

packaging machinery manufacturers of all sizes operating in the United States. We discovered a total of forty-three manufacturers operating in California, which is less than 10 percent of the national total. One hundred and eighty machinery manufacturers are members of the PMMI and these are generally considered to be the larger manufacturers. Sixteen of the PMMI members are located in California, this is again less than 10 percent. The results of our research concerning California manufacturers are given in Section 6.0. As a general rule California exports an estimated 25 percent of all its industrial production internationally. At the same time, an undetermined amount of products are exported to other parts of the U.S. California packaging machinery manufacturers routinely reported that exports featured as high as 70 percent of their total production. For these reasons, it is possible to determine that the requirement for machinery produced outside California is substantially greater than \$5 million. Our conservative estimate is that California offers a \$50 million market for imported packaging machinery of all kinds.

It must be remembered, however, that this market potential is already actively serviced by at least the fifty sales organizations discovered during our research and that they are experiencing considerable success with both a wide range of U.S. and imported machinery. U.S. national imports of food processing machinery (including food packaging machinery) were \$284 million in 1980. A confirmed \$181 million of these imports are for packaging machinery of all types. U.S. Industrial Outlook