



# How to Write an Effective Export Plan

Doug Barry

International Trade Specialist

[Doug.Barry@trade.gov](mailto:Doug.Barry@trade.gov)



# The One-Page Export Plan





# Export Business Planner

For Your Small Business



# www.sba.gov/exportbusinessplanner

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Chapter Content](#)

## List of Worksheets

### 4. Getting Started: Creating an Export Business Plan

- > Market Expansion: Benefits/Trade-offs
- > Business Analysis
- > Industry Analysis
- > Products with Export Potential
- > Matching Products to Global Trends/Needs
- > Most Penetrable Markets
- > Markets to Pursue
- > Short- and Long-Term Goals

### 5. Developing Your Marketing Plan

- > Market Factor Assessment
- > Your Industry in Target Global Markets
- > Building a Distributor or Agent Relationship
- > Marketing Your Product/Service
- > Marketing Your Product: Identifying Practical Needs
- > Defining Your Marketing Strategy
- > Identifying Customers Within Your Chosen Markets

### 6. Financing Your Export Venture

- > Financing Grid: Financing Your Small Business Export



# The Value of a Plan

- Benefits:
  - Identifies strengths and weaknesses
  - Prevents losing track of export strategy
  - Allows for financing to build up a businesses' export department
  - Enhances communication
  - Assigns responsibility
  - Provides for result measurement



# The Value of a Plan

- Additional Benefits:
  - Challenges assumptions which can give insight into new opportunities
  - Assures a commitment to exporting



# Length of the Plan

- 
- Only needs to be a few pages to start
  - The plan will evolve in detail



# The Planning Process

- Questions to ask yourself (Product or Service):
  - What need does my product or service fill in the global marketplace?
  - What modifications need to be made to adapt to an overseas market?
  - Do I need a special license or certificate from exporter's/importer's government?
  - Do I need to modify my packaging/labeling?
  - How much will it cost to get the product to the market?
  - What will be my pricing strategy?



# The Planning Process

- Questions to ask yourself (Promotional, Management Issues):
  - What modifications will be necessary to my website to ease the purchasing process?
  - What (if anything) is necessary to protect my intellectual property?
  - Why am I pursuing international customers?
  - How can I use the lessons I've learned in my previous international sales experiences to make my new export plan stronger?



# The Planning Process

- Questions to ask yourself (Management Issues)
  - Am I fully committed to exporting?
  - How much time will it take for implementation?
  - Is my production capacity high enough to meet the new demand resulting from international sales?
  - Is my personnel capacity adequate to meet the new demand of international sales?
  - Will I need additional financing?
    - Where will it come from?
    - How can I become familiar with government export assistance finance programs that I may qualify for?



# Small Business Administration Funding Website

<http://www.sba.gov/financialassistance/>

U.S. Small Business Administration  
**SBA**  
Your Small Business Resource

Programs and services to help you start, grow and succeed

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E-PAYMENTS  
SBA DIRECT  
MOST REQUESTED ITEMS  
BUDGET AND

SMALL BUSINESS PLANNER  
**SERVICES**  
TOOLS  
LOCAL RESOURCES

Home > Financial Assistance

Financial Assistance SBA Program Office  GO

> For Borrowers  
> For Prospective Lenders

Whether you're just starting a small business or expanding to take advantage of new opportunities, your business needs the right financing at the right time in order to succeed.

SBA is committed to helping small businesses, which are the backbone of the nation's economy, thrive. Working closely with a wide range of lending partners across the country, SBA has developed a number of financial programs that address the various needs of small businesses.

To find out more about programs that might be right for you, click on one of the links below.

> [For Borrowers](#)  
> [For Prospective Lenders](#)

Please note that SBA does not offer grants to start or expand small businesses. Those grant programs that SBA does offer are primarily designed to expand and enhance organizations that provide small business management, technical, or financial assistance.

[SBA Weekly Lending Report for Major Programs](#)

**SBA** 2009 RECOVERY ACT

HELPING SMALL BUSINESS START, GROW AND SUCCEED



# Export-Import Bank Funding Website

<http://www.exim.gov/products/>

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# The Planning Process

- Questions to ask yourself (Management Issues):
  - What will my export effort cost?
  - What are my projected international sales for the first year?
  - What additional expertise in international trade will I need and where will I get it?
    - Webinars, How-to books, other classes, freight forwarders
  - What sales channels could I use?
  - How will I handle returns or warranty issues?



# The Planning Process

- Questions to ask yourself (Management Issues)
  - Will I attend any trade shows or join any trade missions sponsored by the government for which I will need to plan for in the first year?
    - Where will I get information on these events?

# Trade Shows Website

<http://www.export.gov/tradeevents/index.asp>

The screenshot shows the 'export.gov' website with the tagline 'Helping U.S. Companies Export'. The navigation bar includes 'Opportunities', 'Solutions', 'Locations', 'FAQ', 'Blog', and 'Connect'. The main content area is titled 'Trade Events' and provides information about trade events, including a searchable list and related topics like 'Involved in Trade Shows?'.

**export.gov**  
Helping U.S. Companies Export

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↑ Opportunities Solutions Locations FAQ Blog Connect

Home > Trade Events Print | E-mail Page

**Trade Events**

- Trade Events Home
- Agriculture Trade Events
- Specialty Event Listings
- Export Finance Seminars
- Licensing Seminars

**Related Topics**

- Trade Show Audits
- Basics: Locating Buyers
- Private Trade Shows

**Trade Events**

Trade Events provide venues for U.S. exporters to meet international buyers, distributors, or representatives.

By organizing trade missions and educational seminars; providing matching or export counseling services at trade shows; and recruiting buyer delegations to U.S. trade shows, the U.S. Government helps U.S. exporters expand global sales at trade events.

- [Learn more about Certified Trade Missions](#)

***The Export.gov Trade Events List***

This [searchable list](#) includes all official trade missions and trade events sponsored by the International Trade Administration of the U.S. Department of Commerce.

This listing does not include any events for Agricultural goods. Find the link on the right menu to Agricultural trade events and other specialty calendars and trade event programs.

- [Search Export.gov Trade Events](#)

***Involved in Trade Shows?***

Learn about services that increase your global exposure and assist U.S. exhibitors with international sales.

- [International Buyer Program](#)
- [Trade Fair Certification](#)

# Trade Shows list example from Export.gov: Mining Industry

## Event Information By Type For International Trade Fair

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### August , 2013

World Mining Congress & Expo -- multiple industry sectors

**Location/Date:** Montreal, Canada 8/11/2013 - 8/13/2013

#### Contacts:

Connie Irrera, Montreal  
Commercial Specialist  
Phone: 514/398-9695, ext. 2262, direct line 514/908-3662  
[Connie.Irrera@trade.gov](mailto:Connie.Irrera@trade.gov)

Connie Smith, Calgary  
Commercial Assistant  
Phone: 403-265-2116  
[Connie.Smith@trade.gov](mailto:Connie.Smith@trade.gov)

Matt Baker, North Texas  
International Trade Specialist  
Phone: 817-684-5347  
[Matt.baker@trade.gov](mailto:Matt.baker@trade.gov)

### August , 2013

CSA Annual Meeting 2013 China Dental Show -- Dental Eq.

**Location/Date:** Shanghai, China 8/15/2013 - 8/18/2013

#### Contacts:

Lisa Huot, Trade Event Programs  
Senior International Trade Specialist  
Phone: 202-482-2796  
[Lisa.Huot@trade.gov](mailto:Lisa.Huot@trade.gov)

Sarah Fox, Shanghai  
Commercial Officer  
Phone: 86-21-6279-8598  
[Sarah.Fox@trade.gov](mailto:Sarah.Fox@trade.gov)

Beth Casson, Reed Exhibitions

Phone: 203.840.5308  
[bcasson@reedexpo.com](mailto:bcasson@reedexpo.com)

# U.S. Trade Missions Website

<http://www.export.gov/ctm/index.asp>

The screenshot shows the export.gov website interface. At the top left is the logo "export.gov" with the tagline "Helping U.S. Companies Export". To the right of the logo are links for "Register | Manage Account" and a search bar with the text "Search Our Site" and a "Search" button. Below the search bar is a link for "Advanced Search". A navigation bar contains links for "Opportunities", "Solutions", "Locations", "FAQ", "Blog", and "Connect". The main content area is titled "Certified Trade Missions" and includes a "CTM Main Topics" sidebar with links to "CTM Home", "Conditions of Participation", "Planning Guidelines", "Federal Register Notice", "CTM vs Trade Mission", "Organizers' Application", "Standards", and "Presentation". The main text explains what Certified Trade Missions are, their purpose, and provides contact information for Karen Dubin at the International Trade Administration's U.S. Foreign and Commercial Service.

**export.gov**  
Helping U.S. Companies Export

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**CTM Main Topics**

- ▶ [CTM Home](#)
- ▶ [Conditions of Participation](#)
- ▶ [Planning Guidelines](#)
- ▶ [Federal Register Notice](#)
- ▶ [CTM vs Trade Mission](#)
- ▶ [Organizers' Application](#)
- ▶ [Standards](#)
- ▶ [Presentation](#)

## Certified Trade Missions

### What Are Certified Trade Missions?

U.S. and Foreign Commercial Service Certified Trade Missions (CTMs) are overseas events planned, organized, recruited, and led by private and public sector export-oriented groups outside of the U.S. Department of Commerce. CTMs are hosted by the U.S. Department of Commerce's overseas Commercial Service offices.

CTMs bring representatives of U.S. companies into contact with potential agents, distributors, joint venture partners, licensees, local businesses, and government contacts.

CTMs typically include the following:

- one-on-one business appointments
- market briefings
- networking receptions
- selective sessions on local business practices, site visits, or seminars

U.S. Commercial Service posts in the targeted markets provide guidance to the sponsoring organization (the organizer) and the participating companies. The posts also provide trade promotion focused services to the organizers which are mutually agreed upon during the application phase of the trade mission. Mission budgets and parameters, once agreed upon in the [Certified Trade Missions Application for Mission Organizers](#), are finalized by a signed Participation Agreement. The agreement commits both the CTM organizers and the posts to specific responsibilities laid out in the [Conditions of Participation](#).

For more guidance on organizing Certified Trade Missions, please explore our available [program standard](#), [planning guidelines](#), and [presentation materials](#).

To learn even more about CTMs, please contact Karen Dubin at the Global Trade Programs Office of the International Trade Administration's U.S. Foreign and Commercial Service. She can be reached at [Karen.Dubin@trade.gov](mailto:Karen.Dubin@trade.gov), or at (202) 482-3786.



# The Planning Process

- Questions to ask yourself (Management Issues)
  - What credit policies will I use
    - Cash in advance? Letters of credit?
  - How will I ship the product?
    - Freight forwarder? Postal service? Air/Sea? Customer's Responsibility?
  - How will I make use of government export assistance programs?
    - USEACs (in your state)
  - What documents will I need to become familiar with to export?
    - AES
    - Certificates of Origin



# The Planning Process

- Questions to ask yourself (Management Issues)
  - What countries am I prohibited from exporting to?
  - What countries require a license to export my good to?
  - What is the minimum order I will sell and ship?
    - One unit? One container? One box?
  - What will be the elements of my Export Action Plan?



# Part 1: The Introduction

- Name of your company
  - Solar Sells
- Product to be exported
  - Solar Panels
- Why you are going to begin exporting
  - A mission statement
- Limit to a few paragraphs





## Part 2: Goals

- Examples:
  - Use ecommerce to increase company sales by 5% in two years
  - Participate markets outside of the U.S., where 97% of buyers live
  - Improve product lines, marketing and management by learning from discerning customers in the new markets where we will sell
  - Locate one new country distributor in two new country markets within two years of selling via my website, eBay, etc.

# Part 3: Financial Resources



- Examples:
  - Annual capital budget of \$15,000, which will cover assistance finding distributors and participation in a government-sponsored trade show or overseas trade mission
  - A decent web site that will be further internationalized with the help of the CS and others
  - A half-time staff position

# Part 4: Non-Financial Resources



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*Department of Commerce*

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- Examples:
  - Several staff members have travelled abroad
  - One staff member will take courses on how to export
  - One staff member will research free and low-cost government export assistance

## Part 5: Current Trends and Practices

- Examples:
  - Revenues have grown 4 percent for the past four years
  - Our product is sold via the Internet and through a network of domestic distributors
  - Occasional unsolicited international sales, all to individual buyers but with a few inquiries from potential distributors

## Part 6: Production Capacity

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- An example:
  - Capacity to increase production 30 percent without additional capital investment.
- Customize for your business and products



# Part 7: Target Markets

- **Examples:**

- Will pursue all leads generated by export.gov website and will also investigate Singapore as a regional market for Southeast Asia
- Will investigate Singapore and other country markets for solar panels by using available market research including those from government sources
- Will look at past 4 years for effects of recession and 2010 partial year for signs of recovery
- Will look at U.S.-Free Trade Agreement countries for advantages created by zero tariff on importation of goods
- Will look at shipments of solar panels from the U.S. to other countries and the average selling price to help determine where the demand is and whether I'm price competitive
- Will look at market size, GDP, national debt and currency reserves
- Will ask US Commercial Service to help find a distributor

# U.S. Market Research Website

<http://www.export.gov/mrktresearch/index.asp>

The screenshot shows the export.gov website interface. At the top left is the logo "export.gov" with the tagline "Helping U.S. Companies Export". To the right of the logo is a navigation area with "Register / Manage Account" and a search box labeled "Search Our Site" with a "Search" button and a link to "Advanced Search". Below this is a dark blue navigation bar with white text for "Opportunities", "Solutions", "Locations", "FAQ", "Blog", and "Connect", preceded by a home icon. The main content area is divided into a left sidebar and a main column. The sidebar has two sections: "Market Research" with links like "Market Research Home", "Market Research Basics", "Learn to Benefit from FTAs", "Webcasts on Exporting", "Country & Industry Webinars", "Order Custom Research", and "Other Sources of Info"; and "Related Topics" with a link for "Information by Country". The main column features a "Market Research" heading, followed by introductory text about market entry, a paragraph about focusing on two or three best-prospect markets, a "Market Research" sub-heading, and text describing the U.S. Commercial Service Market Research Library. A bulleted list of library contents includes "Country Commercial Guides", "Industry Overviews\*", "Market Updates\*", "Multilateral Development Bank Reports\*", "Best Markets\*", and "Industry/Regional Reports\*". A footnote explains that these reports are available only to registered users. The section concludes with a heading for "Agricultural Goods Market Research Reports" and text about crop reports, export statistics, and the National Agricultural Library.

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**Market Research**

- ▶ [Market Research Home](#)
- ▶ [Market Research Basics](#)
- ▶ [Learn to Benefit from FTAs](#)
- ▶ [Webcasts on Exporting](#)
- ▶ [Country & Industry Webinars](#)
- ▶ [Order Custom Research](#)
- ▶ [Other Sources of Info](#)

**Related Topics**

- ▶ [Information by Country](#)

**Market Research**

Plan your market entry the right way – use market research to learn your product's potential in a given market, the best prospects for success, and the market's business practices before you first export.

If you're just beginning to sell internationally, narrow your focus by concentrating on no more than two or three best-prospect markets. Use our [Step-by-Step](#) research guidelines to get started.

**Market Research**

Access the U.S. Commercial Service Market Research Library containing more than 100,000 industry and country-specific market reports, authored by our specialists working in overseas posts.

The Library Includes:

- [Country Commercial Guides](#)
- [Industry Overviews\\*](#)
- [Market Updates\\*](#)
- [Multilateral Development Bank Reports\\*](#)
- [Best Markets\\*](#)
- [Industry/Regional Reports\\*](#)

\* These market research reports are available only to U.S. companies and students/researchers that are registered with Export.gov. Register above to get access.

**Agricultural Goods Market Research Reports**

Market research, crop reports, export statistics, and the National Agricultural Library -- all focusing on exporters of agricultural goods and commodities. Market reports on processed and finished agricultural products can also be found in the "Country and Industry Market Reports" above.

# Census Bureau Market Statistics

## USA Trade Online Quick Reference

Data Product	Dimensions	Commodity	Measures	Time Periods
<b>District Level</b> (10-digit HS)	Commodity Country District Measures Time	10-digit HS	Value Quantity Unit Price	Monthly & Year-to-Date: 2002 – present Annual: 1992 – present
<b>Port Level</b>	Port/District Commodity Country Measures Time	6-digit HS	Value Air Value Air Shipping Weight Vessel Value Vessel Shipping Weight Containerized Vessel Value Containerized Vessel Shipping Weight	Monthly, Annual & Year-to-Date: 2003 - present
<b>State Exports</b>	State Commodity Country Measures Time	6-digit HS 4-digit NAICS	Value Air Value Air Shipping Weight Vessel Value Vessel Shipping Weight Containerized Vessel Value Containerized Vessel Shipping Weight	Monthly, Annual & Year-to-Date: 2002 - present
<b>NAICS</b>	Commodity Country District Measures Time	6-digit NAICS	Total Export Value Foreign Export Value Domestic Export Value General Customs Import Value General CIF Import Value Consumption Customs Import Value Consumption CIF Import Value Balance (Total Export Value – General Customs Import Value)	Monthly, Annual & Year-to-Date: 2002 - present

\*Unless otherwise specified Value is Total Export Value and General Customs Import Value

(Note: Data in following slide taken from the USA Trade Online/Census Bureau demo page, and so is dated 2002-2003. Current information is available via a subscription to this service, currently costing \$75/month and \$300/year)

# Census Bureau Market Statistics

[www.usatradeonline.gov](http://www.usatradeonline.gov)

**USA Trade** *Online*
Reports ? Help ABC Tutor

**Select dimensions**

- Commodity
- Country
  - District
- Measures
- Time

= Members selected

**Standard Report - Annual Exports - \*DEMO\***  
 Author: US Bureau of the Census: Foreign Trade Division USA Trade ® Online. Source: U.S. Import and Export Merchandise trade statistics. For information on confidentiality protection, nonsampling error, and definitions, see [technical documentation](#).  
 Current date: 10/14/2010 9:21:21 AM

Rows 1-50 of 244 [·] Columns 1-8 of 8

Commodity	All Commodities							
	December 2003 YTD				2002			
	Value (Dollars)		Quantity		Value (Dollars)		Quantity	
Country	↑ ↓	↑ ↓	↑ ↓	↑ ↓	↑ ↓	↑ ↓	↑ ↓	
Andorra	8,190,342			10,993,901				
Angola	490,609,324			374,047,169		13,528	27	335
Anguilla	21,489,983			19,865,469				
Antigua and Barbuda	127,313,765			81,359,228		3,210	10	
Argentina	2,437,303,964			1,585,395,999		885,878	10,093	55
Armenia	102,784,291			111,846,797				
Aruba	355,009,130			464,581,524				3
Australia	13,087,602,344			13,084,993,973		2,856,952	325,832	3,289
Austria	1,768,422,220			2,427,417,649		213,103	581	586
Azerbaijan	119,781,779			69,640,881				
Bahamas	1,074,693,697			975,309,133		8,526	6	187
Bahrain	508,402,431			419,331,501		4,045	5	7
Bangladesh	225,884,184			269,061,189		128,640	804	326
Barbados	300,095,183			267,646,245				
Belarus	84,064,237			19,070,983				
Belgium	15,236,053,747			13,325,845,798		24,498,585	41,421	3,242
Belize	198,808,473			137,666,560		10,395	18	
Benin	30,150,963			35,152,791		8,643	30	
Bermuda	401,152,475			415,094,319				5
Bhutan	1,008,122			954,565				
Bolivia	182,749,531			192,068,280		72,750	725	31
Bosnia-Herzegovina	21,164,794			31,670,712				
Botswana	25,867,334			31,700,742				
Brazil	11,211,988,950			12,275,937,777		1,452,560	7,880	5,000

# World Bank Statistics/Forecasts Website

<http://go.worldbank.org/PF6VWYXS10>

The screenshot shows the World Bank's website for the 'Global Economic Prospects' report, Summer 2010. The page features a navigation menu at the top with categories like 'About', 'Countries', 'Data & Research', 'Learning', 'News', 'Projects & Operations', 'Publications', and 'Topics'. A search bar is present with the text 'Prospects for the Global Economy'. The main content area is titled 'Global Economic Prospects Summer 2010' and includes a 'Key messages' section with a bulleted list of points regarding the global recovery, Europe, fiscal policy, and aid flows. A 'Global outlook summary table' section is also present, along with a 'Debt crisis' section. On the right side, there is a 'Global Economic Prospects Summer 2010: Fiscal Headwinds and Recovery' section with a photo of a road and links to the complete report and regional analyses. A 'Related links' section at the bottom right contains links for 'Feature story', 'Press release', and 'Multimedia'.

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About Countries Data & Research Learning News Projects & Operations Publications Topics

Global Economic Prospects  
Published June 10, 2010

Search Prospects for the Global Economy GO

Home > Data & Research > Prospects > Prospects for the Global Economy Email

## Global Economic Prospects

Summer 2010 Published June 10, 2010 Print

### Key messages

The global recovery is moving into a more mature phase led by growing domestic demand.

- However, conditions in Europe may derail the recovery.
- A more rapid adjustment of fiscal policy would be better for developing countries.
- A decline in aid flows could have serious consequences for the poorest countries.
- [More...](#)

### Global outlook summary table

A table summarizing the forecast. More detailed information is available [here](#).

### Debt crisis

So far, the uncertainty about the sustainability of fiscal positions in several high-income European countries (EU-5) has had limited impacts on developing countries. While stock markets have declined, spreads and credit default swaps for most countries have remained stable. So far industrial production and trade continue to expand rapidly. [More...](#)

### Financial markets

Financial markets have recovered from their lows in

### Global Economic Prospects Summer 2010: Fiscal Headwinds and Recovery

Global Economic Prospects—Summer 2010  
FISCAL HEADWINDS AND RECOVERY

[Complete report](#) [Main analysis](#) [Topical Appendix](#)

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### Related links

[Feature story](#)  
[Press release](#)  
[Multimedia](#)

**Site Tools**

- ▶ Regional detailed forecasts
- ▶ Commodity forecasts
- ▶ Commodity briefs



# Part 8: Your Risk Profile

- Customized for your business
- Example:
  - Our risk is mostly centered on non-payment or goods held up in foreign customs. Our cash in advance policy largely mitigates risk. As we get close to finding one or more distributors, we plan to use the services of our government export promotion service. By better understanding the shipping and export documentation processes, we will minimize potential risk from customs clearance problems.



# Part 9: Credit Policies

- Examples:
  - Cash in advance via debit or credit card
  - Will check with card issuer to make sure account is in good order before shipping goods
  - Will consider and investigate providing terms for sales to distributors
  - Will become familiar with letters of credit for use with larger orders from distributors



# Part 10: Return Policies

- Customize for each product
- Example:
  - Will provide full refund or replacement for lost goods or goods damaged in transit, Web site will reflect policy



# Part 11: Shipping

- Examples:
  - Staff will handle shipping tasks and will ship within 24 hours of receiving order and verifying payment
  - We will primarily ship by air and will select an express carrier and will also offer the postal service as a lower cost option
- Sample shipping services:
  - USPS
  - DHL
  - UPS
  - FedEx

# Shipping Websites

[https://wwwapps.ups.com/tradeability?loc=en\\_US](https://wwwapps.ups.com/tradeability?loc=en_US)

The screenshot shows the UPS TradeAbility International Tools interface. At the top, there's a navigation bar with 'United States' and 'Log In' options. Below that, a menu includes 'My UPS', 'Shipping', 'Tracking', 'Freight', 'Locations', 'Support', and 'Business Solutions'. The main content area is titled 'UPS TradeAbility International Tools' and includes a brief description of the service. A sidebar on the left lists various shipping-related actions like 'Create a Shipment', 'View History', and 'Estimate Landed Cost'. The main content area features two primary tool sections: 'Estimate Landed Cost' and 'Screen for Denied Parties'. The 'Estimate Landed Cost' section includes a form with dropdown menus for 'Ship To Country' (set to United States) and 'Ship From Country' (set to Select One), along with a 'Next' button. The 'Screen for Denied Parties' section has a form for 'Enter Company and/or Name' with fields for 'Company Name', 'Contact Name', and 'Select Country'. A search support section is also visible at the bottom left.

[https://www.fedex.com/GTM?cntry\\_code=us](https://www.fedex.com/GTM?cntry_code=us)

The screenshot displays the FedEx Global Trade Manager (GTM) interface. The top navigation bar includes 'Español', 'Customer Support', 'FedEx Locations', and a search bar. Below the navigation, there are tabs for 'Package/Envelope', 'Freight', 'Expedited', and 'Office/Print Services'. The main content area is titled 'FedEx Global Trade Manager' and features a list of tools: 'FedEx International Tools', 'SED/Electronic Export Information', 'FedEx Trade Networks', 'International Resource Center', and 'Product Profiles'. A section titled 'Select the tool you need or check more than one to combine several tools then press "Go".' includes checkboxes for 'Find International Documents', 'Shipping Advisories', 'Estimate Duties and Taxes', 'Denied Party Screening', and 'Country Profiles'. A 'Go' button is located at the bottom right. A sidebar on the left promotes 'Learn to export from the experts' with a 'Free Training' offer and a 'View the Demo' link.

<http://www.dhl-usa.com/home/home.asp>

The screenshot shows the DHL USA website homepage. The top navigation bar includes 'Ship', 'Track', 'Services', 'About DHL', and 'Help'. The main content area is titled 'Welcome to DHL' and features a large image of a DHL carrier. Below the image, there's a 'Get it there' section with a 'Get a quote' button and a form for 'Origination Information' and 'Destination Information'. The 'Destination Information' section includes a radio button for 'Current recipients' and a dropdown menu for 'Country' (set to RUSSIA). A 'Track it' section is also visible, along with a 'REQUEST A DHL ACCOUNT TODAY' button. The bottom of the page includes a 'Log in to DHL' section with fields for 'User ID' and 'Password', and a 'Drop-off & Pickup' section with a list of actions like 'Find drop-off locations' and 'Schedule a pickup'.

<http://www.usps.com/international/intlresourcecenter.htm>

The screenshot displays the USPS International Resource Center website. The top navigation bar includes 'HOME', 'CUSTOMER SERVICE', and 'SIGN IN'. Below the navigation, there's a search bar and a list of services: 'Business', 'Household', 'Buy Stamps & Shop', 'All Products & Services', and 'About USPS & News'. The main content area is titled 'International Resource Center' and features a list of resources: 'Service Updates', 'International Shipping Instructions', 'Addressing International Mail', 'Customs', 'International Inquiries and Claims', 'International Extra Services', 'International Price Calculator', 'International Forms', 'International Mail Manual', and 'Order Supplies Online'. A sidebar on the right includes sections for 'Price Tables', 'Prices by Destination', and 'Find a Qualified Postal Wholesaler near you!'.



# Part 12: Freight Forwarder

- What will the forwarder do?
- What will it cost?
  
- Look for local licensed freight forwarders



# Customs Brokers and Forwarders Association of America

<http://www.ncbfaa.org/findmembers/?navItemNumber=493>



[Login](#) [Become a Member](#) [Advertise](#) [Contact Us](#)

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[Associate Members](#)

[Home](#) > [Find Members](#)

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## Welcome to NCBFAA's Member Search

To find a customs broker or freight forwarder, click on the words "Membership Directory," left side of the page, just below the NCBFAA logo. You may search by city, state and/or member name.

If you need a service or product under one of these categories, click on the words "Affiliate Members," left side of the page, just below the words "Membership Directory," to find it.

- Reciprocal Association
- Carriers & Agents
- Computer Services
- Customs & Trade Services
- Executive Recruiters
- Forms/Business Supplies
- Financial
- Inspections & Repair Services
- Insurance Bonding
- Legal Services
- Management Consultants
- Ports & Port Authorities
- Publications
- Specialized Services
- Trucking
- Warehouse Services





# Part 13: Export Licenses

- Generally not needed if product is coming from the United States
- Only about 5% of U.S. exports require a license
- Check for exporter responsibilities under U.S. law



# Bureau of Industry and Security

<http://www.bis.doc.gov/licensing/index.htm>



Where Industry and Security Intersect

[What's New](#) | [Sitemap](#) | [Search](#)

About BIS	<a href="#">Home</a> > Licensing
News	
Policies And Regulations	
Licensing	
Export Control Basics	
Licensing Guidance	
Frequently Asked Questions (FAQs)	
Multilateral Export Control Regimes	
SNAP-R (On-Line Submissions)	
Compliance And Enforcement	
Seminars And Training	
International Programs	
Defense Industrial Base Programs	

A primary mission of BIS is the accurate, consistent and timely evaluation and processing of licenses for proposed exports and re-exports of goods and technology from the United States. BIS' objective is to protect U.S. national security, foreign policy, and economic interests without imposing undue regulatory burdens on legitimate international trade. This section of our Web site is designed to assist visitors through the export licensing process and provides important information that individuals and firms need to know before exporting.

<a href="#">Export Control Basics</a>	This page is designed to help people who are new to exporting, and, in particular, new to export controls, gain a basic understanding of our regulations and how to use them.
<a href="#">Commodity Classifications</a>	What is a commodity classification and how do I know if I need one?
<a href="#">Commodity Jurisdiction Determination</a>	What is a Commodity Jurisdiction request, When and How do I submit one?
<a href="#">Deemed Exports</a>	What are "deemed" exports and how do I apply for a license?
<a href="#">SNAP-R Electronic Licensing</a>	<b>SNAP Redesign.</b> SNAP-R includes enhanced security, the ability to attach supporting documentation electronically, user access rights, and the ability for BIS Licensing Officers to view work items and supporting documents electronically along with all the functionalities you came to expect from SNAP. <b>NEW</b>
<a href="#">Tracking Your Application (STELA)</a>	STELA is an automated system that provides detailed BIS work item status information that can be accessed using either a touch-tone phone or the internet
<a href="#">Acronyms</a>	A list of acronyms commonly used in the Bureau of Industry and Security.



# Part 14: Health Certificates

- Product may require a health certificate issued by U.S. state or federal government
- FDA Website



# Example: FDA Cosmetic Exports

<http://www.fda.gov/Cosmetics/InternationalActivities/ImportsExports/CosmeticExports/default.htm>

The screenshot shows the FDA website page for Cosmetic Exports. The header includes the U.S. Department of Health & Human Services logo and the FDA logo. A navigation bar contains links for Home, Food, Drugs, Medical Devices, Vaccines, Blood & Biologics, Animal & Veterinary, Cosmetics, Radiation-Emitting Products, and Tobacco Products. The main content area is titled "Cosmetic Exports" and includes a list of questions such as "Is my product really a cosmetic under the law?" and "What types of cosmetic certificates does FDA issue, and how do I obtain them?". A sidebar on the left contains a navigation menu with "International Activities", "Imports & Exports", and "Cosmetic Exports", and a "Resources for You" section with a link to "Office of Cosmetics and Colors 'Certificate' Export Application (PDF - 89KB)".

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

FDA U.S. Food and Drug Administration

A-Z Index Search  go

Home | Food | Drugs | Medical Devices | Vaccines, Blood & Biologics | Animal & Veterinary | Cosmetics | Radiation-Emitting Products | Tobacco Products

**Cosmetics** [+ Share](#) [✉ Email this Page](#) [🖨 Print this page](#) [🔍 Change Font Size](#)

Home > Cosmetics > International Activities > Imports & Exports

**International Activities**

**Imports & Exports**

▶ **Cosmetic Exports**

**Resources for You**

- Office of Cosmetics and Colors "Certificate" Export Application (PDF - 89KB)

**Cosmetic Exports**

Is my product really a cosmetic under the law?  
What types of cosmetic certificates does FDA issue, and how do I obtain them?  
How much does a cosmetic certificate cost?  
How long will it take to process my cosmetic certificate request?  
Are there other sources of cosmetic certificates, besides FDA?  
Do exported cosmetics have to comply with the FD&C Act and FPLA?  
What if my product is a drug or medical device?  
Does FDA issue any other types of cosmetic certificates?  
Does a certificate mean FDA approval?  
How do I learn other countries' requirements?  
How do I learn about other U.S. government requirements for exports?

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Firms exporting products from the United States (U.S.) are often asked by foreign governments or customers to supply a "certificate" as a required part of the process to import a product into their country. Please note:

- FDA does not require that you obtain an export certificate,
- FDA is not required by law to issue certificates for cosmetics (although the agency intends to continue to provide this service as resources permit), and
- FDA does not issue certificates for cosmetics manufactured outside the U.S.**

If you export cosmetics, it is your responsibility to--



# Part 15: Language Laws

- Be sure that the product packaging includes all necessary languages
- Consumer goods may require that ingredients are displayed and that the phrase “Made in the U.S.” is included in the national language on the packaging



## Part 16: My HS, Schedule B, or HTS Number

- Check the census bureau to find out your product's number
- Example:
  - 8541.40.6020 : Solar Cells Assembled Into Modules Or Panels



# 3CE: Census Schedule B/HS Classification engine

<http://uscensus.prod.3ceonline.com/#/p=0>

## Schedule B Search Engine

My product is:    Use Spell Checker?

The more you tell us about your product, the easier it will be for 3CE to find its HS code.

[Search by Code](#) | [Help](#) | [Terms of use](#)

### Examples:

- Ladies cotton knitted top
- Wooden upholstered chair
- Bed sheet, cotton, woven, not printed
- Table lamp, with fabric shade
- Table runner, woven, polyester
- Hand woven wool rug pile construction

Send Feedback

### Need Help? Contact us at:

Email: [ftd.scheduleb@census.gov](mailto:ftd.scheduleb@census.gov)

Phone: 1-800-549-0595 option #2

Web Site: <http://www.census.gov/trade>

Powered by 

# Part 17: Intellectual Property

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- Examples:
  - Will investigate international protection for my trademark with the U.S. Patent and Trademark Office
  - Will file for patent protection in countries where I have distributors or retailers



# USPTO Website

<http://www.uspto.gov/>



## United States Patent and Trademark Office

An Agency of the Department of Commerce

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SEARCH:

HOW DO I:

[About USPTO](#) [Patents](#) [Trademarks](#) [IP Law & Policy](#) [Products & Services](#) [Careers](#) [Inventors](#) [News & Notices](#) [eBusiness/Alerts](#) [FAQs](#) [For Kids](#)

### USPTO Reorganizes Operational Structure



USPTO Director David Kappos announced that, effective October 1, the USPTO is reorganizing its operational structure to strengthen the agency's management, communications and policy functions in accordance with the goals set forth in its 2010-2015 Strategic Plan, the text of which is available on the USPTO Web site and which will be available in final format in the coming weeks.

[» Read More](#)



### USPTO Self Service

Information Services and Data Products:



### Patents

- 1 Patents Process**  
Visit the Patents Process page
- 2 Search**  
Search patent databases
- 3 View Fee Schedule**  
Check on the current fees and information related to the patent process
- 4 File Online**  
Apply for a patent using the Electronic Filing System (EFS-Web)

### Trademarks

- 1 Trademark Basics**  
Read Basic Information and View Instructional Videos
- 2 Search Marks**  
Search pending and registered marks (TESS)
- 3 File Forms Online**  
File application and other documents online (TEAS)
- 4 Check Status**  
Check the status of an application or registration (TARR)

### IP Law & Policy

- 1 IP Policy and Enforcement**  
USPTO leads efforts to develop and strengthen both domestic and international IP protection
- 1 Training and Education**  
The Global IP Academy (GIPA) offers IP related programs around the world
- 1 Boards and Counsel**  
General Counsel, Office of the Solicitor, Office of General Law, Office of Enrollment and Discipline, Board of Patent Appeals and

# Part 18: Export Documents

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- Example:
  - What are the documents I need to be familiar with including the Commercial Invoice, Bill of Lading, and Certificates of Origin?
  - Check Trade Information Center and U.S. Census websites

# Export.gov Relevant Pages

## Common Export Documents

[http://www.export.gov/logistics/eg\\_main\\_018121.asp](http://www.export.gov/logistics/eg_main_018121.asp)



**export.gov**  
Helping U.S. Companies Export

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Q Search Our Site Search  
Advanced Search

Home > International Logistics Print | E-mail Page

**International Logistics**

- Int'l Logistics Home
- Freight Forwarder
- Schedule B and HS Number
- Tariffs and Import Fees
- Common Export Documents

**Related Topics**

- FAQs
- Learn to Benefit from FTAs
- NAFTA Certificate of Origin
- Automated Export System
- Basic: Logistics
- Shipping
- Inspections
- Incoterms
- Glossary of Shipping Terms (PDF)
- Corporate Partners to Assist You

**Common Export Documents**

The Section covers to documents that are commonly used in exporting, but specific requirements vary by destination and product. It is divided in the following sections: common export-related documents, certificates of origin, other certificates for shipments of specific goods, Export licenses and Temporary shipment documents. For assistance with country-specific documentation requirements, please contact the **Trade Information Center at 1-800-USA-TRADE.**

Common Export Documents

Certificates of Origin

Other Certificates for Shipments of Specific Goods

Export Licenses

Other Export Related Documents

Temporary Shipments

**Common Export Documents**

**Airway Bill**

Air freight shipments require Airway bills, which can never be made in negotiable form (see sample). Airway bills are shipper-specific (i.e. USPS, Fed-Ex, UPS, DHL, etc).

**Bill of Lading**

A contract between the owner of the goods and the carrier (as with domestic shipments). For vessels, there are two types: a

## NAFTA Certificate of Origin

[http://www.export.gov/logistics/eg\\_main\\_018131.asp](http://www.export.gov/logistics/eg_main_018131.asp)



**export.gov**  
Helping U.S. Companies Export

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**International Logistics**

- Int'l Logistics Home
- Freight Forwarder
- Schedule B and HS Number
- Tariffs and Import Fees
- Common Export Documents

**Related Topics**

- FAQs
- Learn to Benefit from FTAs
- NAFTA Certificate of Origin
- Automated Export System
- Basic: Logistics
- Shipping
- Inspections
- Incoterms
- Glossary of Shipping Terms (PDF)
- Corporate Partners to Assist You

**North American Free Trade Agreement (NAFTA) Certificate of Origin**

Before you begin to fill out the NAFTA Certificate of Origin form you should have the following information

- Determine **when to use** Certificate of Origin ( Form 434 )
- Have the exporter's tax identification number\* and address
- Have the producer's tax identification number and address
- Have the importer's tax identification number and address
- Find your **HS classification number**
- Determine your **preference criterion**
- Have the producer's tax identification number and address

Please see the instructional videos, NAFTA Certificates of Origin Part 1 and Part 2.

With this information you can fill out the **NAFTA Certificate of Origin**.

\*What is the Tax Identification Number?

- Canada: the employer number of importer/exporter assigned by the Canada Customs and Revenue Agency;
- Mexico: the federal taxpayer's registry number (RFC);
- United States: the employer's identification number or Social Security Number.



# Export.gov Basic Guide to Exporting

<http://export.gov/basicguide/>

## export.gov

Helping U.S. Companies Export

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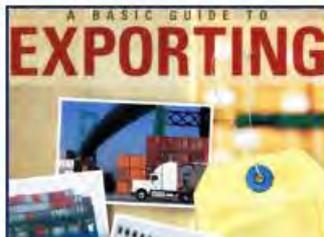
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### Basic Guide

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- ▶ [Reviews and Testimonials](#)
- ▶ [Bibliographic Information](#)

### Related Topics

- ▶ [Learn About Export Basics](#)
- ▶ [State Export Data](#)
- ▶ [Exporting Fact Sheet](#)
- ▶ [Success Story Archive](#)



## Welcome to Exporting 101

Looking for a comprehensive overview of how to export? For more than 70 years, *A Basic Guide to Exporting* has been the resource that businesses have turned to for answers to their questions about how to establish and grow overseas markets for their products and services. Whether your firm is new to exporting or in need of a refresher on the latest ideas and techniques, this comprehensive guide, now completely revised and updated, provides the nuts-and-bolts information you will need to meet the challenges of the world economy by examining:

- How to identify markets for your company's products
- How to finance your export transactions
- The best methods of handling orders and shipments
- Sources of free or low-cost export counseling

You'll also find numerous real-life examples that illustrate the principles of exporting, samples of forms needed to export, and—in a valuable appendix—information on how to obtain guidance and counseling offered by the federal government through its domestic network of more than 100 Export Assistance Centers and through commercial counselors located in U.S. embassies abroad.

*A Basic Guide to Exporting* is available for purchase from the [U.S. Government Bookstore](#).

- [Read Sample Chapters](#)
- [Download an Order Form](#)
- [Read Reviews and Testimonials](#)
- [Bibliographic Information](#)

Or, to order by telephone, please call (866) 512-1800.



# U.S. Census Bureau Export Help Videos

<http://www.census.gov/foreign-trade/aes/exporttraining/videos/>

U.S. Census Bureau People | Business | Geography | Newsroom | Subjects A to Z | Search@Census

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**FOREIGN TRADE STATISTICS** [FTD Links] Select a topic and click GO.  Go

[MAIN: About Foreign Trade](#) | [Data](#) | [A.E.S.](#) | [Regulations](#) | [Reference](#) | [Definitions](#) | [Schedule B](#) | [FAQs](#) | [Feedback](#) | [Search](#)

[AES: Getting Started](#) | [Document Library](#) | [Meetings and Presentations](#) | [Related Sites](#) | [Contact Us](#)

**NAICS**  
Balance, Exports & Imports

**FTD Web News**  
  
[What is required for me to ship charity goods to Haiti?](#)  
From [GLOBAL REACH](#): "In order to facilitate the movements of these goods, we offer the following guidance that applies to any goods not requiring a license, such as food, clothing, and medicines." (January 22, 2010)  
  
[Foreign Trade has GLOBAL REACH](#)  
Foreign Trade has just created and published its official blog, "Global Reach." Visit it to discuss the Foreign Trade Regulations, Export Filing (AES), Trade Data, and other

*Export Training Videos*



New Videos

- Video #13: [What is a Freight Forwarder? Part 1](#) (3:31 mins)
  - Pro Forma Invoice
  - Help you Ship Economically
  - Help you Ship Safely
  - Ship in Compliance with U.S. export laws
  - International Transportation Department



# Part 19: Pricing

- Examples:
  - Our pricing strategy is premium product and premium pricing.
  - We will offer to calculate the full landed cost to the customer purchasing one or more of our products. We will make it clear in our communications and on the Web site that the customer is responsible for paying all applicable duties, taxes, and shipping costs.
  - For larger orders to say, Mexico, we calculate the cost of shipping one package at \$25 per package including trucking, freight forwarder fee, documentation fee, banking fee and insurance. With a market price of \$10 per package, minus transportation costs and distributor fee, we will have about \$8.75 to cover production, marketing, and profit.



# Part 20: Website Tactics

- Examples:
  - We will make the following changes within the next 30 days:
    - Internationalize the site by adding text on homepage welcoming international buyers.
    - Add a currency converter on the homepage.
    - Add text regarding duties and taxes and that it is the buyer's responsibility to pay them. Include sample duties and taxes for select countries
    - Say that all prices are stated in U.S. dollars but inviting shoppers to use currency converter link, which will be located next to each order placement button.
    - Add international buyer testimonials (and photos) as they become available.
    - Add shipping choices and consider including the Postal Service as a lower cost option.
    - Include clearly written returns policy.
    - Invite inquiries from potential distributors.

# Part 21: An Action Plan

Example on next slide

## Action Plan

Priority	Objective	Task	Resources	Schedule	Evaluation
1	Create or revise export plan	Review export plan template and customize for your business	Your time or staff time to write the plan	Next one-two weeks	Completion of plan
2	Internationalize Website	Use template to identify enhancements; contact CS for advice	Task in-house or contract Web folks	Complete within 30 days	Evaluate international transactions
3	Learn more about international transactions	Review CS learning resources	Identify what you need to know and who in the company needs to know it	Complete within 60 days	Number of error free transactions
4	Develop database of international prospects and customers and email new product offers	Create database and email template for sending promotions	Identify staffing and frequency of messaging; include opt out	Start within 30 days	Number of messages; open rate; sales
5	Secure certificate from FDA if needed	Understand the process, turnaround time, etc.	Staff time	Complete within 14 days	Certificate in hand if needed by importing country
6	Determine whether product needs an export license	Review government lists	Staff time	Complete within 14 days	
7	Learn how to calculate duties and taxes	Check Trade Information Center's Website: export.gov	Staff time; no charge for information	Complete within 14 days	Accurate calculation and communication to buyer
8	Identify for Tariff code for your products	Review recommended links in CS export plan template	Staff time; no charge for information	Complete within 14 days	Accurate completion of shipping documents
9	Establish pricing and returns policy	Calculate landed costs and make revenue projections	Staff time	Complete within 14 days	Establish revenue benchmarks
10	Meet your local government export resource	Understand the services available to your company	Staff time	Complete within 30 days	Value of assistance provided
11	Research a new market	Use Country Commercial Guides available at export.gov through the U.S. Commercial Service	Staff time	Complete within 120 days	Go/or no go decision
	Travel to the market with help	Meet potential		Complete within	



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# The End

Doug Barry

International Trade Specialist

[Doug.Barry@trade.gov](mailto:Doug.Barry@trade.gov)