

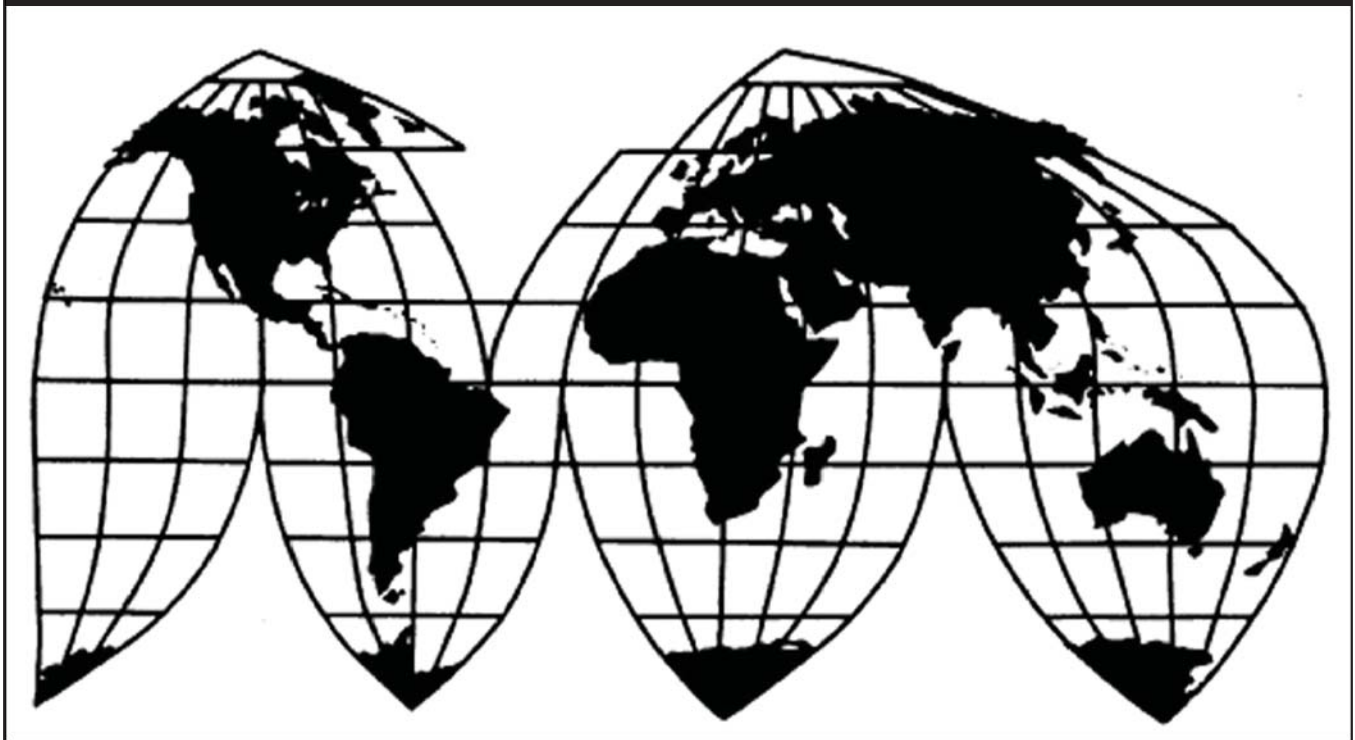
Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand

Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Second Review)
and AA1921-188 (Fourth Review)

Publication 4527

April 2015

U.S. International Trade Commission



Washington, DC 20436

U.S. International Trade Commission

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UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Second Review) and
AA1921-188 (Fourth Review)

Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand

DETERMINATIONS

On the basis of the record¹ developed in the subject five-year reviews, the United States International Trade Commission (“Commission”) determines, pursuant to section 751(c) of the Tariff Act of 1930 (19 U.S.C. § 1675(c)), that revocation of the countervailing duty order on prestressed concrete steel wire strand (“PC strand”) from India, the antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand, as well as the antidumping duty finding on PC strand from Japan, would be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.

BACKGROUND

The Commission instituted these reviews on November 3, 2014 (79 F.R. 65246) and determined on February 6, 2015, that it would conduct expedited reviews (80 F.R. 9747, February 24, 2015).

The Commission completed and filed its determinations in these reviews on April 10, 2015. The views of the Commission are contained in USITC Publication 4527 (April 2015), entitled *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand: Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Second Review) and AA1921-188 (Fourth Review)*

¹ The record is defined in sec. 207.2(f) of the Commission’s Rules of Practice and Procedure (19 CFR § 207.2(f)).

Views of the Commission

Based on the record in these five-year reviews, we determine under section 751(c) of the Tariff Act of 1930, as amended (“the Tariff Act”), that revocation of the countervailing duty order on prestressed concrete steel wire strand (“PC strand”) from India, the antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand, and the antidumping duty finding on PC strand from Japan would be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.

I. Background

Original Determination on PC Strand from Japan. In November 1978, the Commission determined that a domestic industry was injured by reason of less than fair value imports of PC strand from Japan,¹ and the Department of the Treasury issued an antidumping duty finding on imports of PC strand from Japan in December 1978.²

First Two Reviews on PC Strand from Japan. In January 1999, the Commission completed its first expedited five-year review of the antidumping duty finding on PC strand from Japan and determined that revocation of the finding would be likely to lead to a continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.³ As a result of the affirmative five-year review determination by Commerce and the Commission, Commerce issued a continuation of the antidumping duty finding.⁴

In June 2004, the Commission completed its second expedited five-year review of the antidumping duty finding on PC strand from Japan and again determined that revocation of the finding would be likely to lead to a continuation or recurrence of material injury to an industry

¹ *Steel Wire Strand for Prestressed Concrete from Japan*, Inv. No. AA1921-188, USITC Pub. 928 (Nov. 1978), (“Japan Original Determination, USITC Pub. 928”). Under the Antidumping Duty Act of 1921, the Commission made findings of “injury,” rather than “material injury.”

² *Steel Wire Strand for Prestressed Concrete from Japan*, 43 Fed. Reg. 57599 (Dec. 8, 1978). In the original investigation, Treasury excluded one Japanese producer, Kawatetsu Wire Products Co., Ltd., from its antidumping duty finding. Japan Original Determination, USITC Pub. 928 at 3. In 1986, Commerce revoked the antidumping duty finding for a second Japanese producer, Sumitomo Electric Industries, Ltd. *Steel Wire Strand for Prestressed Concrete from Japan*, 43 Fed. Reg. 57599 (Dec. 8, 1978). In a changed circumstances review in 1990, Commerce applied Kawatetsu’s exclusion to its successor in interest, Kawasaki Steel Techno-Wire (55 Fed. Reg. 28796 (Jul. 13, 1990)). There has been no changed circumstances review in which Commerce could consider whether to extend the exclusion to Kawasaki’s successor, JFE Techno-Wire, and therefore the exclusion does not apply to JFE. Confidential Report (“CR”) at 15-16 n.22, Public Report (“PR”) at I-8 n.22.

³ *Prestressed Concrete Steel Wire Strand from Japan*, Inv. No. AA1921-188 (Review), USITC Pub. 3156 (Feb. 1999) (“Japan First Review Determination, USITC Pub. 3156”).

⁴ *Continuation of Antidumping Finding: Prestressed Concrete Steel Wire Strand From Japan*, 64 Fed. Reg. 40554 (Jul. 27, 1999).

in the United States within a reasonably foreseeable time.⁵ Commerce again issued a continuation of the antidumping duty finding on imports of PC strand from Japan.⁶

Original Determinations on PC Strand from Brazil, India, Korea, Mexico, and Thailand. In January 2004, the Commission determined that a domestic industry was materially injured by reason of subsidized imports of PC strand from India and less than fair value imports of PC strand from Brazil, India, Korea, Mexico, and Thailand.⁷ Commerce subsequently issued a countervailing duty order on imports of PC strand from India and antidumping duty orders on imports of PC strand from Brazil, India, Korea, Mexico, and Thailand.⁸

2009 Reviews. The Commission conducted grouped first reviews of the countervailing duty order on PC strand from India and the antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand, and the third review of the antidumping duty finding on PC strand from Japan. These grouped reviews will be referenced as “the 2009 reviews.” After full reviews, the Commission determined in November 2009 that revocation of those orders and the finding on PC strand from Japan would be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.⁹ Commerce accordingly issued a continuation of the countervailing duty and antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand and the antidumping duty finding on PC strand from Japan.¹⁰

Current Reviews. The Commission instituted these reviews on November 3, 2014.¹¹ It received one submission in response to its notice of institution, filed on behalf of Insteel Wire

⁵ *Prestressed Concrete Steel Wire Strand from Japan*, Inv. No. AA1921-188 (Second Review), USITC Pub. 3699 (Jun. 2004) (“Japan Second Review Determination, USITC Pub. 3699”).

⁶ *Continuation of Antidumping Duty Findings: Prestressed Concrete Wire Strand from Japan and Pressure Sensitive Plastic Tape From Italy*, 69 Fed. Reg. 35584 (Jun. 25, 2004).

⁷ *Prestressed Concrete Steel Wire Strand From Brazil, India, Korea, Mexico, and Thailand*, Inv. Nos. 701-TA-432 and 731-TA-1024-1028 (Final), USITC Pub. 3663 (Jan. 2004) (“2004 Original Determinations, USITC Pub. 3663”).

⁸ *Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from the Republic of Korea, Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from India, Notice of Amended Final Determination of Sales at Less Than Fair Value and Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from Thailand, Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from Brazil, Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from Mexico*, 69 Fed. Reg. 4109-4113 (Jan. 28, 2004); and *Notice of Countervailing Duty Order: Prestressed Concrete Steel Wire Strand From India*, 69 Fed. Reg. 5319 (Feb. 4, 2004) (collectively, “2004 Orders”).

⁹ *Prestressed Concrete Steel Wire Strand From Brazil, India, Japan, Korea, Mexico, and Thailand; Determinations*, 74 FR 62820 (Dec. 1, 2009); *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand*, Inv. Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review), USITC Publication 4114 (Nov. 2009) (“2009 Reviews, USITC Pub. 4114”).

¹⁰ *Continuation of Antidumping and Countervailing Duty Finding and Orders: Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand*, 74 Fed. Reg. 65739 (Dec. 11, 2009).

¹¹ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand, Institution of Five-Year Reviews*, 79 Fed. Reg. 65246 (Nov. 3, 2014).

Products Co. (“Insteel”) and Sumiden Wire Products Co. (“Sumiden”) (collectively, “Domestic Producers”).¹² The Commission received no respondent interested party responses to the notice of institution. On February 6, 2015, the Commission determined that the domestic interested party group response was adequate for all reviews and that the respondent interested party group response was inadequate for all reviews. The Commission did not find any other circumstances that would warrant conducting full reviews and therefore determined that it would conduct expedited reviews pursuant to section 751(c)(3) of the Tariff Act.¹³

II. Domestic Like Product and Industry

A. Domestic Like Product

In making its determination under section 751(c) of the Tariff Act, the Commission defines the “domestic like product” and the “industry.”¹⁴ The Tariff Act defines “domestic like product” as “a product which is like, or in the absence of like, most similar in characteristics and uses with, the article subject to an investigation under this subtitle.”¹⁵ The Commission’s practice in five-year reviews is to examine the domestic like product definition from the original investigation and consider whether the record indicates any reason to revisit the prior findings.¹⁶

1. The Subject Merchandise

Commerce has defined the scope of the orders in these five-year reviews as follows:

The product covered in the sunset reviews of the antidumping duty [and countervailing duty] orders on PC strand from Brazil, India, Korea, Mexico, and Thailand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pre-tensioned and

¹² Domestic Producers’ Response to Notice of Institution (“Domestic Producers’ Response”).

¹³ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand; Scheduling of Expedited Five-Year Reviews*, 80 Fed. Reg. 9747 (Feb. 24, 2015).

¹⁴ 19 U.S.C. § 1677(4)(A).

¹⁵ 19 U.S.C. § 1677(10); *see, e.g., Cleo Inc. v. United States*, 501 F.3d 1291, 1299 (Fed. Cir. 2007); *NEC Corp. v. Department of Commerce*, 36 F. Supp. 2d 380, 383 (Ct. Int’l Trade 1998); *Nippon Steel Corp. v. United States*, 19 CIT 450, 455 (1995); *Timken Co. v. United States*, 913 F. Supp. 580, 584 (Ct. Int’l Trade 1996); *Torrington Co. v. United States*, 747 F. Supp. 744, 748-49 (Ct. Int’l Trade 1990), *aff’d*, 938 F.2d 1278 (Fed. Cir. 1991); *see also* S. Rep. No. 249, 96th Cong., 1st Sess. 90-91 (1979).

¹⁶ *See, e.g., Internal Combustion Industrial Forklift Trucks from Japan*, Inv. No. 731-TA-377 (Second Review), USITC Pub. 3831 at 8-9 (Dec. 2005); *Crawfish Tail Meat from China*, Inv. No. 731-TA-752 (Review), USITC Pub. 3614 at 4 (July 2003); *Steel Concrete Reinforcing Bar from Turkey*, Inv. No. 731-TA-745 (Review), USITC Pub. 3577 at 4 (Feb. 2003).

post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.

The product covered in the sunset review of the antidumping duty finding on PC strand from Japan is steel wire strand, other than alloy steel, not galvanized, which is stress-relieved and suitable for use in prestressed concrete.

The merchandise subject to the finding/orders is currently classifiable under subheadings 7312.10.3010 and 7312.10.3012 of the Harmonized Tariff Schedule of the United States (HTSUS). Although the HTSUS subheadings are provided for convenience and customs purposes, the written description of the merchandise under the finding/orders is dispositive.¹⁷

PC strand consists of multiple steel wires wound together to produce a strong, flexible product that is used to strengthen concrete structures. It is commonly available in three grades, in covered and uncovered form, and in several nominal diameters. The most common PC strand configuration consists of six wires wound helically around a single wire core. Nominal diameters of PC strand typically range from 0.25 to 0.70 inch, while the three common grade designations (250, 270, and 300) correspond to the minimum ultimate strength of the product in thousands of pounds per square inch.¹⁸

PC strand is used in the construction of prestressed concrete structural components to introduce compression into the concrete. This compression offsets or neutralizes forces within the concrete that occur when it is subjected to loads. Typical applications of prestressed concrete include parking garages, bridge decks, bridge girders, pilings, precast concrete panels and structural supports, roof trusses, floor supports, and certain concrete foundations.¹⁹

PC strand may be pre-tensioned or post-tensioned. Pre-tensioned PC strand is tensioned (pulled tightly and slightly elongated) using a calibrated tensioning apparatus, and concrete is cured around the PC strand. After the concrete has cured, the tension is released and the tensile force of the strand induces a compressive force in the concrete. For post-tensioned PC strand, there is no bond between the PC strand and the cured concrete. Instead, the PC strand is tensioned using a calibrated tensioning apparatus after the concrete has cured. In post-tensioned prestressed concrete, permanent mechanical anchors remain in place to maintain tension after the removal of the tensioning apparatus. Whether PC strand is sold for pre- or post-tensioned applications, it serves the same purpose of imparting compressive forces into concrete so that it can withstand tensile stress without cracking.²⁰

¹⁷ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand: Final Results of the Expedited Sunset Reviews of the Antidumping Duty Finding/Orders*, 80 Fed. Reg. 13827 (Mar. 17, 2015).

¹⁸ CR at 9, PR at I-4.

¹⁹ CR at 9-10, PR at I-4-5.

²⁰ CR at 10-11, PR at I-5.

2. Domestic Like Product In Original Determinations and Prior Reviews

In its first two reviews of the antidumping duty finding concerning subject imports from Japan, the Commission defined the domestic like product to be coextensive with Commerce's scope; *i.e.*, all steel wire strand, other than alloy steel, not galvanized, that has been stress-relieved and is suitable for use in prestressed concrete.²¹

In its 2004 Original Determinations, the Commission found the domestic like product to be all PC strand that was coextensive with Commerce's scope; *i.e.*, steel strand produced from wire of non-stainless, non-galvanized steel that is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses covered and uncovered strand and all types, grades, and diameters of PC strand. The Commission considered and rejected an argument that covered and uncovered PC strand should be treated as separate like products.²²

In the 2009 reviews, the Commission found no new facts that would warrant defining the domestic like product differently than in the first and second reviews of the Japan finding and in the 2004 Original Determinations and, therefore, defined the domestic like product consistent with those prior determinations. The Commission recognized that the description of the scope of the orders following the 2004 Original Determinations differed in a number of technical respects from that of the scope of the Japan finding, but found that those differences lacked significance.²³

3. Current Reviews

No new facts have been presented in these expedited reviews to warrant defining the domestic like product differently than in the 2009 reviews.²⁴ Moreover, Domestic Producers stated in their response to the notice of institution that they support the definition set forth in the Commission's prior determinations.²⁵ Therefore, we again define the domestic like product to encompass "steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses covered and uncovered strand and all types, grades, and diameters of PC strand."²⁶

²¹ Japan First Review Determination, USITC Pub. 3156 at 4; Japan Second Review Determination, USITC Pub. 3699 at 4-6. The Commission did not make a like product finding in its original determination concerning PC strand from Japan.

²² 2004 Original Determinations, USITC Pub. 3663 at 9-10.

²³ 2009 Reviews, USITC Pub. 4114 at 5-7.

²⁴ See *generally* CR at 9-13, PR at I-4-6.

²⁵ Domestic Producers' Response at 20.

²⁶ 2009 Reviews, USITC Pub. 4114 at 7.

B. Domestic Industry

Section 771(4)(A) of the Tariff Act defines the relevant industry as the domestic “producers as a whole of a domestic like product, or those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of the product.”²⁷ In defining the domestic industry, the Commission’s general practice has been to include in the industry producers of all domestic production of the like product, whether toll-produced, captively consumed, or sold in the domestic merchant market.

We must determine whether any producer of the domestic like product should be excluded from the domestic industry pursuant to section 771(4)(B) of the Tariff Act. This provision allows the Commission, if appropriate circumstances exist, to exclude from the domestic industry producers that are related to an exporter or importer of subject merchandise or which are themselves importers.²⁸ Exclusion of such a producer is within the Commission’s discretion based upon the facts presented in each investigation.²⁹

1. Domestic Industry in Original Determinations and Prior Reviews

In its original determination regarding subject imports from Japan, the Commission defined the domestic industry as “facilities in the United States devoted to the production of steel wire strand for prestressed concrete.”³⁰ In its expedited first and second reviews of the Japan finding the Commission defined the domestic industry as all U.S. producers of PC strand.³¹ In the 2004 Original Determinations, the Commission defined the domestic industry to include

²⁷ 19 U.S.C. § 1677(4)(A). The definitions in 19 U.S.C. § 1677 are applicable to the entire subtitle containing the antidumping and countervailing duty laws, including 19 U.S.C. §§ 1675 and 1675a. *See* 19 U.S.C. § 1677.

²⁸ *See Torrington Co v. United States*, 790 F. Supp. 1161, 1168 (Ct. Int’l Trade 1992), *aff’d without opinion*, 991 F.2d 809 (Fed. Cir. 1993); *Sandvik AB v. United States*, 721 F. Supp. 1322, 1331-32 (Ct. Int’l Trade 1989), *aff’d mem.*, 904 F.2d 46 (Fed. Cir. 1990); *Empire Plow Co. v. United States*, 675 F. Supp. 1348, 1352 (Ct. Int’l Trade 1987).

²⁹ The primary factors the Commission has examined in deciding whether appropriate circumstances exist to exclude a related party include the following:

- (1) the percentage of domestic production attributable to the importing producer;
- (2) the reason the U.S. producer has decided to import the product subject to investigation, *i.e.*, whether the firm benefits from the LTFV sales or subsidies or whether the firm must import in order to enable it to continue production and compete in the U.S. market; and
- (3) the position of the related producer vis-a-vis the rest of the industry, *i.e.*, whether inclusion or exclusion of the related party will skew the data for the rest of the industry. *See, e.g., Torrington Co. v. United States*, 790 F. Supp. at 1168.

³⁰ Japan Original Determination, USITC Pub. 928 at 4.

³¹ Japan First Review Determination, USITC Pub. 3156 at 4; Japan Second Review Determination, USITC Pub. 3699 at 6-7.

all producers of PC strand.³² In the 2009 reviews, the Commission observed that no new facts had been presented to warrant a conclusion different from that in the 2004 Original Determinations and the first and second reviews of the Japan finding. It noted, moreover, that no party raised any objections to this domestic industry definition. Therefore, based on its definition of the domestic like product, the Commission defined the domestic industry to include all producers of the domestic like product.³³

2. The Current Reviews

No new facts have been presented to warrant a conclusion different from that in the 2004 Original Determinations, the first and second reviews of the Japan finding, and the 2009 reviews. The record indicates no related party issues.³⁴ Moreover, Domestic Producers support the prior domestic industry definition.³⁵ Therefore, based on our definition of the domestic like product, we define the domestic industry to include all producers of the domestic like product.

III. Cumulation

A. Legal Standard

With respect to five-year reviews, section 752(a) of the Tariff Act provides as follows: the Commission may cumulatively assess the volume and effect of imports of the subject merchandise from all countries with respect to which reviews under section 1675(b) or (c) of this title were initiated on the same day, if such imports would be likely to compete with each other and with domestic like products in the United States market. The Commission shall not cumulatively assess the volume and effects of imports of the subject merchandise in a case in which it determines that such imports are likely to have no discernible adverse impact on the domestic industry.³⁶

Cumulation therefore is discretionary in five-year reviews, unlike original investigations, which are governed by section 771(7)(G)(i) of the Tariff Act.³⁷ The Commission may exercise its

³² 2004 Original Determinations, USITC Pub. 3663 at 10-12. The Commission also determined that plastic coating did not constitute sufficient production-related activity to qualify coaters as members of the domestic industry producing PC strand. *Id.*

³³ 2009 Reviews, USITC Pub. 4114 at 7.

³⁴ Although Sumiden is affiliated with a producer of PC strand from Japan, that producer is not subject to the antidumping finding. CR at 24-25, PR at I-15. There were no related party issues in the 2004 Original Determinations or any of the prior reviews.

³⁵ Domestic Producers' Response at 20.

³⁶ 19 U.S.C. § 1675a(a)(7).

³⁷ 19 U.S.C. § 1677(7)(G)(i); *see also, e.g., Nucor Corp. v. United States*, 601 F.3d 1291, 1293 (Fed. Cir. 2010) (Commission may reasonably consider likely differing conditions of competition in deciding (Continued...))

discretion to cumulate, however, only if the reviews are initiated on the same day, the Commission determines that the subject imports are likely to compete with each other and the domestic like product in the U.S. market, and imports from each such subject country are not likely to have no discernible adverse impact on the domestic industry in the event of revocation. Our focus in five-year reviews is not only on present conditions of competition, but also on likely conditions of competition in the reasonably foreseeable future.

B. Cumulation in the Prior Investigations and Reviews

In the 2004 Original Investigations, the Commission cumulated imports from the five countries subject to those investigations. With respect to fungibility, the Commission found that imports of PC strand from the subject sources were fungible with each other and with the domestic like product. It stated that PC strand is a largely undifferentiated product in the U.S. market, conforming to ASTM specifications and generally produced in a single form, size, and strength. All U.S. producers and purchasers considered domestically produced PC strand to be interchangeable with PC strand from each subject country, and most importers considered the domestic like product and subject imports to be always or sometimes interchangeable.³⁸

Because the domestic like product and imports from all subject countries were generally marketed throughout the United States, the Commission found overlapping geographic markets for subject imports and the domestically produced product. The Commission found an overlap of channels of distribution because most of the domestic like product and most subject imports were sold to end users. Finally, the Commission found that the domestic like product and imports from all subject countries were present in the U.S. market throughout the period of investigation.³⁹

In the 2009 reviews, the Commission found that subject imports from each of the six countries would not be likely to have no discernible adverse impact on the domestic industry in the event of revocation. It based its no discernible adverse impact analysis upon such factors as the volume of subject imports from the individual countries prior to and following issuance of the order or finding, production capacity and excess capacity of the industry in each subject country, and the export orientation of each subject industry.⁴⁰

The Commission also found a likely reasonable overlap of competition among the imports from the subject countries and between the subject imports and the domestic like product in the event of revocation. The Commission found, as it had in the 2004 Original Determinations, that the domestic like product and imports from each subject source were

(...Continued)

whether to cumulate subject imports in five-year reviews); *Allegheny Ludlum Corp. v. United States*, 475 F. Supp. 2d 1370, 1378 (Ct. Int'l Trade 2006) (recognizing the wide latitude the Commission has in selecting the types of factors it considers relevant in deciding whether to exercise discretion to cumulate subject imports in five-year reviews); *Nucor Corp. v. United States*, 569 F. Supp. 2d 1328, 1337-38 (Ct. Int'l Trade 2008).

³⁸ 2004 Original Determinations, USITC Pub. 3663 at 13-14.

³⁹ 2004 Original Determinations, USITC Pub. 3663 at 15.

⁴⁰ 2009 Reviews, USITC Pub. 4114 at 9-15.

fungible notwithstanding application of Buy America provisions to a portion of the market and differing concentrations of domestic and subject PC strand in the markets for pre-tensioned and post-tensioned applications. The Commission found that all reported shipments during the period of review were to end users. Although the volume of subject imports from certain of the subject countries was small or nonexistent due to the discipline of the orders and finding, the Commission found no evidence that subject imports would not again compete in the same geographic markets with domestically produced PC strand in the reasonably foreseeable future upon revocation of the orders and the finding. Similarly, with respect to simultaneous presence, the Commission found that the industry in each of the subject countries was likely to resume or increase its exports to the United States upon revocation and thus that the subject imports and the domestic like product were likely to be simultaneously present in the U.S. market in the reasonably foreseeable future upon revocation. Accordingly, the Commission concluded that there likely would be a reasonable overlap of competition between the subject imports and the domestic like product and among the subject imports if the countervailing duty order, the antidumping duty orders, and the antidumping duty finding were revoked.⁴¹

The Commission also did not find any significant differences in the likely conditions under which subject imports from any subject country were likely to compete in the U.S. market if the orders or finding were revoked. The Commission rejected an argument that, because Mexico was a net importer of PC strand, subject imports from Mexico were likely to compete under different conditions in the U.S. market in the event of revocation than were the other subject imports. The Commission found that the industry in Mexico was not any less likely than those in other subject countries to export to the United States in the event of revocation given its export orientation in the original investigation, its current substantial excess capacity, and its proximity to the United States.⁴²

C. Analysis

In these reviews, the statutory threshold for cumulation is satisfied because all reviews were initiated on the same day, November 3, 2014.⁴³ In addition, we consider the following issues in deciding whether to exercise our discretion to cumulate the subject imports: (1) whether imports from either of the subject countries are precluded from cumulation because they are likely to have no discernible adverse impact on the domestic industry; (2) whether there is a likelihood of a reasonable overlap of competition among subject imports from the subject countries and the domestic like product; and (3) whether subject imports are likely to compete in the U.S. market under different conditions of competition.

⁴¹ 2009 Reviews, USITC Pub. 4114 at 15-18.

⁴² 2009 Reviews, USITC Pub. 4114 at 19.

⁴³ 79 Fed. Reg. 65246 (Nov. 3, 2014).

1. Likely Discernible Adverse Impact

The statute precludes cumulation if the Commission finds that subject imports from a country are likely to have no discernible adverse impact on the domestic industry.⁴⁴ Neither the statute nor the Uruguay Round Agreements Act (“URAA”) Statement of Administrative Action (“SAA”) provides specific guidance on what factors the Commission is to consider in determining that imports “are likely to have no discernible adverse impact” on the domestic industry.⁴⁵ With respect to this provision, the Commission generally considers the likely volume of subject imports and the likely impact of those imports on the domestic industry within a reasonably foreseeable time if the orders are revoked. Our analysis for each of the subject countries takes into account, among other things, the nature of the product and the behavior of subject imports in the original investigations.

Based on the record in these reviews, we do not find that imports from any of the subject countries would likely have no discernible adverse impact on the domestic industry in the event of revocation.

Brazil. Brazil was a significant exporter of the subject merchandise to the United States during the original period of investigation, and was the third largest source of imports among the subject countries. Subject imports from Brazil declined sharply in 2004, and since then were present in the U.S. market only in 2010.⁴⁶ Belgo Bekaert, the sole producer of PC strand in Brazil, claims to be “the largest wire manufacturer in the Americas with an annual capacity of around 900,000 tons (1.8 billion pounds) of drawn wire.”⁴⁷ In the 2009 reviews, the Commission observed that Belgo Bekaert’s capacity had *** since the imposition of the antidumping duty order in 2004, although there was evidence in the record that the company planned to expand its capacity for stranded wires and other long products. Moreover, Belgo Bekaert’s capacity utilization was *** lower in interim 2009 than in interim 2008.⁴⁸ According to the Global Trade Atlas (“GTA”), Brazil’s annual exports between 2009 and 2013 of stranded wire, ropes, and cables, a category that includes PC strand but also nonsubject merchandise, ranged between 41.8 million and 65.2 million pounds.⁴⁹ Consequently, we do not find that subject imports from Brazil would likely have no discernible adverse impact on the domestic industry if the relevant order were revoked.

India. Subject imports from India increased steadily during the original period of investigation, were present in the U.S. market in small quantities from 2004 to 2008, and have

⁴⁴ 19 U.S.C. § 1675a(a)(7).

⁴⁵ SAA, H.R. Rep. No. 103-316, vol. I at 887 (1994).

⁴⁶ CR/PR at Tables 5 and C-1; 2009 Reviews, USITC Pub. 4114 at 10 n.47.

⁴⁷ CR at 37, PR at I-24-25. Belgo Bekaert is a joint venture between ArcelorMittal Brasil Long Wire (formerly known as Belgo-Mineira), a member company of multinational steel producer ArcelorMittal Group, and Bekaert, a producer of wire and metallic coatings headquartered in Belgium. CR at 37, PR at I-24.

⁴⁸ 2009 Reviews, USITC Pub. 4114 at 10.

⁴⁹ CR/PR at Table 11.

been absent from the U.S. market since 2009.⁵⁰ There were three PC strand producers in India at the time of the original investigations and four in the period examined in the 2009 reviews. The industry in India had substantial unused capacity in the original period of investigation and the Commission found in the first five-year reviews, based on the questionnaire response of the sole producer in India that responded, that the industry in India was at least moderately export oriented.⁵¹ According to GTA, India's world exports of stranded wire, ropes, and cables increased from 98.4 million pounds in 2009 to 164.6 million pounds in 2013, or by 67 percent.⁵² We consequently do not find that subject imports from India would likely have no discernible adverse impact on the domestic industry if the relevant orders were revoked.

Japan. While subject imports from Japan decreased both absolutely and relative to U.S. consumption between 1974 and 1977, they held over 60 percent of the U.S. market in both 1976 and 1977. Subject imports from Japan were present in the U.S. market in each year from 2004 to 2008 in amounts ranging from 1.4 million pounds to 2.0 million pounds.⁵³ Subject imports from Japan were absent from the market in 2009 and 2010, but were present in 2011, 2012, and 2013 in quantities ranging from 651,000 pounds to 1.3 million pounds.⁵⁴ It is believed that there are currently four subject producers of PC strand in Japan. The most recent information on unused capacity in Japan is from the second five-year review of the Japan finding, in which the Commission found that Japanese producers subject to the antidumping finding had substantial unused capacity to manufacture PC strand. The Commission estimated that those producers were operating at a capacity utilization rate of only *** percent and that the unused capacity of those producers could supply *** percent of the U.S. market.⁵⁵ We consequently do not find that subject imports from Japan would likely have no discernible adverse impact on the domestic industry if the relevant finding were revoked.

Korea. Subject imports from Korea increased sharply during the original period of investigation, declined sharply in 2004 and 2005, were at quantities ranging from 2.8 million to 4.0 million pounds from 2006 to 2008, and have remained in the U.S. market at quantities ranging from 462,000 pounds to 2.3 million pounds from 2009 to 2013.⁵⁶ There are believed to be four producers of PC strand in Korea.⁵⁷ The Korean PC strand industry had substantial unused capacity during the original investigations, when its capacity utilization rate ranged between 74.5 percent and 86.2 percent.⁵⁸ In the 2009 reviews, the Commission observed that the capacity utilization of the two Korean producers that responded to the Commission's questionnaire in those reviews was *** lower in interim 2009 than in interim 2008.⁵⁹ According

⁵⁰ CR/PR at Tables 5 and C-1; 2009 Reviews, USITC Pub. 4114 at 10 & n.57.

⁵¹ 2009 Reviews, USITC Pub. 4114 at 10 n.47.

⁵² CR/PR at Table 11.

⁵³ 2009 Reviews, USITC Pub. 4114 at 11.

⁵⁴ CR/PR at Table 6.

⁵⁵ Japan Second Review Determination, USITC Pub. 3699 at 11; 2009 Reviews, USITC Pub. 4114 at 11.

⁵⁶ CR/PR at Tables 5, C-1; 2009 Reviews, USITC Pub. 4114 at 12 & n.65.

⁵⁷ CR at 40-41. PR at I-26.

⁵⁸ 2004 Original Determination, USITC Pub. 3663 at Table VII-6.

⁵⁹ 2009 Reviews, USITC Pub. 4114 at 12.

to GTA, Korea's world exports of stranded wire, ropes, and cables increased from 536.7 million pounds in 2009 to 687.5 million pounds in 2013, or by 28 percent.⁶⁰ We consequently do not find that subject imports from Korea would likely have no discernible adverse impact on the domestic industry if the relevant order were revoked.

Mexico. Subject imports from Mexico increased sharply during the original period of investigation, and Mexico was the second largest source of subject imports.⁶¹ Subject imports from Mexico declined sharply in 2004; while official import statistics indicate varying quantities of imports from Mexico in 2004-10 and 2013, the known producers of PC strand in Mexico stated in the prior reviews that they had not exported subject merchandise to the United States ***. Therefore, the official import data may include out-of-scope merchandise.⁶² Two producers were believed to account for all production of PC strand in Mexico at the time of the original investigations. Based on the two companies' responses to questionnaires in the 2009 reviews, the Commission found that the capacity of the Mexican PC strand industry had increased substantially and its capacity utilization rate had fallen substantially since the original investigation.⁶³ According to GTA, Mexico's exports to the world of stranded wire, ropes, and cables increased from 27.3 million pounds in 2009 to 35.7 million pounds in 2013, or by 31 percent.⁶⁴ We consequently do not find that subject imports from Mexico would likely have no discernible adverse impact on the domestic industry if the relevant order were revoked.

Thailand. Subject imports from Thailand increased over the original period of investigation.⁶⁵ The quantity of subject imports from Thailand declined moderately in 2004, declined sharply in 2005 and 2006, and was zero in 2007 and 2008. During the current review period, the quantity of subject imports from Thailand rose to 106,000 pounds in 2009 and 1.0 million pounds in 2010, and was zero in 2011, 2012, and 2013.⁶⁶ There were five known PC strand producers in Thailand during the original period of investigation, domestic interested parties identified an additional PC strand producer in the 2009 reviews, and Domestic Producers identified the same six producers in Thailand in the current reviews. The record of the 2009 reviews did not include complete capacity data for the industry in Thailand, but the Commission found that the record data indicated that the capacity of the industry in Thailand had increased substantially since the original investigations. Moreover, the industry in Thailand had substantial unused capacity during the original investigations, when its capacity utilization rate ranged between *** percent and *** percent.⁶⁷ According to GTA, Thailand's exports to the world of stranded wire, ropes, and cables, which includes PC strand, increased from 192.0 million pounds in 2009 to 216.2 million pounds in 2013, or by 13 percent.⁶⁸ We consequently

⁶⁰ CR/PR at Table 11.

⁶¹ 2009 Reviews, USITC Pub. 4114 at 12.

⁶² CR/PR at Tables 5, C-1.

⁶³ 2009 Reviews, USITC Pub. 4114 at 12.

⁶⁴ CR/PR at Table 11.

⁶⁵ 2009 Reviews, USITC Pub. 4114 at 15.

⁶⁶ CR/PR at Tables 5, C-1.

⁶⁷ 2009 Reviews, USITC Pub. 4114 at 15.

⁶⁸ CR/PR at Table 11.

do not find that subject imports from Thailand would likely have no discernible adverse impact on the domestic industry if the relevant order were revoked.

2. Likely Reasonable Overlap of Competition

The Commission generally has considered four factors intended to provide a framework for determining whether subject imports compete with each other and with the domestic like product.⁶⁹ Only a “reasonable overlap” of competition is required.⁷⁰ In five-year reviews, the relevant inquiry is whether there likely would be competition even if none currently exists because the subject imports are absent from the U.S. market.⁷¹

Fungibility. As stated above, the Commission found in the 2004 Original Determinations and the 2009 reviews that imports from each subject country were generally interchangeable with the domestic like product, notwithstanding Buy America(n) requirements and differing concentrations in pre-tensioned and post-tensioned applications. There is no new information in these reviews to indicate that this has changed. Domestic Producers assert that PC strand from each subject country and the United States is fungible.⁷²

Common Channels of Distribution. In the original investigations and the 2009 reviews the Commission found that domestically produced PC strand and imports from each subject country were sold to end users.⁷³ There is no new information in these reviews to indicate that this has changed. Domestic Producers claim that both domestically produced PC strand and subject imports from each subject country are sold through the same channels of distribution.⁷⁴

⁶⁹ The four factors generally considered by the Commission in assessing whether imports compete with each other and with the domestic like product are as follows: (1) the degree of fungibility between subject imports from different countries and between subject imports and the domestic like product, including consideration of specific customer requirements and other quality-related questions; (2) the presence of sales or offers to sell in the same geographical markets of imports from different countries and the domestic like product; (3) the existence of common or similar channels of distribution for subject imports from different countries and the domestic like product; and (4) whether subject imports are simultaneously present in the market with one another and the domestic like product. *See, e.g., Wieland Werke, AG v. United States*, 718 F. Supp. 50 (Ct. Int’l Trade 1989).

⁷⁰ *See Mukand Ltd. v. United States*, 937 F. Supp. 910, 916 (Ct. Int’l Trade 1996); *Wieland Werke*, 718 F. Supp. at 52 (“Completely overlapping markets are not required.”); *United States Steel Group v. United States*, 873 F. Supp. 673, 685 (Ct. Int’l Trade 1994), *aff’d*, 96 F.3d 1352 (Fed. Cir. 1996). We note, however, that there have been investigations where the Commission has found an insufficient overlap in competition and has declined to cumulate subject imports. *See, e.g., Live Cattle from Canada and Mexico*, Inv. Nos. 701-TA-386 and 731-TA-812-13 (Preliminary), USITC Pub. 3155 at 15 (Feb. 1999), *aff’d sub nom, Ranchers-Cattlemen Action Legal Foundation v. United States*, 74 F. Supp. 2d 1353 (Ct. Int’l Trade 1999); *Static Random Access Memory Semiconductors from the Republic of Korea and Taiwan*, Inv. Nos. 731-TA-761-62 (Final), USITC Pub. 3098 at 13-15 (Apr. 1998).

⁷¹ *See generally, Cheflin Corp. v. United States*, 219 F. Supp. 2d 1313, 1314 (Ct. Int’l Trade 2002).

⁷² Comments at 11.

⁷³ 2004 Original Determinations, USITC Pub. 3663 at 15; 2009 Reviews, USITC Pub. 4114 at 17.

⁷⁴ Comments at 11.

Geographic Overlap. In the original Investigations, the domestic industry and importers reported selling their products in overlapping geographic markets.⁷⁵ In the 2009 reviews, the Commission found that the domestic like product and at least some imports of subject merchandise were sold nationwide.⁷⁶ In these reviews, the record indicates that the domestic like product was sold nationwide, imports from four subject countries (Japan, Korea, Mexico, and Thailand) entered in Los Angeles, and imports from three subject countries (Brazil, Korea, and Mexico) entered in Seattle.⁷⁷ The Commission found in the 2009 reviews that there was no evidence in the record that subject imports would not again compete in the same geographic markets with domestically produced PC strand in the reasonably foreseeable future upon revocation of the orders and the finding.⁷⁸ There is no information in these reviews to indicate that this has changed.

Simultaneous Presence in Market. In the original investigations, the Commission found that domestic shipments of PC strand and subject imports from each source were simultaneously present in the U.S. market. In these reviews, the record shows that only subject imports from Korea were present in the U.S. market in each year of the period of review.⁷⁹ The Commission found in the 2009 reviews that, although imports from each subject country were not present in the U.S. market throughout the period of review, each subject country was likely to resume or increase its exports to the United States upon revocation.⁸⁰ In light of our findings in section III.C.1. above, such a finding is equally appropriate in these reviews.

Analysis. The limited record of these expedited reviews includes no information suggesting that, upon revocation, imports from any subject country would have appreciably different characteristics, distribution patterns, or geographic presence. In light of this, the Commission's findings based on a similar record in the 2009 reviews, and the absence of any contrary arguments, we find a likely reasonable overlap of competition among subject imports from Brazil, India, Japan, Korea, Mexico, and Thailand, and between subject imports from each country and the domestic like product, should the orders and finding be revoked.

3. Other Likely Conditions of Competition

In determining whether to exercise our discretion to cumulate the subject imports, we assess whether subject imports from the subject countries would compete under similar or different conditions in the U.S. market if the orders and finding under review were revoked. The record in these reviews does not indicate that there would likely be any significant difference in the conditions of competition among subject imports upon revocation.

⁷⁵ 2004 Original Determinations, USITC Pub. 3663 at 15.

⁷⁶ 2009 Reviews, USITC Pub, 4114 at 17.

⁷⁷ CR at 34, PR at I-22; CR/PR at Table 9. There were no subject imports from India from 2009 to 2013. CR/PR at Tables 5, 9, and 10.

⁷⁸ 2009 Reviews, USITC Pub. 4114 at 17.

⁷⁹ CR/PR at Table 10.

⁸⁰ 2009 Reviews, USITC Pub. 4114 at 18.

Accordingly, we exercise our discretion to cumulate subject imports from Brazil, India, Japan, Korea, Mexico, and Thailand.

IV. Whether Revocation of the Orders and Finding Would Likely Lead to Continuation or Recurrence of Material Injury Within a Reasonably Foreseeable Time

A. Legal Standards

In a five-year review conducted under section 751(c) of the Tariff Act, Commerce will revoke an antidumping or countervailing duty order or finding unless: (1) it makes a determination that dumping or subsidization is likely to continue or recur and (2) the Commission makes a determination that revocation of the antidumping or countervailing duty order or finding “would be likely to lead to continuation or recurrence of material injury within a reasonably foreseeable time.”⁸¹ The SAA states that “under the likelihood standard, the Commission will engage in a counterfactual analysis; it must decide the likely impact in the reasonably foreseeable future of an important change in the status quo – the revocation or termination of a proceeding and the elimination of its restraining effects on volumes and prices of imports.”⁸² Thus, the likelihood standard is prospective in nature.⁸³ The CIT has found that “likely,” as used in the five-year review provisions of the Act, means “probable,” and the Commission applies that standard in five-year reviews.⁸⁴

The statute states that “the Commission shall consider that the effects of revocation or termination may not be imminent, but may manifest themselves only over a longer period of

⁸¹ 19 U.S.C. § 1675a(a).

⁸² SAA at 883-84. The SAA states that “{t}he likelihood of injury standard applies regardless of the nature of the Commission’s original determination (material injury, threat of material injury, or material retardation of an industry). Likewise, the standard applies to suspended investigations that were never completed.” *Id.* at 883.

⁸³ While the SAA states that “a separate determination regarding current material injury is not necessary,” it indicates that “the Commission may consider relevant factors such as current and likely continued depressed shipment levels and current and likely continued {sic} prices for the domestic like product in the U.S. market in making its determination of the likelihood of continuation or recurrence of material injury if the order is revoked.” SAA at 884.

⁸⁴ See *NMB Singapore Ltd. v. United States*, 288 F. Supp. 2d 1306, 1352 (Ct. Int’l Trade 2003) (“‘likely’ means probable within the context of 19 U.S.C. § 1675(c) and 19 U.S.C. § 1675a(a)”), *aff’d mem.*, 140 Fed. Appx. 268 (Fed. Cir. 2005); *Nippon Steel Corp. v. United States*, 26 CIT 1416, 1419 (2002) (same); *Usinor Industeel, S.A. v. United States*, 26 CIT 1402, 1404 nn.3, 6 (2002) (“more likely than not” standard is “consistent with the court’s opinion;” “the court has not interpreted ‘likely’ to imply any particular degree of ‘certainty’”); *Indorama Chemicals (Thailand) Ltd. v. United States*, 26 CIT 1059, 1070 (2002) (“standard is based on a likelihood of continuation or recurrence of injury, not a certainty”); *Usinor v. United States*, 26 CIT 767, 794 (2002) (“‘likely’ is tantamount to ‘probable,’ not merely ‘possible’”).

time.”⁸⁵ According to the SAA, a “‘reasonably foreseeable time’ will vary from case-to-case, but normally will exceed the ‘imminent’ timeframe applicable in a threat of injury analysis in original investigations.”⁸⁶

Although the standard in a five-year review is not the same as the standard applied in an original investigation, it contains some of the same fundamental elements. The statute provides that the Commission is to “consider the likely volume, price effect, and impact of imports of the subject merchandise on the industry if the orders are revoked or the suspended investigation is terminated.”⁸⁷ It directs the Commission to take into account its prior injury determination, whether any improvement in the state of the industry is related to the order or the suspension agreement under review, whether the industry is vulnerable to material injury if the orders are revoked or a suspension agreement is terminated, and any findings by Commerce regarding duty absorption pursuant to 19 U.S.C. § 1675(a)(4).⁸⁸ The statute further provides that the presence or absence of any factor that the Commission is required to consider shall not necessarily give decisive guidance with respect to the Commission’s determination.⁸⁹

In evaluating the likely volume of imports of subject merchandise if the orders under review are revoked and/or a suspended investigation is terminated, the Commission is directed to consider whether the likely volume of imports would be significant either in absolute terms or relative to production or consumption in the United States.⁹⁰ In doing so, the Commission must consider “all relevant economic factors,” including four enumerated factors: (1) any likely increase in production capacity or existing unused production capacity in the exporting country; (2) existing inventories of the subject merchandise, or likely increases in inventories; (3) the existence of barriers to the importation of the subject merchandise into countries other than the United States; and (4) the potential for product shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products.⁹¹

In evaluating the likely price effects of subject imports if the orders under review are revoked and/or a suspended investigation is terminated, the Commission is directed to consider whether there is likely to be significant underselling by the subject imports as

⁸⁵ 19 U.S.C. § 1675a(a)(5).

⁸⁶ SAA at 887. Among the factors that the Commission should consider in this regard are “the fungibility or differentiation within the product in question, the level of substitutability between the imported and domestic products, the channels of distribution used, the methods of contracting (such as spot sales or long-term contracts), and lead times for delivery of goods, as well as other factors that may only manifest themselves in the longer term, such as planned investment and the shifting of production facilities.” *Id.*

⁸⁷ 19 U.S.C. § 1675a(a)(1).

⁸⁸ 19 U.S.C. § 1675a(a)(1). No duty absorption findings have been made for any of the subject countries. See CR at 21, PR at I-12.

⁸⁹ 19 U.S.C. § 1675a(a)(5). Although the Commission must consider all factors, no one factor is necessarily dispositive. SAA at 886.

⁹⁰ 19 U.S.C. § 1675a(a)(2).

⁹¹ 19 U.S.C. § 1675a(a)(2)(A-D).

compared to the domestic like product and whether the subject imports are likely to enter the United States at prices that otherwise would have a significant depressing or suppressing effect on the price of the domestic like product.⁹²

In evaluating the likely impact of imports of subject merchandise if the orders under review are revoked and/or a suspended investigation is terminated, the Commission is directed to consider all relevant economic factors that are likely to have a bearing on the state of the industry in the United States, including but not limited to the following: (1) likely declines in output, sales, market share, profits, productivity, return on investments, and utilization of capacity; (2) likely negative effects on cash flow, inventories, employment, wages, growth, ability to raise capital, and investment; and (3) likely negative effects on the existing development and production efforts of the industry, including efforts to develop a derivative or more advanced version of the domestic like product.⁹³ All relevant economic factors are to be considered within the context of the business cycle and the conditions of competition that are distinctive to the industry. As instructed by the statute, we have considered the extent to which any improvement in the state of the domestic industry is related to the orders under review and whether the industry is vulnerable to material injury upon revocation.⁹⁴

B. Conditions of Competition

Demand. In the original investigation concerning subject imports from Japan, the Commission observed that PC strand was used to reinforce concrete units used in the construction of bridge girders, beams, pilings, railroad ties, and a variety of building products, such as columns, roofs, and floors.⁹⁵ A peak period of heavy construction in 1973 and 1974 was followed by a recession in 1975, with noticeable improvements in the level of heavy construction and demand appearing in 1977.⁹⁶ In its first and second five-year reviews of the finding on subject imports from Japan, the Commission observed that the domestic construction industry had enjoyed a substantial expansion since the original investigation, thus increasing U.S. demand for PC strand.⁹⁷

⁹² See 19 U.S.C. § 1675a(a)(3). The SAA states that “[c]onsistent with its practice in investigations, in considering the likely price effects of imports in the event of revocation and termination, the Commission may rely on circumstantial, as well as direct, evidence of the adverse effects of unfairly traded imports on domestic prices.” SAA at 886.

⁹³ 19 U.S.C. § 1675a(a)(4).

⁹⁴ The SAA states that in assessing whether the domestic industry is vulnerable to injury if the order is revoked, the Commission “considers, in addition to imports, other factors that may be contributing to overall injury. While these factors, in some cases, may account for the injury to the domestic industry, they may also demonstrate that an industry is facing difficulties from a variety of sources and is vulnerable to dumped or subsidized imports.” SAA at 885.

⁹⁵ Japan Original Determination, USITC Pub. 928 at 3-4.

⁹⁶ Japan Original Determination, USITC Pub. 928 at A-7-8.

⁹⁷ Japan First Review Determination, USITC Pub. 3156 at 6-8; Japan Second Review Determination, USITC Pub. 3669 at 8-10.

In the 2004 Original Determinations, the Commission found that apparent U.S. consumption of PC strand declined from 2000 to 2003. The Commission also found that the U.S. market was not strictly segmented based on pre-tensioned versus post-tensioned PC strand applications.⁹⁸ In the 2009 reviews, apparent U.S. consumption of PC strand increased overall but had declined at the end of the review period from the peak in 2006. Most U.S. producers and importers reported that demand was expected to continue to decline in the near term and that any recovery in demand depended on a recovery in construction.⁹⁹ The Commission explained that most of the subject imports during the period of review were sold for post-tensioned applications, while the domestic product was sold mostly for pre-tensioned applications. The Commission observed that Buy America(n) provisions continued to account for about one-third of the market and were more prevalent with respect to sales to pre-tensioned customers.¹⁰⁰

In the current reviews the record indicates that PC strand continues to be used in construction applications.¹⁰¹ Apparent U.S. consumption was *** pounds in 2013, contrasted with 942.7 million pounds in 2008, the end of the first review period.¹⁰²

Supply. In the original investigation concerning subject imports from Japan, the Commission observed that capacity in the United States and other countries had expanded in response to supply shortages in 1973 and 1974.¹⁰³ In its first and second five-year reviews of the finding on subject imports from Japan, the Commission observed that the domestic industry was the largest source of supply in the U.S. market, nonsubject imports were the second largest source, and subject imports from Japan had largely exited the market.¹⁰⁴

In the 2004 Original Determinations, the domestic industry was the largest source of supply to the U.S. market, although its share declined over the period to below 70 percent of the market. Subject imports supplied more than 20 percent of the market and nonsubject imports less than 10 percent.¹⁰⁵ In the 2009 Reviews, the Commission explained that there had been a number of changes in the identity of the suppliers of PC strand to the U.S. market since the 2004 Original Determinations. Two Mexican PC strand producers had established, then closed, production facilities in the United States. Rettco, a new domestic producer, commenced production in 2005. The domestic industry's capacity grew from 742 million pounds in 2003 to 904 million pounds in 2008, at which time there were five domestic producers of PC strand. Subject imports from Brazil, India, Korea, Mexico, and Thailand largely left the market, or continued at much reduced levels, after the imposition of the antidumping duty orders and the countervailing duty order in 2004. Imports of PC strand from China,

⁹⁸ 2004 Original Determinations, USITC Pub. 3663 at 16-17.

⁹⁹ 2009 Reviews, USITC Pub. 4114 at 24.

¹⁰⁰ 2009 Reviews, USITC Pub. 4114 at 24.

¹⁰¹ CR at 9-10, PR at I-4-5.

¹⁰² CR/PR at Table 8.

¹⁰³ Japan Original Determination, USITC Pub. 928 at A-7.

¹⁰⁴ Japan First Review Determination, USITC Pub. 3156 at 6-8; Japan Second Review Determination, USITC Pub. 3669 at 8-10.

¹⁰⁵ 2004 Original Determinations, USITC Pub. 3663 at 17.

however, increased rapidly over the period of review. By 2008, the domestic industry accounted for only 56.2 percent of apparent U.S. consumption, whereas imports from China accounted for 40.5 percent.¹⁰⁶

In the current reviews, the domestic industry accounted for *** percent of apparent U.S. consumption in 2013.¹⁰⁷ Two new producers entered the U.S. PC strand industry during the review period. Deacero USA, a subsidiary of Mexican PC strand producer Deacero, began production in 2010, and Wire Mesh Corporation, a privately owned firm, began production in 2012. There were also several acquisitions, divestments, and reorganizations of production arrangements within the domestic industry.¹⁰⁸ Subject imports accounted for *** percent of apparent U.S. consumption in 2013, and nonsubject imports accounted for *** percent.¹⁰⁹

Substitutability and Other Conditions. In its first and second five-year reviews of the finding on subject imports from Japan, the Commission characterized PC strand as predominantly a commodity product, for which competition was based mostly on price.¹¹⁰ In the 2004 Original Determinations, the Commission found PC strand to be a largely undifferentiated product that was generally produced in a single form, size, and strength and that subject imports and domestically produced PC strand were generally substitutable, with price being an important factor in purchasing decisions.¹¹¹ It observed that Buy America(n) restrictions or preferences applied to about 30 percent of the entire U.S. PC strand market, largely in pre-tensioned applications.¹¹²

In the 2009 Reviews, the Commission explained that market participants found subject imports from Brazil, India, Japan, Korea, Mexico, and Thailand to be generally interchangeable with one another and with the domestic like product. Approximately one-third of the domestic PC strand market was subject to Buy America(n) restrictions during the period of review, which was about the same proportion as in the 2004 original investigations. The Commission noted that wire rod costs were an important component of the total cost of producing PC strand and

¹⁰⁶ 2009 Reviews, USITC Pub. 4114 at 25, Table C-1.

¹⁰⁷ CR/PR at Table 8.

¹⁰⁸ The 2005 agreement of RettCo Steel, LLC to conduct toll production for MMI Strand Co. terminated in 2010. ***. RettCo *** entered into a toll-processing agreement with American Spring Wire in 2011. American Spring Wire continued operation of its PC strand operations in Houston, Texas, but ceased production of PC strand at its Bedford Heights, Ohio plant. In July 2014, American Spring Wire acquired RettCo and, in August 2014, sold its PC strand business, including the former RettCo plant at Newnan, Georgia, and the equipment, but not the real estate, at its Houston, Texas plant to Insteel. Insteel is to lease the Houston facility from American Spring Wire. CR at 8, PR at 1-3.

¹⁰⁹ CR/PR at Table 8. Principal nonsubject sources of PC strand imports in 2013 included Malaysia, South Africa, and Spain. CR/PR at Table 6.

¹¹⁰ Japan First Review Determination, USITC Pub. 3156 at 6-8; Japan Second Review Determination, USITC Pub. 3669 at 8-10.

¹¹¹ 2004 Original Determinations, USITC Pub. 3663 at 17-18.

¹¹² 2004 Original Determinations, USITC Pub. 3663 at 18.

that global prices of wire rod increased at the beginning of 2008, peaked in August of that year, and then declined to pre-2008 levels.¹¹³

The information available in these reviews includes nothing to indicate that the substitutability between subject imports and domestic like product and among subject imports from the various subject countries has changed since the prior investigations and reviews. Accordingly, we again find that subject imports to be generally substitutable for one another and for the domestic like product and price to be an important factor in purchasing decisions.

C. Likely Volume of Subject Imports

1. Original Investigation and First Two Reviews of PC Strand from Japan

In the original investigation of PC strand from Japan, the Commission observed that, despite an overall decline in the volume of subject imports over the period of investigation, imports from Japan held over 60 percent of the U.S. market in both 1976 and 1977.¹¹⁴ In its first five-year review, the Commission found that capacity in Japan far exceeded domestic demand and that Japan and other Asian countries were experiencing a severe recession, while demand for PC strand in the United States was strong. The Commission also found that Japanese producers' exports to the United States fell sharply after the antidumping duty finding was in place and that the volume of imports from Japan likely would be significant and likely would increase significantly if the finding were revoked.¹¹⁵

In its second five-year review, the Commission noted that Japanese producers subject to the finding continued to have substantial excess capacity and that the exportation of even a limited amount of this capacity to the United States would likely result in significant increases in subject import volumes. It found that the then-prevailing buoyant construction activity in the United States and sluggish demand in Japan created incentives for Japanese producers to target the U.S. market. The Commission also explained that the recent imposition of antidumping duties on imports of PC strand from Brazil, India, Korea, Mexico, and Thailand and countervailing duties on imports from India would create an opening for subject imports from Japan to reenter the market if the finding on Japan were revoked. The Commission accordingly found that subject imports likely would be significant, both in absolute terms and relative to production and consumption in the United States, if the finding were revoked.¹¹⁶

¹¹³ 2009 Reviews, USITC Pub. 4114 at 25-26.

¹¹⁴ Japan Original Determination, USITC Pub. 928 at 5.

¹¹⁵ Japan First Review Determination, USITC Pub. 3156 at 8-10.

¹¹⁶ Japan Second Review Determination, USITC Pub. 3699 at 10-12.

2. Original Investigations with Respect to PC Strand from Brazil, India, Korea, Mexico, and Thailand

In the 2004 Original Determinations, the Commission found that the volume of cumulated subject imports from Brazil, India, Korea, Mexico, and Thailand increased during the period of investigation from 118.6 million pounds in 2000 to 129.2 million pounds in 2001, then jumped sharply to 164.9 million pounds in 2002. Their market share increased from 15.1 percent of the U.S. market in 2000 to 22.0 percent in 2002. The Commission observed that subject imports were focused on sales to post-tensioned customers, where they displaced domestic producers from a significant volume of sales. The Commission found the volume of subject imports, both in absolute terms and relative to production and consumption in the United States, as well as the increase in that volume, to be significant.¹¹⁷

3. 2009 Reviews

In the 2009 reviews the Commission found that several factors supported the conclusion that cumulated subject import volume was likely to be significant in the event of revocation. First, it found that the aggregate estimated production capacity in the subject countries was considerable, growing by 20 percent since the original investigations, from 1.04 billion pounds in 2002/2003 to 1.25 billion pounds in 2008/2009. Second, although the Commission was unable to quantify precisely the unused production capacity in the subject countries because of the failure of many subject producers to respond to the Commission's questionnaire, it was clear that the excess capacity had become substantial, given reporting of decreased capacity utilization by producers in *** and the deepening effects of the worldwide economic slowdown. The Commission found that the aggregate excess capacity would likely provide a strong incentive for producers of PC strand in the subject countries to increase shipments to export markets, including the United States, if the orders and the finding were revoked. Third, the Commission observed that the record in the original investigations indicated that the PC strand industries in at least some of the subject countries depended to a significant degree on exports and there was no information in the record suggesting that those countries had directed their focus away from exports. Finally, the Commission found that the United States was an attractive market for foreign producers because of its size, with the United States being the world's largest importer of iron or steel stranded wire, ropes, cables, and cordage during the period of review. Accordingly, based on the demonstrated ability of the PC strand producers in the subject countries to increase imports into the U.S. market rapidly, their substantial production capacity and unused capacity, and the attractiveness of the U.S. market, the Commission found that the likely volume of subject imports, both in absolute terms and as a share of the U.S. market, would be significant in the event of revocation.¹¹⁸

¹¹⁷ 2004 Original Determinations, USITC Pub. 3663 at 18-20.

¹¹⁸ 2009 Reviews, USITC Pub. 4114 at 27-28.

4. The Current Reviews

In these reviews, the information available indicates that the finding on subject imports from Japan in 1978 and the orders on subject imports from Brazil, India, Korea, Mexico, and Thailand in 2004 have had disciplining effects on the volume of subject imports, which decreased significantly since the imposition of the finding and orders. Subject imports from Japan were 176.5 million pounds in 1977, and those from the other five subject countries reached 164.9 million pounds in 2002.¹¹⁹ By contrast, for the six countries subject to these reviews, cumulated subject imports were 6.4 million pounds in 2008 and 4.2 million pounds in 2013.¹²⁰

As previously stated, no producer or exporter of subject merchandise participated in these expedited reviews. Nevertheless, available record data indicate that the industries in subject countries continue to manufacture and export substantial volumes of stranded wire, ropes, and cables, which includes PC strand.¹²¹ There is no information in the current record suggesting a decline in subject producers' capacity or unused capacity since the prior reviews. Consequently, on the basis of the facts available, we find that the subject producers continue to have substantial capacity and excess capacity. The facts available further indicate that, on a cumulated basis, the PC strand industries in the subject countries continue to depend on exports to a significant degree.¹²²

Finally, the United States remains an attractive market to the PC strand industries in the subject countries. The PC strand industries in each of the subject countries has been present in the U.S. market to some extent since imposition of the orders and finding, albeit at substantially lower quantities than during the original investigations and in some cases intermittently.¹²³ The record indicates that the United States continues to be a large market for PC strand, and Domestic Producers point to the continued attractiveness of the U.S. market reflected in its continued substantial construction activity.¹²⁴

Accordingly, based on the demonstrated ability of the PC strand producers in the subject countries to increase imports into the U.S. market rapidly, their substantial production capacity and unused capacity, and the attractiveness of the U.S. market, we find that the likely volume of subject imports, both in absolute terms and as a share of the U.S. market, would be significant in the event of revocation.¹²⁵

¹¹⁹ Japan Original Determination, USITC Pub. 928 at 5; 2004 Original Determinations, USITC Pub. 3663 at Table C-1.

¹²⁰ CR/PR at Table 7.

¹²¹ CR/PR at Table 11.

¹²² CR/PR at Table 11.

¹²³ CR/PR at Tables 5, 7.

¹²⁴ 2009 Reviews, USITC Pub. 4114 at 28; Domestic Producers' Comments at 12; Domestic Producers' Response at 19.

¹²⁵ The record of the current reviews does not contain any information about inventories of the subject merchandise or the likelihood of product shifting. There are currently no antidumping or (Continued...)

D. Likely Price Effects of Subject Imports

1. Original Investigation and First Two Reviews of PC Strand from Japan

In the original investigation of subject imports from Japan, the Commission found that those imports consistently undersold the domestic product for most of the period examined, resulting in lost sales and price depression.¹²⁶ In its first five-year review, although the record contained little pricing data, the Commission observed that the commodity nature of the product resulted in largely price-based competition, which was of particular significance in light of the narrowing of products commonly sold since the original investigation. The Commission further noted that average unit values for domestic shipments were declining despite generally high demand levels and that, in the event of revocation, subject producers likely would win sales by discounting from prevailing price levels. The Commission therefore concluded that significant underselling was likely in the event the finding were revoked and that such pricing practices would likely have a significant depressing or suppressing effect on domestic prices.¹²⁷

In its second five-year review, the Commission found that, given the importance of price in the PC strand market, the interchangeability of subject imports and domestically produced PC strand, the likely significant volume of imports, the likely significant underselling by such imports, the pricing practices demonstrated in the original investigation, and the incentives for subject imports to enter the U.S. market, significant volumes of PC strand from Japan likely would significantly undersell the domestic like product to gain market share and likely would have significant depressing or suppressing effects on the prices of the domestic like product if the antidumping duty finding were revoked.¹²⁸

2. The Commission's Original Determinations with Respect to PC Strand from Brazil, India, Korea, Mexico, and Thailand

In the 2004 Original Determinations, the Commission found that significant injurious price effects resulted from the subject imports underselling domestically produced PC strand. The Commission found that the record on underselling by subject imports was mixed but found, on balance, that "significant volumes of the subject merchandise depressed U.S. prices, resulted in substantial lost sales and lost revenues, and had significant adverse price effects on the U.S. industry."¹²⁹

(...Continued)

countervailing duty orders in effect concerning PC strand from any of the subject countries. CR at 43, PR at I-28.

¹²⁶ Japan Original Determination, USITC Pub. 928 at 6.

¹²⁷ Japan First Review Determination, USITC Pub. 3156 at 10-11.

¹²⁸ Japan Second Review Determination, USITC Pub. 3699 at 12-14.

¹²⁹ 2004 Original Determinations, USITC Pub. 3663 at 20-24.

3. 2009 Reviews

In the 2009 reviews, the Commission found that price remained an important factor in the purchase of PC strand and that, even under the discipline of the finding and the orders, the pricing data for the review period indicated a mixture of overselling and underselling by subject imports. The Commission found that, if the orders and the finding under review were revoked, significant volumes of subject imports from Brazil, India, Japan, Korea, Mexico, and Thailand likely would significantly undersell the domestic like product to gain market share and likely would have significant depressing and/or suppressing effects on the prices of the domestic like product, given the likely significant volume of cumulated subject imports, the importance of price in the PC strand market, the interchangeability of subject imports and the domestic like product, the adverse price effects of low-priced imports in the original investigations and the two reviews of imports from Japan, and the underselling that occurred during the period of review even with the finding and the orders in place.¹³⁰

4. The Current Reviews

As discussed above, we continue to find that subject imports are substitutable for each other and for PC strand manufactured in the United States and that price is an important factor in purchasing decisions. The record does not contain current pricing comparisons due to the expedited nature of these reviews. Based on the available information, we find that, if the orders and the finding under review were revoked, significant volumes of subject imports from Brazil, India, Japan, Korea, Mexico, and Thailand likely would significantly undersell the domestic like product to gain market share. These subject imports likely would have significant depressing and/or suppressing effects on the prices of the domestic like product, given the likely significant volume of cumulated subject imports, the importance of price in purchasing decisions for PC strand, the interchangeability of subject imports and the domestic like product, the adverse price effects of low-priced imports in the original investigations, and the underselling that occurred during the period examined in the 2009 Reviews even with the finding and the orders in place.

¹³⁰ 2009 Reviews, USITC Pub. 4114 at 30.

E. Likely Impact of Subject Imports¹³¹

1. Original Investigation and First Two Reviews of PC Strand from Japan

In the original investigation of imports from Japan, the Commission found that the domestic industry was being injured by reason of subject imports from Japan. The industry experienced a declining rate of capacity utilization, a decrease in shipments, an increase in inventories, a drop in employment, and a precipitous decline in profitability between 1974 and 1977. The ratio of operating profit or loss to net sales for domestic producers dropped from a profit of about 20 percent in both 1974 and 1975 to a loss of 3 percent in 1976 and an even greater loss of 7 percent in 1977, the year in which the Treasury Department, which at the time made dumping determinations, found that imports from Japan were sold at less than fair value.¹³²

In its first five-year review, the Commission found that the domestic industry was experiencing a cost-price squeeze in a highly competitive, price-based market supplied by some two dozen other sources that were contributing to an environment of declining prices. The Commission found that the domestic industry was vulnerable to material injury in this environment. It concluded that subject imports would likely have significant negative effects on the domestic industry's prices, output, profitability, capacity utilization, cash flow, and ability to raise capital and make future investments within a reasonably foreseeable time if the finding were revoked.¹³³

In its second five-year review, the Commission found that the domestic industry was vulnerable to further injury if the antidumping duty finding on subject imports from Japan were revoked. The Commission concluded that subject imports would likely have significant negative effects on the domestic industry's prices, output, profitability, capacity utilization, cash flow, and ability to raise capital and make future investments within a reasonably foreseeable time if the finding were revoked.¹³⁴

¹³¹ Under the statute, "the Commission may consider the magnitude of the margin of dumping" in making its determination in a five-year review. 19 U.S.C. § 1675a(a)(6). The statute defines the "magnitude of the margin of dumping" to be used by the Commission in a five-year review as "the dumping margin or margins determined by the administering authority under section 1675a(c)(3) of this title." 19 U.S.C. § 1677(35)(C)(iv); *see also* SAA at 887. Commerce expedited its sunset reviews and found that revocation of the antidumping duty orders and finding would likely lead to a continuation or recurrence of dumping at the following margins: 118.75 percent for subject imports from Brazil, 102.07 percent for subject imports from India, 13.30 percent for subject imports from Japan, 54.19 percent for subject imports from Korea, 77.20 percent for subject imports from Mexico, and 12.91 percent for subject imports from Thailand. 80 Fed. Reg. 13827 (Mar. 17, 2015). Commerce found that revocation of the countervailing duty order on subject imports from India would likely lead to a continuation or recurrence of countervailable subsidies at the rate of 62.92 percent. 80 Fed. Reg. 12804 (Mar. 11, 2015).

¹³² Japan Original Determination, USITC Pub. 928 at 4-6.

¹³³ Japan First Review Determination, USITC Pub. 3156 at 11-14.

¹³⁴ Japan Second Review Determination, USITC Pub. 3699 at 14-15.

2. 2004 Original Determinations and 2009 Reviews

In the 2004 Original Determinations, the Commission found that most indicators of the domestic industry's condition showed marked declines between 2000 and 2002 at a rate greater than the decline in apparent U.S. consumption. It attributed the domestic industry's performance declines in significant part to the increases in subject import volume and market share that had significant price-depressing effects. It explained that Buy America(n) restrictions did not detract from its finding that subject imports had significant price effects, particularly insofar as Buy America(n) sales accounted for only approximately 30 percent of the domestic market. The Commission observed that the vast majority of subject imports were for post-tensioned sales, where subject imports had increased their sales rapidly and at the expense of domestic producers. Although subject imports accounted for only a small share of pre-tensioned sales, they had at least some impact on those sales, persistently underselling the domestic product and resulting in both lost sales and lost revenue.¹³⁵

In the 2009 reviews, the Commission found that the condition of the domestic industry generally improved in the years 2003 through 2006 and then declined in 2007 and 2008, before deteriorating dramatically in interim 2009 with respect to net sales, capacity, capacity utilization, number of production and related workers, hours worked, and productivity. The domestic industry's financial performance followed a similar pattern, with gross profits and operating income surging from 2003 to 2004, reaching a peak in 2005, then declining in subsequent years and turning to losses in interim 2009. The industry's operating income margin increased from 3.4 percent in 2003 to 17.0 percent in 2004 and then declined to 10.7 percent in 2008. It was 15.9 percent in interim 2008 and negative 7.5 percent in interim 2009. The industry's capital expenditures increased irregularly from 2003 to 2006 and then declined irregularly.¹³⁶

Based on the record in those reviews, the Commission concluded that revocation of the orders and the finding would likely lead to a significant increase in the volume of subject imports that would likely undersell the domestic like product and significantly suppress or depress U.S. prices. The Commission also found that the volume and price effects of the subject imports would likely have a significant adverse impact on the production, shipments, sales, market share, and revenues of the domestic industry. It found that these reductions would have a direct adverse impact on the industry's profitability and employment as well as its ability to raise capital and make and maintain necessary capital investments. Thus, it concluded that if the antidumping duty orders, the countervailing duty order, and the antidumping duty finding were revoked, subject imports from Brazil, India, Japan, Korea, Mexico, and Thailand would be likely to have a significant adverse impact on the domestic industry within a reasonably foreseeable time.¹³⁷

¹³⁵ 2004 Original Determinations, USITC Pub. 3663 at 24-27.

¹³⁶ 2009 Reviews, USITC Pub. 4114 at 32-33.

¹³⁷ 2009 Reviews, USITC Pub. 4114 at 33.

The Commission also considered the likely role of nonsubject imports in the U.S. market, which were increasingly imports of PC strand from China, which were then subject to ongoing antidumping and countervailing duty investigations. The Commission found that the increasing presence of nonsubject imports had likely heightened the price sensitivity of the domestic PC strand market, but that those nonsubject imports were not likely to prevent subject imports from reentering the U.S. market in the event of the revocation of the antidumping duty orders, the countervailing duty order, and the antidumping finding. The Commission found that the presence of imports of PC strand from China did not diminish the attractiveness of the U.S. market to producers in the subject countries, especially given the large amount of unused capacity in those countries. Accordingly, the Commission found that subject imports were likely to have a significant adverse impact upon the domestic industry in the event of revocation, notwithstanding the presence of nonsubject imports in the U.S. market.¹³⁸

The Commission found that subject imports were likely to have a significant adverse impact upon the domestic industry in the event of revocation notwithstanding any shielding effect of Buy America(n) provisions.¹³⁹ The Commission also discounted the significance of the fact that the majority of the domestic industry's shipments had been for pre-tensioned applications while the limited volume of subject imports had been mostly for post-tensioned applications. The Commission emphasized that the same product is sold for both types of applications, and that the domestic industry also sells PC strand for post-tensioned applications and has expressed an interest in increasing those sales.¹⁴⁰ Finally, in considering the likely future effects of suppressed demand for PC strand on the domestic industry, the Commission found that subject imports would be likely to have a significant adverse impact on the domestic industry in the event of revocation regardless of demand levels.¹⁴¹

¹³⁸ 2009 Reviews, USITC Pub. 4114 at 33-34. The Commission ultimately made affirmative determinations in the investigations of PC strand from China. *Prestressed Concrete Steel Wire Rod from China*, Inv. Nos. 701-TA-464 and 731-TA-1160 (Final), USITC Pub. 4162 (June 2010). Commerce then issued a countervailing duty order and an antidumping duty order on subject imports of PC Strand from China. 75 Fed. Reg. 38977 (Jul. 7, 2010) (countervailing duty order), 75 Fed. Reg. 37382 (Jun. 29, 2010) (antidumping duty order).

¹³⁹ The Commission also noted that subject imports increased and gained market share while demand declined during the period covered by the investigations leading to the 2004 Original Determinations. 2009 Reviews, USITC Pub. 4114 at 35.

¹⁴⁰ 2009 Reviews, USITC Pub. 4114 at 34. It further observed that the ability of imports to gain market share in post-tensioned applications may have been due, in part, to the lower proportion of Buy America(n) sales in those applications and the greater ability of importers to sell to larger customers in larger quantities. The Commission found that neither of these factors supported the view that the domestic industry had abandoned, was not interested in, or was unable to serve post-tensioned applications. It found that all evidence was to the contrary. Thus, the Commission found that subject imports were likely to have a significant adverse impact upon the domestic industry in the event of revocation, notwithstanding the concentration of the domestic product and subject imports in sales for different applications. 2009 Reviews, USITC Pub. 4114 at 35.

¹⁴¹ 2009 Reviews, USITC Pub. 4114 at 35.

3. The Current Reviews

Because these are expedited reviews, we have only limited information with respect to the domestic industry's financial performance. The limited record is insufficient for us to make a finding on whether the domestic industry is vulnerable to the continuation or recurrence of material injury in the event of revocation of the orders.¹⁴²

The information on the record indicates that domestic industry's capacity was *** pounds in 2013,¹⁴³ its production was *** pounds, and its capacity utilization was *** percent.¹⁴⁴ U.S. shipments were *** pounds in 2013.¹⁴⁵ The industry reported an operating income of \$*** from sales of \$***, resulting in an operating margin of *** percent in 2013.¹⁴⁶ Domestic producers maintain that the antidumping duty finding and orders and the countervailing duty order led to increases in its production, sales, U.S. shipments, market share, capital investment, and operating performance.¹⁴⁷

Based on the information on the record, we find that, should the orders and finding be revoked, the likely significant volume of subject imports that would likely significantly undersell the domestic like product would likely have a significant adverse impact on the production, shipments, sales, market share, and revenues of the domestic industry. These declines would likely have a direct adverse impact on the domestic industry's profitability.

We also have considered the role of factors other than subject imports, including the presence of nonsubject imports, so as not to attribute injury from other factors to the subject imports. Imports of PC strand from nonsubject countries have been present in substantial quantities in the U.S. market since the finding on subject imports from Japan and the orders on subject imports from Brazil, India, Korea, Mexico and Thailand were imposed.¹⁴⁸ Notwithstanding the increase in nonsubject imports during the current review period, the domestic industry was able to increase its share of the U.S. market from 2008, the final full year

¹⁴² Based on the record of these reviews, Vice Chairman Pinkert finds that the domestic industry is not vulnerable to the continuation or recurrence of material injury in the event of revocation of the orders. The information submitted by the domestic interested parties, which account for an estimated *** percent of domestic production, shows that in 2013 they had a healthy operating income of \$*** and a healthy operating income margin of *** percent. CR/PR at Table 4.

¹⁴³ CR/PR at Table 4.

¹⁴⁴ CR/PR at Table 4.

¹⁴⁵ CR/PR at Table 4.

¹⁴⁶ CR/PR at Table 4.

¹⁴⁷ Domestic Producers' Response at 14-16. Reported data for the domestic industry in these reviews are not entirely comparable to data reported in the 2009 reviews because of differences in industry coverage. *Compare* CR/PR at Table 3 *with* 2009 Reviews, USITC Pub. 4114 at III-1. With respect to indicia involving ratios, reported capacity utilization for 2013 was higher, reported net sales value was lower, the reported ratio of cost of goods sold to net sales was lower, and the operating income ratio was lower than those reported in 2008. CR/PR at Table 4.

¹⁴⁸ CR/PR at Table 6.

of the review period in the 2009 reviews, to 2013, and maintained *** operations in 2013.¹⁴⁹ We therefore conclude that the likely adverse effects of revocation that we have identified are not attributable to nonsubject imports.¹⁵⁰

Accordingly, we conclude that, if the countervailing duty order, antidumping duty orders, and antidumping duty finding were revoked, cumulated subject imports would likely have a significant adverse impact on the domestic industry within a reasonably foreseeable time.

V. Conclusion

For the above reasons, we determine that revocation of the countervailing duty order on PC strand from India, the antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand, and the antidumping duty finding on PC strand from Japan would likely lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.

¹⁴⁹ CR/PR at Table 3, 9.

¹⁵⁰ No assertions concerning causes of likely injury other than the subject imports have been made in these expedited reviews.

INFORMATION OBTAINED IN THE CURRENT REVIEWS

BACKGROUND

On November 3, 2014, the U.S. International Trade Commission (“Commission”) gave notice, pursuant to section 751(c) of the Tariff Act of 1930, as amended (“the Act”),¹ that it had instituted a review to determine whether revocation of the antidumping duty orders on prestressed concrete steel wire strand (“PC strand”) from Brazil, India, Korea, Mexico, and Thailand, and the antidumping finding on PC strand from Japan, as well as revocation of the countervailing duty order on PC strand from India would likely lead to the continuation or recurrence of material injury to a domestic industry.² All interested parties were requested to respond to this notice by submitting certain information requested by the Commission.^{3 4} The following tabulation presents information relating to the background and schedule of this proceeding:⁵

Effective or statutory date	Action
November 3, 2014	Notice of institution and initiation by Commerce and Commission
February 6, 2015	Commission vote on adequacy
March 3, 2015	Commerce results of its expedited reviews
April 10, 2015	Commission deadline to complete expedited reviews

¹ 19 U.S.C. 1675(c).

² *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand; Institution of Five-Year Reviews*, [79 FR 65246](#), November 3, 2014.

In accordance with section 751(c) of the Act, the U.S. Department of Commerce (“Commerce”) published a notice of initiation of a five-year review of the subject antidumping duty order concurrently with the Commission’s notice of institution. *Initiation of Five-Year (“Sunset”) Review*, [79 FR 65186](#), November 3, 2014.

³ As part of their response to the notice of institution, interested parties were requested to provide company-specific information. That information is presented in Appendix B.

⁴ As part of their response to the notice of institution, interested parties were requested to provide a list of three to five leading purchasers in the U.S. market for the subject merchandise. Presented in Appendix D are the responses received from purchaser surveys mailed to the purchasers identified in the adequacy phase of this review.

⁵ Pertinent *Federal Register* notices are referenced in app. A, and may be found at the Commission’s website (www.usitc.gov).

RESPONSES TO THE COMMISSION'S NOTICE OF INSTITUTION

Individual Responses

The Commission received one submission in response to its notice of institution in the subject reviews. It was filed on behalf of Insteel Wire Products Company (“Insteel”) and Sumiden Wire Products Corp. (“Sumiden”), domestic producers of PC strand (collectively referred to herein as “domestic interested parties”).

A complete response to the Commission’s notice of institution requires that the responding interested party submit to the Commission all the information listed in the notice. Responding firms are given an opportunity to remedy and explain any deficiencies in their responses. A summary of the number of responses and estimates of coverage for each is shown below.

Table 1
PC strand: Summary of responses to the Commission’s notice of institution

Type of interested party	Completed responses	
	Number	Coverage
Domestic	1	***% ¹

¹ The coverage figure represents the domestic interested party’s estimate of its share of total U.S. production of PC strand. *Response to notice of institution*, December 3, 2014, pp. 18-19 and exh. 12.

Note.--Insteel acquired American Spring Wire, a U.S. producer of PC strand, in 2014, and its 2013 production is thus included in the coverage figure.

Party Comments on Adequacy

The Commission received one submission from parties commenting on the adequacy of responses to the notice of institution and whether the Commission should conduct expedited or full reviews. This submission was filed on behalf of the domestic interested parties. In their comments, the domestic interested parties stated that they submitted a response to the Commission’s notice of institution that contained all of the information requested regarding PC strand. Therefore, the domestic interested parties maintain that the Commission should find that domestic interested parties have provided an adequate response.

Domestic interested parties also argue that the Commission should find the respondent interested party response to be inadequate since there was no response to the notice of institution from producers in the subject countries or from importers in the United States. Based on the inadequate response by the respondent interested parties, they request that the Commission conduct expedited reviews of the antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand, the antidumping duty finding on PC strand from Japan, as well as the countervailing duty order on PC strand from India. The domestic interested parties state that were the Commission to conduct a full review, “it would likely not elicit any additional information from subject companies that have refused to submit information to date

and would only impose an unwarranted burden on both the domestic producers and the Commission.”⁶

RECENT DEVELOPMENTS IN THE INDUSTRY

Since the Commission’s last five-year review, the following developments have occurred in the PC strand industry.

- Two new producers have entered the U.S. PC strand industry: (1) Deacero USA, a subsidiary of Mexican PC strand producer Deacero, began production in 2010 at Houston, Texas; and (2) Wire Mesh Corporation, a privately-owned firm, began production in 2012 at Conroe, Texas.
- RettCo Steel, LLC, which had begun production of PC strand as a toll producer for MMI Strand Co. in 2005, saw its agreement with MMI terminated in 2010. ***.⁷ RettCo *** entered into a toll-processing agreement with American Spring Wire in 2011.⁸
- American Spring Wire continued operation of its PC strand operations in Houston, Texas, but ceased production of PC strand at its Bedford Heights, Ohio plant.⁹ In July 2014, American Spring Wire acquired RettCo and shortly thereafter, in August 2014, sold its PC strand business, including the former RettCo plant at Newnan, Georgia, and the equipment, but not the real estate, at its Houston, Texas plant to Insteel.^{10 11} Insteel will lease the Houston facility from American Spring Wire.¹²

⁶ *Domestic Interested Parties’ Comments on Adequacy*, January 15, 2015.

⁷ Response to Notice of Institution, December 3, 2014, p. 20.

⁸ American Steel Wire Corp., *American Spring Wire and RettCo announce partnership*, Press release October 1, 2011.

⁹ *Ibid.*

¹⁰ American Metal Market, *ASW acquires RettCo Steel assets*, July 30, 2014.

¹¹ Insteel Industries, *Insteel Industries Acquires Prestressed Concrete Strand Business Of American Spring Wire*, press release, August 15, 2014.

¹² *Ibid.*

THE PRODUCT

Commerce's scope

Commerce has defined the subject merchandise as:

The merchandise subject to the AD and CVD orders on PC strand from Brazil, India, Korea, Mexico, and Thailand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.

The merchandise subject to the AD finding on PC strand from Japan is steel wire strand, other than alloy steel, not galvanized, which is stress-relieved and suitable for use in prestressed concrete.

The merchandise subject to the finding/orders is currently classifiable under subheadings 7312.10.3010 and 7312.10.3012 of the Harmonized Tariff Schedule of the United States (HTSUS). Although the HTSUS subheadings are provided for convenience and customs purposes, the written description of the merchandise under the finding/orders is dispositive.¹³

Description and uses¹⁴

PC strand consists of multiple steel wires wound together to produce a strong, flexible product that is used to strengthen concrete structures. PC strand is commonly available in three grades, in covered and uncovered form, and in several nominal diameters. The most common PC strand configuration consists of six wires wound helically around a single wire core. Nominal diameters of PC strand typically range from 0.25 to 0.70 inch and generally have three grade designations: 250, 270, and 300.

PC strand is used in the construction of prestressed concrete structural components to introduce compression into the concrete. This compression offsets or neutralizes forces within the concrete that occur when it is subjected to loads. Typical applications of prestressed concrete include bridge decks, bridge girders, pilings, precast concrete panels and structural

¹³ *Continuation of Antidumping and Countervailing Duty Finding and Orders: Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand*, [74 FR 65739](#), December 11, 2009.

¹⁴ Unless otherwise noted this information is based on *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, pp. I-25-I-27.

supports, roof trusses, floor supports, and certain concrete foundations. One of the most widespread uses of prestressed concrete, however, is parking garages.

PC strand may be pre-tensioned or post-tensioned. Pre-tensioned PC strand is tensioned (pulled tightly and slightly elongated) using a calibrated tensioning apparatus, and concrete is cured around the PC strand. After the concrete has cured, the tension is released and the tensile force of the strand induces a compressive force in the concrete. Pre-tensioned prestressed concrete depends upon the bond between the concrete and the PC strand to hold the concrete in compression. Most pre-tensioned concrete elements are prefabricated in a factory and must be transported to the construction site. Pre-tensioned concrete components may be used in balconies, lintels, floor slabs, beams, or foundation piles.

For post-tensioned PC strand, there is no bond between the PC strand and the cured concrete. Instead, the PC strand is tensioned using a calibrated tensioning apparatus after the concrete has cured. In post-tensioned prestressed concrete, tension is maintained by installing permanent mechanical anchors that remain in place after the tensioning apparatus is removed. Unlike pre-tensioning, which is largely performed at precast manufacturing facilities, post-tensioning takes place on the job site in cast-in-place applications. The concrete component is cast in a way that allows PC strand to be installed so that it is protected from bonding with the concrete. Post-tensioning gives designers the flexibility to further optimize material use by creating thinner concrete components. The predominant end uses of post-tensioned PC strand are in slab-on-grade construction and in buildings for floors with moderate-to-long spans and moderate floor loads such as in parking garages and residential buildings. Approximately *** percent of total U.S. shipments of post-tensioned PC strand in 2013 were used in slab-on-grade (*** percent) and building (*** percent) construction applications.¹⁵

Depending on the application, PC strand will be either uncoated or coated (with plastic or epoxy). For pre-tensioning applications, where the bond between the cured concrete and the PC strand holds the concrete in compression, the PC strand is installed uncoated. In contrast, post-tensioning applications may require uncoated or coated PC strand. Plastic-coated PC strand is lubricated with grease and encased in a plastic tube, whereas epoxy-coated PC strand is coated with epoxy.

There are two methods of post-tensioning PC strand in concrete members: internal and external. For internal post-tensioning applications, the PC strand is either (1) greased and plastic-coated (which keeps the concrete from bonding to the PC strand during the curing process) and concrete is cured around the coated PC strand or (2) plastic or metal ducts are cast into the concrete and uncoated PC strand is passed through each duct. If the duct method is used, after tensioning and anchoring, the ducts containing the PC strand are filled with grout to protect it from corrosion. For external post-tensioning applications, coated PC strand or galvanized (zinc-coated) PC strand may be used to protect against corrosion. Whether it is used

¹⁵ Post-Tensioning Institute, *“PTI Tonnage Report: Summary of Post-Tensioning Industry Shipments in North America 1972-2013,”* 2014, p. 1. During the last review, approximately *** percent of total U.S. shipments of post-tensioned PC strand in 2007 were used in slab-on-grade (*** percent) and building (*** percent) construction applications. *Confidential staff report*, INV-GG-100, p. I-29.

uncoated or coated, PC strand of various suppliers is interchangeable within each physical size, physical configuration, and grade.

Manufacturing process¹⁶

PC strand is produced from hot-rolled, high-carbon steel wire rod through a production process consisting of four distinct steps: drawing, stranding, stabilizing, and packaging. The drawing step begins with cleaning and descaling to remove dirt and mill scale from the hot-rolled, high-carbon steel wire rod before feeding it through the wire drawing dies. Cleaning and descaling can be accomplished chemically, using a strong acid, or mechanically, using abrasive methods. The cleaned and descaled wire rod is then coated with zinc phosphate and pulled through a series of wire drawing dies to reduce its size. Depending on the finished size required, the rod may be drawn through up to nine dies. If indented wire is specified, the wire is indented, using carbide rollers, after the final size reduction.

After drawing, the wire undergoes stranding. During the stranding process, wires are wound into a strand, helically and uniformly, by a stranding machine. The PC strand is then stabilized by removing residual mechanical stresses through thermal and possibly mechanical treatments. The extent of the stress relief determines the type of PC strand. Low-relaxation PC strand is subjected to simultaneous thermal and mechanical treatment after stranding, while “normal”-relaxation PC strand (commonly referred to as stressed-relieved PC strand) requires only thermal treatment. Finally, if coating is required, the PC strand is either lubricated with grease and encased in a plastic tube, or coated with epoxy.

The finished product is wound onto a drum, strapped into place with steel bands, and packaged as a coil. The coil may be covered with a protective material, such as plastic or burlap and is packaged such that the end user can place the coil directly onto a strand dispenser.

U.S. tariff treatment

PC strand is currently classifiable in the Harmonized Tariff Schedule of the United States (“HTS”) under subheading 7310.10.30 and is imported under HTS statistical reporting numbers 7312.10.3010 and 7312.10.3012. PC strand enters the U.S. market at a column 1-general duty rate of “free.”

¹⁶ Unless otherwise noted this information is based on *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, p. I-27.

The Definition of the Domestic Like Product

The domestic like product is defined as the domestically produced product or products which are like, or in the absence of like, most similar in characteristics and uses with, the subject merchandise. Although the Commission did not make a domestic like product determination in its original determination concerning Japan in 1979, in its expedited first and second five-year reviews of that finding it found the appropriate definition of the domestic like product to be the same as Commerce's scope, that is, all steel wire strand, other than alloy steel, not galvanized, which has been stress-relieved and is suitable for use in prestressed concrete.

In its 2004 Original Determinations, the Commission found the domestic like product to be all PC strand co-extensive with Commerce's scope, that is, steel strand produced from wire of non-stainless, non-galvanized steel that is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses covered and uncovered strand and all types, grades, and diameters of PC strand. The Commission considered and rejected an argument that covered and uncovered PC strand should be treated as separate like products.

In the last proceeding, there were no new facts presented to warrant a conclusion different from that in the 2004 determinations and the first and second reviews of the Japan finding. Therefore, the Commission defined the domestic like product to encompass "steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses covered and uncovered strand and all types, grades, and diameters of PC strand," which is how Commerce defined the scope of the countervailing duty order on imports of PC strand from India and the antidumping duty orders on imports of PC strand from Brazil, India, Korea, Mexico, and Thailand. The Commission also recognized that the description of the scope of these orders differs in a number of technical respects from that of the scope of the Japan finding, but it found that these differences lacked significance.¹⁷

In its notice of institution for these reviews, the Commission solicited comments from interested parties regarding the appropriate domestic like product. According to their response to the notice of institution, the domestic producers support the definition set forth in the Commission's Original Determinations.¹⁸

¹⁷ *Ibid.*, pp. 5-7.

¹⁸ *Domestic Interested Parties' Response to the Notice of Institution*, December 3, 2014, p. 20.

THE ORIGINAL INVESTIGATION AND SUBSEQUENT REVIEWS¹⁹

Japan

The Commission instituted an antidumping duty investigation concerning PC strand from Japan (Inv. No. AA1921-188) on August 29, 1978, following notification from the Department of the Treasury (“Treasury”) on August 22, 1978, that steel wire strand from Japan was being, or was likely to be, sold in the United States at less than fair value (“LTFV”) within the meaning of the Antidumping Act, 1921, as amended.^{20 21} Treasury published its final determination of sales at LTFV on August 28, 1978, with the following weighted-average dumping margins: Shinko Wire Co., Ltd. (13.3 percent), Sumitomo Electric Ind. Ltd. (“Sumitomo Electric”) (15.8 percent), Suzuki Metal Industry Co., Ltd. (6.0 percent), Kawatetsu Wire Products Co., Ltd. (0.62 percent), and Tokyo Rope Mfg. Co., Ltd. (4.5 percent).²² The Commission made its

¹⁹ Data compiled during the original investigations and subsequent reviews are presented in appendix C.

²⁰ 19 U.S.C. 160(a).

²¹ Steel Wire Strand for Prestressed Concrete from Japan: Investigation and Hearing, 43 FR 39454, September 5, 1978. The petition which led to Treasury’s determination of LTFV sales was filed on behalf of the following five domestic producers of PC strand: American Spring Wire Corp. (“American”), Armco Steel Corp. (“Armco”), Bethlehem Steel Corp. (“Bethlehem Steel”), CF&I Steel Corp. (“CF&I”), and Florida Wire & Cable Co. (“Florida Wire”). Steel Wire Strand for Prestressed Concrete from Japan, Investigation No. AA1921-188, USITC Publication 928, November 1978, p. A-3.

²² Kawatetsu was excluded from Treasury’s original determination because its weighted-average margin of 0.62 percent was considered minimal in relation to the total volume of its sales and because the firm gave formal assurances that it would make no future sales at LTFV. *Steel Wire Strand for Prestressed Concrete from Japan: Determination of Sales at Less Than Fair Value and Final Discontinuance of Antidumping Investigation*, 43 FR 38495, August 28, 1978; *Steel Wire Strand for Prestressed Concrete from Japan: Determination of Injury*, 43 FR 55826, November 29, 1978. In 1990, Commerce conducted a changed circumstances review and determined that Kawasaki Steel Techno-Wire was the successor-in-interest to Kawatetsu and that the discontinuance previously issued to Kawatetsu applied to Kawasaki Steel Techno-Wire. However, the discontinuance that Commerce applied in 1990 to Kawasaki Steel Techno-Wire as Kawatetsu’s successor-in-interest does not apply to JFE Techno-Wire, the apparent successor firm to Kawasaki Steel Techno-Wire, because a changed-circumstances review has not been conducted by Commerce concerning Kawasaki Steel Techno-Wire’s successor-in-interest. Therefore, any production of PC strand by JFE Techno-Wire in Japan would be subject to the antidumping duty order upon entry into the United States. *Steel Wire Strand for Prestressed Concrete From Japan: Final Results of Changed Circumstances Antidumping Duty Administrative Review*, 55 FR 28796, July 13, 1990; and *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, p. I-19.

final affirmative injury determination on November 16, 1978,²³ and Treasury issued an antidumping duty finding on imports of PC strand from Japan on December 8, 1978.²⁴

In the original investigation, Treasury excluded one Japanese firm producing and exporting PC strand, Kawatetsu, from its antidumping duty finding.²⁵ In 1986, Commerce revoked the antidumping duty finding for a second Japanese producer of PC strand, Sumitomo Electric.²⁶

In January 1999, the Commission completed an expedited first five-year review of the antidumping duty finding on PC strand from Japan, and determined that revocation of the finding would be likely to lead to a continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.²⁷ Following five-year reviews by Commerce and the Commission, effective February 3, 1999, Commerce issued a continuation of the antidumping duty finding on imports of PC strand from Japan.²⁸

In June 2004, the Commission completed an expedited second five-year review of the antidumping duty finding on PC strand from Japan, and unanimously determined that revocation of the finding would be likely to lead to a continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.²⁹ Following second five-year reviews by Commerce and the Commission, effective June 25, 2004, Commerce issued a continuation of the antidumping duty finding on imports of PC strand from Japan.³⁰

²³ *Steel Wire Strand for Prestressed Concrete from Japan: Determination of Injury*, 43 FR 55826, November 29, 1978.

²⁴ *Steel Wire Strand for Prestressed Concrete from Japan*, 43 FR 57599, December 8, 1978.

²⁵ *Steel Wire Strand for Prestressed Concrete from Japan, Investigation No. AA1921-188*, USITC Publication 928, November 1978, p. A-2. Commerce later extended Treasury's "discontinuance" to Kawasaki Steel Techno-Wire Co., Ltd., Kawatetsu's successor company. *Steel Wire Strand for Prestressed Concrete From Japan; Final Results of Changed Circumstances Antidumping Duty Administrative Review*, 55 FR 28796, July 13, 1990.

²⁶ *Steel Wire Strand for Prestressed Concrete From Japan; Final Results of Antidumping Duty, Administrative Review and Revocation In Part*, 51 FR 30894, August 29, 1986.

²⁷ *Prestressed Concrete Steel Wire Strand from Japan, Investigation No. AA1921-188 (Review)*, USITC Publication 3156, February 1999. Commissioner Askey determined that revocation of the antidumping duty finding in this case would not be likely to lead to continuation or recurrence of material injury to an industry in the United States.

²⁸ *Continuation of Antidumping Finding: Prestressed Concrete Steel Wire Strand From Japan*, 64 FR 40554, July 27, 1999.

²⁹ *Prestressed Concrete Steel Wire Strand from Japan, Investigation No. AA1921-188 (Second Review)*, USITC Publication 3699, June 2004.

³⁰ *Continuation of Antidumping Duty Findings: Prestressed Concrete Wire Strand from Japan and Pressure Sensitive Plastic Tape From Italy*, 69 FR 35584, June 25, 2004.

Brazil, India, Korea, Mexico, and Thailand

On January 31, 2003, a petition was filed with Commerce and the Commission alleging that an industry in the United States was materially injured and threatened with material injury by reason of subsidized imports of PC strand from India and by reason of LTFV imports of PC strand from Brazil, India, Korea, Mexico, and Thailand.³¹ On December 8, 2003, Commerce made a final affirmative countervailable subsidy determination with respect to PC strand from India and final affirmative dumping determinations with respect to PC strand from Brazil, India, Korea, Mexico, and Thailand. Commerce calculated a final net subsidy rate of 62.92 percent ad valorem for all Indian producers/exporters of the subject merchandise and it calculated the following final weighted-average dumping margins: Brazil (118.75 percent), India (83.65-102.07 percent), Korea (35.64-54.19 percent), Mexico (67.78-77.20 percent), and Thailand (12.99 percent).³² The Commission made its final affirmative injury determinations on January 21, 2004³³ and Commerce issued a countervailing duty order on imports of PC strand from India and antidumping duty orders on imports of PC strand from Brazil, India, Korea, Mexico, and Thailand thereafter.³⁴

On December 1, 2008, the Commission instituted reviews of the subject finding/orders. On November 25, 2009, following full reviews, the Commission determined that the revocation of the countervailing duty order on PC strand from India and antidumping duty orders on PC strand from Brazil, India, Korea, Mexico, and Thailand, as well as the antidumping duty finding on PC strand from Japan, would be likely to lead to continuation or recurrence of

³¹ The petition was filed by American, Insteel Wire Products Co. (“Insteel”), and Sumiden Wire Products Corp. (“Sumiden”). *Prestressed Concrete Steel Wire Strand From Brazil, India, Korea, Mexico, and Thailand, Investigations Nos. 701 -TA-432 (Final) and 731-TA-1024-1028 (Final)*, USITC Publication 3663, January 2004, p. I-1.

³² *Notice of Final Determination of Sales at Less Than Fair Value and Negative Final Determination of Critical Circumstances: Prestressed Concrete Steel Wire Strand from Thailand, Notice of Final Determination of Sales at Less Than Fair Value and Negative Final Determination of Critical Circumstances: Prestressed Concrete Steel Wire Strand from Mexico, Notice of Final Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from India, Notice of Final Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from the Republic of Korea, Notice of Final Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from Brazil, Final Affirmative Countervailing Duty Determination: Prestressed Concrete Steel Wire Strand From India*, 68 FR 68348-68357, December 8, 2003.

³³ *Prestressed Concrete Steel Wire Strand From Brazil, India, Korea, Mexico, and Thailand, Investigations Nos. 701-TA-432 and 731-TA-1024-1028 (Final)*, 69 FR 4177, January 28, 2004.

³⁴ *Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from the Republic of Korea, Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from India, Notice of Amended Final Determination of Sales at Less Than Fair Value and Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from Thailand, Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from Brazil, Notice of Antidumping Duty Order: Prestressed Concrete Steel Wire Strand from Mexico*, 69 FR 4109-4113, January 28, 2004; and *Notice of Countervailing Duty Order: Prestressed Concrete Steel Wire Strand From India*, 69 FR 5319, February 4, 2004.

material injury to an industry in the United States within a reasonably foreseeable time.³⁵ Effective December 11, 2009, Commerce issued a continuation of the countervailing duty and antidumping duty finding/orders on PC strand from Brazil, India, Japan, Korea, Mexico and Thailand.³⁶

PRIOR RELATED INVESTIGATIONS³⁷

Title VII Investigations

The Commission has conducted several antidumping and countervailing duty investigations and five-year reviews concerning PC strand from 10 different countries. The earliest investigations concerning PC strand were conducted by the Commission in 1978. Although the Commission did not make a like product determination *per se* in its original 1978 determinations concerning India and Japan, the Commission’s domestic like product and domestic industry determinations in all subsequent PC strand investigations and reviews are similar in that the Commission has consistently found one domestic like product consisting of PC strand and one domestic industry consisting of all domestic producers of PC strand. Table 2 presents information on other title VII investigations and five-year reviews concerning PC strand.

Table 2
PC strand: Related title VII investigations and five-year reviews

Investigations/Reviews		Dates		Outcome
Country	Number	Begin	End	
India	AA1921-182(Final)	06/02/1978	08/25/1978	Commission negative final determination
Spain	701-TA-164(Final)	04/26/1982	08/23/1982	Commission negative final determination
Brazil	701-TA-152(Final)		03/14/1983	Commission negative final determinations
France	701-TA-153(Final)		12/06/1982	
United Kingdom	731-TA-89(Final)		03/04/1982	
China	701-TA-464 731-TA-1060(Final)	12/23/2009	06/22/2010	Commission affirmative final determinations

Source: Various Commission publications and *Federal Register* notices.

³⁵ *Prestressed Concrete Steel Wire Strand From Brazil, India, Japan, Korea, Mexico, and Thailand; Determinations*, 74 FR 62820, December 1, 2009.

³⁶ *Continuation of Antidumping and Countervailing Duty Finding and Orders: Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand*, [74 FR 65739](#), December 11, 2009.

³⁷ Unless otherwise noted this information is based on *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, pp. I-12-I-14.

Safeguard Investigations

Following receipt of a request from the Office of the United States Trade Representative on June 22, 2001, the Commission instituted investigation No. TA-201-73, *Steel*, under section 202 of the Trade Act of 1974 to determine whether certain steel products, including PC strand, were being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industries producing articles like or directly competitive with the imported article. On July 26, 2001, the Commission received a resolution adopted by the Committee on Finance of the U.S. Senate (“Senate Finance Committee” or “Committee”) requesting that the Commission investigate certain steel imports under section 201 of the Trade Act of 1974. Consistent with the Senate Finance Committee’s resolution, the Commission consolidated the investigation requested by the Committee with the Commission’s previously instituted investigation No. TA-201-73. On December 20, 2001, the Commission issued its determinations and remedy recommendations. The Commission made a negative determination with respect to the product grouping that included PC strand.

ACTIONS AT COMMERCE³⁸

Final determinations and administrative reviews

During the first, second, and third reviews of the antidumping finding on imports of PC strand from Japan, Commerce calculated a dumping margin of 9.76 percent and firm-specific rates for Shinko (13.30 percent), Suzuki (6.90 percent), and Tokyo Rope Mfg. (4.50 percent). In the original investigations and first reviews, Commerce calculated the following antidumping duty margins: (1) Brazil-118.75 percent (Belgo Bekaert received the same rate) ; (2) India-83.65 percent (Tata Iron and Steel received a firm-specific rate of 102.07 percent); (3) Korea-35.64 percent (Dong-Il and Kiswire received firm-specific rates of 54.19 percent); (4) Mexico-62.78 percent (Aceros Camesa and Cablesa received firm-specific rates of 62.78 percent and 77.20 percent, respectively); and (5) Thailand-12.91 percent (Siam Industrial received the same rate). Commerce also calculated a countervailing duty margin of 62.92 percent for exporters in India. No administrative reviews have been conducted since the last five-year reviews.

Current five-year review results

Commerce notified the Commission that it had not received adequate responses from respondent interested parties to its notice initiating the current five-year reviews of the antidumping and countervailing duty orders on imports of PC strand from Brazil, India, Japan, Korea, Mexico, and Thailand. Consequently, Commerce intends to conduct expedited reviews of the orders and to issue the final results of those expedited reviews by March 3, 2015.

³⁸ Unless otherwise noted this information is based on *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, pp. I-16-I-21.

THE INDUSTRY IN THE UNITED STATES

U.S. producers

Since the Commission's original 1978 investigation concerning imports of PC strand from Japan, the U.S. industry has experienced substantial changes, marked by several closures, openings, and acquisitions. Since that time, closures, openings, and acquisitions have changed the composition of the domestic industry. In 1978, there were six firms producing PC strand in the United States: Armco, Bethlehem, CF&I, American, FW&C, and Washburn. By 2009, the following firms reported domestic production of PC strand: American, Insteel, Rettco/MMI, Strand-Tech, and Sumiden.

In these current reviews, the U.S industry producing PC strand now comprises the following five firms: Insteel, Sumiden, Strand-Tech, Deacero USA, and Wire Mesh Corporation. As mentioned earlier, in July 2014, American Spring Wire acquired RettCo and shortly thereafter, in August 2014, sold its PC strand business, including the former RettCo plant at Newnan, GA and the equipment, but not the real estate, at its Houston, TX plant to Insteel.^{39 40} Insteel will lease the Houston facility from American Spring Wire.⁴¹ In addition, two new producers have entered the U.S. PC strand industry: Deacero USA, a subsidiary of Mexican PC strand producer Deacero, began production in 2010, and Wire Mesh Corporation, a privately-owned firm, began production in 2012.

Table 3 presents the current U.S. producers of PC strand, production locations, and shares of 2013 production.

³⁹ American Metal Market, *ASW acquires RettCo Steel assets*, July 30, 2014.

⁴⁰ Insteel Industries, *Insteel Industries Acquires Prestressed Concrete Strand Business Of American Spring Wire*, press release, August 14, 2014.

⁴¹ Ibid.

Table 3
PC strand: U.S. producers, U.S. production locations, and shares of 2013 reported/estimated production

Firm	U.S. production location(s)	2013 production (1,000 pounds)	2013 share of production (percent)
Insteel	Gallatin, TN Sanderson, FL Houston, TX	***	***%
ASW ¹	Newnan, GA Houston, TX	***	***%
Sumiden ²	Dickson, TN Stockton, CA	***	***%
Total, domestic interested parties		***	***%
Strand-Tech	Summerville, SC	*** ⁴	***%
Deacero USA ³	Houston, TX	*** ⁴	***%
Wire Mesh Corporation	Conroe, TX	*** ⁴	***%
Total		***	100.0%

¹ Insteel acquired the assets of ASW in August 2014.

² Sumiden is related to Sumitomo Electric Industries, Ltd., a Japanese producer of PC strand. However, Sumitomo Electric is no longer subject to the antidumping finding against PC strand from Japan.

³ Deacero USA is a subsidiary of Deacero, a Mexican producer/exporter of the subject merchandise.

⁴ Production estimates for Strand-Tech, Deacero USA, and Wire Mesh Corporation were provided by the domestic interested parties.

Source: *Response to the notice of institution*, December 3, 2014, p. 19 and n 6.

Definition of the Domestic Industry and Related Parties Issues

The domestic industry is defined as the U.S. producers as a whole of the domestic like product, or those producers whose collective output of the domestic like product constitutes a major proportion of the total domestic production of the product. In its original determination regarding Japan, the Commission defined the domestic industry as “facilities in the United States devoted to the production of steel wire strand for prestressed concrete,”⁴² and in its expedited first and second reviews the Commission defined the domestic industry as all producers of PC strand.⁴³

In the 2004 Original Determinations, the Commission defined the domestic industry to include all producers of PC strand and determined that plastic coating did not constitute sufficient production-related activity to qualify coaters as members of the domestic industry producing PC strand.⁴⁴

⁴² Japan Original Injury Determination, p. 4.

⁴³ Japan First Injury Review, p.4; and Japan Second Injury Review, pp. 6-7.

⁴⁴ 2004 Original Determinations, pp. 10-12.

In the last proceeding, no new facts were presented to warrant a conclusion different from that in the 2004 Original Determinations and the first and second reviews of the Japan finding. Therefore, based on the Commission's definition of the domestic like product, the Commission defined the domestic industry to include all producers of the domestic like product.⁴⁵

In these current reviews, the domestic interested parties support the definition set forth in the Commission's Original Determinations.⁴⁶ The domestic interested parties indicated that domestic producer Sumiden is related to Sumitomo Electric Industries, Ltd., a Japanese producer of PC strand. However, Sumitomo Electric is no longer subject to the antidumping finding against PC strand from Japan.⁴⁷

U.S. producers' trade and financial data

The Commission asked domestic interested parties to provide trade and financial data in their response to the notice of institution of the current five-year review.⁴⁸ Table 4 presents a compilation of the data submitted from all responding U.S. producers as well as trade and financial data submitted by U.S. producers in the prior five-year reviews.

⁴⁵ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, p. 7.

⁴⁶ *Domestic Interested Parties' Response to the Notice of Institution*, December 3, 2014, p. 20.

⁴⁷ *Ibid.*, p. 17.

⁴⁸ Individual company trade and financial data are presented in Appendix B.

Table 4

PC strand: Trade and financial data submitted by U.S. producers, 2003-2008, and 2013

Quantity=1,000 pounds; value=1,000 dollars; Unit values, unit labor costs, and unit financial data are per 1,000 pounds							
Item	2003	2004	2005	2006	2007	2008	2013
Capacity	742,295	754,653	791,653	810,653	902,782	903,795	***
Production	578,004	608,562	621,919	673,195	601,732	558,885	***
Capacity utilization	77.9	80.6	78.6	83.0	66.7	61.8	***
U.S. commercial shipments:							
Quantity	564,035	573,700	621,842	627,436	582,801	529,972	***
Value	153,420	254,156	301,420	297,410	268,344	333,721	***
Unit value	\$272	\$443	\$489	\$474	\$460	\$630	\$***
Net sales (\$1,000)	150,480	249,170	299,892	312,046	283,088	354,082	***
COGS (\$1,000)	135,503	193,659	235,830	248,909	230,394	302,334	***
COGS/Net Sales	90.0	77.7	78.6	79.8	81.4	85.4	***
Gross profit or (loss) (\$1,000)	14,977	55,511	64,062	63,137	52,694	51,748	***
SG&A expenses (loss) (\$1,000)	9,887	13,251	13,233	14,648	13,317	13,795	***
Operating income/(loss) (\$1,000)	5,090	42,260	50,829	48,489	39,377	37,953	***
Operating income (loss)/Net sales	3.4	17.0	16.9	15.5	13.9	10.7	***

Source: For the years 2003-08, data are compiled using data submitted in the Commission's first five-year review. See appendix C. For the year 2013, data are compiled using data submitted by domestic interested parties. Domestic Interested Parties' Response to the Notice of Institution, December 3, 2014, exh. 12.

U.S. IMPORTS AND APPARENT CONSUMPTION

U.S. importers

In the mid- to late-1970s (i.e., the period examined in the original investigation concerning PC strand from Japan), the subject merchandise was imported into the United States principally by eight large importing companies, although several smaller companies made occasional purchases from Japan. Companies engaged in importing PC strand into the United States included some of Japan's largest trading houses, such as Kawasho, Mitsubishi, and Mitsui.

In the Commission's first review of the order concerning Japan instituted in 1998, the domestic interested parties identified three firms that they believed to be importers of PC strand from Japan: Mitsubishi, Nippon, and Mitrans. In addition to these three firms, the domestic interested parties identified two more U.S. importers of subject merchandise from

Japan in their response to the Commission's notice of initiation in the second review of the Japanese order instituted in 2004: Mitsui and Nissho Iwai.

In response to Commission questionnaires sent to importers in the final phase of the original 2004 investigations concerning Brazil, Korea, India, Mexico, and Thailand, 12 firms supplied usable data, 8 of which imported PC strand from the countries subject to those investigations. The eight firms and the countries from which they imported subject merchandise are as follows: Crispin Co. ("Crispin") (Brazil and Korea), Trefilarbed Inc. (Brazil), Tata, Inc. ("Tata") (India), Kiswire Trading, Inc. (Korea), Camesa, Inc. (Mexico), Cablesa (Mexico), Universal Products Group, Inc. (Mexico), and Cementhai SCT (USA), Inc. ("Cementhai") (Thailand).

In the last reviews of the orders concerning PC strand, the domestic interested parties identified 54 U.S. firms that they believe imported the subject merchandise into the United States during the review period. The Mexican interested parties identified an additional 14 firms that they believe imported the subject merchandise from Mexico. Importer questionnaires were sent to 68 possible importers of PC strand, as well as to all U.S. producers of PC strand. Usable questionnaire responses were received from 22 companies.

In their response to the Commission's notice of institution in these reviews, domestic producers provided a list of 68 known and currently operating U.S. importers of PC strand from the subject countries.⁴⁹

U.S. imports

In the last five-year reviews, the Commission found that the volume of subject imports and the increase in that volume were significant, both in absolute terms and relative to consumption and production in the United States.⁵⁰

Table 5 presents official Commerce statistics for PC strand, which were imported under HTS statistical reporting numbers 7312.10.3010 and 7312.10.3012 during the period of the current five-year review (2009-13). The total U.S. import quantity of such merchandise increased by 93.6 percent from 2009 to 2013, while the landed, duty-paid value increased slightly by 113.5 percent during the same period. Table 6 presents the top sources of U.S. imports (shown in descending order of 2013 imports by quantity).

⁴⁹ *Domestic Interested Parties' Response to the Notice of Institution*, December 3, 2014, p. 20.

⁵⁰ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, p. 28.

Table 5
PC strand: U.S. imports, 2008, 2009-13

Item	2008	2009	2010	2011	2012	2013
Quantity (1,000 pounds)						
Brazil	0	--	271	--	--	--
India	209	--	--	--	--	--
Korea	3,325	462	630	1,942	1,589	2,344
Mexico ¹	1,514	5,870	941	--	--	646
Thailand	0	106	1,037	--	--	--
Subtotal, 5 subject	5,048	6,437	2,878	1,942	1,589	2,990
Japan ^{2 3}	1,380	-	-	651	1,339	1,201
Subtotal, 6 subject	6,429	6,437	2,878	2,592	2,928	4,191
All other imports (nonsubject)	406,312	105,671	150,310	139,582	195,836	212,851
Total imports	412,741	112,108	153,188	142,174	198,764	217,042
Landed, duty-paid value (\$1,000)						
Brazil	0	0	191	0	0	0
India	156	0	0	0	0	0
Korea	2,201	276	405	1,390	1,141	1,503
Mexico ¹	885	2,541	408	0	0	448
Thailand	0	68	406	0	0	0
Subtotal, 5 subject	3,242	2,885	1,410	1,390	1,141	1,951
Japan ^{2 3}	916	0	0	676	1,474	1,029
Subtotal, 6 subject	4,158	2,885	1,410	2,066	2,615	2,980
All other imports (nonsubject)	211,889	46,306	70,874	71,328	97,667	102,003
Total imports	216,047	49,191	72,284	73,394	100,282	104,983

¹ During the last reviews, Camesa and Deacero, the only PC strand producers in Mexico, reported that they had not exported subject merchandise to the United States since ***. Therefore, U.S. imports of PC strand from Mexico may consist of nonsubject merchandise.

² Sumitomo Electric is excluded from the antidumping duty finding on PC strand from Japan. ***.

³ During the last reviews, *** reported only nonsubject galvanized strand imports from Japan entering the United States under the applicable HTS statistical reporting numbers. During these current reviews, *** accounted for *** of U.S. imports from Japan.

Note.—The subject import data as calculated from official Commerce statistics are overstated by the entry of nonsubject merchandise (e.g., galvanized strand) under the applicable HTS statistical reporting numbers for the subject PC strand. Although in aggregate the degree of overstatement is relatively minor, for certain smaller suppliers, galvanized PC strand can account for a substantial share of U.S. imports.

Note.—Because of rounding, figure may not add to total shown.

Source: Official statistics of Commerce for HTS statistical reporting numbers 7312.10.3010 and 7312.10.3012.

Table 6
PC strand: Top sources of U.S. imports, 2008, 2009-13

Item	2008	2009	2010	2011	2012	2013
Quantity (1,000 pounds)						
Malaysia	--	4,757	32,744	37,154	43,003	62,016
South Africa	957	8,165	19,914	22,494	32,820	34,765
Spain	348	8,651	18,669	27,220	33,956	31,130
Portugal	7,224	12,188	15,193	9,275	12,726	15,940
Canada	11,312	12,605	15,040	11,420	18,624	13,397
All other ¹	392,904	65,743	51,629	34,612	57,635	59,795
Total imports	412,741	112,108	153,188	142,174	198,764	217,042
Landed, duty-paid value (\$1,000)						
Malaysia	0	2,023	14,033	18,550	19,570	27,739
South Africa	465	2,846	8,402	10,836	15,036	14,311
Spain	349	3,402	8,726	13,084	17,100	14,516
Portugal	4,166	4,876	6,755	4,565	5,742	8,504
Canada	8,365	8,171	9,226	7,995	12,423	9,235
All other ¹	202,702	27,873	25,142	18,364	30,411	30,678
Total imports	216,047	49,191	72,284	73,394	100,282	104,983

¹ As of June 2010, PC strand from China is subject to antidumping and countervailing duty orders. China accounted for 381.7 million pounds in 2008, 36.6 million pounds in 2009, 1.1 million pounds in 2010, 548,000 pounds in 2011, 495,000 pounds in 2012, and 541,000 pounds in 2013.

Note.--Because of rounding, figure may not add to total shown.

Source: Official statistics of Commerce for HTS statistical reporting numbers 7312.10.3010 and 7312.10.3012.

Apparent U.S. consumption and market shares

Table 7 presents data on U.S. producers' U.S. shipments, U.S. imports, and apparent U.S. consumption, while table 8 presents data on U.S. market shares of U.S. apparent consumption.

Table 7
PC strand: U.S. producers' U.S. shipments, U.S. imports, and apparent U.S. consumption,
2003-08, and 2013

Item	2003	2004	2005	2006	2007	2008	2013
Quantity (1,000 pounds)							
U.S. producers' U.S. shipments	564,035	573,700	621,842	627,436	582,801	529,972	***
U.S. imports from—							
Brazil	21,511	449	0	0	0	0	--
India	3,210	34	2	2	235	209	--
Korea	36,934	316	258	3,958	2,831	3,325	2,344
Mexico	38,257	867	555	1,526	2,283	1,514	646
Thailand	6,791	5,800	624	45	0	0	--
Subtotal, 5 subject	106,703	7,466	1,439	5,530	5,349	5,048	2,990
Japan	768	1,545	1,564	1,580	1,952	1,380	1,201
Subtotal, 6 subject	107,471	9,011	3,003	7,111	7,301	6,429	4,191
All other imports (nonsubject)	134,423	276,723	282,247	477,667	390,402	406,312	212,851
Total imports	241,894	285,733	285,250	484,778	397,703	412,741	217,042
Apparent U.S. consumption	805,929	859,433	907,092	1,112,214	980,504	942,713	***
Value (1,000 dollars)							
U.S. producers' U.S. shipments	153,420	254,156	301,420	297,410	268,344	333,721	***
U.S. imports from—							
Brazil	4,610	168	0	0	0	0	0
India	704	41	17	9	81	156	0
Korea	7,995	167	196	1,506	1,399	2,201	1,503
Mexico	11,534	290	187	729	1,036	885	448
Thailand	1,572	1,819	240	25	0	0	0
Subtotal, 5 subject	26,415	2,485	640	2,268	2,516	3,241	1,951
Japan	399	876	1,092	1,100	1,343	916	1,029
Subtotal, 6 subject	26,813	3,361	1,732	3,368	3,859	4,157	2,980
All other imports (nonsubject)	34,990	95,994	122,471	164,334	134,966	211,890	102,003
Total imports	61,803	99,355	124,203	167,702	138,825	216,047	104,983
Apparent U.S. consumption	215,223	353,511	425,623	465,112	407,169	549,768	***

Source: For the years 2003-08, data are compiled using data submitted in the Commission's first five-year review. See appendix C. For the year 2013, U.S. producers' U.S. shipments are compiled from the domestic interested parties' response to the Commission's notice of institution and U.S. imports are compiled using official Commerce statistics under HTS statistical reporting numbers 7312.10.3010 and 7312.10.3012.

Table 8
PC strand: Apparent U.S. consumption and U.S. market shares, 2003-08, and 2013

Item	2003	2004	2005	2006	2007	2008	2013
Quantity (1,000 pounds)							
Apparent U.S. consumption	805,929	859,433	907,092	1,112,214	980,504	942,713	***
Value (1,000 dollars)							
Apparent U.S. consumption	215,223	353,511	425,623	465,112	407,169	549,768	***
Share of consumption based on quantity (percent)							
U.S. producer's share	70.0	66.8	68.6	56.4	59.4	56.2	***
U.S. imports from--							
Brazil	2.7	0.1	0.0	0.0	0.0	0.0	***
India	0.4	0.0	0.0	0.0	0.0	0.0	***
Korea	4.6	0.0	0.0	0.4	0.3	0.4	***
Mexico	4.7	0.1	0.1	0.1	0.2	0.2	***
Thailand	0.8	0.7	0.1	0.0	0.0	0.0	***
Subtotal, 5 subject	13.2	0.9	0.2	0.5	0.5	0.5	***
Japan	0.1	0.2	0.2	0.1	0.2	0.1	***
Subtotal, 6 subject	13.3	1.0	0.3	0.6	0.7	0.7	***
All other imports (nonsubject)	16.7	32.2	31.1	42.9	39.8	43.1	***
Total imports	30.0	33.2	31.4	43.6	40.6	43.8	***
Share of consumption based on value (percent)							
U.S. producer's share	71.3	71.9	70.8	63.9	65.9	60.7	***
U.S. imports from--							
Brazil	2.1	0.0	0.0	0.0	0.0	0.0	***
India	0.3	0.0	0.0	0.0	0.0	0.0	***
Korea	3.7	0.0	0.0	0.3	0.3	0.4	***
Mexico	5.4	0.1	0.0	0.2	0.3	0.2	***
Thailand	0.7	0.5	0.1	0.0	0.0	0.0	***
Subtotal, 5 subject	12.3	0.7	0.2	0.5	0.6	0.6	***
Japan	0.2	0.2	0.3	0.2	0.3	0.2	***
Subtotal, 6 subject	12.5	1.0	0.4	0.7	0.9	0.8	***
All other imports (nonsubject)	16.3	27.2	28.8	35.3	33.1	38.5	***
Total imports	28.7	28.1	29.2	36.1	34.1	39.3	***

Source: For the years 2003-08, data are compiled using data submitted in the Commission's first five-year review. See appendix C. For the year 2013, U.S. producers' U.S. shipments are compiled from the domestic interested parties' response to the Commission's notice of institution and U.S. imports are compiled using official Commerce statistics under HTS statistical reporting numbers 7312.10.3010 and 7312.10.3012.

CUMULATION CONSIDERATIONS

In assessing whether imports should be cumulated, the Commission determines whether U.S. imports from the subject countries compete with each other and with the domestic like product and has generally considered four factors: (1) fungibility, (2) presence of sales or offers to sell in the same geographical markets, (3) common or similar channels of distribution, and (4) simultaneous presence in the market. Additional information concerning geographical markets and simultaneous presence in the market is presented below.

Geographical markets

PC strand produced in the United States is shipped⁵¹ nationwide. Information summarizing the regional shipment of imported PC strand is presented in table 9.

⁵¹ In addition, available information concerning subject country producers and the global market is presented in the next section of this report.

Table 9
PC strand: U.S. imports from subject countries, by Customs district, January 2009-September 2014

Item	Customs district	Imports (Quantity in 1,000 pounds)
Brazil	Seattle, WA	180
	St. Albans, VT	80
	Pembina, ND	11
Subtotal, Brazil		271
Japan	Los Angeles, CA	4,043
	Dallas, Forth Worth, TX	14
	New Orleans, LA	0 ¹
Subtotal, Japan		4,058
Korea	Philadelphia, PA	3,259
	Norfolk, VA	1,472
	Miami, FL	1,167
	Columbia-Snake, OR	1,066
	Los Angeles, CA	727
	Seattle, WA	126
	Houston-Galveston, TX	88
	Subtotal, Korea	
Mexico	Laredo, TX	7,794
	Norfolk, VA	615
	Houston-Galveston, TX	512
	Los Angeles, CA	168
	Seattle, WA	28
Subtotal, Mexico		9,117
Thailand	Los Angeles, CA	1,142
Subtotal, Thailand		1,142
Total, subject countries		22,492

¹ Quantity less than 1,000 pounds.

Source: Compiled from official Commerce statistics.

Presence in the market

Table 10 presents data on the monthly entries of U.S. imports of PC strand, by source, during 2009-13 and January-September 2014. PC strand produced in each of the subject countries was generally present during the period examined, with the exception of India. Imports from Korea were present in each period examined. However, the presence of subject imports in the market for the remaining subject countries appeared more sporadic, with no monthly entries for imports of PC strand for the following: Brazil (2009, 2011-13, and January-September 2014), Japan (2009-10), and Mexico (2011-12), and Thailand (2011-13 and January-September 2014).

Table 10
PC strand: U.S. imports, monthly entries into the United States, by sources, 2009-13 and January-September 2014

Country	Calendar year					January-September
	2009	2010	2011	2012	2013	2014
Brazil	0	3	0	0	0	0
India	0	0	0	0	0	0
Japan	0	0	5	7	5	4
Korea	3	7	9	9	9	8
Mexico	9	3	0	0	9	7
Thailand	2	2	0	0	0	0

Source: Compiled from official Commerce statistics.

THE SUBJECT FOREIGN INDUSTRIES⁵²

The industry in Brazil

In the original investigation concerning Brazil, the Commission found that Belgo Bekaert was the only producer of PC strand in Brazil.⁵³ Although it has undergone a change in ownership since the original investigations, Belgo Bekaert remains the sole producer of PC strand in Brazil. The company is a joint venture between ArcelorMittal Brasil Long Wire (formerly known as Belgo-Mineira), a member company of leading steel producer ArcelorMittal Group, and Bekaert, a leader in wire and metallic coatings headquartered in Belgium.⁵⁴ In addition, Belgo Bekaert claims to be “the largest wire manufacturer in the Americas with an annual capacity of

⁵² Unless otherwise noted this information is based on *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, pp. IV-11-IV-31.

⁵³ *Staff Report*, December 19, 2003 (INV-AA-191), p. VII-1

⁵⁴ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, p. IV-17.

around 900,000 tons (1.8 billion pounds) of drawn wire.⁵⁵ According to the Global Trade Atlas (“GTA”), Brazil exported a high of 65.2 million pounds in 2011 and a low of 41.8 million pounds in 2013 of stranded wire, ropes, and cables, which includes PC strand, during the period examined.

The industry in India

Three major producers of PC strand in India were identified by the Commission in its original investigations: Tata Steel (formerly known as Tata Iron and Steel Co. (“TISCO”)), Usha Martin Industries (“Usha Martin”), and Indore Wire Co., Ltd. (“Indore Wire”). TISCO was, ***, the largest producer in India at that time, accounting for an estimated *** percent of the total production of PC strand in India during 2002 and *** percent of all imports of the subject merchandise into the United States from India during January 2000-June 2003.⁵⁶ Usha Martin began production of PC strand in India during the last quarter of 2002 but neither Indore Wire nor Usha Martin exported PC strand produced in India to the United States at the time of the original investigations.

In the last reviews, the domestic interested parties reported that the same three firms that produced PC strand in India during the original investigations continue to produce PC strand in India today. They added, however, that a fourth company in India, Ramsarup Lohh Udyog Ltd. (“RLUL”) opened a PC strand production line in May 2009. Only one PC strand producer in India (Usha Martin) responded to the Commission’s questionnaire in the last reviews. Usha Martin indicated in its questionnaire response that it accounted for *** percent of total PC strand production in India during 2008.

In these current reviews, the domestic interested parties identified the same four companies. According to GTA, India was the tenth largest exporter of stranded wire, ropes, and cables, which includes PC strand, and accounted for three percent of the global market.

The industry in Japan

In the original 1978 investigation concerning Japan, five Japanese companies were identified by Treasury as having produced PC strand for export to the United States: Kawatetsu Wire Products Co., Ltd. (“Kawatetsu”); Sumitomo Electric Ind., Ltd. (“Sumitomo”); Shinko Wire Co., Ltd. (“Shinko”); Suzuki Metal Co., Ltd. (“Suzuki”); and Tokyo Rope Mfg. Co., Ltd. (“Tokyo Rope”). Shinko was *** exporter of PC strand to the United States during 1977, accounting for *** percent of total PC strand exports from Japan to the United States, *** Sumitomo, Kawatetsu, Suzuki, and Tokyo Rope, accounting for *** percent, respectively.⁵⁷ At the time of the Commission’s first five-year review, five Japanese companies were believed to be producing merchandise subject to the antidumping finding on PC strand: original producers Shinko, Suzuki, and Tokyo Rope, as well as Kokoku Steel Wire Co., Ltd. (“Kokoku”), and Tesac Corp.

⁵⁵ *Response to the Notice of Institution*, December 3, 2014, p. 7 and exh. 2.

⁵⁶ *Confidential staff report*, INV-GG-100, p. I-29.

⁵⁷ *Ibid.*, p. IV-39.

("Tesac"). In its response to the Commission's notice of institution in the second five-year review, the domestic industry listed the following subject Japanese PC strand producers: original producers Shinko, Suzuki, and Tokyo Rope, as well as Tesac and JFE Techno-Wire.

In the second five-year reviews, the domestic interested parties reported in their response to the Commission's notice of institution that each of the producers identified in the prior sunset review, with the exception of Tokyo Rope, continues to produce PC strand in Japan. They also reported that Shinko and Suzuki are believed to have the largest capacity and production volumes of PC strand in Japan, accounting for an estimated 57 and 24 percent of total Japanese capacity to produce PC strand, respectively.

The two Japanese firms believed to have the *** capacity and production volumes of subject PC strand in Japan during the period examined in the third reviews (i.e., Tesac and Tokyo Rope) responded to the Commission's questionnaire. In fact, Tokyo Rope reported that it ceased production of PC strand in ***. Tesac estimated that it accounted for *** percent of total PC strand production in Japan during 2008 and claimed to be the *** PC strand producer in Japan.⁵⁸

The industry in Korea

The following four firms were identified as Korean producers of PC strand in the Commission's original investigations: Dong-Il; Kiswire Ltd. ("Kiswire"); Manho Rope and Wire, Ltd. ("Manho"); and Young Heung Iron and Steel Co., Ltd. ("Young Heung"). The Commission reported that PC strand exported to the United States by these four Korean PC strand producers accounted for *** percent of all imports of the subject merchandise into the United States from Korea during January 2000-June 2003. During the last five-year reviews, the interested parties indicated that the same four firms identified in the Commission's original investigations as producers of the subject merchandise were the only producers of PC strand in Korea. Two PC strand producers in Korea (Dong Il and Young Heung) responded to the Commission's questionnaire in the last five-year reviews. Based on the Korean's producers' questionnaire responses, it is estimated that these two producers accounted for *** percent of total PC strand production in Korea during 2008 and *** percent of total exports of PC strand to the United States from Korea.⁵⁹

In these current reviews, the domestic interested parties identified the same four companies and indicated that numerous companies continue to produce and export PC strand from Korea.⁶⁰ According to GTA, Korea's world exports of stranded wire, ropes, and cables, which includes PC strand, increased from 536.7 million pounds in 2009 to 687.5 million pounds in 2013, or by 28 percent.

⁵⁸ Ibid., p. IV-40.

⁵⁹ Ibid., p. IV-45.

⁶⁰ *Response to the Notice of Institution*, December 3, 2014, p. 9 and exh. 9.

The industry in Mexico

At the time of the Commission's original investigations, the Commission reported that the following two firms were believed to have accounted for all production of PC strand in Mexico: Aceros Camesa S.A. de C.V. ("Camesa") and Cablea, S.A. de C.V. ("Cablea"). During 2002, Camesa *** and Cablea ***.⁶¹

During the last five-year reviews, participating Mexican producers indicated that there were no other producers of the subject merchandise in Mexico aside from Camesa and Deacero, both of which provided responses to the Commission's questionnaires. Camesa was the larger of the two Mexican producers, accounting for more than *** of PC strand production in Mexico during 2008.⁶²

During these current reviews, the domestic interested parties report that Camesa and Deacero continue to be the only producers of the subject merchandise in Mexico.⁶³ According to GTA, Mexico's exports to the world of stranded wire, ropes, and cables, which includes PC strand, increased from 27.3 million pounds in 2009 to 35.7 million pounds in 2013, or by 31 percent.

The industry in Thailand

The following five Thai producers of PC strand were identified in the Commission's original investigations: Bangkok Steel Wire Co., Ltd. ("Bangkok Steel Wire"); Siam Wire Industry Co., Ltd. ("Siam Wire"); Thai Wire Products Public Co., Ltd. ("Thai Wire Products"); The Siam Industrial Wire Co., Ltd. ("Siam Industrial"); and Thai Special Wire Co. Ltd. ("Thai Special Wire"). Each of these producers, with the exception of Thai Special Wire, provided a response to the Commission's questionnaire in the original investigations. Based on company estimates provided in response to the Commission's questionnaire in the final phase of the original investigations, the responding four Thai producers together accounted for *** of the total production of PC strand in Thailand during 2002. *** exported PC strand to the United States during 2002.

During the last five-year reviews, domestic interested parties identified an additional PC strand producer, Rayong Wire Industries ("Rayong"), owned by Eastern Wire. Only one PC strand producer in Thailand (i.e., Thai Special Wire) responded to the Commission's questionnaire in these reviews. Thai Special Wire, which is estimated to have accounted for *** percent of all PC strand production in Thailand during 2008 and which *** exported PC strand to the United States.⁶⁴

⁶¹ Confidential staff report, INV-GG-100, p. IV-52.

⁶² Ibid.

⁶³ Response to the Notice of Institution, December 3, 2014, pp. 9-10 and exh. 9.

⁶⁴ Confidential staff report, INV-GG-100, p. IV-65.

During these current reviews, the domestic interested parties identified the same six companies.⁶⁵ According to GTA, Thailand's exports to the world of stranded wire, ropes, and cables, which includes PC strand, increased from 192.0 million pounds in 2009 to 216.2 million pounds in 2013, or by 13 percent.

ANTIDUMPING OR COUNTERVAILING DUTY ORDERS IN THIRD-COUNTRY MARKETS

There are currently no antidumping or countervailing duty orders on PC strand in third-country markets. During the last five-year reviews, the domestic interested parties indicated that South Africa had antidumping/countervailing duty orders in place for subject imports of PC strand from Korea and India and several other countries. The product covered by the orders from South Africa was defined as "stranded wire, of iron or steel, not electrically insulated, of a diameter exceeding 8 mm (excluding that of wire plated, coated or clad with tin).⁶⁶ Effective April 11, 2014, South Africa terminated the antidumping duty order on Korea and the countervailing duty order on India covering such imports.⁶⁷ The domestic interested parties in those reviews indicated that it would not be applying for a sunset review of the orders, and the South African government subsequently terminated the orders.⁶⁸

THE GLOBAL MARKET

Table 11 presents the largest global export sources of product exported under HTS number 7312.10 (stranded wire, ropes and cables of iron or steel, not electrically insulated) during 2009-13.

⁶⁵ *Response to the Notice of Institution*, December 3, 2014, p. 10 and exh. 9.

⁶⁶ *Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Review) and AA1921-188 (Third Review)*, USITC Publication 4114, November 2009, pp. IV-16-IV-17.

⁶⁷ World Trade Organization, "Semi-Annual Report under Article 16.4 of the Agreement" (Committee on Anti-Dumping Practices) and "Semi-Annual Report under Article 25.11 of the Agreement" (Committee on Subsidies and Countervailing Measures), August 27, 2014.

⁶⁸ International Trade Administration Commission of South Africa, "Termination of the Anti-Dumping duty on wire ropes and cables originating in or imported from The People's Republic of China and The Republic of Korea, Anti-Dumping duty on wire ropes and cables of a diameter less than or equal to 32mm originating in or imported from Germany and the United Kingdom, Anti-Dumping duty on stranded wire originating in or imported from Germany, the United Kingdom and the Korea Republic, Anti-Dumping duty on stranded wire of a diameter less than 12.7mm originating in or imported from the People's Republic of China and the countervailing duty on wire ropes and cables and stranded wire originating in or imported from India," Report no. 462, January 22, 2014, <<http://www.itac.org.za/docs/Report%20462.PDF>>.

Table 11
Stranded wire, ropes, and cables of iron or steel, not electrically insulated: Global exports by major sources, 2009-13

Reporting Country	2009	2010	2011	2012	2013
Quantity (1,000 pounds)					
Brazil	51,828	55,477	65,230	56,183	41,839
India	98,395	99,929	198,220	146,189	164,643
Japan	130,212	167,177	136,768	113,357	100,447
Korea	536,685	588,767	652,930	647,222	687,465
Mexico	27,335	33,978	34,163	39,253	35,722
Thailand	191,987	200,281	247,842	209,878	216,236
Subtotal, subject countries	1,036,442	1,145,608	1,335,153	1,212,082	1,246,353
China	1,288,437	1,541,726	1,755,125	1,811,880	1,851,222
Spain	286	281	282	279	295
Malaysia	204,007	209,139	208,698	249,894	284,097
Italy	276	369	341	286	245
Germany	223	231	251	227	211
United States	147,062	159,844	173,641	176,449	176,983
Portugal	99	112	133	180	167
Belarus	138,618	190,193	181,383	153,058	161,965
Turkey	106,194	146,753	136,603	137,269	143,323
Hungary	121	92	106	123	125
Subtotal, top 10 nonsubject countries	2,888,376	3,332,138	3,568,149	3,622,678	3,661,989
All other countries	1,090,109	1,270,332	1,274,797	1,200,133	1,275,112
World	5,014,926	5,748,078	6,178,099	6,034,893	6,183,454

Note.--Because of rounding, figures may not add to total shown.

Source: Global Trade Information Services, Inc., *Global Trade Atlas*, HS subheading 7312.10, retrieved December 22, 2014.

APPENDIX A

FEDERAL REGISTER NOTICES

The Commission makes available notices relevant to its investigations and reviews on its website, www.usitc.gov. In addition, the following tabulation presents, in chronological order, *Federal Register* notices issued by the Commission and Commerce during the current proceeding.

Citation	Title	Link
79 FR 65246 November 3, 2014	<i>Prestressed Concrete Steel Wire Strand from Brazil, India, Japan, Korea, Mexico, and Thailand; Institution of Five-Year Reviews</i>	http://www.gpo.gov/fdsys/pkg/FR-2014-11-03/pdf/2014-25983.pdf
79 FR 65186 November 3, 2014	<i>Initiation of Five-Year ("Sunset") Review</i>	http://www.gpo.gov/fdsys/pkg/FR-2014-11-03/pdf/2014-26087.pdf
80 FR 9747 February 24, 2015	<i>Prestressed Concrete Steel Wire Strand From Brazil, India, Japan, Korea, Mexico and Thailand; Scheduling of Expedited Five-Year Reviews</i>	http://www.gpo.gov/fdsys/pkg/FR-2015-02-24/pdf/2015-03679.pdf
80 FR 12804 March 11, 2015	<i>Final Results of Expedited Sunset Review of Countervailing Duty Order: Prestressed Concrete Steel Wire Strand From India</i>	http://www.gpo.gov/fdsys/pkg/FR-2015-03-11/pdf/2015-05560.pdf
80 FR 13827 March 17, 2015	<i>Prestressed Concrete Steel Wire Strand From Brazil, India, Japan, the Republic of Korea, Mexico, and Thailand: Final Results of the Expedited Sunset Reviews of the Antidumping Duty Finding/Orders</i>	http://www.gpo.gov/fdsys/pkg/FR-2015-03-17/pdf/2015-05815.pdf
<p>Note.—The press release announcing the Commission’s determinations concerning adequacy and the conduct of a full or expedited review can be found at http://www.usitc.gov/press_room/news_release/2015/er0206ll426.htm. A summary of the Commission’s votes concerning adequacy and the conduct of a full or expedited review can be found at http://pubapps2.usitc.gov/sunset/caseProfSuppAttmnt/download/11703. The Commission’s explanation of its determinations can be found at http://pubapps2.usitc.gov/sunset/caseProfSuppAttmnt/download/11712.</p>		

APPENDIX B
COMPANY-SPECIFIC DATA

RESPONSE CHECKLIST FOR U.S. PRODUCERS

* * * * *

APPENDIX C

SUMMARY DATA COMPILED IN PRIOR INVESTIGATIONS

Table C-1
PC strand: Summary data concerning the U.S. market, 2003-08, January-June 2008, and January-June 2009

(Quantity=1,000 pounds, value=1,000 dollars, unit values, unit labor costs, and unit expenses are per thousand pounds; period changes=percent, except where noted)

Item	Reported data								Period changes							
	2003	2004	2005	2006	2007	2008	January-June		2003-08	2003-04	2004-05	2005-06	2006-07	2007-08	Jan.-June	
							2008	2009							2008-09	
U.S. consumption quantity:																
Amount	805,929	859,433	907,092	1,112,214	980,504	942,713	557,809	229,130	17.0	6.6	5.5	22.6	-11.8	-3.9	-58.9	
Producers' share (1)	70.0	66.8	68.6	56.4	59.4	56.2	58.4	79.9	-13.8	-3.2	1.8	-12.1	3.0	-3.2	21.5	
Importers' share (1):																
Brazil	2.7	0.1	0.0	0.0	0.0	0.0	0.0	0.0	-2.7	-2.6	-0.1	0.0	0.0	0.0	0.0	
India	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	-0.4	-0.0	-0.0	0.0	-0.0	0.0	
Korea	4.6	0.0	0.0	0.4	0.3	0.4	0.3	0.0	-4.2	-4.5	-0.0	0.3	-0.1	0.1	-0.3	
Mexico	4.7	0.1	0.1	0.1	0.2	0.2	0.1	1.0	-4.6	-4.6	-0.0	0.1	0.1	-0.1	0.8	
Thailand	0.8	0.7	0.1	0.0	0.0	0.0	0.0	0.0	-0.8	-0.2	-0.6	-0.1	-0.0	0.0	0.0	
Subtotal, 5 subject	13.2	0.9	0.2	0.5	0.5	0.5	0.4	1.0	-12.7	-12.4	-0.7	0.3	0.0	-0.0	0.6	
Subject Japan	0.1	0.2	0.2	0.1	0.2	0.1	0.2	0.0	0.1	0.1	-0.0	-0.0	0.1	-0.1	-0.2	
Subtotal, 6 subject	13.3	1.0	0.3	0.6	0.7	0.7	0.7	1.0	-12.7	-12.3	-0.7	0.3	0.1	-0.1	0.4	
All other sources	16.7	32.2	31.1	42.9	39.8	43.1	41.0	19.1	26.4	15.5	-1.1	11.8	-3.1	3.3	-21.9	
Total	30.0	33.2	31.4	43.6	40.6	43.8	41.6	20.1	13.8	3.2	-1.8	12.1	-3.0	3.2	-21.5	
U.S. consumption value:																
Amount	215,223	353,511	425,623	465,112	407,169	549,768	284,301	118,835	155.4	64.3	20.4	9.3	-12.5	35.0	-58.2	
Producers' share (1)	71.3	71.9	70.8	63.9	65.9	60.7	63.0	82.4	-10.6	0.6	-1.1	-6.9	2.0	-5.2	19.4	
Importers' share (1):																
Brazil	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-2.1	-2.1	-0.0	0.0	0.0	0.0	0.0	
India	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.3	-0.3	-0.0	-0.0	0.0	0.0	0.0	
Korea	3.7	0.0	0.0	0.3	0.3	0.4	0.4	0.0	-3.3	-3.7	-0.0	0.3	0.0	0.1	-0.3	
Mexico	5.4	0.1	0.0	0.2	0.3	0.2	0.1	0.8	-5.2	-5.3	-0.0	0.1	0.1	-0.1	0.7	
Thailand	0.7	0.5	0.1	0.0	0.0	0.0	0.0	0.0	-0.7	-0.2	-0.5	-0.1	-0.0	0.0	0.0	
Subtotal, 5 subject	12.3	0.7	0.2	0.5	0.6	0.6	0.5	0.9	-11.7	-11.6	-0.6	0.3	0.1	-0.0	0.4	
Subject Japan	0.2	0.2	0.3	0.2	0.3	0.2	0.3	0.0	-0.0	0.1	0.0	-0.0	0.1	-0.2	-0.3	
Subtotal, 6 subject	12.5	1.0	0.4	0.7	0.9	0.8	0.8	0.9	-11.7	-11.5	-0.5	0.3	0.2	-0.2	0.1	
All other sources	16.3	27.2	28.8	35.3	33.1	38.5	36.2	16.7	22.3	10.9	1.6	6.6	-2.2	5.4	-19.5	
Total	28.7	28.1	29.2	36.1	34.1	39.3	37.0	17.6	10.6	-0.6	1.1	6.9	-2.0	5.2	-19.4	
U.S. imports from:																
Brazil:																
Quantity	21,511	449	0	0	0	0	0	0	-100.0	-97.9	-100.0	(2)	(2)	(2)	(2)	
Value	4,610	168	0	0	0	0	0	0	-100.0	-96.4	-100.0	(2)	(2)	(2)	(2)	
Unit value	\$214	\$373	(2)	(2)	(2)	(2)	(2)	(2)	(2)	74.1	(2)	(2)	(2)	(2)	(2)	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
India:																
Quantity	3,210	34	2	2	235	209	0	0	-93.5	-98.9	-93.9	-22.7	14,326.6	-11.2	(2)	
Value	704	41	17	9	81	156	0	0	-77.9	-94.1	-59.7	-48.7	843.4	92.3	(2)	
Unit value	\$219	\$1,208	\$7,934	\$5,265	\$344	\$746	(2)	(2)	239.9	450.5	556.7	-33.6	-93.5	116.7	(2)	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
Korea:																
Quantity	36,934	316	258	3,958	2,831	3,325	1,661	86	-91.0	-99.1	-18.2	1,432.8	-28.5	17.5	-94.8	
Value	7,995	167	196	1,506	1,399	2,201	1,081	54	-72.5	-97.9	17.6	668.8	-7.1	57.3	-95.0	
Unit value	\$216	\$527	\$759	\$380	\$494	\$662	\$651	\$624	205.7	143.6	43.8	-49.8	29.9	33.9	-4.2	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
Mexico:																
Quantity	38,257	867	555	1,526	2,283	1,514	759	2,214	-96.0	-97.7	-36.0	175.1	49.6	-33.7	191.5	
Value	11,534	290	187	729	1,036	885	377	997	-92.3	-97.5	-35.7	290.5	42.1	-14.5	164.5	
Unit value	\$301	\$335	\$337	\$478	\$454	\$584	\$496	\$450	93.9	11.1	0.5	41.9	-5.1	28.8	-9.3	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
Thailand:																
Quantity	6,791	5,800	624	45	0	0	0	0	-100.0	-14.6	-89.2	-92.7	-100.0	(2)	(2)	
Value	1,572	1,819	240	25	0	0	0	0	-100.0	15.7	-86.8	-89.8	-100.0	(2)	(2)	
Unit value	\$231	\$314	\$385	\$543	(2)	(2)	(2)	(2)	(2)	35.5	22.7	41.0	(2)	(2)	(2)	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
Subtotal, 5 subject:																
Quantity	106,703	7,466	1,439	5,530	5,349	5,048	2,421	2,300	-95.3	-93.0	-80.7	284.3	-3.3	-5.6	-5.0	
Value	26,415	2,485	640	2,268	2,516	3,241	1,458	1,051	-87.7	-90.6	-74.3	254.6	10.9	28.8	-27.9	
Unit value	\$248	\$333	\$444	\$410	\$470	\$642	\$602	\$457	159.4	34.5	33.5	-7.7	14.7	36.5	-24.2	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
Japan:																
Quantity	768	1,545	1,564	1,580	1,952	1,380	1,224	0	79.7	101.1	1.3	1.0	23.5	-29.3	-100.0	
Value	399	876	1,092	1,100	1,343	916	874	0	129.8	119.7	24.7	0.7	22.1	-31.8	-100.0	
Unit value	\$519	\$567	\$698	\$696	\$688	\$663	\$715	(2)	27.8	9.2	23.1	-0.3	-1.1	-3.6	(2)	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
Subtotal, 6 subject:																
Quantity	107,471	9,011	3,003	7,111	7,301	6,429	3,644	2,300	-94.0	-91.6	-66.7	136.8	2.7	-11.9	-36.9	
Value	26,813	3,361	1,732	3,368	3,859	4,157	2,333	1,051	-84.5	-87.5	-48.5	94.5	14.6	7.7	-55.0	
Unit value	\$249	\$373	\$577	\$474	\$529	\$647	\$640	\$457	159.2	49.5	54.6	-17.9	11.6	22.3	-28.6	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
All other sources:																
Quantity	134,423	276,723	282,247	477,667	390,402	406,312	228,681	43,806	202.3	105.9	2.0	69.2	-18.3	4.1	-80.8	
Value	34,990	95,994	122,471	164,334	134,966	211,890	102,835	19,839	505.6	174.3	27.6	34.2	-17.9	57.0	-80.7	
Unit value	\$260	\$347	\$434	\$344	\$346	\$521	\$450	\$453	100.3	33.3	25.1	-20.7	0.5	50.8	0.7	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	
All sources:																
Quantity	241,894	285,733	285,250	484,778	397,703	412,741	232,325	46,106	70.6	18.1	-0.2	69.9	-18.0	3.8	-80.2	
Value	61,803	99,355	124,203	167,702	138,825	216,047	105,168	20,889	249.6	60.8	25.0	35.0	-17.2	55.6	-80.1	
Unit value	\$255	\$348	\$435	\$346	\$349	\$523	\$453	\$453	104.9	36.1	25.2	-20.6	0.9	50.0	0.1	
Ending inventory quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***	

Table continued on next page.

Table C-1--Continued
PC strand: Summary data concerning the U.S. market, 2003-08, January-June 2008, and January-June 2009

(Quantity=1,000 pounds, value=1,000 dollars, unit values, unit labor costs, and unit expenses are per pound; period changes=percent, except where noted)															
Item	Reported data							Period changes							
	2003	2004	2005	2006	2007	2008	January-June 2008	January-June 2009	2003-08	2003-04	2004-05	2005-06	2006-07	2007-08	Jan.-June 2008-09
U.S. producers:															
Average capacity quantity	742,295	754,653	791,653	810,653	902,782	903,795	454,684	456,277	21.8	1.7	4.9	2.4	11.4	0.1	0.4
Production quantity	578,004	608,562	621,919	673,195	601,732	558,885	327,355	172,375	-3.3	5.3	2.2	8.2	-10.6	-7.1	-47.3
Capacity utilization (1)	77.9	80.6	78.6	83.0	66.7	61.8	72.0	37.8	-16.0	2.8	-2.1	4.5	-16.4	-4.8	-34.2
U.S. shipments:															
Quantity	564,035	573,700	621,842	627,436	582,801	529,972	325,484	183,024	-6.0	1.7	8.4	0.9	-7.1	-9.1	-43.8
Value	153,420	254,156	301,420	297,410	268,344	333,721	179,133	97,946	117.5	65.7	18.6	-1.3	-9.8	24.4	-45.3
Unit value	\$272	\$443	\$489	\$474	\$460	\$630	\$550	\$535	131.5	62.9	10.4	-3.0	-2.9	36.8	-2.8
Export shipments:															
Quantity	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Ending inventory quantity	38,343	59,605	44,596	68,014	61,262	67,082	47,677	51,281	75.0	55.5	-25.2	52.5	-9.9	9.5	7.6
Inventories/total shipments (1)	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Production workers	315	335	364	385	357	331	337	253	5.1	6.3	8.7	5.8	-7.3	-7.3	-24.9
Hours worked (1,000s)	762	744	784	856	771	694	392	244	-8.9	-2.5	5.5	9.1	-9.9	-10.0	-37.6
Wages paid (\$1,000)	11,658	12,764	14,302	16,963	14,145	13,264	7,933	4,592	13.8	9.5	12.0	18.6	-16.6	-6.2	-42.1
Hourly wages	\$15.30	\$17.17	\$18.24	\$19.82	\$18.34	\$19.11	\$20.25	\$18.79	24.9	12.2	6.2	8.7	-7.5	4.2	-7.2
Productivity (pounds per hour)	758.3	818.5	793.2	786.7	780.1	805.0	835.7	705.3	6.2	7.9	-3.1	-0.8	-0.8	3.2	-15.6
Unit labor costs	\$20.17	\$20.97	\$23.00	\$25.20	\$23.51	\$23.73	\$24.23	\$26.64	17.7	4.0	9.6	9.6	-6.7	1.0	9.9
Net sales:															
Quantity	564,937	610,678	605,636	661,470	613,704	589,793	341,238	188,242	4.4	8.1	-0.8	9.2	-7.2	-3.9	-44.8
Value	150,480	249,170	299,892	312,046	283,088	354,082	191,146	100,343	135.3	65.6	20.4	4.1	-9.3	25.1	-47.5
Unit value	\$266	\$408	\$495	\$472	\$461	\$600	\$560	\$533	125.4	53.2	21.4	-4.7	-2.2	30.1	-4.8
Cost of goods sold (COGS)	135,503	193,659	235,830	248,909	230,394	302,334	153,600	101,280	123.1	42.9	21.8	5.5	-7.4	31.2	-34.1
Gross profit or (loss)	14,977	55,511	64,062	63,137	52,694	51,748	37,546	(937)	245.5	270.6	15.4	-1.4	-16.5	-1.8	(3)
SG&A expenses	9,887	13,251	13,233	14,648	13,317	13,795	7,128	6,603	39.5	34.0	-0.1	10.7	-9.1	3.6	-7.4
Operating income or (loss)	5,090	42,260	50,829	48,489	39,377	37,953	30,418	(7,540)	645.6	730.3	20.3	-4.6	-18.8	-3.6	(3)
Capital expenditures	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit COGS	\$240	\$317	\$389	\$376	\$375	\$513	\$450	\$538	113.7	32.2	22.8	-3.4	-0.2	36.5	19.5
Unit SG&A expenses	\$18	\$22	\$22	\$22	\$22	\$23	\$21	\$35	33.6	24.0	0.7	1.3	-2.0	7.8	67.9
Unit operating income or (loss)	\$9	\$69	\$84	\$73	\$64	\$64	\$89	(\$40)	614.2	668.1	21.3	-12.7	-12.5	0.3	(3)
COGS/sales (1)	90.0	77.7	78.6	79.8	81.4	85.4	80.4	100.9	-4.7	-12.3	0.9	1.1	1.6	4.0	20.6
Operating income or (loss)/ sales (1)	3.4	17.0	16.9	15.5	13.9	10.7	15.9	(7.5)	7.3	13.6	-0.0	-1.4	-1.6	-3.2	-23.4

(1) "Reported data" are in percent and "period changes" are in percentage points.
(2) Not applicable.
(3) Undefined.

Note.--Financial data are reported on a fiscal year basis and may not necessarily be comparable to data reported on a calendar year basis. Because of rounding, figures may not add to the totals shown. Unit values and shares are calculated from the unrounded figures.

Source: Compiled from data submitted in response to Commission questionnaires and from official Commerce statistics.

APPENDIX D
PURCHASER SURVEYS

As part of their response to the notice of institution, interested parties were asked to provide a list of three to five leading purchasers in the U.S. market for the domestic like prestressed concrete steel wire strand. A response was received from domestic interested parties and it named the following three firms as the top purchasers of prestressed concrete steel wire strand: ***. Purchaser questionnaires were sent to these three firms and one firm (***) provided responses which are presented below.

1. a.) Have any changes occurred in technology; production methods; or development efforts to produce prestressed concrete steel wire strand that affected the availability of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand since January 1, 2009?

- b.) Do you anticipate any changes in technology; production methods; or development efforts to produce prestressed concrete steel wire strand that will affect the availability of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand within a reasonably foreseeable time?

Purchaser	Changes that have occurred	Anticipated changes
***	***	***

2. a.) Have any changes occurred in the ability to increase production of prestressed concrete steel wire strand (including the shift of production facilities used for other products and the use, cost, or availability of major inputs into production) that affected the availability of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand since 2009?

- b.) Do you anticipate any changes in the ability to increase production (including the shift of production facilities used for other products and the use, cost, or availability of major inputs into production) that will affect the availability of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand within a reasonably foreseeable time?

Purchaser	Changes that have occurred	Anticipated changes
***	***	***

3. a.) Have any changes occurred in factors related to the ability to shift supply of prestressed concrete steel wire strand among different national markets (including barriers to importation in foreign markets or changes in market demand abroad) that affected the availability of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand since 2009?

b.) Do you anticipate any changes in factors related to the ability to shift supply among different national markets (including barriers to importation in foreign markets or changes in market demand abroad) that will affect the availability of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand within a reasonably foreseeable time?

Purchaser	Changes that have occurred	Anticipated changes
***	***	***

4. a.) Have there been any changes in the end uses and applications of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand since 2009?

b.) Do you anticipate any changes in the end uses and applications of prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand within a reasonably foreseeable time?

Purchaser	Changes that have occurred	Anticipated changes
***	***	***

5. a.) Have there been any changes in the existence and availability of substitute products for prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand since 2009?

b.) Do you anticipate any changes in the existence and availability of substitute products for prestressed concrete steel wire strand in the U.S. market or in the market for prestressed concrete steel wire strand in Brazil, India, Japan, Korea, Mexico, and Thailand within a reasonably foreseeable time?

Purchaser	Changes that have occurred	Anticipated changes
***	***	***