

ITA's Virtual First Transformation Initiative will dramatically increase the number of firms assisted online, providing exporting resources across a range of virtual platforms to create a comparative advantage for U.S. companies in an increasingly connected, digital world. The initiative aims to double the number of U.S. firms assisted by the end of 2023 and digitalize 90% of interactions with ITA clients by 2030, a goal that is projected to result in a 10-fold increase in the total number of clients assisted. ITA's plan will benefit businesses in underserved communities by arming more companies with the market intelligence and expertise they need to make sales in foreign markets. In a global virtual business environment, businesses will be able to interact with foreign partners, distributors, and buyers early in their growth cycle and quickly respond to export opportunities to grow their businesses.

Similarly, EXIM is implementing innovative approaches to modernize its outreach strategies. EXIM uses digital marketing platforms to automatically email information about products and services to key stakeholders in specific industries and geographies and tracks the success of each informational campaign to adjust the approach accordingly. With automated platforms, each customer interaction is tracked from first touch (for example, downloading an e-book or white paper), to each subsequent touch through to the authorization of an EXIM product. By analyzing the data around customer interactions, EXIM gains insight about the exporting needs and interests of specific communities and industries at various stages of exporting and can better deliver its resources to the right people at the right time.

Promote the Use of E-Commerce and Digital Tools

New global challenges and opportunities require innovative solutions to meet the needs of U.S. small businesses hoping to export. One of the silver linings of the pandemic was that many small businesses—particularly those in rural areas and underserved communities—have adopted new technologies, digital sales strategies, and virtual platforms at high rates, and many have become exporters using these strategies.¹² With the emergence of digital trade and e-commerce, artisans, entrepreneurs, app developers, freelancers, and small businesses participated directly in the global marketplace in ways that were previously impossible, and at a time when the rest of the world is also increasingly digitalizing. As global travel was disrupted, digital approaches to finding customers became the norm, and deals could be struck via video conference, leveling the playing field for U.S. small business

¹² "Global, Digital & Resilient: How digital tools are powering U.S. small businesses' global engagement amid COVID-19," Global Innovation Forum, February 2021, <https://globalinnovationforum.com/wp-content/uploads/2021/02/2021-02-Global-Digital-Resilient-report-1.pdf>

exporters who lacked the time and resources for international travel. ITA's [e-commerce resources](#) offer guidance on implementing a business digital strategy to promote brand awareness and generate sales among overseas customers.

Export assistance programs have been modernized to enable small businesses to take advantage of digital trade and e-commerce export opportunities. In most states, SBA's STEP can be used by small businesses to globalize their websites and enhance e-commerce capabilities. To make participation in trade programs more accessible, SBA has taken steps to increase usage of STEP for e-commerce and digital trade, helping U.S. small businesses leverage online sales to grow globally.

Furthermore, SBA launched the [Small Business Digital Alliance](#) with the Business Forward Foundation, a public-private partnership that will connect small businesses with critical technology resources to start and expand their e-commerce business to scale for success. The new initiative will feature a series of free briefings and trainings to help small businesses access and utilize these digital tools to reach new markets, find diverse talent, improve operations, and raise capital.

Similarly, ITA has expanded its resources and services available to enable small businesses to promote and sell their products to foreign buyers via online digital sales channels and platforms. ITA publishes [e-commerce resources online](#) and has created new, virtual services to meet changing client needs. ITA employs a network of trade specialists in more than 100 U.S. cities and 80 countries worldwide who have refined their tradecraft skills to help small businesses navigate the digital economy and provide the following services:

Website Globalization Review Service: Supports small business exporters with online overseas customer acquisition through website gap analysis and search engine optimization.

Business Service Providers: Promotes the use of professional experts, digital tools, and e-commerce services by providing a reference resource of business service providers to U.S. exporters.

Market Intelligence: Provides digital consumer market intelligence and relevant third-party market research to help exporters connect to global customers.

E-commerce Learning: Features experts in e-commerce exporter educational and technical presentations created by both ITA and other trade promotion agencies and strategic partners.

MBDA also offers digital engagement opportunities to connect minority business enterprises to the global market, such as the [Minority Business and Technology Initiative](#), which seeks to accelerate the inclusion of minority business enterprises in e-commerce and improve the use of digital technology for domestic and global sales. Similarly, ITA's [Rural Export Center](#)

provides targeted e-commerce counseling assistance to businesses in rural areas and ITA's [Vets Go Global](#) program helps U.S. veteran, service-disabled veteran, and military spouse-owned businesses take advantage of export opportunities.

Cybersecurity Awareness

While digital trade presents new export opportunities for many firms, it also poses risks, including cybersecurity risks. The U.S. Department of Commerce's National Institute of Standards and Technology (NIST) Cybersecurity Framework (Framework) can help an organization begin or improve its cybersecurity program. Built on practices that are known to be effective, this free resource can help organizations strengthen their cybersecurity posture. It fosters communication among both internal and external stakeholders about cybersecurity. For larger organizations, the Framework helps to better integrate and align cybersecurity risk management with broader enterprise risk management processes. The Framework is organized by five key functions—Identify, Protect, Detect, Respond, Recover—that provide a comprehensive view of the lifecycle for managing cybersecurity risk over time. The Framework is available in 10 languages.

In addition to the Framework, NIST provides other online cybersecurity resources tailored to the needs of SMEs. Through the NIST Small Business Cybersecurity Act, Congress gave NIST responsibility to disseminate consistent, clear, concise, and actionable resources to small businesses. The NIST Small Business Cybersecurity Corner puts resources in one place for easy access by small businesses. All resources are free and draw from information produced by NIST, other federal agencies, as well as nonprofit organizations.

NIST's Hollings Manufacturing Extension Partnership (MEP) has provided cybersecurity awareness training and assistance services to manufacturers since 2017. MEP Centers work directly with small- and medium-sized manufactures (SMMs) to help them develop plans for managing risk. As of 2022, MEP Centers have engaged with over 2,300 manufacturers on cybersecurity-related services resulting in more than 3,300 completed cybersecurity technical assistance projects, including over 1,400 cybersecurity awareness and training events.

Additionally, SBA has published [resources](#) to help small businesses learn about cybersecurity and protect themselves from cyberthreats, including planning and assessment tools and information on best practices, as well as resources for reporting a cyberattack. In early 2022, SBA also announced \$3 million in new funding for state governments to help emerging small businesses across America develop their cybersecurity infrastructure—a priority outlined in the Infrastructure Investment and Jobs Act. As part of SBA's Cybersecurity for Small Business Pilot Program, state governments are eligible to compete for grants that will help deliver cybersecurity assistance to nascent and startup business owners.

Ensure U.S. Trade Agreements and Dialogues Support SMEs

Trade agreements help small businesses enter and compete more easily in the global marketplace by eliminating trade barriers and by creating a more stable and transparent trade and investment environment. Trade agreements can provide greater certainty and predictability to companies, which is especially important for small businesses. By reducing the costs associated with exporting, a trade agreement can also make small business products and services more cost competitive in the foreign market.

United States–Mexico–Canada Agreement

The [United States-Mexico-Canada Agreement \(USMCA\)](#) includes a dedicated chapter on SMEs in recognition of the fundamental role of SMEs as engines of growth for the North American economy. Mexico and Canada are the top two export destinations for U.S. SME goods. The USMCA SME chapter promotes cooperation among the parties to increase SME trade and investment opportunities and establishes information-sharing tools that help SMEs better understand the benefits of the USMCA. Furthermore, the chapter launched an SME dialogue to be convened annually, which is open to participation by SMEs, including companies in underserved communities. The SME chapter also established a committee on SME issues comprised of government officials from each country. The SME Committee convenes periodic webinars for SME stakeholders on topics useful for doing business under the USMCA, including, advanced customs rulings and e-commerce strategies. The Office of the U.S. Trade Representative (USTR), ITA, and SBA jointly issued a USMCA Small Business Exporter Checklist and a guide to specialized resources for women, minority, and Native American small business owners to help SMEs take advantage of the benefits of the USMCA. Elevating North America as an export platform through enhanced small business linkages with both Mexico and Canada brings more jobs and investment home to the United States and its neighbors, strengthening U.S. global competitiveness.

U.S.-EU Trade and Technology Council and U.S.-EU SME Best Practices Workshop

Launched at the U.S.-EU Summit in Brussels in June 2021, the [U.S.-EU Trade and Technology Council \(TTC\)](#) is a forum for the United States and the European Union (EU) to address key global trade, economic, and technology issues and to deepen transatlantic partnerships. The TTC is comprised of 10 working groups spanning the range of U.S.-EU trade and investment, including a Working Group on Promoting SME Access to and Use of Digital Tools. Recent webinar topics for SME stakeholders include cybersecurity and digital skills. The United States and the EU also convene ongoing SME workshops to bring SME stakeholders on both sides of the Atlantic together with government officials to discuss topics of relevance to small businesses, such as best practices in SME finance and post-pandemic economic recovery.

U.S.-UK SME Dialogue

The United States and United Kingdom (UK) also hold ongoing SME dialogues, which bring together SME stakeholders with U.S. and UK officials to discuss trade challenges, opportunities, and best practices of interest to SMEs on a range of topics, including opportunities for U.S.-UK SME trade and cooperation in emerging technologies, access to capital for SMEs, and trade resources for small businesses.

Deepen Federal, State, and Local Coordination

Collaboration within local exporting ecosystems is paramount to delivering effective trade promotion services to U.S. small businesses. Federal trade promotion agencies have historically placed great emphasis on partnering with state and local trade entities to align efforts and reduce duplication of services to better serve U.S. small businesses. These collaborative activities among federal, state, and local export promotion agencies have included joint strategic planning, joint export counseling, cross-training, referring clients, and event planning, while respecting differences in performance measures, reporting requirements, and organizational structures. Federal agencies will increase cooperation and coordination of their respective programs and services to support small business exports, including improving the process of referrals among agencies.

In 2017, ITA launched an annual export strategic planning process for each state and their federal partners to share information about: (1) export promotion and investment attraction priorities; (2) planned events, such as trade missions and trade shows; (3) resource availability, such as matching funds or financing programs; and (4) training needs. The planning process promulgates best practices for federal, state, and local coordination to ensure U.S. small businesses receive export assistance matched to their level of need. Over time, it has evolved to respond to changing economic realities and exporter needs. For example, one of the current efforts underway is to establish client intake and referral protocols across federal, state, and local trade agencies and other service providers to ensure clients are best served and develop a pipeline of export-ready firms. These processes can be integrated across organizations through joint counseling. Integrating metrics for referrals into organization and individual performance measures also supports increased coordination.

Local Collaboration

Federal trade promotion agencies also manage initiatives specifically designed to train local organizations to provide counseling and assistance on specific programs and services. For example, the [Regional Export Promotion Program \(REPP\)](#) is a cooperative arrangement among EXIM, cities, counties, states, and local nonprofit economic development organizations with a view to stimulating U.S. export sales abroad and bolstering job growth at home. EXIM has regional offices located across the United States that actively work with REPP members to

provide export finance counseling to U.S. companies. REPP members have market knowledge and the ability to personally reach companies selling internationally. Through this program, EXIM extends its reach into local communities. Importantly, more jobs will be created and sustained with REPP outreach.

The U.S. Trade and Development Agency (USTDA) helps companies create U.S. jobs through the export of U.S. goods and services for priority infrastructure projects in emerging economies. In order to connect more U.S. companies to the export opportunities that it creates, USTDA launched [Making Global Local](#), the largest outreach campaign in its history. Through Making Global Local, USTDA forms strategic partnerships with state and local economic development organizations, world trade centers, chambers of commerce, and SBDCs to help companies in their respective communities benefit from USTDA's programs. USTDA is expanding Making Global Local to new communities across the United States.

The U.S. Department of Education's [Centers for International Business Education \(CIBE\)](#) program provides funding to institutions of higher education in the United States on issues of importance to U.S. trade and competitiveness. Among other things, CIBE grantees provide instruction focused on understanding the cultures and customs of U.S. trading partners and they conduct research and training in the international aspects of trade, commerce, and other fields of study. CIBE grantees also serve as regional resources to local businesses, and they work with District Export Councils and ITA to expand export capabilities for U.S. companies, including small businesses and businesses in underserved communities.

As previously noted, SBA provides financial awards to state and territory governments to assist small businesses with export development. STEP grants reimburse U.S. small businesses for export development-related expenses such as attending trade shows and translating websites.

Together, these programs will continue to develop the local export ecosystems that support small businesses across the United States.

Leverage U.S. Emerging Technologies and Innovations to Solve Global Development Challenges

By connecting with federal agencies focused on trade development and those focused on international development and poverty alleviation, U.S. small businesses can adapt innovations to target local markets, mitigate country entry risks, and create pathways to scale with federal contracts and grants, as well as private capital.

By working with federal development agencies such as the Millennium Challenge Corporation (MCC), the U.S. Agency for International Development (USAID), DFC, and USTDA, barriers that prevent U.S. small businesses from entering and competing in developing countries can be unblocked. Private sector partnerships with U.S. development agencies can also provide an opportunity to test business models that are financially sound, scalable, sustainable, and provide avenues for U.S. small business growth. SBA's collaboration with the MCC [Innovation Technology Program](#) is an example of mutually reinforcing objectives across federal agencies.

Chapter 3

Climate and Clean Technologies



The United States faces a world of profound change and opportunity due to the climate crisis. A narrow window exists to actively pursue measures to reduce—and ultimately neutralize—greenhouse gas emissions to prevent more severe climate impacts across the globe. The Biden-Harris Administration is taking concrete action to achieve the President’s goal of economy-wide net-zero emissions by no later than 2050.

On January 27, 2021, President Biden signed [Executive Order 14008](#) on *Tackling the Climate Crisis at Home and Abroad*, in which the President directed the U.S. government to place climate considerations at the forefront of U.S. foreign policy and national security concerns. In response, U.S. government agencies, through the Trade Promotion Coordinating Committee, are prioritizing climate and clean tech exports in the NES to advance U.S. climate goals and build on the momentum of the implementation of historic new legislation, including the Infrastructure Investment and Jobs Act, the CHIPS and Science Act, and the Inflation Reduction Act. Climate and clean tech include technologies that contribute to climate mitigation, adaptation, and resilience goals as the world advances on a path to net-zero greenhouse gas emissions and adjusts to a changing climate.

Enhanced U.S. competitiveness in climate and clean tech exports will advance efforts for climate action while ensuring greater economic security and employment opportunities for U.S. communities and workers. Increasing U.S. exports in the global climate and clean tech market, worth hundreds of billions of dollars per year, will strengthen the U.S. economy, support domestic job creation, help trading partners achieve ambitious climate targets, and support global efforts to deploy the technologies necessary to limit global warming to 1.5 degrees Celsius. The U.S. government has reviewed key factors affecting the implementation and adoption of climate and clean tech and related services, identified potential strengths and weaknesses of the current U.S. government approach, and developed a comprehensive, data-driven strategy to promote U.S. export competitiveness across climate and clean tech market segments and in overseas markets that offer the most opportunity for sustained growth for U.S. exporters.

The U.S. government is pursuing three objectives: (1) strengthen the domestic competitiveness of U.S. climate and clean tech market segments; (2) promote, demonstrate, and enable the value proposition of U.S. exports; and (3) align U.S. government resources to match U.S. competitive advantages and global market opportunities.

Strengthen the Domestic Competitiveness of U.S. Climate and Clean Tech Market Segments

U.S. industry has repeatedly affirmed that U.S. companies cannot compete effectively abroad without a thriving domestic market. The Biden-Harris Administration is responding to calls from industry by doubling down on America’s clean energy innovation leadership

and accelerating the deployment of climate and clean tech within the United States. The Inflation Reduction Act provides significant resources toward expanding the domestic industrial base for the U.S. climate and clean tech industry, including more than \$60 billion to support investments in domestic manufacturing of key products such as wind turbines, solar panels, and electric vehicles, as well as their upstream components and materials. To further advance climate and clean tech competitiveness in an international trade and investment context, the U.S. government will:

- Prioritize investments in climate and clean tech by agencies participating in the SBIR program.
- Support prizes for business incubators and accelerators focused on climate and clean tech exporters, particularly in high growth and R&D, under SBA's Growth Accelerator Fund Competition.
- Provide resources to demonstrate and de-risk innovative technologies and help them reach full market acceptance through the Department of Energy's (DOE) Office of Clean Energy Demonstrations and Loan Program Office (LPO).
- Advance EXIM's Make More in America Initiative, which is designed to support both the creation and expansion of U.S. manufacturing facilities and infrastructure projects that support U.S. exports.
- Engage in focused efforts to attract foreign direct investment in climate and clean tech to strengthen the domestic supply chain and develop export capacity.
- Identify and resolve supply chain vulnerabilities, including through robust engagement with industry stakeholders.
- Promote innovation through standards processes and intellectual property protections.

Promote, Demonstrate, and Enable the Value Proposition of U.S. Climate and Clean Tech Exports

While U.S. climate and clean tech exporters face stiff competition from lower-cost foreign alternatives, U.S. exports offer many superior benefits to trading partners. The United States has a long- and well-established innovation ecosystem, bolstered by support from national laboratories and other U.S. government investments in R&D. In purchasing U.S. climate and clean tech goods and services, buyers benefit from access to cutting-edge, high-value solutions to achieve ambitious climate goals. Innovation remains a signature element of the U.S. value proposition, particularly as U.S. companies hold leadership positions across a host of sectors, such as smart grids; energy storage; advanced and small modular reactors; electric transport; biofuels and electrofuels; advanced heating, ventilation, and air conditioning equipment; electrolyzers; mineral recycling technology; clean hydrogen; methane detection, capture, and abatement; and turbines. In addition to

innovation, several other elements enhance the U.S. value proposition: superior lifecycle costs, transparency that reduces the risk of corruption and unintended costs for buyers, security and resilience of many digitally connected U.S. products against exploitation by malign actors, and commitment to environmental and social standards.

The U.S. government has many tools at its disposal to increase foreign buyers' awareness of the products and services that U.S. climate and clean tech companies offer. U.S. government agencies can communicate this message by conducting export promotion events, educating foreign government procurement officials, enhancing technical specifications when funding project preparation abroad, providing technical assistance, and providing export financing in the face of foreign competition.

Furthermore, the U.S. government will also leverage its unique capacity building tools to enhance enabling environments for climate, clean tech, and responsible extractive industries in emerging economies, including programs such as:

- USTDA's Global Procurement Initiative
- USAID and the National Renewable Energy Laboratory's Advanced Energy Partnership for Asia
- The U.S. Department of Commerce's Commercial Law Development Program (CLDP) Global Energy Transition Assistance program
- U.S. Department of Transportation's (DOT) global engagement program *Momentum*
- U.S. Department of State's (State) [Greening Diplomacy Initiative](#)
- ITA's Clean Tech Strategic Projects Fund
- State's Minerals Security Partnership
- Regional collaborative programs on climate and clean tech deployment such as Power Africa, Clean Enhancing Growth and Development (EDGE) Asia, the Clean Economy Pillar of the Indo-Pacific Economic Framework for Prosperity, the Just Energy Transition Partnerships, and Net Zero World

As foreign competitors and G7 partners aggressively support their climate and clean tech exporters through financing, the United States will also seek to enhance its financing offerings to encourage more U.S. companies to export their goods and services and to help ensure that U.S. climate and clean tech companies are able to compete on a level playing field. The U.S. government offers an array of financial programs and instruments across multiple agencies to help facilitate U.S. climate and clean tech exports, including specialized export financing for climate and clean tech. Key tools and resources to support U.S. exporters are spread across SBA, USTDA, EXIM, and DFC. The U.S. government will work to enhance these tools by assessing financing terms and risk tolerance to incentivize climate and clean tech exports, as well as streamlining access to these resources through improved coordination across U.S. government agencies and joint outreach to U.S. companies.

Align U.S. Government Resources to Match U.S. Competitive Advantages and Global Market Opportunities

Technologies and services that can hasten the transition to net-zero emissions and build resilience to climate change cut across market segments. However, the drivers of competitiveness in climate and clean tech market segments differ, as does the competitive position of U.S. companies in each segment. Trade barriers, foreign competition, intellectual property protection, access to market intelligence, and the readiness of foreign markets to deploy new technologies are all factors affecting the export competitiveness of both established and emerging climate and clean tech market segments. These challenges require a tailored approach to overcome. Similarly, geographic regions have unique needs that influence their pathways to net-zero emissions. To address the range of challenges for climate and clean tech market segments and help U.S. companies capitalize on global opportunities, the U.S. government will undertake the following approaches:

- Enhance resources to engage and support U.S. climate and clean tech industry stakeholders in alignment with industry specific needs and opportunities, including events programming, advocacy for U.S. companies competing on foreign government procurements, commercial diplomacy, reverse trade missions, and other export promotion services.
- Engage U.S. companies in the climate and clean tech industry to best protect their intellectual property in export products and services through business consultations and specialized educational programs and products, including the [STOPfakes Clean Technology Intellectual Property Brochure](#).
- Provide ITA's Climate and Clean Tech Resource Directory for U.S. companies to access information about the wide range of U.S. government tools and resources to support their domestic and export competitiveness.
- Create new informational and market intelligence resources for industry and the public to better identify and understand climate and clean tech export opportunities.
- Highlight innovative U.S. commercial and demonstration climate and clean tech projects to international buyers through tools such as USTDA's reverse trade missions, and DOE's LPO and Advanced Reactor Demonstration Program.
- Conduct early engagement with industry and foreign government stakeholders, through programs such as the Small Modular Reactor Public-Private Program, on emerging technologies to strengthen U.S. supply chains and lay the groundwork for commercial deployment in global markets.

A Climate and Clean Tech Export Strategy for All Americans

SMEs, including those from underserved and rural communities, underpin America's export machine. Additionally, energy communities have transformed the United States into a global economic powerhouse. As the economy transitions to net-zero emissions and consumers demand more sustainable energy, those communities dependent on coal, oil and gas, and power plants are well positioned to become climate and clean tech transition leaders. Given the importance of these energy communities, an effective climate and clean tech export strategy must include all of America in order to achieve the goal of strengthening U.S. climate and clean tech export competitiveness. To support SMEs in communities across America, the U.S. government will undertake the following actions:

- ITA will develop a GDEI outreach strategy that connects climate and clean tech exporting SMEs to U.S. Department of Commerce and other U.S. government resources.
- SBA, in collaboration with ITA, has launched a series of webinars focused on small business clean technology export opportunities.
- USTDA's Making Global Local and Global Partnership for Climate-Smart Infrastructure initiatives will help connect underserved and rural climate and clean tech SMEs to the export opportunities that USTDA creates in emerging economies.
- U.S. government investment dollars for climate and clean tech will be allocated to rural, underserved, and energy communities through the Inflation Reduction Act, Infrastructure Investment and Jobs Act, Justice40 Initiative, and the Interagency Working Group on Coal and Power Plant Communities and Economic Revitalization.

Chapter 4

Manufacturing



Manufacturing remains a significant driver of economic growth in the United States, generating wealth, jobs, and innovation. In 2019, U.S. manufacturers employed 11.5 million American workers and made sales worth \$5.7 trillion. International sales are a major component of that sum, with export goods valued at \$1.6 trillion, representing nearly 30% of total sales. In some sub-sectors, such as manufacturing technology, exports account for nearly half of total sales. Beyond significant goods exports, the manufacturing sector also supports a diverse and robust services sector, including digital, accounting, financial, legal, logistics, transportation, design, and engineering services.

American manufacturing builds on a deep and storied heritage and is constantly innovating and evolving. Manufacturing in the 21st century combines long-established mechanical and electrical technologies with cutting-edge tools—including recent advances in information technology (IT), software, sensors, data analytics, and the Internet of Things—all of which depend on each other to enable advanced manufacturing processes. The United States is a leading global competitor in manufacturing technology industries, supplying roughly 10% of the global market. Manufacturing machinery, industrial component, and associated electrical and automation technology producers are also major employers: machinery manufacturers employ 417,600 workers, industrial component manufacturers employ 249,600 workers, and industrial automation and process control manufacturers employ 193,200 workers. U.S. businesses and workers, however, face an intensely competitive global marketplace with foreign counterparts receiving strong support from their respective governments. To remain competitive and continue supporting significant employment, U.S. manufacturers, especially SMMs, can benefit from U.S. government support in accessing and pursuing opportunities in overseas markets. U.S. government.

To help U.S. manufacturers navigate the competitive global landscape, the U.S. government will focus its efforts in the following key policy areas: supply chain resiliency, sustainability and digital transformation, trade finance, and technical standards development. All of this work will also include ensuring fair and equitable inclusion, which means conducting outreach to SMMs and firms in underserved communities to ensure that they are aware of the opportunities and resources available to support their exporting ambitions.

Develop Supply Chain Resiliency

Resilient and diversified supply chains are a cornerstone of a successful manufacturing sector. The onset of the global COVID-19 pandemic and Russia's unjustified and illegal invasion of Ukraine exposed the fragility of global supply chains, posing challenges to U.S. and global manufacturers and consumers. At the same time, countries around the world began to recognize the vulnerabilities that stem from over-reliance on a single supplier for critical resources. In response to these growing challenges, President Biden issued [Executive Order 14017](#) on *America's Supply Chains* (EO 14017) in February 2021 to direct federal efforts to support the development of resilient supply chains.

As EO 14017 notes, greater domestic production can contribute to the development of more resilient supply chains, including by decreasing risks associated with shipping disruptions, concentrated supply, and geopolitical threats to trade. Shifting to domestic and regional production can also mitigate concerns related to forced labor and environmental harm. When U.S. manufacturers look for inputs, they need sustainable and ethical suppliers across the value chain.

In May 2023, the United States and 13 partners of the Indo-Pacific Economic Framework for Prosperity (IPEF) announced the substantial conclusion of the IPEF Supply Chain Agreement. The proposed Agreement will increase the resilience of supply chains in the region, including by strengthening supply chain logistics and infrastructure to better prepare businesses to resolve bottlenecks.

Resiliency: EO 14017 defines resilient supply chains as "secure and diverse—facilitating greater domestic production, a range of supply, built-in redundancies, adequate stockpiles, safe and secure digital networks, and a world-class American manufacturing base and workforce. Moreover, close cooperation on resilient supply chains with allies and partners who share U.S. values will foster collective economic and national security and strengthen the capacity to respond to international disasters and emergencies."

To further support the development of more resilient supply chains and address the challenges outlined above, the U.S. government will take actions described below:

Grow Domestic and Regional Manufacturing Capacity

The [Infrastructure Investment and Jobs Act](#) provides a significant boost to needed supply chain infrastructure for many sectors. Additional support for domestic and regional manufacturing will further bolster domestic supply chains. The U.S. government will continue to prioritize measures to address key gaps in U.S. supply chains, such as semiconductors and material processing for advanced battery inputs.

As the United States' largest trading partners, Canada and Mexico will be critical partners in strengthening secure manufacturing supply chains in North America, which are highly integrated through the USMCA. For example, the average manufactured good from Mexico contains 40% U.S. content, and the average manufactured good from Canada contains 25% U.S. content. Together with regional partners we are deepening economic cooperation to ensure durable and inclusive economic growth that delivers for American working people. The United States' priority is to work with Canada and Mexico to continue implementation of the USMCA and to advance a North American vision for the future that draws on shared strengths and bolsters U.S. global competitiveness.

Boost Supply Chain Knowledge, Transparency, and Decision-Making

To promote resilient and responsible supply chains free from forced labor and environmental harm, and in response to the [Uyghur Forced Labor Prevention Act](#), the U.S. government will enhance available resources and develop guidance to aid industry's ability to perform due diligence across supply chains. Knowledge of potential risks and opportunities related to economic, environmental, social, and human rights factors within global supply chains will enhance government and private sector strategic planning and decision-making. ITA has developed a [free training tool](#) and resource guide to help U.S. companies combat forced labor. Additionally, DOE supply chain strategy includes critical actions to improve government data and analytical capabilities to give public and private decision-makers better visibility into their supply chains, which will promote the adoption and implementation of traceability standards to improve global supply chain mapping capabilities, instill integrity of product custody, promote social responsibility, and support carbon foot-printing of energy supply chains.

Improve Data Collection

The U.S. government will consider creating new classifications for emerging technologies in the North American Industry Classification System, the Product Service Codes, and the Harmonized Tariff System. Modernizing specific industry and product classifications can help catalyze the growth of these technologies through improved data collection to guide policy decisions by signaling the viability of these sectors to private actors.

Develop Resiliency in Clean Energy Supply Chains

In response to EO 14017, DOE released [America's Strategy to Secure the Supply Chain for a Robust Clean Energy Transition](#). In this report, DOE maps out a strategy to rapidly secure the critical supply chains necessary to meet economic, national security, and climate goals. Informed by 13 deep-dive supply chain assessments, DOE groups common risks and vulnerabilities into seven main opportunities for action: (1) increase raw material availability; (2) expand domestic manufacturing capabilities; (3) support formation of and invest in diverse, secure, and socially responsible foreign supply chains; (4) increase the adoption and deployment of clean energy; (5) improve end-of-life energy-related waste management; (6) attract and support a skilled workforce for the clean energy transition; and (7) enhance supply chain knowledge and decision-making.

Address Transportation Supply Chain Disruptions

In response to EO 14017, DOT released the [Supply Chain Assessment of the Transportation Industrial Base: Freight and Logistics](#), which offers policy recommendations to address current disruptions and to build modern supply chains that can withstand future disruptions,

strengthen the U.S. economy, and keep goods moving. DOT is working with other federal agencies to implement recommendations across five areas: (1) invest in freight infrastructure, such as ports, bridges, and railroads, to enhance capacity and connectivity; (2) provide technical assistance to support the planning and coordination of freight investments and operations and supporting the workers employed in this sector; (3) improve data and research into supply chain performance; (4) strengthen and streamline governance to improve efficiency, build the workforce, increase competitiveness, and reduce safety and environmental risks; and (5) partner with stakeholders across the supply chain, including coordination with both the public and private sectors.

DOT has already invested in significant transportation improvements that will support U.S. manufacturing exports, such as addressing freight bottlenecks, intermodal transfers, and port infrastructure that impacts U.S. manufacturers and agricultural producers. DOT also works with states through the State Freight Planning process to identify important manufacturing corridors and to invest National Highway Freight Program funding into transportation improvements that improve the reliability and condition of our transportation system.

Enforce Made in America Laws

EO 14005 on *Ensuring the Future Is Made in All of America by All of America's Workers*, recognized that an important step to support U.S. manufacturing is to use the purchasing power of the federal government to boost demand for American-made products. In response, the Administration made changes to the Buy American Act, which increased domestic content thresholds for products to be considered Made in America from 55% to 60%, with further increases up to 75% by 2029. In addition, the Administration introduced new standards that will require 100% of construction materials used in new federal infrastructure projects to be Made in America. The Office of Management and Budget will finalize guidance to put this into place and continue to encourage U.S. government agencies to ensure that when U.S. dollars are spent, they are spent on goods that are Made in America. Strengthening partnerships with federal agencies and federally funded networks, such as MEP, can also help increase the share of government contracts that go to Small Disadvantaged Businesses.

Showcase Sustainable Solutions and Digital Transformation

Today's fierce domestic and global competition is a constant catalyst to develop cost effective and sustainable processes within the manufacturing industry. Transitioning to more sustainable manufacturing practices has become essential to retain and grow a company's customer base as well as increase profitability. Many of today's sustainable manufacturing solutions—such as additive manufacturing, automation, robotics, and green materials—are the very same disruptive technologies featured at prominent industry trade events around

the world. The phenomenal global demand for sustainable manufacturing solutions means a critical transition for U.S. manufacturers, and the U.S. government is ready to support that change.

ITA is increasing outreach and programming targeted to U.S. sustainable manufacturing solution providers. As trade shows shift focus to highlight these technologies, ITA will increase its efforts to identify and promote U.S. solutions. Additionally, ITA is developing actionable market intelligence to share with U.S. exporters and customized programming for U.S. sustainable manufacturing solutions providers to better capitalize on global opportunities as they arise.

Along with a shift to sustainability, many of the most competitive U.S. products—such as aircraft, machinery, and medical devices—are also platforms for collecting data and delivering digital services. This facilitates improved operation and maintenance and also improves the overall customer experience. It also, however, creates new market requirements, and new trade barriers that must be addressed. The ability to move data across international borders, and to do so securely, is critical to U.S. export competitiveness.

The U.S. government is responding to these shifting industry dynamics by supporting U.S. leadership in developing global digital standards for manufacturing, promoting the free flow of data, ensuring data privacy and protection, and enhancing efforts around cybersecurity. A new effort by NIST will work with the private sector, government, and other stakeholders to improve cybersecurity in supply chains. The effort, known as the National Initiative for Improving Cybersecurity in Supply Chains, will emphasize tools, technologies, and guidance focused on the developers and providers of technology. This work complements ongoing cybersecurity efforts including an update to the NIST Cybersecurity Framework, CSF 2.0, which NIST launched in summer 2022.

Strengthen Support for Manufacturers Through Trade Finance Programs

Access to capital and the ability to acquire export financing are essential ingredients for exporting and represent areas where U.S. manufacturers—especially SMMs—often face challenges. To address this issue, the U.S. government provides a range of programs to assist exporters.

SBA maintains a comprehensive array of loan programs that can assist manufacturers with financing needs, ranging from equipment and facility purchases to working capital and business acquisitions. These programs are well positioned to assist small business manufacturers, as they can support the entire financing needs of the business and are not limited to export transactions. SBA programs also assist community banks and credit unions to build financing capacity for commercial clients. As financial institutions become more

familiar with SBA programs, they are able to add specialty programs, such as trade finance and revolving working capital. On the export side, SBA's Export Express and International Trade Loan are term loan products. SBA's Export Working Capital is an important line of credit product, given the unique financing needs of exporters due to longer sales cycles and elevated country and currency risk. These loan guarantee products support direct and indirect exporters. Manufacturers are among the largest category of loan recipients.

In addition to EXIM's standard direct loan, loan guarantee, and insurance programs, which support U.S. sales to foreign buyers when private financing is unavailable or official financing is required, EXIM has introduced the [Make More in America Initiative](#) to revitalize American manufacturing and export capacity. This new financing initiative leverages EXIM's existing tools in innovative ways for specific types of domestic manufacturing and infrastructure projects with an export nexus, supporting U.S. businesses across the export lifecycle. This initiative is open to all sectors, with priority given to environmentally beneficial projects, small businesses, and transformational export area transactions, including semiconductors, biotech and biomedical products, renewable energy, and energy storage. Further, it will strengthen domestic manufacturing capacity, and level the playing field for American companies competing in overseas markets.

In addition, EXIM's 2019 reauthorization directed the establishment of the [China and Transformational Exports Program](#) (CTEP), which has a two-part mandate to help U.S. exporters facing competition from the People's Republic of China and to advance the comparative leadership of the United States in 10 transformational export areas: artificial intelligence; biotechnology; biomedical sciences; wireless communications equipment; quantum computing; semiconductors; renewable energy, energy efficiency, and energy storage; emerging financial technologies; water treatment and sanitation; and high-performance computing.

CTEP supports the extension of loans, guarantees, and insurance at rates, terms, and other conditions that are—to the extent practicable—fully competitive with rates, terms, and other conditions established by the People's Republic of China or by other covered countries, as designated by the Secretary of the Treasury. The law charges EXIM with a goal of reserving not less than 20% of the agency's total financing authority (that is, \$27 billion out of a total of \$135 billion) to the program. Additionally, EXIM's board passed a narrowly tailored content policy lowering the required U.S. domestic content to receive full EXIM coverage to 51%, or possibly lower if certain conditions are met, for transactions in the 10 transformational export areas.

Promote Acceptance of International Standards

As world leaders in manufacturing, services, and R&D in many advanced technology areas, U.S. firms play a key role in the development of the standards, best practices, and conformity assessment procedures that underpin global trade. The United States boasts a uniquely vibrant standards development ecosystem, driven by the private sector, that produces high quality international standards used around the world. Despite these strengths, U.S. stakeholders often face challenges from governments and standards authorities in foreign markets that narrowly define international standards as only those developed by international organizations such as the International Organization for Standardization and the International Electrotechnical Commission, excluding those developed by U.S. standards development organizations like UL, ASTM International, and the Institute of Electrical and Electronics Engineers Standards Association, among others.

Preventing and resolving standards-related trade barriers are priorities for ITA, including through promoting the recognition of international standards developed in the United States, addressing burdensome or duplicative conformity assessment requirements, and encouraging the adoption of good regulatory practices by trading partners. ITA provides training, workshops, and assistance to foreign partners to promote the adoption of international standards and prevent standards-related technical barriers to trade.

To support U.S. exports and competitiveness, ITA will continue advocating for U.S. commercial interests in foreign markets to ensure that rulemaking processes follow international norms to support U.S. manufacturers' competitiveness. Standards and technical regulations remain the largest non-tariff trade barriers raised by U.S. industry, affecting more than 92% of U.S. exports.¹³ Federal agencies will also continue to work together to address company-specific trade barriers and to encourage the notification of rules and regulations via the World Trade Organization Technical Barriers to Trade Inquiry Point, with a specific focus on lower trade barriers for climate-forward industries.

ITA also maintains standards-focused staff in Brazil, Mexico, China, the EU, South Africa, and Saudi Arabia. These standards attachés work to promote U.S. products and services that use U.S. industry-adopted standards, address standards-related market access issues, and work with local government ministries to advance U.S. policy goals.

¹³ Okun-Kozlowicki, Jeff. "Standards and Regulations: Measuring the Link to Goods Trade," June 2016, https://legacy.trade.gov/td/osip/documents/osip_standards_trade_full_paper.pdf

Increasing Outreach and Counseling to Manufacturers Through Programs and Partnerships

Federal trade promotion agencies are working together to better coordinate and promote export opportunities and information to U.S. manufacturers, including rural and underserved manufacturers. Similarly, in partnership with private sector entities such as chambers of commerce, business and professional associations, and business development centers, these agencies are jointly creating new programming to meet the specific needs of businesses in underserved communities. For example, during Manufacturing Month, a virtual event series featured SMM exporters from underserved communities across the United States and included a Spanish-language webinar, which was offered with support from multiple U.S. agencies and the U.S. Hispanic Chamber of Commerce. Federal trade promotion agencies will continue outreach to underserved manufacturers and communities to ensure they are aware of the export resources available to them and to gain a better understanding of what additional support is needed.

To facilitate outreach to export-ready manufacturers across the United States and to more effectively connect them to export resources, ITA and MBDA are teaming up with NIST's [MEP](#) to reach more SMMs and allow for more seamless access to joint resources.

Hollings Manufacturing Extension Partnership

NIST's Hollings Manufacturing Extension Partnership (MEP) is a national network of federal, state, and industry partnerships that provide U.S. manufacturers with access to technology, resources, and experts. The MEP National Network consists of 51 centers in every U.S. state and Puerto Rico that work directly with their local manufacturing communities to strengthen the competitiveness of the U.S. manufacturing base. Funding for MEP Centers is a cost-sharing arrangement consisting of support from the federal government, non-federal sources including state and local government/entities, and fees charged to the manufacturing clients for services provided by the MEP Centers. NIST provides technical assistance in food safety best practices, accelerating the adoption of advanced manufacturing technologies, addressing emerging manufacturing needs, supply chain optimization and supplier scouting, exporting and international business, advising on cybersecurity, and transferring technology from NIST Laboratories and other federal research organizations. In 2022, MEP Centers interacted with more than 33,500 manufacturers to perform its mission. Through the MEP client impact survey, clients reported \$18.8 billion in new and retained sales, \$2.5 billion in cost savings, \$6.4 billion in new capital investments, and more than 116,700 jobs created or retained.

This collaboration also extends to sharing trade leads generated by ITA's overseas offices with the MEP [Supplier Scouting](#) program to expand the pool of U.S. suppliers that may meet the overseas buyer's product or service qualifications.

Additional joint programming, including the [ExporTech](#) program, continues to educate export-ready manufacturers through in-person and virtual events and programs across the United States. MEP's ExporTech is a national export assistance program that helps companies enter or expand further into global markets. Jointly offered by MEP and ITA, ExporTech connects companies with a wide range of world-class experts and is the only national program in which companies develop a written export plan that is vetted by a panel of experts. This results in companies rapidly expanding global sales and saving countless hours of effort. Since 2006, 265 ExporTech programs have been delivered in 37 states and Puerto Rico with over 1,330 participating companies.

Digital Tools

The COVID-19 pandemic has severely disrupted supply chains, purchasing habits, and operating procedures for international business. Just as manufacturers have been forced to adapt their business models, the federal government pivoted to using virtual channels to support U.S. exporters. Federal agencies have leveraged new virtual platforms and collaborated with industry partners to offer an array of programming and opportunities to U.S. exporters. In order to help manufacturers, ITA is developing a [Digital Solutions for Manufacturers](#) program to make it easier for manufacturing companies to reach their audiences more effectively in the virtual environment.

Innovation

Recognizing the importance of and vast global opportunities for disruptive and emerging technologies, ITA is increasing its support for U.S. early-stage manufacturers and startups. Many of these new technologies have included international collaboration from the start, and their developers are well positioned to incorporate exporting into their initial commercialization strategy. Through targeted outreach to accelerators, incubators, manufacturing institutes, research institutions, and startups, ITA is developing programs aimed at helping these new companies go global. New programming for startups includes webinars on exporting basics and federal government resources, pitch sessions at in-person and virtual trade events, virtual business matchmaking appointments, and more. Learning from these innovative communities about new forms of communication, marketing, and outreach, ITA will apply new outreach and programming strategies across the manufacturing ecosystem.

Grant programs can accelerate innovation by catalyzing R&D on critical technical barriers to manufacturing. For example, the NIST Metals-based Additive Manufacturing Grant Program (MBAMGP) supports measurement science research to address barriers for widespread adoption of metals-based additive manufacturing (AM). These technical barriers prevent

AM processes from reaching their full production potential. Various roadmapping activities for AM share research recommendations to advance the industry and emphasize that the ability to achieve predictable and repeatable operations is critical. Issues with surface quality, part accuracy, fabrication speed, material properties, and computational requirements are significant limitations. To mitigate these challenges, the MBAMGP focuses on the problems associated with metals-based AM material characterization, real-time control of metals-based AM processes, qualification methodologies, and system integration for metals-based AM. Nearly \$4 million has been awarded each year since the grant program was established in 2020.

Benchmarking is another tool that the U.S. Department of Commerce uses to drive technical advances for manufacturing. For example, the NIST Additive Manufacturing Benchmark Test Series (AM-Bench) provides a continuing series of controlled benchmark measurements, in conjunction with a conference series, with the primary goal of enabling the nascent field of additive manufacturing process modeling to test simulations intended to supplement and improve production against rigorous, highly-controlled additive manufacturing benchmark test data. All AM-Bench data are permanently archived for public use. The first round of benchmark measurements and the first conference, AM-Bench 2018, were completed in 2018, and the next round of measurements and the next conference, AM-Bench 2022, were completed in August 2022. The AM-Bench partnership boasts representatives from nearly 20 organizations working together to help provide the foundation of validated test methods necessary to bolster performance confidence for manufacturers, buyers, and sellers of AM parts.

Public-Private Partnerships

The federal government has multiple platforms for partnership with the private sector to advance U.S. international commercial interests. ITA's [Market Development Cooperator Program](#) (MDCP) is highly flexible and has the advantage of linking ITA funds and technical support with private sector vision and leadership to set the direction for international market development. Similarly, ITA's [Strategic Partnership Program](#) provides a framework for ITA and private sector partners to pursue common interests and objectives in promoting exporting and ITA services available to U.S. companies. As the U.S. government addresses the competitive environment and supply chain issues facing U.S. manufacturers, greater use can be made of both programs to advance U.S. commercial interests.

NIST's Manufacturing USA promotes direct and broad collaboration on industry relevant R&D—with an emphasis on SMMs—to make sure that innovations developed in the United States are also manufactured in the United States rather than other countries. Manufacturing USA bridges a key market failure in the U.S. innovation ecosystem, which is even more pronounced in advanced manufacturing. U.S. manufacturers individually have difficulty funding these technological development functions, and small manufacturers especially struggle with individually investing in prototyping and scale up of new technologies and

products. Much of this work happens through the U.S. Department of Commerce's industry-driven Innovation Institutes, which facilitate the adoption of new manufacturing technologies, tools, and methodologies that make U.S. manufacturers more competitive. NIST is required by Congress to convene, support, and coordinate the network of all 16 Manufacturing USA Institutes, including the existing institutes at the U.S. Department of Defense and DOE.

Chapter 5

Travel and Tourism



Travel and tourism is a critical driver of economic growth and employment in the United States and integral to the nation's unmatched cultural reach.¹⁴ Supporting some 9.5 million American jobs through \$1.9 trillion of economic activity, travel and tourism is an engine of prosperity and opportunity in communities across the country—from the bright lights and bustling streets of the nation's iconic cities to the placid wonder of its national parks to the dynamism and depth of its emerging destinations.¹⁵

Whether touring for pleasure, visiting friends and family, or conducting business, millions visit the United States, its territories, and the District of Columbia each year drawn by the promise of unrivaled destinations and experiences. From exploring natural wonders to discovering the United States' cultural heritage, these visitors bring an immense economic benefit to the United States. Approximately 1 in every 20 jobs in the United States relies directly or indirectly on travel and tourism,¹⁶ including in industry sectors such as accommodations, food services, arts, entertainment, recreation, attractions, transportation, and education. But travel and tourism is so much more than the United States' top services export. The benefits of travel and tourism extend beyond the jobs and growth they create by forming the vivid impressions and memories visitors take home with them.

2022 National Travel and Tourism Strategy

- Focuses federal efforts to support travel and tourism in the United States.
- Establishes a five-year goal of attracting 90 million visitors, who will spend \$279 billion annually.
- Envisions private and public sectors working together to increase the volume and value of tourism.

The United States has long been a top destination for global travel and tourism. In 2019, before the COVID-19 pandemic, 79.4 million international visitors came to the United States and contributed \$239.4 billion to the U.S. economy, making the United States the global leader in revenue from international travel and tourism. As the top services export for the United States that year, travel and tourism generated a \$53.4 billion trade surplus.

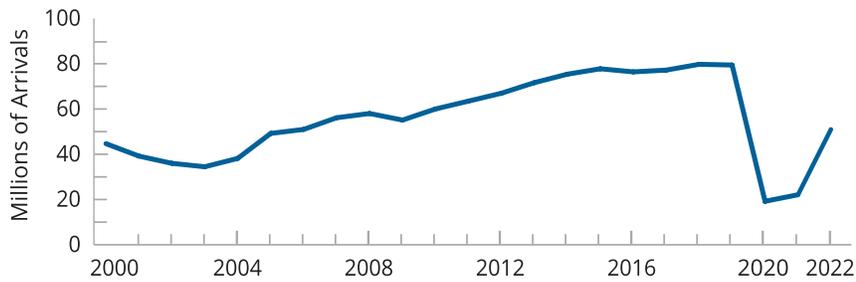
The travel and tourism industry, however, was one of the U.S. business sectors hardest hit by the COVID-19 pandemic and subsequent health and travel restrictions. As a result, travel exports decreased nearly 65% from 2019 to 2020.¹⁷ This decline contributed heavily

¹⁴ The United States as used in this document includes all 50 states, U.S. territories, and the District of Columbia.

¹⁵ Using 2019 data as a pre-COVID baseline.

¹⁶ Bureau of Economic Analysis (BEA). "U.S. Travel and Tourism Satellite Account for 1999–2020," *Survey of Current Business*, February 2022.

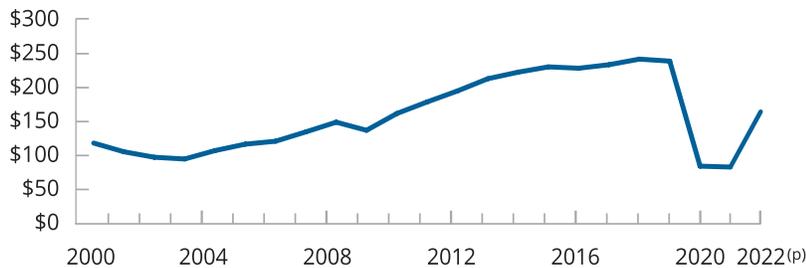
¹⁷ International Trade Administration (ITA) National Travel and Tourism Office from BEA data, "Annual Visitor Spending 1960–2021," April 2022, <https://www.trade.gov/travel-and-tourism-research>

Figure 13. U.S. International Arrivals

Source: National Travel and Tourism Office, International Trade Administration, U.S. Department of Commerce

Figure 14. Total Travel and Tourism-Related Exports

(USD Billions)



(p) Preliminary

Source: National Travel and Tourism Office, International Trade Administration, U.S. Department of Commerce

to unemployment, with leisure and hospitality shedding 8.2 million jobs in March and April 2020 alone, accounting for 37.5%¹⁸ of the decline in overall nonfarm employment during this period (Figure 13).

The Biden-Harris Administration has taken important steps to support travel and tourism, as well as the families and communities that rely on the industry. By 2021, the rollout of vaccines and lifting of many international and domestic restrictions allowed travel and tourism to begin its recovery. International arrivals to the United States grew to 22.1 million in 2021, up from 19.2 million in 2020. Spending by international visitors also grew, reaching \$81 billion or 34% of the total in 2019 (Figure 14).¹⁹

¹⁸ U.S. Bureau of Labor Statistics, Current Employment Statistics program.

¹⁹ "U.S. International Transactions, Fourth Quarter and Year 2021," Bureau of Economic Analysis, March 2022, <https://www.bea.gov/sites/default/files/2022-03/trans421.pdf>

The industry's nascent recovery is encouraging, but it is just the start. More must be done to support the resurgence of travel and tourism to ensure the industry rebuilds to be more resilient, sustainable, and equitable, and to ensure the economic benefits of travel and tourism reach communities of all sizes, makeups, and locations across the United States. To this end, the federal government released a new [National Travel and Tourism Strategy](#) (Strategy) to accelerate the recovery of the sector and to restore the competitive position of the United States as a destination. The Strategy establishes an overarching goal of increasing American jobs by attracting and welcoming 90 million international visitors, who will spend an estimated \$279 billion annually by 2027.²⁰

The Strategy focuses U.S. government efforts to promote the nation as a premier destination grounded in the breadth and diversity of its communities. It also seeks to foster a travel and tourism sector that drives economic growth, creates good jobs, and bolsters conservation and sustainability. Drawing on engagement and capabilities from across the federal government, the Strategy aims to increase not only the volume but also the value of tourism.

In addition to increasing international visitation and spending, the Strategy advances other priorities for the travel and tourism sector, from investing in technology to reducing emissions and fostering an ethos of conservation across the industry. It likewise applies a holistic approach to tourism development, including incorporating sustainability- and community-based development and management strategies. This approach seeks to foster growth while addressing the challenges that accompany it, including limited-destination carrying capacity and the impact on the United States' natural and cultural resources.

The Strategy is divided into four pillars, each with its own goal:

1. Promoting the United States as a Travel Destination

Goal: Leverage existing programs and assets to promote the United States to international visitors and broaden marketing efforts to encourage visitation to underserved communities.

2. Facilitating Travel To and Within the United States

Goal: Reduce barriers to trade in travel services and make it safer and more efficient for visitors to enter and travel within the United States.

3. Ensuring Diverse, Inclusive, and Accessible Tourism Experiences

Goal: Extend the benefits of travel and tourism by supporting the development of diverse tourism products, focusing on underserved communities and populations. Address the financial and workplace needs of travel and tourism businesses,

²⁰ This goal was recommended by the U.S. Travel and Tourism Advisory Board in a letter to Secretary Raimondo on November, 5 2021 (https://www.trade.gov/sites/default/files/2021-12/TTAB%20National%20Goal%20Letter_%20Nov%202021.pdf), and adopted by the Tourism Policy Council on March 3, 2022.

supporting destination communities as they expand their tourism economies. Deliver world-class experiences and customer service on federal lands and waters that showcase U.S. assets while protecting them for future generations.

4. Fostering Resilient and Sustainable Travel and Tourism

Goal: Reduce travel and tourism's contributions to climate change and build a travel and tourism sector that is resilient to natural disasters, public health threats, and the impacts of climate change. Build a sustainable sector that integrates protecting natural resources, supporting the tourism economy and its workers, and ensuring equitable development.

To achieve these goals, federal agencies will continue to make travel and tourism a priority and focus the full efforts of the federal government to promote the United States as a premier destination, in close collaboration with the private sector. To learn more about the strategies and activities the U.S. government will undertake to achieve these goals, please see the [2022 National Travel and Tourism Strategy](#), which was released in June 2022 by U.S. Secretary of Commerce Gina M. Raimondo on behalf of the [Tourism Policy Council \(TPC\)](#). Created by Congress and chaired by Secretary Raimondo, the TPC is the interagency council charged with coordinating national policies and programs relating to travel and tourism.

Chapter 6

International Education



Globally, it is expected that education will be a \$7 trillion industry by 2025.²¹ A significant element of this industry is travel exports for education purposes, which includes all expenditures by international students who come to the United States for their studies.²² In 2022, the U.S. Department of Commerce’s Bureau of Economic Analysis reported that U.S. exports of education-related travel totaled \$37.68 billion, a 17% increase from the previous year. Education exports also return cross-cutting economic benefits to the nation through workforce development, R&D, and foreign direct investment, which underpin prosperity, economic development, and competitiveness across sectors.

The presence in the United States of international students, researchers, scholars, and educators also results in significant non-economic benefits. Such exchanges strengthen relationships between current and future leaders, which can help facilitate relations between the United States and other countries.²³ Their presence in U.S. education institutions also contributes to Americans’ global competency, as they are exposed to the ideas, perspectives, cultures, and languages of their international peers.

U.S. education-related travel exports play an important role in supporting U.S. research and innovation, particularly in the fields of science, technology, engineering, and mathematics (STEM), which bolsters the competitiveness of the U.S. economy. When international students and exchange program participants study in the United States, they make significant contributions to U.S. innovation through their academic work and subsequent professional collaboration across a broad range of fields.²⁴ Many international students also gain practical post-graduation experience and training that they then bring to the U.S. workforce, in addition to multicultural perspectives and linguistic skills.

The COVID-19 pandemic had negative repercussions worldwide for the international education sector, including in the United States.²⁵ According to research by NAFSA: Association of International Educators, 2020 marked the largest single-year drop in the dollar amount contributed by international students studying at U.S. higher education institutions.²⁶ With campus closures and students unable to travel during the 2019–2020 and 2020–2021

²¹ Global Market Intelligence. “2022 Global Education Outlook,” Holon IQ, 2022, <https://www.holoniq.com/notes/2022-global-education-outlook>

²² Bureau of Economic Analysis. *Concepts and Methods Guide*, Chapter 10, 2022, <https://www.bea.gov/system/files/2022-06/iea-concepts-methods-2022.pdf>

²³ “Joint Statement of Principles in Support of International Education,” U.S. Department of State and U.S. Department of Education, July 26, 2021, <https://educationusa.state.gov/us-higher-education-professionals/us-government-resources-and-guidance/joint-statement>

²⁴ Ibid.

²⁵ Kanwar, Asha and Alexis Carr. “The Impact of COVID-19 on International Higher Education: New Models for the New Normal,” *Journal of Learning for Development*, 2020, <https://eric.ed.gov/?id=EJ1280602>

²⁶ Stewart, Erica and Matt Ruffner. “New NAFSA Data Show Largest Ever Drop in International Student Economic Contributions to the U.S.,” NAFSA: Association of International Educators, November 15, 2021, <https://www.nafsa.org/about/about-nafsa/new-nafsa-data-show-largest-ever-drop-international-student-economic#:~:text=Findings%20show%20that%20the%20nearly,largely%20due%20to%20the%20pandemic>

academic years, U.S. educational institutions amplified their digital outreach strategies to attract new international students and expanded distance learning and hybrid programs. Nevertheless, the total number of enrolled international students during the 2020–2021 academic year declined 15% from the prior academic year.²⁷

Although there was some recovery during the 2021–2022 academic year, the industry has not recovered to pre-pandemic levels. The nearly one million international students studying at U.S. higher education institutions contributed \$33.8 billion to the U.S. economy during the 2021–2022 academic year, an increase of 19%—or \$5.4 billion—from the prior year. NAFSA’s analysis also estimated that the total number of jobs supported by the financial contributions of international students increased to 335,423, an increase of 9.5% from the year prior.²⁸

In addition to increased competition from Australia, Canada, and the United Kingdom, the United States is also competing for students against markets like France, Germany, and Nordic countries that are increasingly offering degrees taught entirely in English, as well as countries like China that have historically been a source of students but are now emerging as international study destinations.²⁹

Based on the number of international students they receive, English-speaking countries are the most attractive student destinations globally, with Australia, Canada, the United Kingdom, and the United States together receiving more than 35% of all internationally mobile students from Organization for Economic Cooperation and Development (OECD) countries and key partner countries.^{30, 31}

As a destination country, the United States accounts for 15% of the global market share in international education, while Australia and the UK each have 7% and 9% respectively.³² Of the 4.39 million international students enrolled in OECD countries and partner countries, the UK hosts 551,000 international students, Australia hosts 458,000, and Canada hosts 323,000, far below the 957,000 students enrolled in programs in the United States.³³

²⁷ Institute of International Education. “International Student Enrollment Trends, 1948/49–2020/21,” *Open Doors Report on International Educational Exchange*, 2021, <https://opendoorsdata.org/data/international-students/enrollment-trends/>

²⁸ NAFSA International Student Value Tool. Accessed January 9, 2023, <https://www.nafsa.org/policy-and-advocacy/policy-resources/nafsa-international-student-economic-value-tool-v2#main-content>

²⁹ Altbach, Philip G. and Hans de Wit. “Student Mobility: Can the US Correct its Loss of Primacy?” *University World News*, August 28, 2021, <https://www.universityworldnews.com/post.php?story=20210823150426803>

³⁰ OECD (2022), *Education at a Glance 2022: OECD Indicators*, OECD Publishing, Paris, <https://doi.org/10.1787/3197152b-en>

³¹ OECD Key Partners include Brazil, China, India, Indonesia, and South Africa. OECD Key Partners participate in policy discussions in OECD bodies, take part in regular OECD surveys, and are included in statistical databases.

³² Ibid.

³³ Ibid.

The United States holds several advantages when compared to its international competitors:

- The United States has unused capacity for additional enrollments at all levels of education, though circumstances vary by institution.³⁴
- U.S. postsecondary schools are among the highest rated academic institutions internationally.
- The U.S. community college system provides postsecondary education that is affordable and accessible, often with strong instructional and student support services.³⁵
- U.S. policy provides opportunities for international students to complement their academic careers with experiential learning over a multi-year model.³⁶
- U.S. policy promotes international students' participation in STEM education through a cooperative relationship between the U.S. Department of Homeland Security (DHS) and the U.S. Department of Education's National Center for Education Statistics (NCES). NCES classifies programs of study in the United States through its Classification of Instructional Programs (CIP). The DHS STEM Designated Degree Program List uses CIP codes to develop a complete list of fields of study that DHS considers to be STEM fields of study for purposes of the 24-month STEM optional practical training extension.³⁷ Under the Biden-Harris Administration, DHS added 22 fields of study eligible for the STEM extension of practical training employment authorization and may consider adding more fields if nominated.
- In addition to its focus on postsecondary academic opportunities, the United States also leads in other areas, including secondary education for minor international students; as a destination for international student athletes; and in its unique programs, such as piano tuning for blind students, wood turning for string instruments, and wooden ship building.³⁸

U.S. government agencies that touch on international education are well positioned to support the U.S. education industry to compete and succeed. These federal agencies—which include the U.S. Departments of State, Commerce, Education, Defense, and Homeland Security,

³⁴ Student and Exchange Visitor Program (SEVP). "2021 SEVIS by the Numbers Report. U.S. Immigration and Customs Enforcement," 2021, <https://www.ice.gov/doclib/sevis/pdf/sevisBTN2021.pdf>

³⁵ Hagedorn, Linda Serra. *International Students in Community Colleges: An Unplanned Diversity*. American Council on Education, 2020, <https://www.acenet.edu/Documents/International-Students-in-Community-Colleges.pdf>

³⁶ "Training Opportunities in the United States," U.S. Department of Homeland Security, 2022, <https://studyinthestates.dhs.gov/students/training-opportunities-in-the-united-states>

³⁷ "Eligible CIP Codes for STEM OPT Extension," U.S. Department of Homeland Security, 2022, <https://studyinthestates.dhs.gov/stem-opt-hub/additional-resources/eligible-cip-codes-for-the-stem-opt-extension>

³⁸ Student and Exchange Visitor Program (SEVP). "2021 SEVIS by the Numbers Annual Report on International Student Trends," U.S. Immigration and Customs Enforcement, 2021, <https://www.ice.gov/doclib/sevis/pdf/sevisBTN2021.pdf>

as well as USAID—plan to deepen cooperation on international education, continue to be mutually supportive, and adopt complementary approaches in overseas operations in support of U.S. international education. As such, federal agencies will hold both domestic and overseas market-focused meetings to develop market-specific strategies on improving U.S. international education market entry and expansion. The U.S. government will also convene industry roundtables with U.S. international education industry leaders to discuss best export practices.

Connect U.S. Institutions and Consortia with Foreign Groups Interested in U.S. Education

A key element of the federal education export strategy is to connect foreign recruitment groups and U.S. educational institutions. To help with this, the U.S. government, through ITA's export promotion services, offers virtual programming designed to engage overseas recruitment partners. These virtual trade promotion events are designed to assist U.S. education exporters to gain exposure in new markets, build partnerships, develop distribution channels, and learn firsthand about real-time market developments in a specific country. These programs enable U.S. educational institutions, including minority-serving institutions, to schedule one-on-one meetings with potential agents, counselors, and university partners, as well as with foreign corporations and government officials. They also help U.S. institutions to build strong partner networks overseas and strengthen their influence abroad to attract international students to the United States. When traditional export promotion programs fully return after the pandemic, ITA will engage in in-person matchmaking services and trade missions and provide on-site services to state-led delegations.

Promote the United States as a Premier Study Destination

ITA, State, and DHS all support promotional campaigns that amplify the message that international students from all regions and backgrounds are welcome in the United States. These marketing campaigns also promote the diversity of programs in primary, secondary, and higher education, in both rural and urban locations, as well as the unique cultural and social experience of studying in the United States, with its diverse study body, extracurricular activities, and opportunities for personal growth and development. U.S. government agencies will coordinate these campaigns to ensure consistency, as well as collaborate with public and private sector partners globally to provide social media content and [marketing videos](#) that highlight the United States as a study destination. This effort will direct international visitors to federal websites with information on studying in the United States.

Highlight the Importance of International Education as a U.S. Export

The U.S. government will work with U.S. educational institutions, [Study State consortia](#) (composed of colleges and universities, community programs, and similar entities representing education within U.S. states), and other state offices and programs as appropriate to highlight the importance of U.S. international education as a U.S. export and economic driver in local communities. The U.S. government will convene U.S. International Education Stakeholder Roundtables in states and U.S. territories to connect Study State consortia, educational institutions, and in-state stakeholders such as governors' offices, state trade agencies, economic development offices, and travel and tourism professionals, to discuss avenues to support international education at the state and local level. Topics may include marketing a state as a study destination, development of economic impact reports to capture international education numbers beyond higher education, outlining jobs impacted by the sector within the state, and inclusion of international education in state export plans. For example, [StudyColorado](#) was founded in 2012 by an Executive Order signed by then-Governor John Hickenlooper. Governor Jared Polis continues to support the program by providing an administrative home and staff support for StudyColorado at the Colorado Department of Higher Education. Similarly, [Study Hawai'i](#) has a successful track record of working with the State of Hawaii's Department of Business, Economic Development and Tourism to develop programming and measure the economic impact of international students with funding support from the state legislature. The U.S. government will also encourage the participation of educational institutions in District Export Councils.

Identify and Promote Global Opportunities to U.S. Education Industry

To ensure U.S. international education is at the forefront when opportunities for training and/or workforce development arise in foreign markets, the U.S. government will proactively promote these opportunities to U.S. educational institutions for their consideration. The U.S. government will convene U.S. International Education Stakeholder Roundtables with the education and business communities in foreign markets to learn about educational programs of interest in the form of Education Trade Leads and to share best practices. These connections will assist to establish strong partnerships and develop future program opportunities in markets.

Level the Playing Field in Export Markets

To increase the diversity of U.S. education institutions active in export markets, the U.S. government will promote relevant grant programs to U.S. education organizations to assist with their development and execution of an export strategy, such as ITA's [MDCP](#). The U.S. government will plan robust programming around events and trade shows to level the playing field for U.S. educational institutions against competing countries. This will include the development of USA pavilions and booths in coordination with Study State consortia and other educational entities at strategic trade shows with various value-added activities, including pre-market promotion, on-the-ground support, and introductions to visiting delegations through pre-scheduled business-to-business and government-to-business meetings. The U.S. government plans to organize meetings with representatives of ministries of education and foreign embassies in emerging markets to speak about countrywide initiatives and opportunities for collaboration with U.S. educational institutions and Study State consortia. The U.S. government will create and publicize ongoing webinars on available resources provided by federal agencies that support U.S. education institutions offering services and programs to foreign governments.

Chapter 7

Global Infrastructure Development



Across the globe, there is a significant need for infrastructure improvement in critical sectors, including climate and energy security; health and health security; digital connectivity and information and communications technologies (ICT); and transportation. The climate crisis, the COVID-19 pandemic, and rapidly shifting demographic trends of urbanization and population growth have exacerbated these needs.

Many developing countries lack access to quality financing, technical expertise, institutional and policy frameworks, and the human capital necessary to build sustainable infrastructure over the long term. Infrastructure deficits in the developing world will reach into the trillions of dollars,³⁹ elevating the need for solutions that meet the central challenges of the 21st century. Global demand for infrastructure will create opportunities for American businesses and workers, strengthen and diversify U.S. supply chains, advance U.S. economic security, and deliver solutions that make a difference in people's lives.

U.S. companies provide a range of world-class infrastructure services, and they are well positioned to help meet the infrastructure needs of emerging economies. As such, U.S. infrastructure exports will be a critical component of global infrastructure development in the years to come. The United States has a long history of providing quality financing and technical support for infrastructure projects around the world, and U.S. firms are positioned to lead globally in providing public procurement solutions. Improved coordination of federal resources, in addition to better cooperation with like-minded partners, will help U.S. firms to be more competitive in meeting global infrastructure needs.

Through the [Partnership for Global Infrastructure and Investment \(PGII\)](#), the U.S. government will boost the competitiveness of U.S. companies pursuing infrastructure deals through a coordinated strategy that leverages U.S. trade finance and investment programs, promotes fairness and transparency in global public procurement, improves federal coordination to support early stage and active deals, and promotes commercial advocacy. To ensure new programs, knowledge, and tools are accessible to all companies, particularly small business and businesses in underserved communities, U.S. trade promotion and development agencies will also significantly increase domestic outreach and support.

Additionally, the United States will apply best practices from the Infrastructure Investment and Jobs Act, a once-in-a-generation investment in domestic infrastructure, to this global effort. For example, in 2022, DOT launched *Momentum*, a new initiative to help countries around the world learn from U.S. best practices and expertise in planning and modernizing transportation infrastructure. *Momentum* harnesses DOT's broad array of transportation expertise and shares it through digital resources and toolkits, capacity building, and technical assistance targeted at a global audience of transportation officials from national and sub-national government agencies and regional organizations.

³⁹ G20 Global Infrastructure Outlook, 2022, <https://outlook.gihub.org/>

Partnership for Global Infrastructure and Investment

At the 2022 G7 Leaders' Summit, President Biden and G7 Leaders formally launched PGII, a values-driven, high-impact, transparent infrastructure partnership to meet the enormous infrastructure needs of low- and middle-income countries that will make a difference in people's lives around the world, strengthen and diversify supply chains, and advance shared national security interests. At the launch, President Biden announced that the United States aims to mobilize \$200 billion for PGII over the next five years through grants, federal financing, and leveraging private sector investments, as part of the broader G7 target of \$600 billion by 2027.

PGII is designed to fill the global infrastructure gap while deploying investments that are sustainable; advance gender equity and equality; raise labor and environmental standards; expand opportunities for U.S. businesses; and create good jobs, both at home and abroad. The United States is focused on key priority areas that guide PGII investments in the near-term, including clean energy supply chains, trusted ICT networks, connective transportation corridors, sustainable agriculture and resilient food systems infrastructure, and resilient health systems.

Such investments could include fiber, mobile and wireless networks; subsea cables, landing stations, and data centers; ports and railroads; energy diversification and clean energy access; critical mineral mining and processing; vaccine and other essential medical product manufacturing; hospital and clinic construction; medical record and supply chain digitization; disease surveillance and early warning systems; food storage and cold chain transportation equipment. Where possible, PGII interventions will focus on the development of transformative economic corridors that maximize the impact of public dollars and create opportunities for private sector engagement. Together, investments across a corridor can leverage broader, transformative impacts than any individual investment and provide greater opportunities to boost economic development and bolster regional connectivity.

Government cannot make these infrastructure investments alone. To build on the early success of PGII, the United States will more comprehensively leverage the expertise and financing from G7+ partners and the private sector, including by building coalitions to compete on global infrastructure projects and working to de-risk investments to drive capital towards low- and middle-income countries. Beyond the priority areas of PGII, the United States remains committed to supporting U.S. companies competing for and participating in infrastructure projects around the world across all sectors.

Momentum Toolkit

Momentum is DOT's global engagement program. It harnesses DOT's broad array of transportation expertise and shares it with a global audience of transportation officials from national and sub-national government agencies and regional organizations. *Momentum* comprises an ever-growing set of digital resources, including toolkits, links to DOT publications, research, and manuals, as well as virtual and in-person technical assistance, capacity building activities, and exchanges. *Momentum* works with foreign partners to share knowledge and best practices focused on seven key areas across all modes of transportation, all of which address overarching policy issues including sustainability, equity, and economic development: (1) transportation infrastructure projects; (2) climate change mitigation, adaption, and resilience; (3) safety; (4) regional corridors, borders, and trade facilitation; (5) freight and logistics supply chains; (6) innovative and emerging technologies; and (7) standards and good regulatory practices.

Leverage U.S. Trade Finance and Investment Programs

Many low- and middle-income countries lack the requisite financing to support significant or long-term infrastructure projects. As a result, U.S. companies can be reluctant to pursue such projects where financing is in doubt. Reliable financing mechanisms can increase the likelihood that U.S. companies will compete for infrastructure projects in developing countries. The U.S. government can assist U.S. companies to compete more effectively by mobilizing capital for infrastructure investments and attracting additional investment, increasing awareness of federal financing options, and improving interagency coordination on infrastructure financing solutions.

The U.S. government assists U.S. companies by providing a comprehensive range of financing options and by streamlining the financing process. Federal agencies will develop financing strategies tailored to the unique needs of each market to increase the potential for investment of private capital, which could include blended finance approaches, such as first loss facilities, guarantees or partial grants, like MCC and DFC's [American Catalyst Facility for Development](#) and USAID's [Digital Invest](#). Other strategies include debt financing mechanisms, such as guarantee and loan programs, like those provided by EXIM and SBA. Guarantee programs may provide the working capital necessary for SMEs to participate in international projects.

Emerging market currency risks can deter long-term investment in infrastructure. To advance international infrastructure priorities, the United States can help develop a robust local currency-lending platform. Under the BUILD Act of 2018, DFC was granted expanded authority

to make local currency loans if there is a substantive policy rationale for doing so, and DFC is working to implement this capability through its authorities. Local currency financing is particularly important for renewable energy generation and public transportation, as ongoing costs and revenue bases for these sectors are localized. The expense of currency hedging is often the factor that makes returns for U.S. companies unattractive.

Surety bonds help small businesses win contracts by providing the customer with a guarantee that the work will be completed. Many public and private contracts require surety bonds, which are offered by surety companies. SBA guarantees [surety bonds](#) for certain surety companies, which allows the companies to offer surety bonds to small businesses that might not meet the criteria for other sureties. Federal agencies will market this tool to encourage small businesses to bid on projects.

EXIM's [CTEP](#) can also be used to help U.S. companies compete on infrastructure projects. CTEP is a Congressional mandate for EXIM to support U.S. companies facing competition on their export sales from the People's Republic of China or companies in transformational export areas, such as wireless communications, renewable energy, energy efficiency, water treatment, biotechnology, and biomedical sciences. This support may include reduced fees, extended repayment terms, and exceptions to other EXIM policies. For transformational export areas, EXIM has the ability to support transactions with at least 51% U.S. content and may consider less than 51% if certain criteria are met.

USTDA engages at one of the most critical and strategically important stages of the infrastructure development cycle in emerging economies. USTDA provides grant-based funding to overseas project sponsors for project preparation activities such as feasibility studies, technical assistance, and pilot projects. U.S. companies perform these activities, which define technical and design options for infrastructure projects. This is critical to American competitiveness.

USTDA's tools are also essential for structuring infrastructure projects that can be financed, implemented, and sustained. USTDA's project preparation assistance helps to build a pipeline of bankable infrastructure activities for U.S. government agencies, such as EXIM and DFC, for trusted international financial institutions, including multilateral development banks (MDBs) and regional development banks, as well as for private banks. These partners increase the likelihood of implementation of infrastructure projects—both public and private sector in nature—into which U.S. goods and services may be exported. USTDA works hand-in-hand with other U.S. government partners to ensure that its programs align with key priorities, such as PGII, IPEF, and Prosper Africa.

Promote Fairness and Transparency in Public Procurements

U.S. companies are less likely to compete for infrastructure projects in developing countries without fair and transparent procurement systems. According to the United Nations, lack of a fair and transparent procurement system can increase costs by 10–20% for bidding companies and can often lead to poorer quality infrastructure and higher long-term costs for the country itself. Infrastructure projects, consultancies, and investments are financed, tendered, and managed by a variety of entities, including foreign government ministries, MDBs, and U.S. trade and development agencies. Each entity requires extensive and unique application and proposal processes involving significant time and financial and human resources, making pursuit a challenge for many U.S. SMEs.

To promote fair and transparent procurement, the U.S. government will encourage MDBs in which the United States is a shareholder to have stronger oversight over MDB-funded procurements run by foreign governments. The U.S. government will also continue to work with MDBs to promote best value over low cost in procurement awards, so that countries are incentivized to consider and assign value to projects with long-term benefits, such as increased sustainability, over short-term, low-cost solutions.

The Biden-Harris Administration will work with international partners to advance infrastructure solutions that generate economic, environmental, and social benefit by improving outcomes for marginalized groups and by incentivizing innovation, such as by supporting the transition towards low-carbon infrastructure and digital technologies. For example, to support the Administration's focus on climate and clean tech, EXIM will use its [Chair's Council on Climate](#), comprised of members from private sector corporations, academia, research, and civil society, to advise EXIM on how to better support U.S. climate and clean tech exporters.

Additionally, unclear legal and regulatory requirements, perceived corruption, and other local standards or practices limit investor confidence and interest in many developing country markets. The United States will engage partner countries, international financial institutions, development finance institutions, and other donors to identify policy and market barriers to investment and potential actions to reduce their impact, including by introducing and supporting policy reforms. For example, the United States jointly launched the [Blue Dot Network](#) with Japan and Australia to certify quality infrastructure projects that meet robust international standards to create accountability and support sustainable investment.

While U.S. companies are competitive in the supply of high quality, innovative infrastructure solutions, too often emerging markets prioritize the lowest cost over best long-term value in their procurements. This approach favors foreign competitors that are subsidized or willing to compete at no profit or a loss, thereby squeezing out U.S. companies whose

solutions provide longer-term value. To address this challenge, and in addition to the U.S. Department of the Treasury's MDB reform agenda, USTDA's Global Procurement Initiative and CLDP coordinate efforts to improve public procurement systems in markets that use lowest-price procurement practices without considering the total cost of the investment over its entire life cycle. These efforts will build the internal capacity of foreign governments to adopt value-based procurement practices consistent with the G20 Principles for Quality Infrastructure Investments.

Improve Interagency Coordination to Support Early Stage and Active Deals

The U.S. government will enhance coordinated promotion of the federal infrastructure toolkit, including market intelligence, early-stage project preparation, and export assistance resources. Better coordination and information sharing ensures that government resources flow to projects with the highest likelihood of commercial success and helps to mitigate risk. Federal agencies, including USAID, EXIM, USTDA, and DFC, will formalize and strengthen partnerships to improve project referrals and to make it easier for U.S. companies to work with multiple federal agencies to identify and pursue export opportunities and bankable projects.

USTDA and ITA will develop infrastructure resource guides to supplement [Country Commercial Guides](#). The resource guides will provide a detailed listing of near-term infrastructure projects in priority markets, which will provide a roadmap for new-to-market companies to identify near-term sales opportunities. ITA will develop online training tools to serve as a one-stop-shop for U.S. businesses with overviews and links to all U.S. government resources that support or facilitate the competitiveness of U.S. company participation in foreign infrastructure projects, including fact sheets, resource guides, program checklists, and case studies. This site will also host recorded webinars and training programs that guide U.S. companies through the process of bidding on MDB-funded projects, as well as in-depth trainings on working with USTDA, EXIM, DFC, and other U.S. trade promotion and investment agencies.

Promote Commercial Advocacy

ITA's Advocacy Center coordinates the activities of relevant federal agencies in support of U.S. exporters bidding against foreign competitors on foreign public sector projects. The goal of advocacy is to level the playing field on behalf of U.S. exporters competing for international contracts against foreign firms and to promote the export of U.S. goods and services around the world. The Advocacy Center works with U.S. embassies and missions across the globe to increase engagement with foreign governments and deliver a strong message of support for

U.S. bidders. Assistance is available to U.S. exporters for projects ranging from small contracts to large multi-year efforts. Advocacy for U.S. exporters bidding on foreign government procurements is beneficial to both U.S. companies and host countries, as it can promote fairness and transparency in the tendering process and can be a powerful tool to combat corruption.

Additionally, in cases in emerging economies where U.S. companies face a competitive disadvantage from foreign competitors offering incentives that exceed tender requirements, they may request that USTDA help level the playing field with a training grant to fund the cost of beneficial training for the foreign government that is sponsoring the infrastructure project.

The Advocacy Center will leverage the ITA [MDB Liaison program](#) to carry out targeted outreach to help SMEs, as well as large companies, understand how they can benefit from advocacy and gain access to opportunities connected to MDBs. The MDB Liaison program, a congressionally mandated initiative that places commercial liaison officers at each of the MDBs where the U.S. government is a shareholder, will share information about and connect export-ready companies to infrastructure opportunities overseas.

The Advocacy Center and USTDA work closely together to support the participation of U.S. exporters in public sector projects abroad. To improve outreach to foreign counterparts, USTDA will increase the utilization of its reverse trade missions, which are designed to bring foreign decision-makers to the United States to see the design, manufacture, and operation of U.S.-manufactured goods and services prior to making procurement decisions and to increase U.S. company access to foreign government officials. Reverse trade missions provide an inexpensive alternative for small businesses to meet with potential buyers in the United States.

Deal Team Initiative

Commercial diplomacy is central to U.S. foreign policy. In order to better assist U.S. companies to secure export and investment opportunities overseas, State and Commerce jointly lead the Deal Team Initiative in collaboration with 11 other federal trade promotion and development agencies.

Embassy Deal Teams are working groups of federal officers and staff at overseas posts focused on helping U.S. companies do business in their markets. The purpose of the Deal Team Initiative is to support U.S. businesses interested in exporting overseas by identifying opportunities early in the deal cycle and deploying all available federal tools to help U.S. companies successfully compete abroad. Deal Teams are a powerful tool because they bring together the collective programs, resources, and expertise of the U.S. government to boost the competitiveness of U.S. companies in global markets.

Increase Domestic Outreach

Often, U.S. companies, particularly SMEs and businesses from underserved communities, are not aware of procurement opportunities. Although U.S. companies develop groundbreaking innovative solutions, they can find it difficult to win bids against foreign competitors that engage in aggressive commercial diplomacy efforts. To increase the number of U.S. companies that compete for, and win, procurement projects overseas, the U.S. government will increase awareness of federal resources available to support U.S. companies pursuing foreign government procurement and infrastructure development through communications and outreach efforts. The U.S. government will also promote U.S. innovation to countries seeking infrastructure solutions through initiatives such as USTDA's reverse trade missions, as discussed above.

The U.S. Department of Commerce will engage public and private sector partners across the country in sector-specific roundtable discussions to identify innovative companies and technologies that align with priority infrastructure sectors. To promote procurement opportunities to U.S. companies, heads of trade promotion and finance agencies will participate in domestic events to highlight overseas infrastructure opportunities and federal resources that support U.S. companies going global.

Special attention will be given to promoting procurement opportunities, including subcontracting, to SMEs and businesses in underserved communities. For example, working with other Trade Promotion Coordinating Committee agencies, SBA will enhance utilization of the [8\(a\) program](#) to promote the engagement of socially and economically disadvantaged businesses in global infrastructure development. The program incentivizes partnerships between 8(a) companies and larger, more experienced U.S. infrastructure firms that can mentor and build the capacity of 8(a) companies to contribute to sustainable infrastructure development.

USTDA will develop and include a competitive analysis of U.S. companies within all project preparation activities that USTDA funds. By including this new competitive analysis, U.S. companies will have a guide to potential U.S. partners that are ready to enter and succeed in emerging markets. Likewise, understanding where new technological capabilities in the United States are emerging will be important to build export markets for new, growing companies and industries and mitigate supply chain risks.

EXIM established a new global development division, the Office of Global Business Development, which reports directly to EXIM's President and Chair and is responsible for marketing EXIM's programs and products to various geographic regions and business sectors worldwide to advance business opportunities for U.S. exporters and U.S. strategic interests.

MCC will continue to actively encourage American firms to participate in MCC-funded business opportunities. MCC will organize webinars and in-person seminars for American firms for projects in all countries at major milestones of its program development, MCC Compact-wide meetings at the beginning of the Compact, and specific procurement focused meetings for large-value procurements. These seminars are open to all interested firms and are advertised on [MCC.gov](https://www.mcc.gov).

Chapter 8

Agriculture, Fish, and Forestry



Exports are crucial to the economic viability of U.S. farmers, ranchers, fishermen, and foresters. USDA promotes the sale of safe, wholesome, and sustainable U.S. food and agricultural products to customers around the world. USDA's Foreign Agricultural Service (FAS) provides market information and supports export promotion activities, which help U.S. agriculture, food, fish, and forest product exporters identify and take advantage of international market opportunities. USDA/FAS works with its partners to assess market conditions, mitigate and remove barriers to U.S. exports, and build partners' capacities to participate in international trade. USDA/FAS administers export development programs and activities, working in partnership with land-grant universities, U.S. companies and their affiliated State Regional Trade Groups (SRTGs), U.S. agriculture, fish, and forest product associations (market development program cooperators), as well as U.S. and foreign financial institutions. USDA/FAS will create more and better market opportunities, including development of foreign markets for U.S. climate-smart products, for U.S. exporters through the following strategies and programs.

Connect U.S. Exporters with New Markets

USDA/FAS endorses international trade shows and delivers agribusiness trade missions (ATMs) and virtual trade events (VTEs) to connect U.S. exporters with new and emerging foreign markets.

USDA/FAS Endorsed Trade Shows

USDA/FAS endorses more than 20 select international trade shows around the world annually. USDA endorses shows that provide the best marketing opportunities for U.S. companies and producers. Endorsed shows have a "USA Pavilion" showcasing the variety and quality of made-in-America products to potential foreign buyers. USDA/FAS provides participating companies in the endorsed shows with marketing and promotion services, market intelligence, logistical support, and on-site assistance.

USDA/FAS Agribusiness Trade Missions

USDA typically hosts six in-person ATMs in select markets each year. ATMs provide a unique opportunity for state departments of agriculture, SRTGs, cooperators, trade associations, and U.S. agribusinesses to learn about new market opportunities and conduct one-on-one business meetings. ATMs also provide a platform for USDA leadership to engage in trade-related policy discussions with host government counterparts.

Virtual Trade Events

USDA's VTEs—developed during the pandemic and now part of USDA's toolbox—are effective in maintaining and establishing relationships between U.S. exporters and potential buyers and remain a valuable means for U.S. exhibitors to gain market insight, access informal networking, and conduct formal business to business meetings with prospective foreign buyers. VTEs also help U.S. exporters explore newer or smaller niche markets that they may not be able to explore during a trade mission or a traditional international trade show.

Expand Agribusiness SME Participation in Programs and Exporting

USDA/FAS incentivizes expansion of U.S. SME participation in market development programming, especially in underserved communities, by supporting outreach and export training initiatives of SRTGs and other participants, such as the Intertribal Agriculture Council (IAC).

Expanded SME Eligibility

USDA's [Agricultural Trade Promotion \(ATP\)](#) program provided an infusion of \$300 million to market development investment and established a larger size eligibility for SME participation than USDA's [Market Access Program \(MAP\)](#), enabling larger SMEs to participate in the program, as well as providing additional funding to better meet overall demand. Most SME engagements are in SRTG cost-share activities that facilitate participation in trade shows and trade missions. The number of participating SMEs and their activity level are expected to increase as more in-person events take place. The ATP funds will run through September 2024.

Expanded Intertribal Agriculture Council Involvement

USDA/FAS works closely with the IAC to support strategic planning and exporter training for Native American-owned companies and to help the IAC improve its strategic planning and program management practices. FAS programs are critical to increasing awareness and sales of Tribal food and agricultural products.

Showcase the Sustainability of U.S. Producers

Product sustainability, including products' economic, social, and environmental performance, is an increasingly important marketing consideration and, in many cases, a significant potential advantage to U.S. exporters. USDA/FAS and its U.S. partners are undertaking several initiatives to communicate and promote the sustainability of U.S. agriculture exports, including exports of climate-smart products.

U.S. Sustainability Alliance Project Messaging

USDA/FAS provides MAP funds to support the [U.S. Sustainability Alliance](#) (USSA), a group of U.S. agriculture, fishery, and forest product industry associations, that showcase over a hundred years of U.S. legislation addressing air, soil, and water conservation efforts and demonstrate the sustainable production practices of their commodities. This educational campaign helps address growing consumer and retailer interest, particularly in Europe, to take sustainability factors into consideration in their purchasing decisions. USSA maintains a website with industry [fact sheets](#) and an array of related materials. USSA plans to expand its public awareness campaign, which will include outreach to industry and government stakeholders in Europe, a website revamp, and expanded social media engagement.

U.S. State/Regional Agriculture Image Videos

USDA/FAS overseas offices, working with the U.S. Meat Export Federation and the four SRTGs, are using MAP funds to produce approximately 40 two- to three-minute videos to help improve foreign public perception of U.S. high-value food products. The videos help demonstrate the sustainability of U.S. agriculture. These videos are expected to be used in social media, advertising, trade shows, and other public events. Filming has taken place in Louisiana, Colorado, and Minnesota.

Leather Lifecycle Assessment

USDA/FAS is using MAP to fund the Hide and Leather Council's initiative to develop a leather life cycle assessment (LCA), calculating the environmental footprint of U.S. leather production, compared to synthetic alternatives. U.S. exports have severely declined due to competition from petroleum-based, synthetic replacements that are incorrectly viewed as more environmentally friendly. The results will be shared with the U.S. meat and animal agriculture sectors for incorporation into their own LCA work.

Partnerships for Climate-Smart Commodities

USDA is committed to supporting a diverse range of farmers, ranchers, and private forest landowners through Partnerships for Climate-Smart Commodities. This effort will expand markets for America's climate-smart commodities, leverage the greenhouse gas benefits of climate-smart commodity production, and provide direct, meaningful benefits to production agriculture, including for small and underserved producers.

In September 2022, Secretary Vilsack announced USDA would invest up to \$2.8 billion in 70 selected projects under the first pool of the Partnerships for Climate-Smart Commodities funding opportunity. In December 2022, he announced \$325 million would be invested in an additional 71 projects under the second funding pool. USDA anticipates this combined investment of more than \$3 billion will result in additional markets for U.S. commodities and expanded revenue streams for farmers and ranchers across the United States.

Use Trade and Regulatory Dialogues to Expand Market Access

In partnership with industry and other countries, USDA/FAS will develop new and more diverse export markets and reduce existing barriers to export, using its analytical, negotiating, marketing and diplomatic expertise.

Enforcing Trade Agreements

USDA/FAS and USTR work together to promote fair agricultural trade and to enforce trade agreements to ensure trading partners fulfill their agricultural trade commitments. Enforcement of the USMCA through constant engagement with foreign government counterparts is critical to ensure the expected benefits for U.S. farmers and ranchers are fully realized. On January 31, 2023, U.S. Trade Representative Katherine Tai and Secretary Vilsack announced a new USMCA dispute settlement panel to challenge Canada's revised dairy tariff-rate quota (TRQ) allocation measures that unfairly advantage Canadian processors in determining TRQ allocations, and impose new conditions effectively prohibiting retailers, food service operators, and other types of importers from utilizing TRQ allocations. On June 2, 2023, Ambassador Tai and Secretary Vilsack announced that the United States has requested USMCA dispute settlement consultations with Mexico on measures affecting products of agricultural biotechnology, including a ban on the use of biotechnology corn in tortillas or dough. Both of these dispute settlement proceedings are ongoing. Enforcement of other trade agreements will also be prioritized by USDA as appropriate, to include engagement of senior USDA officials as needed.

Trade Rule Harmonization

USDA/FAS is working in Africa, Asia, and Latin America to promote regional and global harmonization of trade rules. USDA programs in these regions help other countries develop, adopt, and implement science-based regulations that protect human, plant, and animal life and health and promote sustainable agricultural policies, while adhering to World Trade Organization commitments and facilitating trade.

Regulatory rule harmonization, as well as ensuring transparency and predictability in regulatory development, helps to reduce the cost to export U.S. agricultural products to foreign markets. Through USDA/FAS's policy and regulatory work with other countries, USDA/FAS-led projects reduce risks that U.S. agricultural exports will be subject to arbitrary detention or denial of entry at foreign port destinations.

Help Developing Countries Build Their Trade Capacity

USDA/FAS works with developing countries on regulatory technical training that supports risk-based policies that minimize potential trade disruptions and improve transparency and predictability. USDA/FAS will continue to work with partners on regional alignment of pesticide regulations and to establish science-based food safety, animal health, and plant health regulations. For example, in 2022, USDA/FAS trained individuals throughout the world using fellowships and scientific exchange programs, as well as interactive, web-based courses to support efforts to integrate science-based principles in sanitary and phytosanitary measures.

Recognizing the inherent links between the agricultural sector, trade, and climate change, USDA is leading efforts to help developing countries adapt and mitigate the impact of climate change, limit future supply and trade disruptions, and develop transparent, science-based decision-making to increase opportunities for agricultural trade. USDA supports international engagements for sharing knowledge on the adoption, use, and trade of agricultural biotechnology products that help to mitigate and adapt to climate change. USDA exchange programming shares best practices in climate resilient technologies and strengthens relationships with trading partners.

USDA programs share climate-smart agriculture expertise from USDA technical agencies, land grant universities, and agricultural industry partners, also known as cooperators—such as innovations for low-emissions livestock and solar energy for agriculture—with emerging markets, helping them adopt or adapt climate-smart practices and become better U.S. trading partners. One such example is the Food for Progress Program, in which private voluntary organizations and other international organizations in developing countries provide training and technical assistance intended to increase agricultural productivity and expand access to markets and trade.

Leverage USDA/FAS Export Financing Programs to Assist U.S. Exporters

USDA/FAS will continue to administer its export financing programs and identify and address barriers that might prevent SMEs from participating.

USDA/FAS Export Credit Programs

To enhance the availability of financing in developing countries and emerging markets, USDA/FAS operates two export credit guarantee programs that assist the commercial financing of U.S. agricultural products and goods and services: the [Export Credit Guarantee \(GSM-102\) Program](#) and the [Facility Guarantee Program \(FGP\)](#). Both programs provide guarantees of repayment issued by USDA's Commodity Credit Corporation that provide commercial lenders and exporters the reduction in repayment risk needed to extend financing in countries where credit is necessary to purchase U.S. agricultural products, goods, and services. With USDA/FAS's export credit guarantee programs, U.S. exporters and U.S. financial institutions can ensure that payment is guaranteed for the export of U.S. agricultural products, goods, and services, thus turning their business opportunities into real transactions. Every fiscal year, \$5.5 billion in available guarantees is allocated to eligible destinations.

USDA/FAS's export finance outreach efforts have spanned its primary regions, with particular focus on countries with growth potential in Africa, Asia, Latin America, and the Middle East. Export finance staff work closely with USDA/FAS's overseas offices and cooperators to hold seminars and information sessions that educate U.S. exporters, including SMEs, foreign buyers, and U.S. and non-U.S. financial institutions. Technology is making outreach more accessible than ever, providing another tool to reach wider audiences and raise awareness of export finance programs.

Partnerships are essential to building awareness of export finance assistance. USDA/FAS collaborates frequently with EXIM, SBA, USTDA, and State to share information and hold joint seminars. These relationships have also led to partnerships with state and local networks, such as the Small Business Development Centers, and minority-serving organizations, such as the National Black Farmers Association. In addition, USDA export credit guarantee fees are now an eligible expense under SBA's STEP. Depending on how an exporter's state administers STEP funds, a percentage of the guarantee fee is potentially reimbursable.

USDA/FAS also collaborates with U.S. regional banks to reach SMEs and new-to-export agribusiness companies. Further, USDA/FAS works with SRTGs and state departments of agriculture to increase awareness of GSM-102 among all agricultural commodity sectors, thus expanding the use of credit to support a greater variety of U.S. agricultural exports.

Chapter 9

Seafood Industries



Seafood can be good for people, good for the economy, and good for the planet when produced responsibly. The United States is recognized as a global leader in sustainable seafood—both wild-caught and farmed. Wild harvest and ocean farming of seafood are critical sources of protein for the growing global population. Given its low carbon footprint relative to other animal proteins, sustainable seafood production can be an environmentally efficient way to produce food, and it is an increasingly central part of food systems designed to reduce and mitigate the effects of climate change.

Seafood is also a driver of growth and employment in the blue economy, with the U.S. seafood industry supporting some 1.2 million jobs⁴⁰ and sustaining coastal communities around the country, including in rural and underserved communities. The industry generates about \$165 billion in sales⁴¹ and \$11 billion worth of processed seafood each year,⁴² with exports valued at about \$5 billion in 2019.⁴³

Difficulty accessing foreign markets undermines the potential growth and competitiveness of the U.S. seafood industry. The U.S. seafood trade deficit was \$17 billion in 2019.⁴⁴ Fishing vessel owners and operators, processors, exporters, and other stakeholders have expressed concerns that foreign competitors have better access to the U.S. market than the U.S. seafood industry has overseas, undercutting market opportunities both domestically and internationally.

SMEs account for approximately 90% of the U.S. fishing industry, which includes both wild-caught and farmed seafood, but they often lack the tools to compete effectively in global markets. At the same time, large U.S. seafood exporters are disadvantaged in global markets due to the effects of trade and tariff policies, non-tariff barriers to trade, and differences in international resource management practices.

The recent impacts of COVID-19 and supply chain constraints have compounded existing market challenges for the U.S. seafood industry. Some segments of the U.S. seafood industry suffered even more than the overall U.S. economy during the COVID-19 pandemic. For example, commercial landings revenue declined by over 20% in 2020 relative to the most recent five-year historical average; shellfish farmers, who rely heavily on sales to restaurants, lost approximately 90% of their market at the height of the pandemic. The seafood dealer and processor sector, which had already experienced market weakness for much of 2019, suffered from a more sustained contraction during much of 2020 due to the impacts of the

⁴⁰ National Marine Fisheries Service (2022) Fisheries Economics of the United States, 2019. U.S. Department of Commerce, NOAA Technical Memo, NMFS-F/SPO-229A, https://media.fisheries.noaa.gov/2022-07/FEUS-2019-final-v3_0.pdf

⁴¹ Ibid.

⁴² National Marine Fisheries Service (2021) Fisheries of the United States, 2019. U.S. Department of Commerce, NOAA Current Fishery Statistics No. 2019, <https://media.fisheries.noaa.gov/2021-05/FUS2019-FINAL-webready-2.3.pdf?null=>

⁴³ Ibid.

⁴⁴ Ibid.

COVID-19 pandemic. Furthermore, the U.S. seafood trade deficit grew during the pandemic, as U.S. seafood exports declined by 23% in 2020 even as imports held steady. Ongoing trade and supply chain disruptions caused by the pandemic highlight the need for the industry to modernize, diversify, and expand domestic production, processing, cold storage, and markets; address labor shortage and workforce development needs; and reassess and diversify international trade options in the face of existing constraints.

A thriving, well-regulated U.S. seafood industry capable of competing at home and abroad will translate into greater global seafood supply and increased food security from sustainable U.S. fisheries. Ensuring that sustainable U.S. fisheries and exporters remain competitive will also help decrease the global seafood supply's reliance on foreign fisheries that are at greater risk of overfishing, illegal, unreported, and unregulated (IUU) fishing, and labor abuses, including forced labor. The U.S. seafood industry has a critical role to play in enhancing public health and nutrition, creating jobs, especially in rural and underserved communities, and serving as a key part of a climate resilient food strategy. The U.S. government will advance trade policy, market access, and trade promotion to support legal and sustainable U.S. fisheries.

Trade-Related Developments at the National Oceanic and Atmospheric Administration

The National Oceanic and Atmospheric Administration's National Marine Fisheries Service (NOAA Fisheries) reorganized its international office in 2022 to become the [Office of International Affairs, Trade, and Commerce](#) (IATC), which includes a new [Trade and Commerce Division](#). The reorganization seeks to address increasing demands related to trade and commerce policy and analysis, to implement new and expanding statutory mandates, to update information technology and analytical capabilities, and to prioritize issues such as seafood trade, seafood competitiveness, and IUU fishing.

IATC will integrate and further develop NOAA Fisheries' capacity to deter IUU fish and fish products and misrepresented seafood from entering into U.S. commerce and promote trade that supports food security and sustainable fisheries. All four NOAA Fisheries import-oriented trade-monitoring programs are now consolidated in IATC to promote functional and operational efficiencies and IT modernization. IATC intends to further develop its capacity to promote U.S. seafood exports, ensure fair market access, shape seafood trade strategies, and enhance global recognition of U.S. seafood as a sustainable choice.

NOAA Fisheries also plays a direct role in facilitating exports through certificates issued by the [Seafood Inspection Program](#). The reorganization of IATC will also help leverage the trade-related aspects of the Seafood Inspection Program, including continuing to engage in the negotiation and issuance of export certificates and efforts to mitigate technical barriers to seafood trade imposed by other countries.

Parallel to the NES, NOAA Fisheries is developing a national strategy to support the resilience and competitiveness of the seafood industry, including both wild-capture and aquaculture products. This broader strategy will focus on how to assist the U.S. seafood industry by addressing challenges related to accelerating changes in ocean conditions due to climate change, labor shortages, and aging harvest, processing, and distribution infrastructure. A robust export strategy will build upon other seafood strategies and the core work of NOAA Fisheries and help the U.S. seafood industry thrive in domestic and international markets.

Coordinate Interagency Efforts on Seafood Trade Policy and Export Promotion

The U.S. seafood industry is diffuse and varied, with diverse interests and constituencies that could benefit from a coordinated agenda. Trade-related authorities for seafood, however, are spread across multiple agencies and bureaus, including NOAA, USDA, the U.S. Food and Drug Administration, and USTR.

These agencies will collaborate on a coordinated approach to identify targeted actions to promote seafood industry exports, engage with industry, and ensure responsible trade in support of broader goals for conservation and sustainable use of marine resources. This will include the creation of an interagency working group focused on the seafood sector to improve collaboration and efficiency in addressing seafood trade concerns and policy initiatives, to design proactive strategies to address existing barriers in support of U.S. industry, and to react quickly when new proposed barriers emerge that could impact broader trade equities or require a response through bilateral channels or World Trade Organization notifications.

Facilitate Trade Strategies and Increase Access to Foreign Markets

Agencies with authorities to conduct or support trade negotiations and facilitate trade will seek opportunities to improve market access for the U.S. seafood industry through high-level support and stronger coordination. NOAA Fisheries, USTR, USDA, and ITA will work together to identify priority market access issues and strategies to address them with relevant interagency partners.

Agencies will develop a more coordinated and systematic approach to addressing priority foreign market access barriers to seafood that will capitalize on opportunities to ensure seafood trade interests are adequately reflected in the negotiation of new trade deals and arrangements and actions are taken to monitor and enforce compliance with existing trade

agreements and facilitate trade and address technical barriers to trade. This will include seeking industry input on priority trade barriers to guide strategies. To date, U.S. seafood industry representatives have identified tariff and non-tariff barriers to U.S. exports in several markets, including Australia, Brazil, Chile, China, the EU, Japan, Peru, Russia, and Taiwan.

With the reorganization of its international office and the establishment of the [Trade and Commerce Division](#), NOAA Fisheries will enhance efforts to provide subject matter expertise to other agencies that have specific trade negotiation and enforcement authorities to help devise strategies and action plans focused on trade barriers identified by the seafood industry. NOAA Fisheries will leverage its enhanced focus on trade and commerce priorities to help channel industry input; identify, assess, and mitigate or eliminate trade barriers that significantly disadvantage U.S. industry; prioritize such barriers through an improved interagency coordination process; and partner with ITA and USTR to advance strategies to address them in foreign government engagements and trade negotiations.

Federal agencies will also work together to facilitate trade through effective certification processes. USDA's Animal and Plant Health Inspection Service and NOAA Fisheries' [Seafood Inspection Program](#) will prioritize work together to develop an agreed-upon approach to managing requirements for animal health attestations as emerging sources of technical barriers to trade, including updating a memorandum of understanding to clarify roles and responsibilities.

NOAA Fisheries has developed a standard export health certificate to be used to negotiate in key export markets as a proactive solution to minimize the burdens of export certification on industry. This standard certificate encompasses all the internationally agreed-upon concerns of food safety and animal health in seafood trade. NOAA Fisheries intends to begin negotiations with a subset of priority countries to prove the concept and align efforts with interagency partners such as USTR, USDA, and ITA. NOAA Fisheries will also seek opportunities to promote acceptance of electronic export certificates and to expedite the process of completing and delivering export health certificates.

Conduct Trade Promotion Activities to Support the U.S. Seafood Industry

The U.S. government has ample resources available to connect the U.S. seafood industry to new markets, promote increased exports, and facilitate trade. Such resources include ITA's [U.S. Commercial Service](#), USDA/ FAS, and State economic officers. For example, using MAP funding, USDA/FAS incentivizes the Alaska Seafood Marketing Institute, the Intertribal Agriculture Council, and SRTGs to collaborate on seafood promotions in priority markets, such as Southeast Asia.

NOAA Fisheries will play a complementary role in identifying priority markets for advancing commercial diplomacy, coordinating strategy, and connecting the U.S. seafood industry with available resources to assist in meeting their export objectives. NOAA Fisheries will engage with federal partners, including ITA's [offices](#) in coastal states and U.S. missions abroad, to actively promote the U.S. seafood industry in priority markets and to identify new export opportunities. NOAA Fisheries will also work alongside ITA, USDA/FAS, and State, including representatives in U.S. foreign missions, to assist in carrying out seafood industry export promotion events and trade missions.

Federal agencies will also explore opportunities to enhance delivery of export promotion programs to minority business enterprises, such as Tribal and small-scale fisheries or aquaculture operations in underserved coastal communities. USDA/FAS provides the Intertribal Agriculture Council with MAP promotional funding for their Tribal seafood exporting companies to participate in international trade shows and trade missions. Additional partnership will be explored, such as a NOAA Fisheries partnership with MBDA.

Improve Outreach and Communications with the Seafood Industry on Trade

NOAA Fisheries intends to design domestic and international outreach strategies to engage relevant operators such as U.S. fishers, processors, distributors, freight forwarders, and seafood dealers. The domestic outreach strategy will ensure that U.S. seafood industry stakeholders are aware of business opportunities, export and import requirements in foreign markets, and existing avenues to highlight and address trade barriers, including ITA's [Office of Trade Agreements Negotiation and Compliance](#). The international outreach strategy would focus on importers of U.S. seafood products to facilitate trade flows and reduce administrative and logistical burdens.

Longer-term, more established mechanisms to consult with the U.S. seafood industry could unlock other opportunities to improve marketing in support of broader trade and commerce objectives. For example, agencies could engage with industry on strategies to market U.S. seafood, with a goal to increase foreign demand for U.S. seafood products, recognize U.S. fisheries and aquaculture as the "gold standard" in resource management, and enhance global confidence in U.S. seafood as legal, safe, high-quality, and sustainable.

Deliver High-Quality Trade Data and Analytics

Improved capacity to sort, analyze, prepare, and share complex trade data to identify relevant trade trends will enhance policymaking related to seafood trade and help identify market challenges and opportunities for growth. Trade data, analytical reporting, and market intelligence related to seafood trade is spread across several agencies, including NOAA, ITA, and USDA. Agencies with seafood-related trade data collection, analysis, and monitoring functions will work together to take stock of existing trade data sources, research, and data gaps in order to identify data trends that could be useful to policymakers and stakeholders. NOAA Fisheries intends to lead efforts to synthesize and develop a central repository of seafood-related trade data, market intelligence, and analytical products that is easily accessible to policymakers and the public, consistent with any applicable confidentiality requirements. NOAA Fisheries plans to develop further online resources for educating seafood industry stakeholders and will seek to implement outreach programs for the private sector that include delivering trade analysis, market access, and export promotion information.

NOAA Fisheries is working on developing and implementing IT tools to improve data collection, analysis, and reporting on global seafood trade flows. The primary goal of the system, currently in a demonstration project stage, is to help verify legitimate trade, deter trade in IUU fish and fish products, and monitor imports to detect high-risk shipments through predictive analytics, artificial intelligence, machine learning, and cloud technology. NOAA Fisheries is also seeking to integrate and synthesize a wide range of seafood trade data to enhance analytics and reporting capacity, particularly for trade monitoring purposes. The system could be expanded to track exports and help analyze trade flows, identify trends that highlight trade opportunities and challenges, automate reporting, and effectively expand analytic capabilities to support seafood trade promotion objectives.

Trade Promotion Coordinating Committee Agencies

- U.S. Department of Commerce
- U.S. Department of State
- U.S. Department of the Treasury
- U.S. Department of Agriculture
- U.S. Department of Energy
- U.S. Department of Transportation
- U.S. Department of Defense
- U.S. Department of Labor
- U.S. Department of the Interior
- U.S. Agency for International Development
- U.S. Trade and Development Agency
- U.S. Environmental Protection Agency
- U.S. Small Business Administration
- U.S. International Development Finance Corporation
- Export-Import Bank of the United States
- Office of the United States Trade Representative
- Council of Economic Advisors
- Office of Management and Budget
- National Economic Council
- National Security Council

Acronyms

AM	Additive Manufacturing
AM-Bench	Additive Manufacturing Benchmark Test Series
ATM	Agribusiness Trade Mission
ATP	Agricultural Trade Promotion
BOP	Balance of Payments
CIBE	Centers for International Business Education
CIP	Classification of Instructional Programs
CLDP	Commercial Law Development Program
CTEP	China and Transformational Exports Program
DFC	United States International Development Finance Corporation
DHS	United States Department of Homeland Security
DOE	United States Department of Energy
DOT	United States Department of Transportation
EDGE	Clean Enhancing Growth and Development
EO	Executive Order
EU	European Union
EXIM	Export-Import Bank of the United States
FAS	Foreign Agricultural Service
FGP	Facility Guarantee Program
FY	Fiscal Year

GDEI	Global Diversity Export Initiative
GDP	Gross Domestic Product
GMF	Global Market Finder
GSM-102	Export Credit Guarantee Program
IAC	Intertribal Agriculture Council
IATC	Office of International Affairs, Trade, and Commerce
ICT	Information and Communications Technologies
IP	Intellectual Property
IPEF	Indo-Pacific Economic Framework for Prosperity
IT	Information Technology
ITA	International Trade Administration
IUU	Illegal, Unreported, and Unregulated
LCA	Life Cycle Assessment
LGBTQ	Lesbian, Gay, Bisexual, Transgender, and Queer
LPO	Loan Program Office
MAP	Market Access Program
MBAMGP	Metals-Based Additive Manufacturing Grant Program
MBDA	Minority Business Development Agency
MCC	Millennium Challenge Corporation
MDB	Multilateral Development Bank
MDCP	Market Development Cooperator Program
MEP	Manufacturing Extension Partnership
MWOB	Minority- and Women-Owned Businesses
NAFSA	Association of International Educators
NCES	National Center for Education Statistics
NES	National Export Strategy
NIST	National Institute of Standards and Technology
NOAA	National Oceanic Atmospheric Administration
OECD	Organization for Economic Cooperation and Development

PGII	Partnership for Global Infrastructure and Investment
R&D	Research and Development
REPP	Regional Export Promotion Program
SBA	United States Small Business Administration
SBDC	Small Business Development Center
SBIR	Small Business Innovation Research
SCORE	Service Corps of Retired Executives
SME	Small- and Medium-Sized Enterprise
SMM	Small- and Medium-Sized Manufacturer
SRTG	State Regional Trade Group
State	United States Department of State
STEM	Science, Technology, Engineering, and Mathematics
STEP	State Trade Expansion Program
TPC	Tourism Policy Council
TRQ	Tariff-Rate Quota
TTC	United States-European Union Trade and Technology Council
UK	United Kingdom
USAID	United States Agency for International Development
USDA	United States Department of Agriculture
USEAC	United States Export Assistance Center
USMCA	United States-Mexico-Canada Agreement
USPTO	United States Patent and Trademark Office
USSA	United States Sustainability Alliance
USTDA	United States Trade and Development Agency
USTR	Office of the United States Trade Representative
VTE	Virtual Trade Event



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