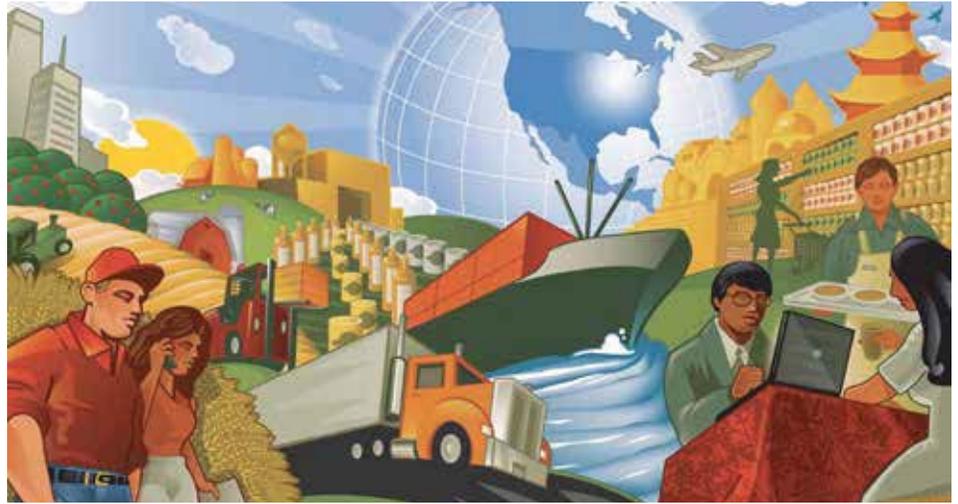


Export
News
From the
Midwest and
Northeast

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JANUARY/FEBRUARY 2015

2015 GLOBAL FOOD AND BEVERAGE TRENDS

Transparency in labeling, convenience for foodies, and marketing to millennials top the list as we take a sneak peak into 2015 global food and beverage trends.

Are you finalizing your export marketing plan for the coming year? Let's take a look at some of the global food and beverage trends experts are predicting to help you stay ahead of the competition.

Innova Market Insights has put together a list of the top food and beverage trends for 2015 and beyond, including:

- **Transparency in Labeling.** Consumers, retailers, industry and regulators are all driving more transparency in labeling, including a move to clearer and simpler product claims and packaging.
- **Convenience for Foodies.** Home cooking driven by the latest cooking shows and food bloggers is driving demand for a greater choice of fresh foods and ingredients for cooking from scratch.



- **Marketing to Millennials.** Millennials, consumers between 15 and 35 who currently make up one third of the global population, are technologically advanced and want to try new things. They are also less brand loyal.
- **Snacks Rise to the Occasion.** Three square meals a day are being replaced by quick, healthy foods, resulting in a growing number of snack foods for specific occasions.
- **Good Fats, Good Carbs.** Emphasis on unsaturated and natural fats and oils is resulting in rising interest in omega-3 fatty acid content, as well as the use of butter as a natural, tasty alternative to artificial margarine. Natural sugar is also growing in popularity over added sugars and artificial sweeteners.
- **New Routes for Fruit.** More product launches are being tracked with real fruit vegetables, as they are perceived to be healthier by consumers.
- **A Fresh Look at Frozen.** Established frozen foods (vegetables and seafood) are focusing on freshness in their marketing and the frozen foods segment is witnessing new product launch activity in new categories, including soups, fruit, drinks, finger foods, sauces, pastries, and herbs.
- **Private Label Powers On.** Private label is still gaining market share in terms of new product launches in Europe, North

MARKET FOCUS: THAILAND

According to the Foreign Agricultural Service (FAS) of the USDA, Thailand is Southeast Asia's second largest economy with a Gross Domestic Product (GDP) of \$366 billion. Thailand is the 17th largest export market for U.S. agricultural products. In 2012, Thailand imported \$401 million in consumer oriented foods from the United States.

Total exports of U.S. foods (including bulk, intermediate, consumer oriented, and edible fishery products) to Thailand have shown tremendous growth over the past five years creating opportunities for U.S. companies with products ready for export. For example, according to Thai Customs data, U.S. agricultural exports to Thailand jumped from \$1.4 billion in 2008 to \$1.8 billion in 2012. During this period, bulk and intermediate products and consumer oriented goods grew by 5 percent and fish and seafood products grew by 8 percent. In 2012, the mix of products exported to Thailand from the United States remained constant. Bulk and intermediate goods accounted for 64 percent of exports, consumer-oriented products with 22 percent, and edible fishery products with 14 percent.

Best Market Prospects

The best market prospects for U.S. suppliers include fresh fruits (cherries, grapes, strawberries, oranges, apples, berries), nuts (walnuts, hazel nuts, and pistachios), breakfast cereal, frozen seafood (scallop, lobster, fish, mussel), dried fruits (raisin), fruit juices, jam, vegetable oils, candy, chocolate, chocolate milk mix, dairy products (cheese, cheese spread, cream cheese, whipped cream, cheese sticks, cheese dip and ice-cream), pie fillings, processed meat, American spices, seasonings and sauces, snack foods,



crisp bread, syrup, vinegar, wine, spirits, and pet food.

The best-selling U.S. food products are fresh fruits, frozen fries, scallops, snack foods, breakfast cereal, wine, dried fruits, popcorn, and pet foods. Products that are not currently present in the market in significant quantities, but have good sales potential, are American bourbon and whisky, seafood including halibut and other fish, sugar confectionery, soup and broth, biscuits and wafers, candy, stone fruits (peaches, plums, nectarines), processed meat, chocolate milk mix, cheese, dip sauce, other cooking products.

Doing Business in Thailand

The following includes observations collected from a variety of sources on best practices of exporting food products to Thailand.

- When greeting a Thai, use the word Khun (pronounced coon) in place of Mr. or Mrs. and the person's first name, which is the first name on his or her business card. For example, a Westerner

with the name "Peter Moore" would be called "Khun Peter." Never refer to yourself with the word Khun; simply say your first name.

- Introductions: foreign companies may write directly to Thai companies, although personal introductions will always enhance a firm's credibility and acceptance.
- It would behoove foreign businesses to hire a representative or agent with local connections who has a good understanding of Thai food and agriculture regulations and food import procedures.

Is Thailand the Right Market for You?

Food Export provides the services and activities you need to help determine if Thailand is the right market for your product. If you're interested in developing potential sales, market education, meeting global buyers, or qualifying for funding assistance in marketing your products overseas, contact us.

UPCOMING ACTIVITY IN THAILAND

**Food Show PLUS!™ at Food
Ingredients Asia**

September 9-11, 2015, Bangkok, Thailand
Early Registration Deadline: May 19, 2015

NEWS STORIES

EXPORT OPPORTUNITIES IN AUSTRALIA



Australia is a prosperous, politically and economically stable, industrialized nation. The country is the world's 12th largest economy reports the Foreign Agricultural Service (FAS) of the USDA. The economy has grown for 22 consecutive years, growing by 2.4% in 2013 and was expected to grow at 2.6% in 2014.

The U.S.-Australia Free Trade Agreement has provided some advantages for U.S. products. For example, tariff rates for all U.S. food products exported to Australia dropped to zero upon implementation of the agreement in January 2005. Prospects are excellent for organic and natural ingredients as well as consumer-ready processed foods and beverages. Visit our website to learn how The Branded Program can help expand your marketing budget to grow your export business in Australia.

SUCCESS STORY

FOOD EXPORT PROGRAMS ENHANCE SIAL PARIS

Ann and Steve Prato, owners of Joe Tea in Montclair, New Jersey, have been in business for 18 years, with international marketing efforts supported the past five years. The Joe Tea brand is exported to 16 countries and their combination of beverages and snacks offer innovative American products to international consumers. After promoting their products in the New York City market, the Pratos began to receive product inquiries from customers abroad. They sought advice on how to develop these sales in a cautious and thoughtful manner and found Food Export through an online search.

“When we realized how many international buyers were coming to U.S. tradeshows, we participated in Food Export’s Buyer Missions. We were concerned that the buyer interests were cocktail conversations but changed our minds when sales developed. We could see 25% of our future business from international customers,” the Pratos commented.



After starting with Buyers Missions, they exhibited at the SIAL Paris show and utilized Food Export’s Food Show PLUS!™ tradeshow enhancement services which included pre-market research and on-site assistance. They also used Branded Program funding to offset exhibition costs. Joe Tea achieved on-site sales for their teas and chips of approximately \$100,000 and expects an additional \$250,000 increase in sales in the next year as a result.

FOOD EXPORT ASSOCIATION OF THE MIDWEST USA® AND FOOD EXPORT USA®–NORTHEAST

We are non-profit organizations comprised of state agricultural promotion agencies that use federal, state, and industry resources to promote the export of Midwestern and Northeastern food and agricultural products.

Food Export–Midwest and Food Export–Northeast administer many services through Market Access Program (MAP) funding from the Foreign Agricultural Service (FAS) of the USDA.

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Food Export-Midwest and Food Export-Northeast do not tolerate fraud and are vigilant in preventing fraud in any of our programs. Food Export does not discriminate, and we reserve the sole right to accept or deny companies into our programs. For complete participation policies and our code of ethics, visit: www.foodexport.org/termsandconditions.

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GLOBAL FOOD AND BEVERAGE TRENDS CONTINUED

America, and Australasia. Store brands are here to stay and are found in all product segments.

Other trends reported by Innova Market Insights include: new sources for protein and texture as an important driver in new food and beverage innovations.

Key Trends in Functional Foods & Beverages for 2015

According to Nutraceuticalsworld.com, foods and beverages that are **naturally functional** will remain the biggest trend in functional foods. That is, foods and beverages that have natural and intrinsic health benefits (e.g., almonds).

Protein also made the top trends list for functional food and beverage trends because it's still in the early stages in Europe and Asia with much room for growth.

Healthy snacking is also at the top of the list for functional food and beverage trends. Healthy snacks are replacing meals across the globe, especially those that connect to multiple health benefits (e.g., protein, gluten-free, natural, etc.).

Food Export Is Here to Help You Navigate the Future!

Food Export-Midwest and Food Export-Northeast provide U.S. suppliers with the support and services you need to succeed in this changing global marketplace. Our services cover a wide variety of assistance,

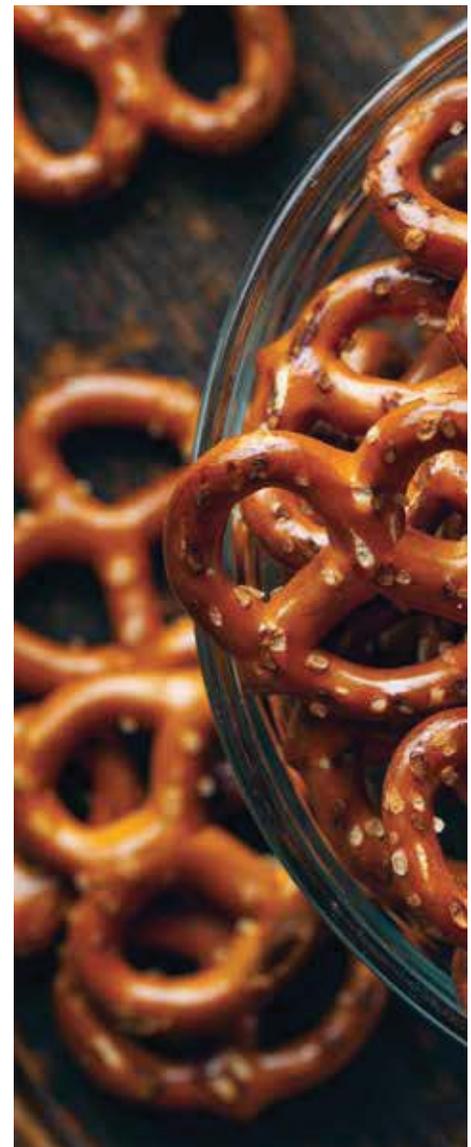
EUROPE'S LEADING FUNCTIONAL INGREDIENTS TRENDS

According to Euromonitor.com, more natural, more protein, and more nutritional content are expected to experience the highest growth in Eastern and Western Europe from 2014-2019.

After general well being, weight management is the largest positioning platform for health and wellness food and beverage products. Supergrains are also in for breakfast and snack foods with their high protein, fiber and other good benefits. And products that promote beauty from within will experience high growth over the next five years, including natural and any products that help consumers get another serving of fruits and vegetables.

Euromonitor.com also predicts gluten-free products that offer better quality and consistency will experience the most growth in the region.

from researching international markets to finding key buyers. Food Export Helpline™ and the Market Builder Program can help you explore market potential and even connect you with potential buyers. Buyers Missions, Focused Trade Missions, and Food Show PLUS!™ events can put you face-to-face with motivated, international buyers. Visit our website for more information.



Food Export—Midwest and Food Export—Northeast Activities

Branded Program: Did you know that you might be eligible for up to 50% reimbursement on travel and exhibition fees for some of these activities? Visit www.foodexport.org/brandedprogram for more information.

Buyers Missions—International Buyers — Here at Home

Buyers Missions bring buyers from all over the globe to U.S. cities. U.S. food and beverage suppliers meet one-on-one with pre-qualified, international buyers to generate sales leads. Imagine meeting with numerous buyers from multiple countries all in one day.

- **Frozen Food Buyers Mission at AFFI-CON 2015** • February 21-23, 2015, Anaheim, California
Registration Deadline: January 12, 2015
- **Natural Products Buyers Mission at Natural Products Expo West** • March 5-7, 2015, Anaheim, California
Registration Deadline: January 23, 2015
- **Pet Food Buyers Mission at Global Pet Expo** • March 3, 2015, Orlando, Florida
Registration Deadline: January 21, 2015
- **Seafood Buyers Mission at Seafood Expo North America** • March 14, 2015, Boston, Massachusetts
Registration Deadline: February 2, 2015

Focused Trade Missions—Total Market Immersion

Focused Trade Missions bring small groups of U.S. suppliers to a country with the goal of building participants' export businesses. You're able to see the market dynamics first-hand, meet and build relationships with interested importers, and discover your products' potential in that market.

- **Focused Trade Mission to Taiwan for Retail and Food Service Products** • May 11-12, 2015, Taipei, Taiwan
Registration Deadline: February 16, 2015
- **Focused Trade Mission to Hong Kong for Food Service Products** • July 13-14, 2015, Hong Kong, China
Early Registration Deadline: March 11, 2015
- **Focused Trade Mission to El Salvador for Retail and Food Service Products** • July 9-10, 2015, San Salvador, El Salvador
Early Registration Deadline: March 5, 2015
- **NEW! Focused Trade Mission to Northern China for Food Service Products** • July 14-17, 2015, Shenyang and Beijing, China
Early Registration Deadline: March 11, 2015

Food Show PLUS!™—International Tradeshow Success

Food Show PLUS!™ provides the logistical assistance you need to be a more effective exhibitor. Services may include registration assistance, pre-show product research, translations of booth and sales materials, technical interpreters at your booth, local industry tours, on-site show assistance from food marketing experts, and much more!

- **Food Show PLUS!™ at Food & Hotel Vietnam** • April 1-23, 2015, Ho Chi Minh City, Vietnam
Registration Deadline: January 26, 2015
- **Food Show PLUS!™ at Vitafoods Europe** • May 5-7, 2015, Geneva, Switzerland
Registration Deadline: February 10, 2015
- **Food Show PLUS!™ at SIAL Canada** • April 28-30, 2015, Toronto, Canada
Registration Deadline: February 3, 2015
- **Food Show PLUS!™ at Seoul Food & Hotel** • May 11-15, 2015, Seoul, South Korea
Registration Deadline: February 17, 2015

Find Export Success. Call Us. We're Here to Help.

Visit www.foodexport.org to get complete details and register online. Or call your Service Squad member to answer any questions.

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Please note: Dates and locations are subject to change and upcoming activities are pending funding from the USDA, Foreign Agricultural Service. Visit our website for more event information.



Expand Your International Marketing Budget... **Expand Your Bottom Line**

Demand for Funding Is at an All-Time High. Submit Your 2015 Application Today!

What Is the Branded Program?

Through the USDA, Foreign Agricultural Service, the Branded Program supports U.S. food and agricultural companies' international marketing efforts by reimbursing 50 percent of approved international marketing and promotional activities such as:

- Advertising
- In-store promotions
- Public relations
- Product literature
- Freight costs for samples
- Package and label modifications
- Overseas tradeshows
- Certain domestic tradeshows with international attendance

Companies Already Enrolled in the Branded Program

Your company may qualify for Branded Program funds for another market even after you've reached the five-year graduation in one market. In fact, you may qualify for many markets at one time.

Put the Branded Program to Work for You

The Branded Program operates on a yearly basis. Go to the Branded Program page at www.foodexport.org today to see if you pre-qualify or to submit an application or an amendment.

How to Qualify?

To be eligible for the Branded Program, U.S. suppliers must be a "small" company according to SBA guidelines or an agricultural producer cooperative; be incorporated in the U.S.; have products that are at least 50 percent U.S. agricultural content by weight (exclusive of added water and packaging); and are headquartered in the Midwestern or Northeastern regions of the U.S. A company's headquarters is defined as the physical location of the business' main management/operations office.

Note: Eligible promotional expenses incurred by overseas importers and distributors on behalf of U.S. program participants may also qualify for reimbursement under the program.

Upcoming Events

Food Export–Midwest and Food Export–Northeast are holding events throughout the year that may qualify for Branded Program reimbursement. If you're interested in growing sales internationally, don't miss these upcoming opportunities. Go to www.foodexport.org and select Help Me Choose on the Programs & Activities drop-down menu for more information about these activities.

For Additional Information

Fax this back to 312.334.9230. (Note: This is not a registration form.)

COMPANY _____

CONTACT _____ TITLE _____

STREET ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ FAX _____

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PRODUCTS _____

Check this box if you no longer want to receive faxes or e-mails from Food Export–Midwest and Food Export–Northeast. Please provide your company name, fax number, and e-mail address and fax this form back to 312.334.9230.

Who We Are

Food Export Association of the Midwest USA and Food Export USA–Northeast are nonprofit organizations composed of state agricultural promotion agencies that use federal, state, and industry resources to promote the export of Midwestern and Northeastern food and agricultural products. Food Export–Midwest and Food Export–Northeast administer many services through Market Access Program (MAP) funding from the USDA, Foreign Agricultural Service.



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Food Export–Midwest and Food Export–Northeast do not tolerate fraud and are vigilant in preventing fraud in any of our programs. Food Export does not discriminate, and we reserve the sole right to accept or deny companies into our programs. For complete participation policies and our code of ethics, visit: www.foodexport.org/termsandconditions.

FOOD EXPORT HELPLINE™: WHICH U.S. PRODUCTS WERE RECENTLY BANNED IN RUSSIA?

Q: I read where U.S. food and agricultural products and food have been banned in Russia. Was the U.S. the only country targeted in the ban and does that mean all food and agricultural products? How long do you think this will last?

A: That is a good question as depending on where you get your information the news varies in accuracy. For our industry, the best source is the USDA's Foreign Agricultural Service (FAS) Agricultural Trade Office (ATO) in Moscow. Their August 8, 2014, International Agricultural Trade Report (IATR) communiqué reads "On August 6, 2014, Russia issued an order banning certain agricultural imports from the United States, the EU-28, Canada, Australia, and Norway for one year. The products banned include beef, pork, poultry, fish and seafood products, fruits and nuts, vegetables, and some sausages and most prepared foods.

In calendar year 2013, the United States shipped \$1.3 billion of agricultural and related food products (including fish and forestry products), and of this amount approximately 55% are products now restricted." Through October 2014, U.S. exports of agricultural and related food products have dropped 15% to \$858.7 million.

It is not a total loss for food and agricultural exporters; however, for those who now have been shut out it could be very difficult to gain traction in the market once it reopens. The U.S. has relatively small market share in Russia as a result of the geographical distance and other factors, with only about 4% share in 2013.

Overview of Banned Products

Russia used its Harmonized System (HS) in order to list the banned products more specifically, which is helpful in separating out the products that were not banned.

Beef

HS Chapter headings 0201 and 0202 are for Beef, fresh chilled and frozen. U.S. beef and beef product exports to Russia in 2013 were only \$1 million because, as with pork, in early 2013 U.S. beef was restricted and this restriction remains in effect. In 2012, U.S. exports of beef to Russia had reached a record \$299 million. Brazil was the largest supplier of beef to Russia in 2013, followed by Paraguay. The U.S. provided less than 1% of Russia's beef imports in 2013, although in 2012 it was 8%. Through October 2014, U.S. exports of beef and products were down 39% to \$550 million.

Pork

Chapter heading 0203 is for pork, fresh, chilled, and frozen. ATO Moscow reports that U.S. pork and pork product exports in 2013 were just \$17.6 million as, for much of the year, Russia restricted all U.S. pork, beef, and turkey. Russia had previously been a much larger importer of U.S. pork and, as recently as 2012, exports were \$267 million. This market was partially reopened earlier this year. As a result, the October 2014 YTD value reached \$137 million, an increase of 680%. The EU-28 is historically the largest supplier followed by Brazil and Canada. The U.S. provided less than 1% of Russia's pork imports in 2013, although in 2012 it was 12%.

Poultry

Chapter heading 0207 is Poultry, fresh, chilled, or frozen. U.S. poultry meat and product exports in 2013 were \$310 million and Russia was the 4th-largest market for U.S. poultry, accounting for nearly 6% of U.S. poultry exports. In 2008 U.S. poultry exports had been over \$800 million (18% of total U.S. poultry exports), but the combination of trade restrictions and the growth of the domestic Russian poultry industry reduced U.S. exports. The United States had more than half of the market share of Russia's poultry imports in 2013, again followed by Brazil. By October 2014 the YTD value had already dropped 43% to \$150.3 million.

Fish and Seafood Not Prepared/Preserved

HS headings 0301 through 0308 were also on the list. This is all fish and seafood that has not been prepared/preserved which is in HS chapter 16 (except for sausages). Russia has been a growing market for U.S. fish and seafood exports, with the largest product being salmon roe for Russian red caviar. Exports of all fish and seafood products in 2013 to Russia reached a record \$83 million. Russia was the 12th largest market for U.S. fish and seafood in 2013, accounting for a little less than 2% of total exports of these products. Through October of 2014 U.S. exports were \$44.5 million, a decline of 37% on a YTD basis.

Dairy Products

HS headings 0401 through 0406 were also banned. These are milk and dairy products. The U.S. has not shipped significant

quantities of dairy products to Russia since 2010 because of Russian certification and establishment listing requirements. Belarus is typically the largest supplier of milk to Russia, with the EU-28 the largest supplier of cheese. Dairy exports to Russia have dropped 49% through October to just over \$3.1 million, although up one half a million since the ban in August.

Fresh Vegetables

HS headings 0701 through 0714 are also on the banned product list. This is the entire chapter and includes mostly fresh or edible vegetables. The U.S. sends limited amounts of these products to Russia, with total exports in 2013 of \$6.3 million. However this year through August exports had grown 65% to \$6.1 million. Through October that figure is the same so exports were halted there.

Fruits and Nuts

HS headings 0801 through 0813 are also banned. These are edible fruits and nuts in various conditions including fresh, dried, and frozen. This includes tree nuts—Russia has been a rapidly expanding market for fresh and dried U.S. tree nuts. In 2013 U.S. exports reached nearly \$172 million, nearly triple the level of 2010, and accounted for 2% of total U.S. tree nut exports. Through October 2014 U.S. exports of Tree Nuts were down 51% to less than \$70 million dollars. In 2013 Russia was the 14th-largest importer of U.S. fresh/dried tree nuts. The U.S. is by far the largest supplier of tree nuts to Russia, followed by Iran.

Fresh and Dried Fruits

Chapter 08 also includes fresh and dried fruit (although not prepared/preserved such as sweetened). Although Russia is one of the largest fruit importers in the world, only a very small share comes from the United States. In 2013, Russia was the 19th-largest market for U.S. fresh fruit, worth \$34.1 million (less than 1% of U.S. fruit exports). The EU-28 was the largest supplier of fresh fruit to Russia in 2013. Key fresh fruit exports from the United States to Russia in 2013 included apples, totaling \$13 million, and pears, totaling \$11.7 million. For dried fruit products in chapter 08, U.S. exports in 2013 were \$16.2 million with the largest product being prunes, with exports totaling

.....continued on back

\$11.4 million. Exports of these products are down 58% to \$8.7 million through August, again the same figure as in October.

Sausages

HS subheading 160100 is also on the list, which includes sausages and similar products of meat including chicken and other poultry, beef and pork, as well as fish and seafood products. Through October, Russia had only imported sausage of chicken which had grown 43% to nearly \$1.7 million. That has stopped as well since through October it is only at \$1.8 million and now down 25% YTD.

Preparations of Cereals, Flour, Starch or Milk and Baker's Wares

Russia also selected to extend HTS codes for the ban from Chapter 19 which covers preparations of cereals, flour, starch or milk and bakers' wares. They are 1901901100 and 1901909100. These include malt extract and dairy blends. Although low in value this was a high growth category for the U.S., up 81% through October '14 at \$2.9 million, far exceeding the 2013 total amount.

Miscellaneous Edible Preparations

Russia also selected extended HTS codes from subheading 210690 which covers miscellaneous edible preparations, so it covers a lot of products "Nesoi" or not elsewhere specified or included. These tariff codes are 2106909200, 2106909804, 2106909805 and 2106909800. These include "food (containing milk, based on vegetable oils)", "mixes or edible products from animal or vegetable fat or their fractions, containing over 15% dairy content", "cheese fondue," and "other" which, of course, is very broad. U.S. exports of "other food preparations" are down 38% to \$45.7 million through October '14, having totaled \$79.6 million in 2013. It would be prudent for any U.S. exporter with the HS subheading of 210690 to determine if their product is banned in Russia if they are currently or would like to export there. The U.S. and EU dominate in this sector so Russia may have plans in place for import substitution or alternative sources.

What Product Are Not Subject to the Ban?

There are a number of categories that have not been subjected to the ban.

There is a categorical exception for "goods designed for baby nutrition," meaning even if in a banned heading or subheading these types of products will be allowed entry. In fact two weeks after the original announcement on the ban the Government



of Russia issued a decree amending the list of banned agricultural products from the United States, Canada, the European Union, Australia, and Norway to exclude certain agricultural items such as Atlantic salmon fry and trout fry, seed (i.e., potatoes, peas, hybrid sweet corn, onion), biologically active additives, vitamins and minerals designed to compensate for the lack of vitamins and minerals in the human body, flavors, protein concentrates and their mixtures, fiber supplements, food additives, and lactose-free dairy products."

Chapter 01 of the HS for example is live animals and it is not on the list. There are a number of meat products in chapter 02 allowed in but they are mostly not bovine, pork, or poultry. Eggs and honey from chapter 04 were not banned either. Chapter 05 of the HS has been excluded from the list which includes animal genetics. Chapter 06 is also not on the list which is live plant products.

Coffee, tea and spices (09), cereal grains (10), milling products (11), oilseeds (12), vegetable plating (13), animal and vegetable fats and oils (15), and non-sausage prepared and preserved meats (16) have also been left off. In addition sugar

and chocolate confections and products (17, 18), baked goods except for the malt extract and dairy blends (19), prepared/preserved fruits and nuts, (20), miscellaneous edible preparations (21) other than the 210690 products listed above are off the list as well. All beverages, spirits and vinegar (22) as well as pet food and animal feed (23) are also not currently banned.

Summary

FAS continues to closely monitor developments regarding Russia and their implications for U.S. market development programs. In consideration of multiple short- and long-term factors, including marketing, trade, and security matters, until notified otherwise, FAS will continue to allow reimbursement of expenses incurred for approved program activities, including Market Access Program (MAP) funds planned with Russia, contingent upon FAS Moscow concurrence on a case-by-case basis. They require U.S. suppliers contact FAS Moscow regarding each planned activity, including those of local representatives, prior to implementation. FAS will continue to evaluate this policy on a regular basis to determine if future activities are viable and eligible for reimbursement.