

Submission to the Productivity Commission Review of Bilateral and Regional Trade Agreements

Australian Trade Commission

April 2010

As the Government's trade and investment development agency, it is the role of the Australian Trade Commission (Austrade) to promote the benefits and opportunities available to Australian businesses and overseas customers from free trade agreements (FTAs). This paper firstly looks at the initiatives Austrade undertook to promote the five FTAs that have come into force since 2003 – FTAs between Australia and Singapore (SAFTA), the United States (AUSFTA), Thailand (TAFTA), Chile (ACI-FTA) and ASEAN + New Zealand (AANZFTA). These initiatives included a variety of information sessions for businesses in Australia and overseas customers in the FTA markets; marketing collateral and other general and industry-specific information on benefits and opportunities; and the appointment of FTA market development specialists.

The submission then examines whether these initiatives had any effect on client activity in the markets of Singapore, the United States and Thailand between 2001–02 and 2006–07. The data has been extracted from Austrade's client database and includes: work orders sent from export advisers in Australia to business development managers (BDMs) at post; visits by Austrade clients to an FTA market, including trade show participation; and Export Market Development Grant (EMDG) statistics.¹

The findings indicate an increase in client activity in Australia and at post in the 12 months prior to, and 18 months following, the FTAs coming into force. Austrade offices in all three markets experienced a significant increase in client interest over that period, with many working with export advisers in Australia before being referred to a BDM at post. This pipeline of export capable and ready clients may have led to growth in the numbers registering export sales in each of the markets, while the increase in the number of clients visiting the market did result in more EMDG claims.

Caution has been taken in attributing this increase in client activity solely to the FTAs, or Austrade's efforts to promote them, as a number of other factors are likely to have contributed. Despite this caveat, the consistency in the findings across the three markets suggests that the existence of the FTAs, and Austrade's efforts to promote them, had a 'head-turning' effect in helping to generate greater business confidence, attraction to, and engagement with, an FTA market.

¹ An export adviser is an Austrade employee based in Australia who assists clients (Australian businesses). Market development specialists were export advisers who focused on a particular FTA market. A business development manager (BDM) is a locally engaged, overseas Austrade employee who works with export advisers in Australia and other Austrade staff overseas to assist clients.

Introduction

Austrade welcomes the opportunity to contribute to the Productivity Commission's study into the impact of Australia's bilateral and regional trade agreements. This submission examines Austrade's role in the implementation of FTAs, and the effect its programs had on client interest and activity levels in those markets, and should be read in conjunction with the submission by the Department of Foreign Affairs and Trade (DFAT).

Austrade is the Australian Government's trade and investment development agency, operating as a statutory agency within the Foreign Affairs and Trade portfolio. Austrade assists Australian businesses across all sectors to contribute to national prosperity by succeeding in trade and investment, and also promotes and supports productive foreign investment into Australia. Austrade also administers the EMDG scheme, which encourages small and medium-sized Australian businesses to develop export markets by reimbursing up to 50 per cent of expenses incurred on eligible export promotion activities above a certain threshold.

At December 2009, Austrade operated in 99 overseas locations in 54 countries. Its 1,046 employees included both Australia-based staff working in Australia and abroad and overseas engaged employees with relevant business skills and local market knowledge. Across Australia, Austrade delivers its services and programs in partnership with state and territory governments, industry associations and regional development bodies. Its global network is divided into four regions: the Americas; Europe, Middle East and Africa; North East Asia; and South East Asia, South Asia and the Pacific.

Austrade has had a role in the FTAs that have been completed, those that are under negotiation and those being considered, as well as other bilateral agreements such as the industry-specific Memoranda of Understanding (MOUs) with Mexico and Colombia, the Australia–EU Partnership Framework, and the Plan of Action with Brazil.

Austrade contributes its in-market knowledge and understanding of the trade and investment issues and opportunities for Australian companies at various stages of the bilateral process. The pre-negotiation stage involves consultations with industry about barriers to trade and offensive and defensive interests, and Austrade assists DFAT by conducting industry focus groups and interviews with clients in Australia and customers overseas. During the negotiation stage, Austrade continues to provide market and industry information to DFAT, but is not usually part of the negotiation team. It is when an FTA is about to come into force that Austrade plays its most active role, in promoting the benefits and opportunities available to Australian clients and overseas customers.

This paper is divided into two parts: the first looks at the resourcing Austrade received and the initiatives Austrade undertook for the five FTAs that have come into force since 2003 – with Singapore (SAFTA), the United States (AUSFTA), Thailand (TAFTA), Chile (ACI-FTA) and ASEAN + New Zealand (AANZFTA).² The second part draws on Austrade data to analyse the effect promotional activities for SAFTA, AUSFTA and TAFTA had on client awareness and subsequent activity levels.

² The Closer Economic Relations (CER) Agreement between New Zealand and Australia was not examined owing to the difficulty of tracing data back to 1983.

Austrade's approach to FTA promotion

In the 2004–05 Budget, the Government provided \$6.1 million of additional funding to Austrade and Austrade redirected significant internal resources for a four-year program supporting SAFTA, AUSFTA and TAFTA. In addition, \$3 million per annum was provided for 30 new positions to promote the AUSFTA. This funding ceased in June 2008.

In recognition of the fact that the opportunities for Australian business are greatest in the period following a tariff reduction, and eventually become part of normal business conditions, resources were concentrated in the period prior to, and directly following, the implementation of each FTA. Austrade has found that an intensive, targeted Government promotional campaign has a 'head-turning' effect in helping to attract businesses to the market.

Resourcing and promotional details specific to each of the FTAs are listed below.

SAFTA

SAFTA came into effect on 28 July 2003 and delivered outcomes in goods and services trade, intellectual property (IP), foreign direct investment (FDI) and competition policy. Key focus sectors for Austrade were services and government procurement, and Austrade's office in Singapore appointed a specialist government procurement BDM to help identify opportunities for Australian companies to sell to the Singapore Government. In 2004, a market development specialist was appointed in Sydney to work closely with the Singapore office in promoting SAFTA to the Australian business community.

A number of promotional initiatives were undertaken:

- Throughout 2003 Austrade held a number of FTA panels with business and Government agencies to discuss the Singapore market and opportunities available through SAFTA.
- In December 2004, Austrade ran 11 seminars across Australia on *Singapore & Malaysia – Springboard to Asia*. The seminar series introduced these markets to small and medium-sized businesses that were new to exporting and featured speakers from Austrade and other Government agencies, and businesses already exporting to, or operating in, Singapore and Malaysia. The seminars attracted 530 attendees.
- A direct marketing campaign was held in conjunction with the Singapore Tourism Board to promote Singapore and SAFTA to 5,000 businesses across Australia. The campaign generated 200 responses from companies interested in learning more about business opportunities in Singapore.
- In July 2006, and again in 2007, Austrade conducted government-to-government *Stay in Touch* sessions across Australia and in Singapore.
- In August 2006, a seminar series focusing on professional services, ICT, building and construction, and health and medical was held with state government allies in New South Wales and Victoria to increase awareness of SAFTA. Over 150 businesses participated.
- In August 2007, another roadshow was conducted in Western Australia, South Australia, the ACT and Queensland to reinforce the potential opportunities in the Singapore Government sector, with 120 businesses taking part.

Marketing collateral provided to clients included:

- a booklet for businesses introducing SAFTA and the opportunities available
- a *Guide to Selling to the Singapore Government*
- a *Successful Business Partnerships with Singapore* booklet showcasing a number of Australian companies doing business with the Singapore Government.

AUSFTA

The AUSFTA, which came into force on 1 January 2005, covers goods, services, investment, financial services, government procurement, standards and technical regulations, telecommunications, competition-related matters, electronic commerce, IP rights, labour and the environment.

Following the 2004–05 Budget allocation, Austrade created 30 new positions to work specifically on US opportunities. Twenty-three of these were located in the United States, working on general market (10 people), government procurement (5), niche market (5) and agricultural (3) opportunities. A specialist Selling to Government Team was established in Washington DC in March 2005 to assist Australian companies tap into the US Government procurement market, while the new agriculture team was managed from Chicago. The remaining seven staff were export advisers located throughout Australia who worked specifically with clients wishing to do business with the United States. In addition, a market development specialist was appointed in Sydney in late 2004 to promote the AUSFTA to the Australian business community and source new clients interested in the United States.

When funding for the 30 additional export facilitators ceased in 2008, Austrade reduced its resources in the United States by approximately \$1 million, with the balance of the \$3 million funding reduction absorbed across the Austrade network. Six locally engaged positions were withdrawn and the duties of the Selling to Government team in Washington DC were incorporated into other industry teams across the region. Austrade continues to promote the AUSFTA across its US network (18 locations).

Key AUSFTA promotional initiatives included:

- In late 2004 and throughout 2005, a number of general and industry-specific AUSFTA *Stay in Touch* sessions were held across Australia, led by a Senior Trade Commissioner.
- Dairy workshops were conducted in February 2005 in collaboration with the Department of Agriculture, Fisheries and Forestry (DAFF) and Dairy Australia.
- In May 2005, seminars were held in six Australian capital cities to inform Australian exporters of changes to IP protection under the AUSFTA and opportunities for Australian technology and services in the US market. Follow-up IP forums and workshops were held across Australia in February 2006.
- A US Homeland Security seminar and workshop series was conducted in six Australian capital cities in March–April 2006, attracting 200 attendees.
- In October 2006, an Australia-wide seminar series entitled *Use the Australia-United States Free Trade Agreement (AUSFTA) to Help Expand Your Business* was held in conjunction with the Export Finance and Insurance Corporation (EFIC), the American Chamber of Commerce (AMCHAM) and the state governments of New South Wales, the ACT, Victoria, South Australia and Western Australia.

- In November 2006, two seminar and panel discussions in Sydney and Melbourne called *AUSFTA Two Years On – How Australian Businesses Are Making it Work* were held with the support of DFAT, Deloitte, Australian Business Limited (ABL), Australian Customs and the state governments of New South Wales and Victoria.

The AUSFTA implementation program also involved communicating with key US buyers about the benefits for them under the AUSFTA. In addition, border issues encountered with US Customs triggered a customs outreach activity whereby Austrade targeted and spoke to hundreds of customs agents to inform them about the new FTA.

Marketing collateral provided to clients included:

- *Selling to the United States Government: A Guide for Business*
- the *Australia-United States Free Trade Agreement – In Brief* was developed to target the broader business community
- Austrade sent six AUSFTA e-magazines to all database contacts
- factsheets on product commercialisation and IP were developed by a US IP specialist, through Austrade, and launched in conjunction with the IP seminars held in May 2005.

TAFTA

TAFTA, which came into effect on 1 January 2005, agreed the elimination of tariffs on almost all goods imported from Australia and improvements to the environment for services trade and investment.

The Austrade office in Bangkok appointed a BDM to help identify opportunities for Australian companies arising from the tariff reductions under TAFTA. In late 2004, a market development specialist was appointed in Sydney to work closely with the Bangkok office to identify high-potential Australian clients to win business in Thailand and to coach exporters on how to use TAFTA effectively.

Austrade worked closely with all state and territory governments when running promotions in Australia. These efforts were focused on industries with significant TAFTA gains, such as food and beverages, building and construction, automotive, elaborately transformed manufactures (ETMs), and beauty and cosmetics.

Promotional activities included:

- an FTA seminar held in eight Australian cities for 463 attendees in July 2004
- a follow-up seminar series in the same cities in December 2004 for 142 attendees
- the Bangkok office hosted luncheons with key customers to promote Australian products and the benefits of TAFTA
- a series of seminars in Thailand between November 2006 and July 2007 to inform Thai importers of the benefits to be gained under TAFTA (of the 234 companies that attended, 134 were not previously known to Austrade).

Marketing collateral provided to clients included:

- the *Thailand-Australia Free Trade Agreement* brochure which covered the major opportunities arising from the FTA and key contacts for Australian companies
- brochures illustrating key product and service groups benefiting from TAFTA
- a guide for Thai businesses entitled *Buy Australian, Gain Competitiveness*, produced to promote Australian capability to prospective buyers.

ACI-FTA

The ACI-FTA came into force on 6 March 2009, covering goods, services and investment. Major areas of focus for Austrade include sustainable energy, coal, and mining technology and services. Austrade realigned internal resources to provide a dedicated energy and environment BDM to promote Australian coal and LNG supply to major Chilean power generators. Austrade also has a specialist mining BDM to develop opportunities for Australian mining technology and services companies.

ACI-FTA promotional initiatives included:

- In October 2008, Austrade partnered with each of the state governments, ProChile (Austrade's Chilean counterpart), the Australian-Latin America Business Council (ALABC), the Australian Industry Group (AiG) and DFAT, to coordinate a senior business delegation from Chile and series of Chile market seminars. The seminars were held in five Australian cities and over 400 participants attended.
- In March 2009, Austrade's office in Santiago partnered with the Santiago Chamber of Commerce and ProChile to deliver a seminar on business opportunities around the ACI-FTA, attracting over 150 attendees.
- In May 2009, the Santiago office promoted the ACI-FTA at the Australian stand at the annual Asia Pacific Chamber of Commerce seminar to over 200 Chilean businesses.

Austrade collaborated with DFAT to produce a brochure detailing the ACI-FTA and opportunities for Australian businesses.

AANZFTA

AANZFTA came into force on 1 January 2010 between ASEAN and Australia and New Zealand, covering trade in goods and services, and investment.

Austrade's three-year plan for AANZFTA promotion seeks to raise business awareness of opportunities across the region and build increased awareness in ASEAN of Australian suppliers and investment opportunities in Australia. Teams in Austrade's ASEAN posts were restructured along industry lines and have pooled customer and market knowledge in order to offer multiple entry points to businesses interested in ASEAN as a production base, as a target market or as a source of investment. The existing TAFTA specialist in Bangkok is helping to identify opportunities arising from the AANZFTA.

Austrade's promotional effort was underpinned by a tariff line analysis for each market to ascertain the expected gains over time for Australian businesses (see Appendix for the matrix covering potential areas of opportunity).

- In October 2009, an Australia-wide seminar series was held in conjunction with DFAT and state governments to promote the AANZFTA to 532 attendees. More events are planned in Australia and at post in 2010.

- Following the roadshow, Austrade hosted a series of webinars to inform clients of opportunities in specific industries.

Hard-copy AANZFTA fact sheets were provided by DFAT at these events, and clients were also directed to the Austrade website to learn more about the benefits of AANZFTA or obtain the full text.

The key to a successful promotional campaign

The purpose of an FTA promotional program is to inform as many businesses as possible about the FTA, its benefits and the specific opportunities available, and how Austrade may be able to assist.

The value to Australian business from an FTA comes through both the direct benefits from tariff and/or non-tariff reductions and the indirect benefits from a more open, predictable, transparent and IP-protected business environment. Promotional campaigns, including marketing of the indirect benefits of an agreement, can therefore help generate greater business confidence, attraction to, and engagement with, an FTA market and can deliver growth in trade and investment even in sectors not directly advantaged through tariff gains.

Austrade has found that the key factors behind a successful promotional campaign are to:

- have a thorough understanding of the opportunities from each FTA, and tailor each promotional campaign accordingly
- work closely with other Government agencies, particularly DFAT, in providing information to business
- hold information sessions such as seminars and webinars in Australia and in the market to promote the benefits and opportunities to as many businesses as possible
- provide concise and easy to understand marketing collateral to businesses, detailing the general benefits of the FTA and specific opportunities within particular sectors
- also promote the indirect benefits of the agreement, such as greater openness, predictability, transparency and IP protection
- use FTA specialists in Australia and at post to inform and work with clients in Australia and customers at post, particularly around the time of implementation.

Assessing the outcomes

While one of Austrade's roles in assisting Australians do business internationally is to promote the benefits of Australia's FTAs to the business community both in Australia and overseas, these activities will be only one factor behind a firm's decision to export to a particular market. Companies may engage Austrade's services anywhere along the internationalisation journey, depending on such factors as their product/service offering, market knowledge, experience and resources. For example, a client may attend an Austrade seminar but not seek Austrade assistance again until the end of the financial year, when submitting a claim for an EMDG grant. Alternatively, the client may require assistance at an early stage, work with an export adviser in Australia to get to a level of export readiness, and then engage with an Austrade BDM at post and visit the market.

To examine the effect Austrade's FTA implementation strategies may have had on client interest levels and subsequent export activity with Singapore, the United States and Thailand between

2001–02 and 2006–07, Austrade’s internal data was used to examine a number of client activity indicators:³

- **Work requests:** are sent internally by an export adviser on behalf of the client to the relevant BDM at post. Depending on the client’s need, the BDM would respond with either a description of the market and any opportunities, or an offer to undertake market research and assistance with a market visit.
- **Market visits:** are recorded by the BDM at post and may involve a number of Austrade services (e.g., in-market briefings; appointments/meetings with customers; interpreting; product launch; use of an office; visa assistance; logistical support; follow-up). A client may contact the BDM at post directly or work through an export adviser in Australia.
- **International trade show participation:** recorded by the BDM at post. As with a market visit, the client may be working with an export adviser in Australia or directly with post.
- **Export Market Development Grants:** the majority of EMDG claims are for market visits (airfares, trade show costs). Other eligible expenses include overseas representation, free samples, advertising and promotion, buyer visits to Australia, and communications. A client receiving an EMDG grant may not have worked with Austrade before.

Singapore

There was a significant increase in client activity indicators with Singapore prior to and following SAFTA coming into effect in July 2003 (Appendix 2a). The increase in work requests reflected a higher number of clients seeking Austrade’s assistance to do business with Singapore.

The proportion of those new to exporting also grew – Singapore is a popular destination for new exporters and those who came to Austrade at the time would have worked with an export adviser before engaging with the BDM at post.

Work requests began to fall in 2004–05, possibly reflecting the reduction in SAFTA promotion in Australia and the shift in focus of the market development specialist team in Sydney from sourcing clients for particular FTA markets to more general export advising.

At post, there was a steady increase in market visits and participation in trade shows. This increase was reflected in the growing number of EMDG claims from the year after SAFTA came into force (Appendix 4). The increased pipeline of clients going to Singapore was also shown in the continued rise in the number of clients registering export sales to Singapore (Appendix 2a and Appendix 3).

³ Note that as Austrade did not have responsibility for FDI promotion during the period covered by this paper, there was no internal data available on enquiries from investors. Similarly, there was no available data on outward FDI, as this activity was recorded internally with other activities and could not be analysed separately.

United States

A number of AUSFTA information sessions were held in the 12 months prior to the agreement coming into force on 1 January 2005, and there was a spike in work requests from Australia and an increase in the proportion of new exporters, reflecting increased client interest in the market (see Appendix 2b).

Work requests by export advisers on behalf of US-focused clients declined following the FTA, possibly because of the change in focus of the market development specialists, as mentioned previously. This does not appear to have affected activity levels at post, however. In 2004–05, there was a sharp increase in clients visiting the market, as reflected by the number of market visits, visits to trade shows and EMDG applicants (Appendix 4).

EMDG claims relating to the US continued to grow both in numbers and as a percentage of total applicants. This increased pipeline of clients going to market and working with Austrade at different stages may have led to the significant growth from 2004–05 in clients achieving export success in the US market.

Thailand

There was a sharp increase in work requests prior to and following TAFTA coming into force on 1 January 2005, as well as growth in the proportion of new exporters (Appendix 2c). Thailand poses more market entry challenges to new exporters than the more mature markets of the United States and Singapore, and clients often prefer to work through an export adviser in Australia than engage directly with a BDM at post.

As with Singapore and the United States, a fall in work requests in 2005–06 may be attributed to the shift in focus of the market development specialists; however, activity at post steadily increased. The larger pipeline of clients interested in Thailand was reflected in the steady number of market visits and the growth in EMDG claims and export sales. The spike in client market visits and the reduced proportion of new exporters in 2006–07 is worth noting, as it may demonstrate the commitment of clients to visit Thailand regularly to maintain business relationships after making their first sale there.

Conclusion

This paper has examined the effect Austrade's implementation programs for SAFTA, AUSFTA and TAFTA have had on client activity levels with those three markets. The findings indicate a rise in client activity in Australia and at post during the most intensive promotional periods – the 12 months prior to, and 18 months after, the implementation date. The steady increase in export successes in those three markets may be attributable to the larger pipeline of export-ready and capable clients working with Austrade.

A number of external and internal factors are also likely to have contributed to this increased client activity. In 2001–02, for instance, in response to the then Government's goal of doubling the number of Australian exporters in five years, Austrade directed additional resources towards assisting new exporters and this would have been a contributing factor. External factors, such as growth in particular markets and exchange rates, will also have affected the decision of Australian businesses to export to FTA markets.

While there are likely to be a number of factors that contributed to the increases in client activity in these three FTA markets, the fact remains that over the relevant period Austrade worked with an increased number of clients interested in international business with Singapore, the United States and Thailand. The consistency across the three markets suggests that the existence of the FTAs, and Austrade's efforts to promote them, helped to generate greater business confidence, attraction to, and engagement with, these markets.

Appendix 1

AANZFTA Potential Areas of Opportunity 2010-2015⁴	Brunei	Cambodia	Indonesia	Laos	Malaysia	Philippines	Singapore (a)	Thailand	Vietnam	Burma (b)
Agribusiness										
• Horses, non-racing			•							
• Goats						•				
• Wheat and pulses									•	
Automotive & Advanced Manufacturing										
• Vehicles – s/wagons, hearses, golf carts, go-carts	•		•		•	•				
• Vehicles, CBU 3000cc and above	•		•		•	•				
• Tyres, new, recond for various cars, heavy equipment			•							
• Auto components, various					•	•		•	•	
• Chemicals, various, and periodic elements			•			•		•	•	
• Ferrous waste, various types						•		•	•	
• Steel, simple – rods, hoop and strip, plate, wire			•					•	•	
Building & Construction										
• Granite, marble, slate and other stone products			•		•	•		•	•	
• Bricks for paving and building			•	•	•	•		•	•	
• Roof, floor and wall tiles		•	•		•	•		•	•	
• Doors, windows and shutters			•		•			•	•	
• Fibreboard and fibre cement panels			•		•	•		•	•	
• Industrial boilers	•	•	•		•	•		•		
• Railway rolling stock		•			•					
• Railway equipment and components		•			•			•		
• Cranes and lifting equipment		•	•		•			•		
Clean Energy										
			•		•	•	•	•	•	
Consumer Products										
• Fashion			•		•	•				
Food & Beverages										
• Nuts and seeds			•		•			•		
• Fruits – oranges, grapes, stone					•	•		•	•	
• Vegetables				•	•	•		•	•	
• Margarine					•	•		•	•	
• Biscuits						•		•		
• Jams					•			•	•	
• Meat		•	•			•		•	•	
• Wine								•	•	
• Seafood (not produced locally)			•							
• Dairy products					•				•	
• Condiments (sauces)						•		•	•	
• Olive oil									•	
• Confectionary (chocolates)			•						•	
• Ice cream			•					•	•	

⁴ Prepared by the South East Asia, South Asia & the Pacific International Liaison Unit, Austrade Canberra – September 2009

Health, Biotechnology, Well-being									•	
• Beauty and make up preparations			•			•		•	•	
• Hair preparations	•		•			•		•	•	
• Dental and oral hygiene products			•					•	•	
• Deodorants, shaving lotions, bath preparations			•			•		•	•	
ICT										
• Telecoms- access to previously monopoly n/works (c)	•	•	•	•	•	•		•	•	
• Computer services - 100% foreign equity (d)				•	•					
Mining, Oil & Gas										
• Mineral ores and concentrates			•							
• Limestone and derived products					•	•			•	
• Salt		•	•					•		
• Gypsum					•			•	•	
• Drills and drill components for mining sector		•	•		•	•		•	•	
• Explosives for mining		•	•		•	•		•	•	
• Oil & gas exploration 100% equity						•				
Services										
• Business services – increased Aust equity			•		•					

(a) Singapore has liberalised previously under SAFTA and thus there are no tariff reductions of more than 5%.

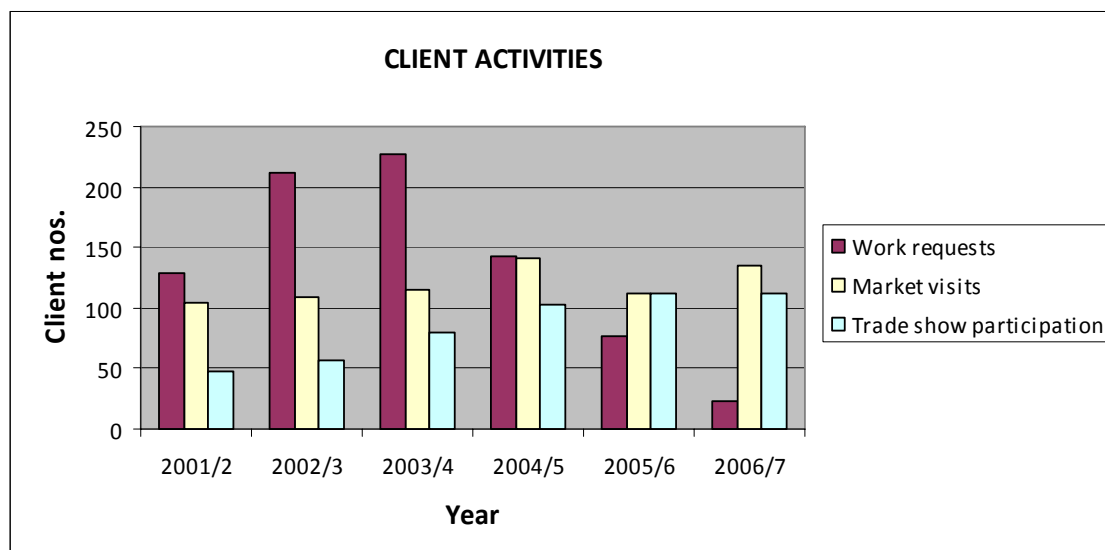
(b) Consistent with Australian Government policy on Burma, Austrade will not encourage or discourage trade with Burma, and will take a reactive approach to any business enquiries from or about this market.

(c) Note: limited to only a few potential Australian providers. Singapore has already liberalised.

(d) This applies to computer and related processes, except data processing in Laos.

Singapore⁵

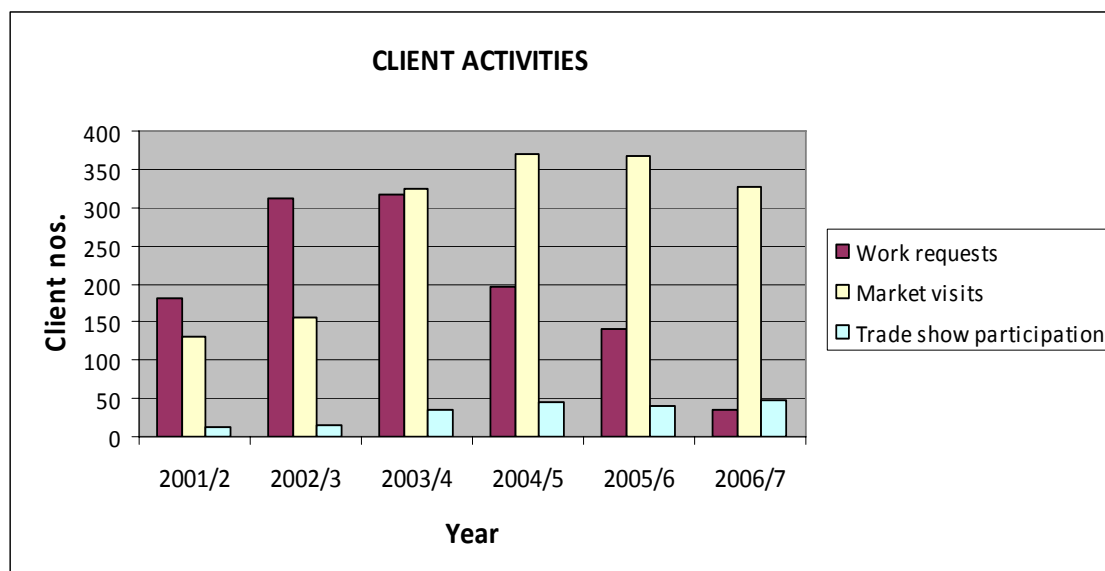
	2001/2	2002/3	2003/4	2004/5	2005/6	2006/7
Work requests	129	212	227	142	77	23
- new/irregular exporters	61	124	138	120	57	19
%	47.3	58.5	60.8	84.5	74.0	82.6
Market Visits	104	109	115	141	112	135
- new/irregular exporters	23	28	39	52	41	38
%	22.1	25.7	33.9	36.9	36.6	28.1
Trade Show participation	47	56	80	103	112	112
- new/irregular exporters	1	6	15	23	25	23
%	2.1	10.7	18.8	22.3	22.3	20.5
Total client export sales	71	92	207	313	449	486
- new/irregular exporters	0	16	76	131	137	162
%	0.0	17.4	36.7	41.9	30.5	33.3
Total client export value (\$m)	124	78	139	181	410	716



⁵ Austrade CBS records

United States⁶

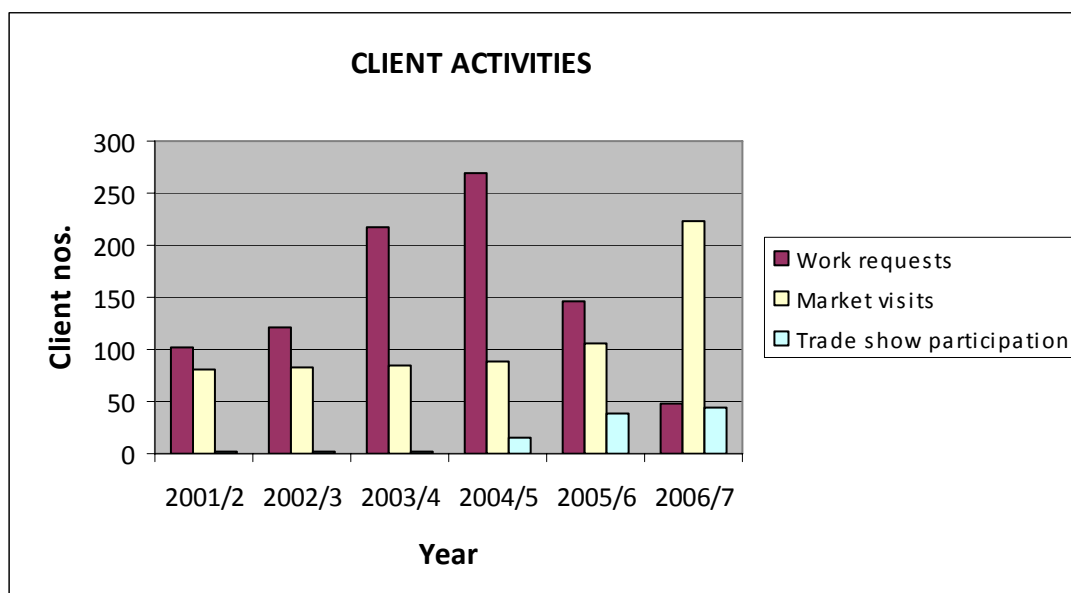
	2001/2	2002/3	2003/4	2004/5	2005/6	2006/7
Work requests	181	311	316	195	142	34
- new/irregular exporters	82	157	192	147	117	24
%	45.3	50.5	60.8	75.4	82.4	70.6
Market Visits	131	155	325	370	368	327
- new/irregular exporters	41	42	104	124	154	132
%	31.3	27.1	32.0	33.5	41.8	40.4
Trade Show participation	12	16	36	45	41	49
- new/irregular exporters	3	5	10	10	14	19
%	25.0	31.3	27.8	22.2	34.1	38.8
Total client export sales	37	156	251	476	485	553
- new/irregular exporters	0	29	148	134	161	229
%	0.0	18.6	59.0	28.2	33.2	41.4
Total client export value (\$m)	1,200	1,200	926	1,500	1,642	1,455



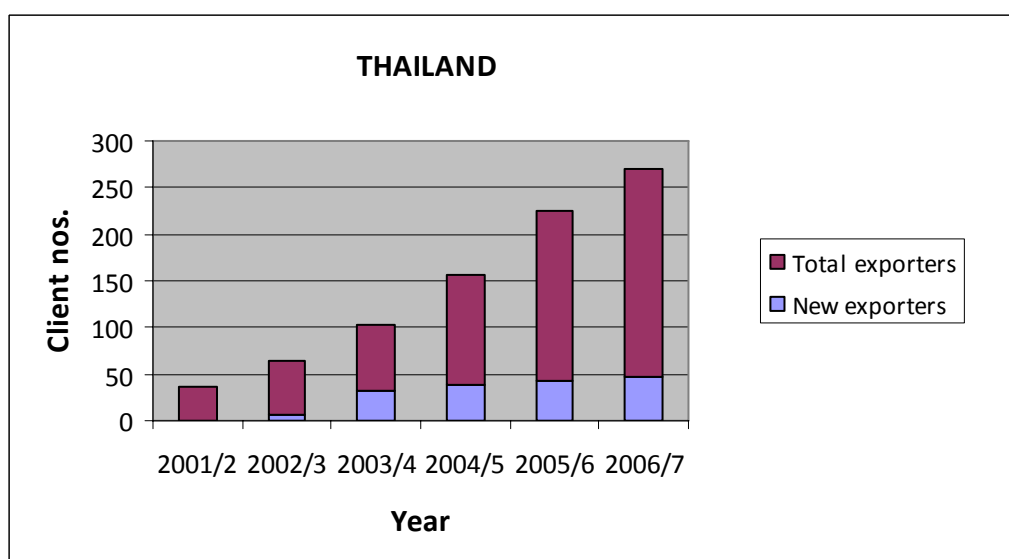
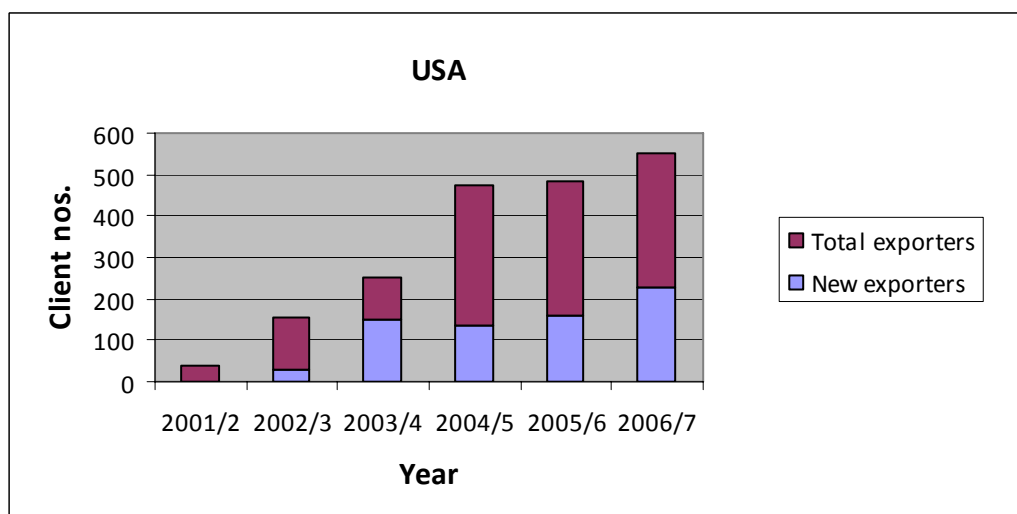
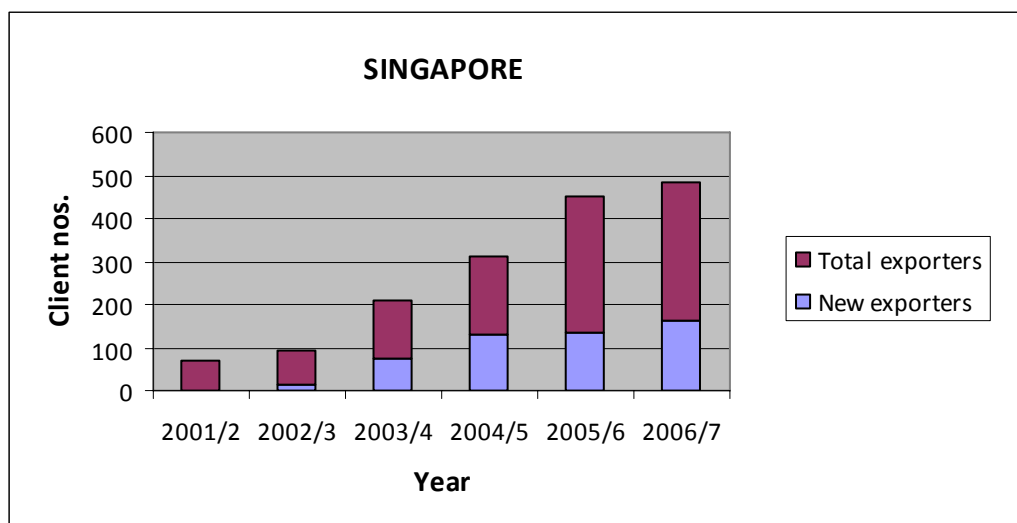
⁶ Austrade CBS records

Thailand⁷

	2001/2	2002/3	2003/4	2004/5	2005/6	2006/7
Work requests	101	121	218	270	146	49
- new/irregular exporters	39	80	99	170	86	35
%	38.6	66.1	45.4	63.0	58.9	71.4
Market Visits	80	82	85	88	106	224
- new/irregular exporters	12	12	14	19	22	19
%	15.0	14.6	16.5	21.6	20.8	8.5
Trade Show participation	1	1	2	16	38	44
- new/irregular exporters	0	0	0	8	7	18
%	0.0	0.0	0.0	50.0	18.4	40.9
Total client export sales	36	64	102	156	226	271
- new/irregular exporters	0	6	32	38	42	48
%	0.0	9.4	31.4	24.4	18.6	17.7
Total client export value (\$m)	114	170	194	407	412	562



⁷ Austrade CBS records

Clients achieving export sales⁸

⁸ Austrade CBS records

EMDG applicants promoting to FTA markets⁹

Grant year	USA - all applicants			USA - first time applicants		
	Number promoting to USA	Total applicants	% promoting to USA	Number promoting to USA	Total first-time applicants	% promoting to USA
2001-02	1991	4164	47.8	685	1487	46.1
2002-03	1949	4022	48.5	542	1134	47.8
2003-04	1769	3588	49.3	574	1233	46.6
2004-05	1918	3765	50.9	640	1354	47.3
2005-06	2068	3813	54.2	635	1235	51.4
2006-07	2318	4247	54.6	702	1375	51.1
2007-08	2422	4472	54.2	680	1382	49.2
2008-09	2805	5148	54.5	912	1760	51.8

Grant year	Singapore - all applicants			Singapore - first time applicants		
	Number promoting to Singapore	Total applicants	% promoting to Singapore	Number promoting to Singapore	Total first-time applicants	% promoting to Singapore
2001-02	1012	4164	24.3	319	1487	21.5
2002-03	832	4022	20.7	210	1134	18.5
2003-04	693	3588	19.3	207	1233	16.8
2004-05	703	3765	18.7	241	1354	17.8
2005-06	746	3813	19.6	251	1235	20.3
2006-07	828	4247	19.5	244	1375	17.7
2007-08	872	4472	19.5	256	1382	18.5
2008-09	988	5148	19.2	321	1760	18.2

Grant year	Thailand – all applicants			Thailand - first time applicants		
	Number promoting to Thailand	Total applicants	% promoting to Thailand	Number promoting to Thailand	Total first-time applicants	% promoting to Thailand
2001-02	381	4164	9.1	113	1487	7.6
2002-03	341	4022	8.5	60	1134	5.3
2003-04	262	3588	7.3	67	1233	5.4
2004-05	309	3765	8.2	100	1354	7.4
2005-06	297	3813	7.8	97	1235	7.9
2006-07	318	4247	7.5	97	1375	7.1
2007-08	334	4472	7.5	87	1382	6.3
2008-09	378	5148	7.3	120	1760	6.8

⁹ Austrade EMDG database records