

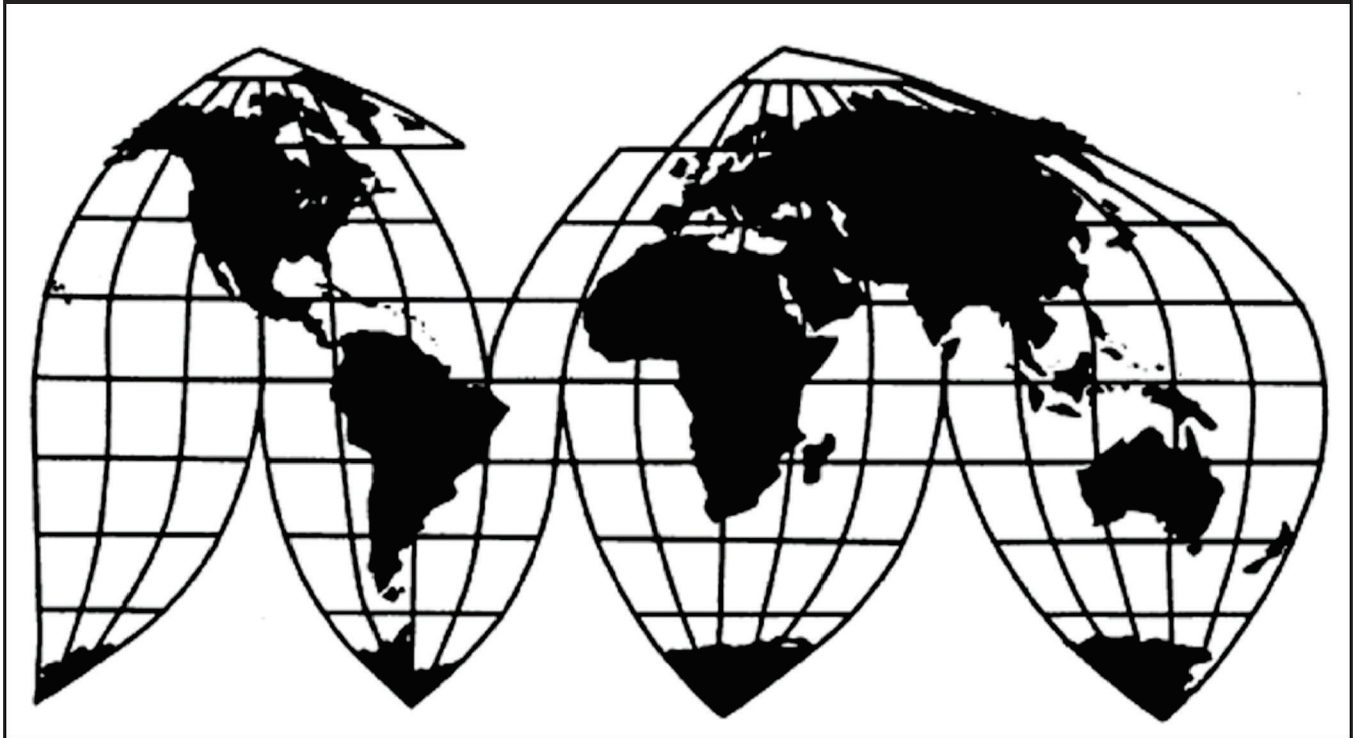
Mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Investigation Nos. 701-TA-645 and 731-TA-1495-1501 (Final)

Publication 5191

May 2021

U.S. International Trade Commission



Washington, DC 20436

U.S. International Trade Commission

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Note.—Information that would reveal confidential operations of individual concerns may not be published. Such information is identified by brackets in confidential reports and is deleted and replaced with asterisks (***) in public reports.

UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation Nos. 701-TA-645 and 731-TA-1495-1501 (Final)

Mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

DETERMINATIONS

On the basis of the record¹ developed in the subject investigations, the United States International Trade Commission (“Commission”) determines, pursuant to the Tariff Act of 1930 (“the Act”), that an industry in the United States is materially injured by reason of imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam, provided for in subheadings 9404.21.00, 9404.29.10, 9404.29.90, 9401.40.00, and 9401.90.50 of the Harmonized Tariff Schedule of the United States, that have been found by the U.S. Department of Commerce (“Commerce”) to be sold in the United States at less than fair value (“LTFV”), and by reason of imports of mattresses from China that have been found by Commerce to be subsidized by the government of China.

BACKGROUND

The Commission instituted these investigations effective March 31, 2020, following receipt of petitions filed with the Commission and Commerce by Brooklyn Bedding (Phoenix, Arizona), Corsicana Mattress Company (Dallas, Texas), Elite Comfort Solutions (Newnan, Georgia), FXI, Inc. (Media, Pennsylvania), Innocor, Inc. (Media, Pennsylvania), Kolcraft Enterprises, Inc. (Chicago, Illinois), Leggett & Platt, Incorporated (Carthage, Missouri), the International Brotherhood of Teamsters (Washington, DC), and United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union, AFL-CIO (Washington, DC). The final phase of the investigations was scheduled by the Commission following notification of preliminary determinations by Commerce that imports of mattresses from China were subsidized within the meaning of section 703(b) of the Act (19

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

U.S.C. 1671b(b)) and imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam were sold at LTFV within the meaning of 733(b) of the Act (19 U.S.C. 1673b(b)). Notice of the scheduling of the final phase of the Commission's investigations and of a public hearing to be held in connection therewith was given by posting copies of the notice in the Office of the Secretary, U.S. International Trade Commission, Washington, DC, and by publishing the notice in the *Federal Register* on November 27, 2020 (85 FR 76105). In light of the restrictions on access to the Commission building due to the COVID-19 pandemic, the Commission conducted its hearing through written testimony and video conference on March 18, 2020. All persons who requested the opportunity were permitted to participate.

Views of the Commission

Based on the record in the final phase of the investigations, we determine that an industry in the United States is materially injured by reason of imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam found by the U.S. Department of Commerce (“Commerce”) to be sold in the United States at less than fair value and imports of the subject merchandise from China found by Commerce to be subsidized by the government of China.

I. Background

The petitions in these investigations were filed on March 31, 2020, by Brooklyn Bedding, Corsicana Mattress Company, Elite Comfort Solutions, FXI, Inc., Innocor, Inc., Kolcraft Enterprises, Inc., and Leggett & Platt, Incorporated, which are domestic producers of mattresses, and the International Brotherhood of Teamsters, and the United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union, AFL-CIO (“USW”), which are unions representing workers at domestic mattress production facilities (collectively, “petitioners”). Petitioners appeared at the hearing represented by counsel and submitted prehearing and posthearing briefs, and final comments.

Several respondent entities participated in these investigations. Appearing at the hearing represented by counsel and submitting joint prehearing and posthearing briefs, and final comments, were Ashley Furniture Industries, Inc. (“Ashley”), a domestic producer and importer; Classic Brands, LLC (“Classic”), a domestic producer and importer; and CVB, Inc. (Malouf Sleep) (“Malouf Sleep”), an importer (collectively, the “joint respondents”). Also participating in the hearing represented by counsel and submitting prehearing and posthearing briefs were Night & Day Furniture LLC (“Night & Day”) and Cozy Comfort LLC (“Cozy Comfort”), importers of subject merchandise. Finally, the government of Indonesia submitted a prehearing brief and participated in the hearing, and the government of Turkey participated in the hearing.¹

U.S. industry data are based on the questionnaire responses from 53 domestic producers that accounted for the vast majority of domestic production of mattresses in 2019.²

¹ In light of the restrictions on access to the Commission building due to the COVID-19 pandemic, the Commission conducted its hearing via videoconference held on March 18, 2021, as set forth in procedures provided to the parties on March 8, 2021.

² Confidential Report (“CR”)/Public Report (“PR”) at I-5 and III-1.

U.S. imports are based on questionnaire responses of 49 firms that accounted for most U.S. imports from the subject countries, according to data submitted in response to the Commission questionnaires and official import statistics.³ The Commission received responses to its questionnaires from 16 foreign producers/exporters of subject merchandise: one producer/exporter in China, accounting for *** percent of U.S. imports from China in 2019; three producers/exporters in Indonesia, accounting for *** percent of U.S. imports from Indonesia in 2019; five producers/exporters in Malaysia, accounting for *** percent of U.S. imports from Malaysia in 2019; two producers/exporters in Turkey, accounting for *** percent of U.S. imports from Turkey in 2019; and five producers/exporters in Vietnam, accounting for approximately *** percent of U.S. imports from Vietnam in 2019.⁴ In the absence of any final phase questionnaire responses from producers in Cambodia, Serbia, and Thailand, the Commission relied on the preliminary phase questionnaire responses of one producer in Cambodia, accounting for *** percent of U.S. imports from Cambodia in 2019; one producer in Serbia, accounting for *** percent of U.S. imports from Serbia in 2019; and one producer in Thailand, accounting for *** percent of U.S. imports from Thailand in 2019.⁵

II. Domestic Like Product

A. In General

In determining whether an industry in the United States is materially injured or threatened with material injury by reason of imports of subject merchandise, the Commission first defines the “domestic like product” and the “industry.”⁶ Section 771(4)(A) of the Tariff Act of 1930, as amended (“the Tariff Act”), defines the relevant domestic industry as the “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.”⁷ In turn, the Tariff Act defines “domestic like product” as “a product which is like,

³ CR/PR at I-5 and IV-1. Questionnaire responses represent greater than 100 percent of U.S. imports from Cambodia, China, Indonesia, Serbia, Thailand, Vietnam, and nonsubject sources in 2019, and *** percent from Malaysia and *** percent from Turkey in 2019 under HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, which are the primary HTS statistical reporting numbers for the subject merchandise. *Id.* at I-5 n.7.

⁴ CR/PR at VII-7, 14, 21, 41, 48.

⁵ CR/PR at VII-3, 29, 35.

⁶ 19 U.S.C. § 1677(4)(A).

⁷ 19 U.S.C. § 1677(4)(A).

or in the absence of like, most similar in characteristics and uses with, the article subject to an investigation.”⁸

By statute, the Commission’s “domestic like product” analysis begins with the “article subject to an investigation,” *i.e.*, the subject merchandise as determined by Commerce.⁹ Therefore, Commerce’s determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value is “necessarily the starting point of the Commission’s like product analysis.”¹⁰ The Commission then defines the domestic like product in light of the imported articles Commerce has identified.¹¹ The decision regarding the appropriate domestic like product(s) in an investigation is a factual determination, and the Commission has applied the statutory standard of “like” or “most similar in characteristics and uses” on a case-by-case basis.¹² No single factor is dispositive, and the Commission may consider other factors it deems relevant based on the facts of a particular investigation.¹³ The

⁸ 19 U.S.C. § 1677(10).

⁹ 19 U.S.C. § 1677(10). The Commission must accept Commerce’s determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value. *See, e.g., USEC, Inc. v. United States*, 34 Fed. App’x 725, 730 (Fed. Cir. 2002) (“The ITC may not modify the class or kind of imported merchandise examined by Commerce.”); *Algoma Steel Corp. v. United States*, 688 F. Supp. 639, 644 (Ct. Int’l Trade 1988), *aff’d*, 865 F.3d 240 (Fed. Cir.), *cert. denied*, 492 U.S. 919 (1989).

¹⁰ *Cleo Inc. v. United States*, 501 F.3d 1291, 1298 (Fed. Cir. 2007); *see also Hitachi Metals, Ltd. v. United States*, Case No. 19-1289, slip op. at 8-9 (Fed. Circ. Feb. 7, 2020) (the statute requires the Commission to start with Commerce’s subject merchandise in reaching its own like product determination).

¹¹ *Cleo*, 501 F.3d at 1298 n.1 (“Commerce’s {scope} finding does not control the Commission’s {like product} determination.”); *Hosiden Corp. v. Advanced Display Mfrs.*, 85 F.3d 1561, 1568 (Fed. Cir. 1996) (the Commission may find a single like product corresponding to several different classes or kinds defined by Commerce); *Torrington Co. v. United States*, 747 F. Supp. 744, 748–52 (Ct. Int’l Trade 1990), *aff’d*, 938 F.2d 1278 (Fed. Cir. 1991) (affirming the Commission’s determination defining six like products in investigations where Commerce found five classes or kinds).

¹² *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); *Torrington Co. v. United States*, 747 F. Supp. 744, 749 n.3 (Ct. Int’l Trade 1990), *aff’d*, 938 F.2d 1278 (Fed. Cir. 1991) (“every like product determination ‘must be made on the particular record at issue’ and the ‘unique facts of each case’”). The Commission generally considers a number of factors, including the following: (1) physical characteristics and uses; (2) interchangeability; (3) channels of distribution; (4) customer and producer perceptions of the products; (5) common manufacturing facilities, production processes, and production employees; and, where appropriate, (6) price. *See Nippon*, 19 CIT at 455 n.4; *Timken Co. v. United States*, 913 F. Supp. 580, 584 (Ct. Int’l Trade 1996).

¹³ *See, e.g., S. Rep. No. 96-249 at 90-91 (1979).*

Commission looks for clear dividing lines among possible like products and disregards minor variations.¹⁴

B. Product Description

Commerce defined the imported merchandise within the scope of these investigations as:

The products covered by this investigation are all types of youth and adult mattresses. The term “mattress” denotes an assembly of materials that at a minimum includes a “core,” which provides the main support system of the mattress, and may consist of innersprings, foam, other resilient filling, or a combination of these materials. Mattresses may also contain (1) “upholstery,” the material between the core and the top panel of the ticking on a single-sided mattress, or between the core and the top and bottom panel of the ticking on a double-sided mattress; and/or (2) “ticking,” the outermost layer of fabric or other material (e.g., vinyl) that encloses the core and any upholstery, also known as a cover.

The scope of this investigation is restricted to only “adult mattresses” and “youth mattresses.” “Adult mattresses” are frequently described as “twin,” “extra-long twin,” “full,” “queen,” “king,” or “California king” mattresses. “Youth mattresses” are typically described as “crib,” “toddler,” or “youth” mattresses. All adult and youth mattresses are included regardless of size or size description.

The scope encompasses all types of “innerspring mattresses,” “non-innerspring mattresses,” and “hybrid mattresses.” “Innerspring mattresses” contain innersprings, a series of metal springs joined together in sizes that correspond to the dimensions of mattresses.

¹⁴ *Nippon*, 19 CIT at 455; *Torrington*, 747 F. Supp. at 748-49; see also S. Rep. No. 96-249 at 90-91 (Congress has indicated that the like product standard should not be interpreted in “such a narrow fashion as to permit minor differences in physical characteristics or uses to lead to the conclusion that the product and article are not ‘like’ each other, nor should the definition of ‘like product’ be interpreted in such a fashion as to prevent consideration of an industry adversely affected by the imports under consideration.”).

Mattresses that contain innersprings are referred to as “innerspring mattresses” or “hybrid mattresses.” “Hybrid mattresses” contain two or more support systems as the core, such as layers of both memory foam and innerspring units.

“Non-innerspring mattresses” are those that do not contain any innerspring units. They are generally produced from foams (e.g., polyurethane, memory (viscoelastic), latex foam, gel-infused viscoelastic (gel foam), thermobonded polyester, polyethylene) or other resilient filling.

Mattresses covered by the scope of this investigation may be imported independently, as part of furniture or furniture mechanisms (e.g., convertible sofa bed mattresses, sofa bed mattresses imported with sofa bed mechanisms, corner group mattresses, day-bed mattresses, roll-away bed mattresses, high risers, trundle bed mattresses, crib mattresses), or as part of a set in combination with a “mattress foundation.” “Mattress foundations” are any base or support for a mattress. Mattress foundations are commonly referred to as “foundations,” “boxsprings,” “platforms,” and/or “bases.” Bases can be static, foldable, or adjustable. Only the mattress is covered by the scope if imported as part of furniture, with furniture mechanisms, or as part of a set, in combination with a mattress foundation.

Excluded from the scope of this investigation are “futon” mattresses. A “futon” is a bi-fold frame made of wood, metal, or plastic material, or any combination thereof, that functions as both seating furniture (such as a couch, love seat, or sofa) and a bed. A “futon mattress” is a tufted mattress, where the top covering is secured to the bottom with thread that goes completely through the mattress from the top through to the bottom, and it does not contain innersprings or foam. A futon mattress is both the bed and seating surface for the futon.

Also excluded from the scope are airbeds (including inflatable mattresses) and waterbeds, which consist of air- or liquid-filled bladders as the core or main support system of the mattress.

Also excluded is certain multifunctional furniture that is convertible from seating to sleeping, regardless of filler material or components, where that filler material or components are upholstered, integrated into the design and construction of, and inseparable from, the furniture framing, and the outermost layer of the multifunctional furniture converts into the sleeping surface. Such furniture may, and without limitation, be commonly referred to as “convertible sofas,” “sofa beds,” “sofa chaise sleepers,” “futons,” “ottoman sleepers” or a like description.

Also excluded from the scope of this investigation are any products covered by the existing antidumping duty orders on uncovered innerspring units from China or Vietnam. See Uncovered Innerspring Units from the People’s Republic of China: Notice of Antidumping Duty Order, 74 FR 7661 (Feb. 19, 2009); Uncovered Innerspring Units From the Socialist Republic of Vietnam, 73 FR 75391 (Dec. 11, 2008).

Also excluded from the scope of this investigation are bassinet pads with a nominal length of less than 39 inches, a nominal width less than 25 inches, and a nominal depth of less than 2 inches.

Additionally, also excluded from the scope of this investigation are “mattress toppers.” A “mattress topper” is a removable bedding accessory that supplements a mattress by providing an additional layer that is placed on top of a mattress. Excluded mattress toppers have a nominal height of four inches or less.¹⁵

¹⁵ See *Mattresses From the People's Republic of China: Final Affirmative Countervailing Duty Determination*, 86 Fed. Reg. 15910 (March 25, 2021); *Mattresses from Vietnam: Final Affirmative Determination of Sales at Less Than Fair Value*, 86 Fed. Reg. 15889 (March 25, 2021); *Mattresses from Serbia: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical Circumstances*, 86 Fed. Reg. 15892 (March 25, 2021); *Mattresses from Cambodia: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical* (Continued...)

Mattresses are defined by the industry as a resilient material or combination of materials generally enclosed by ticking that is intended or promoted for sleeping upon by people.¹⁶ Adult mattresses are produced in standard lengths and widths corresponding to the size descriptors twin, twin XL, full, queen, king, and California king, and youth mattresses are produced in standard dimensions corresponding to the size descriptors crib, toddler, and youth.¹⁷ In terms of construction, mattresses generally consist of: (1) a core, which provides the main support system of the mattress; (2) upholstery material surrounding the core; and (3) ticking, which is the cover or outermost layer of fabric or other material enclosing the core and any upholstery.¹⁸

The U.S. mattress market is characterized by a large variety of mattresses. Depending upon the composition of their cores, mattresses can be characterized as innerspring, non-innerspring, and hybrid mattresses.¹⁹ Innerspring mattresses have a core made of densely packed rows of metal springs, sometimes individually wrapped, surrounded by upholstery and covered in ticking.²⁰ Non-innerspring mattresses consist of either a single slab of foam or multiple layers of foam encased in a fabric sock and covered in ticking.²¹ Hybrid mattresses have a core combining metal springs and one or more layers of foam surrounded by upholstery and covered in ticking.²² All three types of mattresses may be packaged for shipment and delivery flat (flat packed mattresses or (“FPM”)) or rolled and boxed as a mattress-in-a-box (“MiB”).²³ Mattresses can also vary according to spring quality, foam density and type, upholstery and ticking quality, and special design features.²⁴

(...Continued)

Circumstances, 86 Fed. Reg. 15894 (March 25, 2021); *Mattresses from Indonesia: Final Affirmative Determination of Sales at Less Than Fair Value*, 86 Fed. Reg. 15899 (March 25, 2021); *Mattresses from Malaysia: Final Affirmative Less Than Fair Value Determination*, 86 Fed. Reg. 15901 (March 25, 2021); *Mattresses from Turkey: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical Circumstances*, 86 Fed. Reg. 15917 (March 25, 2021); *Mattresses from Thailand: Final Affirmative Determination of Sales at Less Than Fair Value*, 86 Fed. Reg. 15928 (March 25, 2021).

¹⁶ CR/PR at I-13.

¹⁷ CR/PR at I-11, II-1.

¹⁸ CR/PR at I-13-14.

¹⁹ CR/PR at II-1.

²⁰ CR/PR at I-11, I-13-15, Figure I-1.

²¹ CR/PR at I-16-17, Figure I-2.

²² CR/PR at I-11, 14-15, II-1, Figure I-1.

²³ CR/PR at I-15, II-1.

²⁴ See *Mattresses from China*, Inv. No. 731-TA-1424 (Final), USITC Pub. 5000 (Dec. 2019) at 8. In September 2018, nine U.S. mattress producers filed an antidumping petition against imports of (Continued...)

C. Arguments of the Parties

Petitioners' Argument. Petitioners argue that the Commission should define the domestic like product as all mattresses within the scope of the investigations, as it did in *Mattresses from China*, based on an examination of the Commission's traditional like product factors.²⁵ In their view, there is no new information on the record of these investigations that would warrant the Commission's reconsideration of its domestic like product definition from *Mattresses from China*.²⁶

Respondents' Arguments. The joint respondents do not contest petitioners' proposed definition of the domestic like product.²⁷

Cozy Comfort argues that the Commission mistakenly included the Seat-to-Sleep ("STS") furniture component within the single domestic like product defined in the preliminary determinations. It contends that, contrary to the Commission's analysis, the STS furniture component, which is not produced domestically, possesses characteristics and uses most similar to those of domestically produced futons, which the Commission found to differ from in-scope mattresses in *Mattresses from China*.²⁸ Cozy Comfort argues that STS furniture components, unlike sleep sofa or other in-scope mattresses, consist of a seating deck and articulation mechanism that are incorporated into sofas and chairs for sitting and, when converted into a bed, sleeping.²⁹ Cozy Comfort also argues that the STS furniture component and futons differ from in-scope mattresses in terms of interchangeability, channels of distribution, production facilities, processes, and employees, producer and consumer perceptions, and price.³⁰ Finally, Cozy Comfort argues that the only reason it did not submit comments on the draft questionnaires requesting the collection of data on the like product

(...Continued)

mattresses from China. CR/PR at I-5. Commerce and the Commission reached affirmative determinations in their respective investigations, and Commerce issued an antidumping duty order on imports of mattresses from China in December 2019. *Id.* The scope in the prior mattress investigation was virtually identical to the scope of the present investigations.

²⁵ Petitioners' Prehearing Brief at 2-5.

²⁶ Petitioners' Prehearing Brief at 4.

²⁷ Joint Respondents' Prehearing Brief at 1.

²⁸ Cozy Comfort's Prehearing Brief at 6-7.

²⁹ Cozy Comfort's Prehearing Brief at 5-6.

³⁰ Cozy Comfort's Prehearing Brief at 7-9. Cozy Comfort contends that the STS furniture component is *** using patented technology. *Id.* at 9 n.24.

issue and the domestic industry producing futons was that it did not qualify as an interested party until March 2020, when it first imported the STS furniture component.³¹

Night & Day argues that the Commission should define trifold memory foam mattresses as a separate domestic like product because, in its view, a clear dividing line separates such mattresses from other in-scope mattresses under the Commission's six like product factors.³² It claims that, unlike in-scope mattresses, trifold memory foam mattresses are designed to fold into three equally sized foam components for use in murphy bed cabinets, and are thus suitable only for periodic use by guests.³³ Given these characteristics, Night & Day argues that trifold memory foam mattresses are not interchangeable with in-scope mattresses,³⁴ are sold only to producers of cabinets designed to accept such mattresses,³⁵ are perceived by consumers and producers as inferior to in-scope mattresses,³⁶ and are sold only as part of the Murphy Cabinet Bed at prices much higher than most in-scope mattresses.³⁷ At the hearing, a representative from Night & Day testified that trifold memory foam mattresses are not produced domestically.³⁸

D. Domestic Like Product Analysis

Based on the record, we define a single domestic like product that consists of mattresses, coextensive with the scope of the investigations, and consistent with the definition in the preliminary determinations.³⁹ The Commission explained in the preliminary determinations that the Commission's domestic like product analysis in *Mattresses from China*, in which the scope was virtually identical, remained valid and that there was no evidence or argument on the record suggesting otherwise.⁴⁰ The record of the final phase of the

³¹ Cozy Comfort's Prehearing Brief at 10 n.28. Cozy Comfort did not enter an appearance in the final phase of these investigations until January 12, 2021, while the deadline for filing comments on the draft questionnaires was July 21, 2020, about four months after Cozy Comfort would have qualified as an interested party.

³² Night & Day's Prehearing Brief at 2.

³³ Night & Day's Prehearing Brief at 3-4.

³⁴ Night & Day's Prehearing Brief at 4.

³⁵ Night & Day's Prehearing Brief at 4.

³⁶ Night & Day's Prehearing Brief at 5.

³⁷ Night & Day's Prehearing Brief at 5.

³⁸ Hearing Tr. at 179-80 (Gallawa).

³⁹ *Mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam*, Inv. Nos. 701-TA-645 and 731-TA-1495-1501 (Preliminary), USITC Pub. 5059 (May 2020) at 11 ("Preliminary Determinations").

⁴⁰ Preliminary Determinations, USITC Pub. 5059 at 11.

investigations contains no new information that would warrant the Commission's reconsideration of this single domestic like product definition. We therefore define a single domestic like product encompassing all mattresses within the scope of the investigations.

We do not define a separate domestic like product corresponding to either the STS furniture components, as advocated by Cozy Comfort, or trifold memory foam mattresses, as advocated by Night & Day. Only those articles domestically produced may be defined as a separate domestic like product and there is no domestic production of either STS furniture components or trifold memory foam mattresses.⁴¹ In the absence of domestic production of STS furniture components or trifold memory foam mattresses, such components are not capable of examination under the Commission's traditional domestic like product analysis, which entails comparison of products that are in fact domestically produced.⁴² Instead, the Commission must define a domestic like product to include the domestically produced article "most similar" to the imported STS furniture components and trifold memory foam mattresses within the scope of the investigations.⁴³

The domestically produced article most similar to imported STS furniture components would be domestically produced sleep sofa mattresses, which are included within the single domestic like product of all mattresses. Sleep sofa mattresses possess characteristics and uses most similar to those of imported STS furniture components.⁴⁴ Like STS furniture components, sleep sofa mattresses are a sleeping surface incorporated into furniture that may either be used for sitting or, when the mattresses is unfolded and fully extended on a retractable frame, sleeping. Cozy Comfort's website indicates that the mattresses offered by Cozy Comfort are "sleeper sofa" mattresses that are folded into the sleeper sofa and covered by seat cushions

⁴¹ Cozy Comfort's Prehearing Brief at 1; Hearing Tr. at 179-80 (Gallawa).

⁴² See *Large Residential Washers from China*, Inv. No. 731-TA-1306 (Preliminary), USITC Pub. 4591 (Feb. 2016) at 10 ("Absent evidence of domestic production of such washers, we have no basis for determining whether a clear dividing line separates domestically produced out-of-scope low-tech and front load extra-wide washers from in-scope LRWs in terms of our like product factors . . ."); 19 U.S.C. § 1677(4).

⁴³ 19 U.S.C. § 1677(10).

⁴⁴ As discussed above, sofa bed mattresses were produced domestically during the period of investigation. See Hearing Tr. at 131 (Glassman); CR/PR at Tables III-3, VI-10 (***)). In the preliminary phase of the investigations, Cozy Comfort recognized that STS furniture components possess characteristics and uses similar to those of domestically produced sleeper sofa mattresses in arguing that "{t}he Cozy Comfort STS furniture component provides the consumer with a significant quality upgrade" compared to "{m}ost sleeper sofas fitted with a mattress . . ." Cozy Comfort Postconference Brief at 3.

when not in use.⁴⁵ Unlike a futon that serves as a surface for both sleeping and sitting, the mattresses offered by Cozy Comfort, incorporating the STS furniture component, are intended for sleeping, while the seat cushions covering the folded mattress are used for sitting.⁴⁶ Even to the extent that the STS furniture component shares some similarities with futon mattresses, such mattresses are outside the scope of the investigations and not included in the single domestic like product that we define which includes domestically produced sleep sofa mattresses.⁴⁷

Trifold memory foam mattresses are also not produced domestically. The domestically produced article most similar to trifold memory foam mattresses would also be domestically produced sleep sofa mattresses, which possess characteristics and uses most similar to those of imported trifold memory foam mattresses.⁴⁸ Like trifold memory foam mattresses, sleeper sofa mattresses fold away into a piece of furniture when not in use, albeit into a sofa instead of a cabinet, and are not intended or suitable for daily use.⁴⁹ As noted above, and as explained in the preliminary determinations, sleep sofa mattresses are included in the Commission's single domestic like product definition.⁵⁰

In sum, we define a single domestic like product encompassing all mattresses within the scope of the investigations.

III. Domestic Industry

The domestic industry is defined as the domestic "producers as a whole of a domestic like product, or those producers whose collective output of a domestic like product constitutes

⁴⁵ See Cozycomfort – Cozy Mattress for Hotels, EDIS Doc. No. 737895; see also Cozy Comfort's Prehearing Brief at 5.

⁴⁶ See Cozycomfort – Cozy Mattress for Hotels, EDIS Doc. No. 737895.

⁴⁷ We are unpersuaded by Cozy Comfort's argument that it was somehow deprived of the opportunity to comment on the draft questionnaires, presumably to request the collection of information on the like product issue and the domestic production of futons. Cozy Comfort's Prehearing Brief at 9-11. ***, *id.* at 10, Cozy Comfort was in a position to file a notice of appearance in the investigations well in advance of the circulation of draft questionnaires for party comments, particularly given that Cozy Comfort had retained experienced trade counsel and filed a postconference brief in the preliminary phase of the investigations. Instead, Cozy Comfort did not enter an appearance in these investigations until January 15, 2021.

⁴⁸ Sofa bed mattresses were produced domestically during the period of investigation. See Hearing Tr. at 131 (Glassman); CR/PR at Tables III-3, VI-10.

⁴⁹ See Petitioners' Responses to Commissioner Questions at Exhibit 1-41.

⁵⁰ See Preliminary Determinations, USITC Pub. 5059 at 11-12.

a major proportion of the total domestic production of the product.”⁵¹ 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.

A. Sufficient Production-Related Activities

In deciding whether a firm qualifies as a domestic producer of the domestic like product, the Commission generally analyzes the overall nature of a firm’s U.S. production-related activities, although production-related activity at minimum levels could be insufficient to constitute domestic production.⁵²

1. Arguments of the Parties

Respondents’ Argument. The joint respondents repeat their argument from the preliminary phase of the investigations that the Commission should include in the domestic industry companies that develop and promote MiBs for sale over the internet (“MiB developers”), such as Casper, Nector, Leesa, and Tuft & Needle, even though they produce no mattresses.⁵³ Joint respondents assert that MiB developers should qualify as domestic producers based upon the substantial capital investment and technical expertise required to design and market MiBs, the value added by their advertising campaigns, the significant level of their employment, and the reliance of many MiB developers on domestically sourced MiBs.⁵⁴

Petitioners’ Argument. Petitioners argue that the Commission correctly determined not to include MiB developers in the domestic industry because such firms market mattresses but do not manufacture mattresses in the United States.⁵⁵

⁵¹ 19 U.S.C. § 1677(4)(A).

⁵² The Commission generally considers six factors: (1) source and extent of the firm’s capital investment; (2) technical expertise involved in U.S. production activities; (3) value added to the product in the United States; (4) employment levels; (5) quantity and type of parts sourced in the United States; and (6) any other costs and activities in the United States directly leading to production of the like product. No single factor is determinative and the Commission may consider any other factors it deems relevant in light of the specific facts of any investigation. *Crystalline Silica Photovoltaic Cells and Modules from China*, Inv. Nos. 701-TA-481 and 731-TA-1190 (Final), USITC Pub. 4360 at 12-13 (Nov. 2012).

⁵³ Joint Respondents’ Prehearing Brief at 5-6.

⁵⁴ See Joint Respondents’ Prehearing Brief at 6-9.

⁵⁵ Petitioners’ Prehearing Brief at 7 n.27.

2. Analysis

In the preliminary determinations, the Commission found that MiB developers did not engage in production-related activities sufficient to qualify them as domestic producers.⁵⁶ The Commission's production-related activities analysis focuses on "costs and activities in the United States directly leading to production of the like product," and the activities that MiB developers engage in, such as advertising, designing, and testing MiB products, lead to purchases of mattresses but not the domestic production of mattresses by the MiB developers themselves.⁵⁷ The record contains no new information or argument that would warrant the Commission's reconsideration of this analysis.⁵⁸ We therefore find that MiB developers do not engage in production-related activities sufficient to qualify them as domestic producers.

B. Related Parties

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.⁵⁹ Exclusion of such a producer is within the Commission's discretion based upon the facts presented in each investigation.⁶⁰

⁵⁶ Preliminary Determinations, USITC Pub. 5059 at 14.

⁵⁷ Preliminary Determinations, USITC Pub. 5059 at 14.

⁵⁸ Joint Respondents reaffirm that the MiB developers do not produce mattresses in the United States. Joint Respondents' Prehearing Brief at 6.

⁵⁹ 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).

⁶⁰ 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 (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);
- (3) whether inclusion or exclusion of the related party will skew the data for the rest of the industry;
- (4) the ratio of import shipments to U.S. production for the imported product; and
- (5) whether the primary interest of the importing producer lies in domestic production or importation. *Changzhou Trina Solar Energy Co. v. USITC*, 100 F. Supp.3d 1314, 1326-31 (Ct. Int'l. Trade 2015); see also *Torrington Co. v. United States*, 790 F. Supp. at 1168.

*** are subject to consideration for exclusion under the related party provision as importers of subject merchandise during the period of investigation, and *** also qualifies as a related party based on its affiliation with subject foreign producers and exporters and U.S. importers of subject merchandise.^{61 62} We discuss below whether appropriate circumstances exist to exclude each of them from the domestic industry.

1. Arguments of the Parties

Petitioners' Argument. Petitioners argue that the Commission should find that appropriate circumstances exist to exclude *** from the domestic industry as a related party, as it did in the preliminary determinations.⁶³ Arguing that the circumstances have not changed since the preliminary phase of these investigations, petitioners rely on *** high and increasing ratio of subject imports to domestic production, its small share of U.S. production in 2019, and its opposition to the petitions.⁶⁴

Respondents' Argument. The joint respondents argue that the Commission should find that appropriate circumstances do not exist to exclude *** from the domestic industry.⁶⁵ Arguing that the facts have changed since the Commission's preliminary determinations, the

⁶¹ CR/PR at III-7-8 & n.5, Table III-2. Although *** and *** purchased subject imports from importers during the POI, these purchases were not substantial and do not demonstrate control of large volumes of subject imports as required by the statute. See CR/PR at Table III-10; 19 U.S.C. § 1677(4)(B)(ii)(III). *** purchases of subject imports from *** were only *** units in January-September 2020 ("interim 2020"), while *** purchases of subject imports from *** were only *** units in 2019 and *** units in interim 2020. *Id.* We therefore find that neither *** nor *** qualify as a related party because the volume of their respective subject import purchases was not substantial.

⁶² *** also qualifies as a related party based on its affiliation with an importer of subject merchandise. CR/PR at III-7 & n.5, Table III-2. *** is related to ***, which imported subject merchandise from ***. *Id.* Because *** did not provide a response to the Commission's importer questionnaire in the final phase of the investigations, we are unable to compare its imports of subject merchandise to *** domestic production. *Id.* at III-7 n.5. *** was *** in 2019, accounting for only *** percent of domestic industry production. *Id.* at Table III-1. *** reported no imports or purchases of subject merchandise. *Id.* at Tables III-1-2, 9. Based on the limited information available on the record, including *** small share of U.S. production which makes its inclusion or exclusion unlikely to skew the record in this investigation, we find that appropriate circumstances do not exist to exclude *** from the domestic industry under the related party provision.

⁶³ Petitioners' Prehearing Brief at 5-6.

⁶⁴ See Petitioners' Prehearing Brief at 5-7.

⁶⁵ Joint Respondents' Prehearing Brief at 2. The joint respondents also argue that the Commission should again find, as it did in the preliminary determinations, that appropriate circumstances do not exist to exclude *** from the domestic industry under the related parties provision. *Id.* at 5. ***. CR/PR at III-7 n.4.

joint respondents maintain that *** primary interest is in domestic production, as evidenced by its status as the *** largest domestic producer, ***, and ***.⁶⁶ Rather than seeking to benefit from unfair trade, the joint respondents argue, ***.⁶⁷

2. Analysis

We find that appropriate circumstances exist to exclude *** but not *** from the domestic industry based on the following analysis.

***.⁶⁸ *** falls under the related party provision because it imported subject mattresses during the POI and ***.⁶⁹ Specifically, *** imported *** units of mattresses from subject countries in 2017 (the equivalent of *** percent of its domestic production), *** units in 2018 (the equivalent of *** percent of its domestic production), and *** units in 2019 (the equivalent of *** percent of its domestic production).⁷⁰ It imported *** units from subject countries in interim 2020 (the equivalent of *** percent of its domestic production), compared to *** units in January-September 2019 (“interim 2019”) (the equivalent of *** percent of its domestic production).⁷¹ *** explains its reasons for importing as follows: ***.”⁷² It opposes the petitions.⁷³

The record shows that *** primary interest increasingly is in importation rather than domestic production. In this regard, *** ratio of imports to domestic production was high and increasing between 2017 and 2019, and was much higher in interim 2020 than in interim 2019, as increases in its subject imports far outstripped increases in its domestic production during the period.⁷⁴ For all of these reasons, we find that appropriate circumstances exist to exclude *** from the domestic industry under the related party provision.

⁶⁶ Joint Respondents’ Prehearing Brief at 3; CR/PR at Tables III-1, III-3.

⁶⁷ Joint Respondents’ Prehearing Brief at 3-4; CR/PR at Table III-9.

⁶⁸ *** was the *** largest domestic producer in 2019, accounting for *** percent of domestic industry production. CR/PR at Table III-1.

⁶⁹ CR/PR at III-7, Table III-2.

⁷⁰ CR/PR at Table III-9. *** domestic production was *** units in 2017, *** units in 2018, and *** units in 2019, and *** units in interim 2020, compared to *** units in interim 2019. *Id.*

⁷¹ CR/PR at Table III-9.

⁷² CR/PR at Table III-9. *** also states that “***.” *Id.*

⁷³ See CR/PR at Table III-1.

⁷⁴ CR/PR at Table III-9.

***.⁷⁵ *** falls under the related party provision because it imported subject mattresses from *** in ***.⁷⁶ Specifically, *** imported *** mattresses in *** (the equivalent of *** percent of its domestic production).⁷⁷ *** stated that it imported mattresses from ***.⁷⁸ It *** the petitions.⁷⁹

In view of the fact that *** importation of subject merchandise was small in relation to its domestic production, and occurred only in ***, its principal interest appears to be in domestic production. We therefore find that appropriate circumstances do not exist to exclude *** from the domestic industry under the related party provision.

***.⁸⁰ *** falls under the related party provision because it imported subject mattresses during the POI.⁸¹ Specifically, *** imported *** mattresses in 2017 (the equivalent of *** percent of its domestic production), *** units in 2018 (the equivalent of *** percent of its domestic production), and *** units in 2019 (the equivalent of *** percent of its domestic production).⁸² It imported *** units in interim 2020 (the equivalent of *** percent of its domestic production), compared to *** units in interim 2019 (the equivalent of *** percent of its domestic production).⁸³ *** has explained its reasons for importing as follows: ***.⁸⁴ *** opposes the petitions with respect to ***.⁸⁵

The record shows that *** primary interest is in importation rather than domestic production. In this regard, *** ratio of imports to domestic production was *** high and increasing irregularly during the period of investigation, while its domestic production remained ***.⁸⁶ For all of these reasons, we find that appropriate circumstances exist to exclude *** from the domestic industry under the related party provision.

⁷⁵ *** was the *** largest domestic producer in 2019, accounting for *** percent of domestic industry production. CR/PR at Table III-1.

⁷⁶ CR/PR at Table III-9.

⁷⁷ CR/PR at Table III-9. *** domestic production was *** units in interim 2020. *Id.*

⁷⁸ CR/PR at Table III-9.

⁷⁹ CR/PR at Table III-1.

⁸⁰ *** was *** domestic producers in 2019, accounting for *** of domestic industry production. CR/PR at III-2 n.3 (*** percent of domestic industry production in 2019).

⁸¹ CR/PR at Table III-9.

⁸² CR/PR at Table III-9.

⁸³ CR/PR at Table III-9.

⁸⁴ CR/PR at Table III-9.

⁸⁵ CR/PR at III-2 n.3. ***. *Id.*

⁸⁶ CR/PR at Table III-9.

.⁸⁷ *** falls under the related party provision because it imported subject mattresses from *** in ***.⁸⁸ Specifically, *** imported *** mattresses in *** (the equivalent of *** percent of its domestic production) and *** mattresses in *** (the equivalent of *** percent of its domestic production).⁸⁹ *** stated that it began importing mattresses from *** “.”⁹⁰ ***.⁹¹

In view of the fact that *** importation of subject merchandise was small in relation to its domestic production, and occurred only in ***, its principal interest appears to be in domestic production. We therefore find that appropriate circumstances do not exist to exclude *** from the domestic industry under the related party provision.

***.⁹² *** falls under the related party provision because it imported subject mattresses from *** in ***.⁹³ Specifically, *** imported *** mattresses in *** (the equivalent of *** percent of its domestic production) and *** units of mattresses in *** (the equivalent of *** percent of its domestic production).⁹⁴ *** did not indicate the reason for its imports, and takes no position on the petitions.⁹⁵

In view of the fact that *** importation of subject merchandise was small in relation to its domestic production, and occurred only in ***, its principal interest appears to be in domestic production. We therefore find that appropriate circumstances do not exist to exclude *** from the domestic industry under the related party provision.

In sum, we find that appropriate circumstances exist to exclude *** from the domestic industry under the related parties provision, but not ***. Accordingly, based on our definition of the domestic like product, we define the domestic industry to include all domestic producers of mattresses, with the exception of ***.

⁸⁷ *** was the *** largest domestic producer in 2019, accounting for *** percent of domestic industry production. CR/PR at Table III-1.

⁸⁸ CR/PR at Table III-9.

⁸⁹ CR/PR at Table III-9.

⁹⁰ CR/PR at Table III-9.

⁹¹ CR/PR at Table III-1.

⁹² *** was the *** largest domestic producer in 2019, accounting for *** percent of domestic industry production. CR/PR at Table III-1.

⁹³ CR/PR at Table III-9.

⁹⁴ CR/PR at Table III-9. *** domestic production was *** units in 2017, and *** units in 2018.

Id.

⁹⁵ CR/PR at Tables III-1, III-9.

IV. Cumulation⁹⁶

For purposes of evaluating the volume and effects for a determination of material injury by reason of subject imports, section 771(7)(G)(i) of the Tariff Act requires the Commission to cumulate subject imports from all countries as to which petitions were filed and/or investigations self-initiated by Commerce on the same day, if such imports compete with each other and with the domestic like product in the U.S. market. In assessing whether subject imports compete with each other and with the domestic like product, the Commission generally has considered four factors:

- (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 geographic markets of subject 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 the subject imports are simultaneously present in the market.⁹⁷

⁹⁶ Pursuant to Section 771(24) of the Tariff Act, imports from a subject country of merchandise corresponding to a domestic like product that account for less than 3 percent of all such merchandise imported into the United States during the most recent 12 months for which data are available preceding the filing of the petition shall be deemed negligible. 19 U.S.C. §§ 1671b(a), 1673b(a), 1677(24)(A)(i), 1677(24)(B); *see also* 15 C.F.R. § 2013.1 (developing countries for purposes of 19 U.S.C. § 1677(36)).

During the most recent 12-month period preceding the filing of the petitions in these investigations, March 2019-February 2020, responding importers reported that subject imports from Cambodia accounted for *** percent of total imports, subject imports from China accounted for *** percent of total imports, subject imports from Indonesia accounted for *** percent of total imports, subject imports from Malaysia accounted for *** percent of total imports, subject imports from Serbia accounted for *** percent of total imports, subject imports from Thailand accounted for *** percent of total imports, subject imports from Turkey accounted for *** percent of total imports, and subject imports from Vietnam accounted for *** percent of total imports. CR/PR at Table IV-3. Because imports from each subject country were above the statutory negligibility threshold, we find that such imports from each source are not negligible.

While no single factor is necessarily determinative, and the list of factors is not exclusive, these factors are intended to provide the Commission with a framework for determining whether the subject imports compete with each other and with the domestic like product.⁹⁸ Only a “reasonable overlap” of competition is required.⁹⁹

A. Arguments of the Parties

Petitioners’ Argument. Petitioners argue that the Commission should cumulate imports from all subject countries as it did in the preliminary determinations because the petitions were filed on the same day and there is a reasonable overlap of competition between and among imports from each subject country and the domestic like product. Specifically, petitioners highlight the Commission’s finding of a moderately high degree of substitutability between mattresses from all sources, noting that all are produced from the same materials in the same sizes, regardless of packaging, and designed to promote sleep.¹⁰⁰ Petitioners also argue that mattresses from all sources are sold through the same channels of distribution, primarily to retailers, and in the same geographic markets, throughout the United States.¹⁰¹ Finally, they argue that imports from each subject country and the domestic like product were simultaneously present in the U.S. market.¹⁰²

Respondents’ Argument. The joint respondents do not dispute petitioners’ argument that subject imports should be cumulated for purposes of material injury.¹⁰³ They do argue, however, that if the Commission again finds the statutory criteria for cumulation to be satisfied, the Commission must consider subject imports on a cumulated basis, and not treat subject

(...Continued)

⁹⁷ See *Certain Cast-Iron Pipe Fittings from Brazil, the Republic of Korea, and Taiwan*, Inv. Nos. 731-TA-278-280 (Final), USITC Pub. 1845 (May 1986), *aff’d*, *Fundicao Tupy, S.A. v. United States*, 678 F. Supp. 898 (Ct. Int’l Trade), *aff’d*, 859 F.2d 915 (Fed. Cir. 1988).

⁹⁸ See, e.g., *Wieland Werke, AG v. United States*, 718 F. Supp. 50 (Ct. Int’l Trade 1989).

⁹⁹ The Statement of Administrative Action (SAA) to the Uruguay Round Agreements Act (URAA), expressly states that “the new section will not affect current Commission practice under which the statutory requirement is satisfied if there is a reasonable overlap of competition.” H.R. Rep. No. 103-316, Vol. I at 848 (1994) (*citing Fundicao Tupy, S.A. v. United States*, 678 F. Supp. at 902; *see Goss Graphic Sys., Inc. v. United States*, 33 F. Supp. 2d 1082, 1087 (Ct. Int’l Trade 1998) (“cumulation does not require two products to be highly fungible”); *Wieland Werke, AG*, 718 F. Supp. at 52 (“Completely overlapping markets are not required.”)).

¹⁰⁰ Petitioners’ Prehearing Brief at 8-9.

¹⁰¹ Petitioners’ Prehearing Brief at 9-11.

¹⁰² Petitioners’ Prehearing Brief at 10-11.

¹⁰³ Hearing Tr. at 197 (Emerson); *see also* Joint Respondents’ Posthearing Brief at 1.

imports from China any differently than it would treat subject imports from a particular country source in any other investigation in which subject imports are cumulated.¹⁰⁴

B. Analysis

We consider subject imports from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam on a cumulated basis because the statutory criteria for cumulation are satisfied. As an initial matter, petitioners filed the antidumping and countervailing duty petitions with respect to all countries on the same day, March 31, 2020.¹⁰⁵

Fungibility. The record indicates that there is a moderately high degree of substitutability between and among domestically produced mattresses and imports from each subject country.¹⁰⁶ Nearly all responding domestic producers and most responding importers and purchasers reported that imports from each subject country are always or frequently interchangeable with domestically produced mattresses and imports from every other subject country.¹⁰⁷ Most purchasers rated domestically produced mattresses as comparable to mattresses imported from each subject country with respect to 26 factors that influence purchasing decisions.¹⁰⁸ Both domestic producers and importers of mattresses from each subject country offered a complete range of mattresses in 2019, including innerspring, foam, and hybrid mattresses in all sizes, with the exception that there were no imports of ***.¹⁰⁹ Although most subject imports from all sources consisted of MiBs, the domestic industry shipped substantial quantities of both MiBs and FPMs of all types, and substantial volumes of FPMs were imported from ***.¹¹⁰

Channels of Distribution. Domestically produced mattresses and imports from each subject country were sold through the same channels of distribution, primarily to retailers.¹¹¹

¹⁰⁴ See Joint Respondents' Posthearing Brief at 1-4. Although the joint respondents are correct that the Commission must consider subject imports on a cumulated basis if the conditions for cumulation are satisfied, 19 U.S.C. § 1677(7)(G), the Commission is not precluded from considering supply trends for imports from different subject countries as a relevant condition of competition. *Id.* at § 1677(7)(C)(iii).

¹⁰⁵ None of the statutory exceptions to cumulation applies.

¹⁰⁶ CR/PR at II-30-31.

¹⁰⁷ CR/PR at Table II-15.

¹⁰⁸ CR/PR at Table II-14.

¹⁰⁹ CR/PR at Table IV-4. Substantial volumes of crib mattresses were shipped by the domestic industry and imported from *** in 2019. *Id.* at Table IV-7.

¹¹⁰ CR/PR at Tables IV-5-6.

¹¹¹ CR/PR at II-9, Table II-4.

Geographic Overlap. Domestically produced mattresses and imports from each subject country were sold in all geographic market areas of the United States.¹¹² In addition, imports from each subject country entered the United States through all borders of entry in substantial volumes in 2019.¹¹³

Simultaneous Presence in Market. There were temporal differences between subject countries in terms of their presence in the U.S. market.¹¹⁴ According to official import statistics, subject imports from China were present in the U.S. market in every month of the period of investigation, as were domestically produced mattresses.¹¹⁵ By contrast, during the 2017-18 period, subject imports from Serbia were absent and subject imports from Cambodia, Indonesia, Malaysia, Thailand, Turkey, and Vietnam were present in the U.S. market for only 10, 2, 1, 1, 10, and 7 months, respectively.¹¹⁶ As subject imports from China were increasingly supplanted by subject imports from other sources in 2019, however, imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam were present in the U.S. market for 12, 9, 11, 9, 7, 11, and 12 months, respectively.¹¹⁷ Imports from all subject countries and the domestic like product were simultaneously present in the U.S. market from June 2019 through December 2019.¹¹⁸ Furthermore, responding purchasers reported purchases of imports from all subject countries in every year of the period of investigation.¹¹⁹

Conclusion. The record indicates that there is a reasonable overlap of competition between and among domestically produced mattresses and mattresses imported from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam. Specifically, the record shows that there is a moderately high degree of substitutability between and among mattresses from the United States and each subject country. The record also shows that mattresses from all sources were sold through the same channels of distribution and in the same geographic markets. Although subject imports from country sources other than China were not present in every month of the period of investigation, imports from all subject countries and the domestic like product were present in every year of the period and their presence increased during the last 16 months of the period. Given this, and the satisfaction of

¹¹² CR/PR at Table II-5.

¹¹³ CR/PR at Table IV-8. While imports from Turkey also entered through all borders of entry, very few entered the United States through ports of entry in the West. *Id.*

¹¹⁴ See CR/PR at Figure IV-10.

¹¹⁵ CR/PR at IV-32, Table IV-9.

¹¹⁶ CR/PR at IV-32, Table IV-9.

¹¹⁷ CR/PR at IV-32, Table IV-9.

¹¹⁸ CR/PR at Table IV-9.

¹¹⁹ See U.S. Purchasers' Questionnaire Responses at Question II-2.

the other three cumulation factors, we find a reasonable overlap of competition between and among domestically produced mattresses and imports from each subject country sufficient to warrant cumulation.¹²⁰ We therefore cumulate subject imports from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam for purposes of our material injury analysis.

V. Material Injury by Reason of Subject Imports

Based on the record in the final phase of the investigations, we determine that an industry in the United States is materially injured by reason of imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam found by Commerce to be sold in the United States at less than fair value and imports of the subject merchandise from China found by Commerce to be subsidized by the government of China.

A. Legal Standards

In the final phase of antidumping and countervailing duty investigations, the Commission determines whether an industry in the United States is materially injured or threatened with material injury by reason of the imports under investigation.¹²¹ In making this determination, the Commission must consider the volume of subject imports, their effect on prices for the domestic like product, and their impact on domestic producers of the domestic like product, but only in the context of U.S. production operations.¹²² The statute defines

¹²⁰ A “reasonable overlap” does not require imports from subject countries to be simultaneously present in the U.S. market throughout the period of investigation, particularly when imports from all subject countries were simultaneously present towards the end of the period and satisfy the other cumulation factors. No single factor is determinative for the Commission’s cumulation analysis and only a “reasonable overlap” of competition is required. Indeed, the Commission has previously found a reasonable overlap of competition even absent the simultaneous presence of imports from all subject countries throughout the period of investigation. *See Carbon and Certain Alloy Steel Wire Rod from Belarus, Russia, and the United Arab Emirates*, Inv. Nos. 731-TA-1349, 1352, and 1357 (Final), USITC Pub. 4752 (Jan. 2018) at 19-21, IV-16 to IV-20; *Hot-Rolled Steel Products from Argentina and South Africa*, Inv. Nos. 701-TA-404 (Final) and 731-TA-898 and 905 (Final), USITC Pub. 3446 (Aug. 2001) at 13-14; *Certain Cold-Rolled Steel Products from China, Indonesia, Slovakia, and Taiwan*, Inv. Nos. 731-TA-831-832, 835, and 837 (Final), USITC Pub. 3320 (Jul. 2000) at 7.

¹²¹ 19 U.S.C. §§ 1671d(b), 1673d(b).

¹²² 19 U.S.C. § 1677(7)(B). The Commission “may consider such other economic factors as are relevant to the determination” but shall “identify each {such} factor ... and explain in full its relevance to the determination.” 19 U.S.C. § 1677(7)(B).

“material injury” as “harm which is not inconsequential, immaterial, or unimportant.”¹²³ In assessing whether the domestic industry is materially injured by reason of subject imports, we consider all relevant economic factors that bear on the state of the industry in the United States.¹²⁴ No single factor is dispositive, and all relevant factors are considered “within the context of the business cycle and conditions of competition that are distinctive to the affected industry.”¹²⁵

Although the statute requires the Commission to determine whether the domestic industry is “materially injured or threatened with material injury by reason of” unfairly traded imports,¹²⁶ it does not define the phrase “by reason of,” indicating that this aspect of the injury analysis is left to the Commission’s reasonable exercise of its discretion.¹²⁷ In identifying a causal link, if any, between subject imports and material injury to the domestic industry, the Commission examines the facts of record that relate to the significance of the volume and price effects of the subject imports and any impact of those imports on the condition of the domestic industry. This evaluation under the “by reason of” standard must ensure that subject imports are more than a minimal or tangential cause of injury and that there is a sufficient causal, not merely a temporal, nexus between subject imports and material injury.¹²⁸

In many investigations, there are other economic factors at work, some or all of which may also be having adverse effects on the domestic industry. Such economic factors might include nonsubject imports; changes in technology, demand, or consumer tastes; competition among domestic producers; or management decisions by domestic producers. The legislative history explains that the Commission must examine factors other than subject imports to ensure that it is not attributing injury from other factors to the subject imports, thereby

¹²³ 19 U.S.C. § 1677(7)(A).

¹²⁴ 19 U.S.C. § 1677(7)(C)(iii).

¹²⁵ 19 U.S.C. § 1677(7)(C)(iii).

¹²⁶ 19 U.S.C. §§ 1671d(b), 1673d(b).

¹²⁷ *Angus Chemical Co. v. United States*, 140 F.3d 1478, 1484-85 (Fed. Cir. 1998) (“{T}he statute does not ‘compel the commissioners’ to employ {a particular methodology}.”), *aff’g*, 944 F. Supp. 943, 951 (Ct. Int’l Trade 1996).

¹²⁸ The Federal Circuit, in addressing the causation standard of the statute, observed that “{a}s long as its effects are not merely incidental, tangential, or trivial, the foreign product sold at less than fair value meets the causation requirement.” *Nippon Steel Corp. v. USITC*, 345 F.3d 1379, 1384 (Fed. Cir. 2003). This was further ratified in *Mittal Steel Point Lisas Ltd. v. United States*, 542 F.3d 867, 873 (Fed. Cir. 2008), where the Federal Circuit, quoting *Gerald Metals, Inc. v. United States*, 132 F.3d 716, 722 (Fed. Cir. 1997), stated that “this court requires evidence in the record ‘to show that the harm occurred ‘by reason of’ the LTFV imports, not by reason of a minimal or tangential contribution to material harm caused by LTFV goods.’” *See also Nippon Steel Corp. v. United States*, 458 F.3d 1345, 1357 (Fed. Cir. 2006); *Taiwan Semiconductor Industry Ass’n v. USITC*, 266 F.3d 1339, 1345 (Fed. Cir. 2001).

inflating an otherwise tangential cause of injury into one that satisfies the statutory material injury threshold.¹²⁹ In performing its examination, however, the Commission need not isolate the injury caused by other factors from injury caused by unfairly traded imports.¹³⁰ Nor does the “by reason of” standard require that unfairly traded imports be the “principal” cause of injury or contemplate that injury from unfairly traded imports be weighed against other factors, such as nonsubject imports, which may be contributing to overall injury to an industry.¹³¹ It is clear that the existence of injury caused by other factors does not compel a negative determination.¹³²

Assessment of whether material injury to the domestic industry is “by reason of” subject imports “does not require the Commission to address the causation issue in any particular way” as long as “the injury to the domestic industry can reasonably be attributed to the subject

¹²⁹ SAA at 851-52 (“{T}he Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports.”); S. Rep. 96-249 at 75 (1979) (the Commission “will consider information which indicates that harm is caused by factors other than less-than-fair-value imports.”); H.R. Rep. 96-317 at 47 (1979) (“in examining the overall injury being experienced by a domestic industry, the ITC will take into account evidence presented to it which demonstrates that the harm attributed by the petitioner to the subsidized or dumped imports is attributable to such other factors;” those factors include “the volume and prices of nonsubsidized imports or imports sold at fair value, contraction in demand or changes in patterns of consumption, trade restrictive practices of and competition between the foreign and domestic producers, developments in technology and the export performance and productivity of the domestic industry”); *accord Mittal Steel*, 542 F.3d at 877.

¹³⁰ SAA at 851-52 (“{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports.”); *Taiwan Semiconductor Industry Ass’n*, 266 F.3d at 1345 (“{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports Rather, the Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports.” (emphasis in original)); *Asociacion de Productores de Salmon y Trucha de Chile AG v. United States*, 180 F. Supp. 2d 1360, 1375 (Ct. Int’l Trade 2002) (“{t}he Commission is not required to isolate the effects of subject imports from other factors contributing to injury” or make “bright-line distinctions” between the effects of subject imports and other causes.); *see also Softwood Lumber from Canada*, Inv. Nos. 701-TA-414 and 731-TA-928 (Remand), USITC Pub. 3658 at 100-01 (Dec. 2003) (Commission recognized that “{i}f an alleged other factor is found not to have or threaten to have injurious effects to the domestic industry, *i.e.*, it is not an ‘other causal factor,’ then there is nothing to further examine regarding attribution to injury”), *citing Gerald Metals*, 132 F.3d at 722 (the statute “does not suggest that an importer of LTFV goods can escape countervailing duties by finding some tangential or minor cause unrelated to the LTFV goods that contributed to the harmful effects on domestic market prices.”).

¹³¹ S. Rep. 96-249 at 74-75; H.R. Rep. 96-317 at 47.

¹³² *See Nippon Steel Corp.*, 345 F.3d at 1381 (“an affirmative material-injury determination under the statute requires no more than a substantial-factor showing. That is, the ‘dumping’ need not be the sole or principal cause of injury.”).

imports.”¹³³ The Commission ensures that it has “evidence in the record” to “show that the harm occurred ‘by reason of’ the LTFV imports,” and that it is “not attributing injury from other sources to the subject imports.”¹³⁴ The Federal Circuit has examined and affirmed various Commission methodologies and has disavowed “rigid adherence to a specific formula.”¹³⁵

The question of whether the material injury threshold for subject imports is satisfied notwithstanding any injury from other factors is factual, subject to review under the substantial evidence standard.¹³⁶ Congress has delegated this factual finding to the Commission because of the agency’s institutional expertise in resolving injury issues.¹³⁷

B. Conditions of Competition and the Business Cycle

The following conditions of competition inform our analysis of whether there is material injury by reason of subject imports.

1. Demand Considerations

Demand for mattresses is tied to housing sales and economic activity, particularly new home sales, housing starts, home resales, interest rates, gross domestic product (“GDP”) growth, and consumer sentiment.¹³⁸ Many of these factors increased through 2019, driving

¹³³ *Mittal Steel*, 542 F.3d at 876 &78; see also *id.* at 873 (“While the Commission may not enter an affirmative determination unless it finds that a domestic industry is materially injured ‘by reason of’ subject imports, the Commission is not required to follow a single methodology for making that determination ... {and has} broad discretion with respect to its choice of methodology.”) citing *United States Steel Group v. United States*, 96 F.3d 1352, 1362 (Fed. Cir. 1996) and S. Rep. 96-249 at 75. In its decision in *Swiff-Train v. United States*, 793 F.3d 1355 (Fed. Cir. 2015), the Federal Circuit affirmed the Commission’s causation analysis as comports with the Court’s guidance in *Mittal*.

¹³⁴ *Mittal Steel*, 542 F.3d at 873 (quoting from *Gerald Metals*, 132 F.3d at 722), 877-79. We note that one relevant “other factor” may involve the presence of significant volumes of price-competitive nonsubject imports in the U.S. market, particularly when a commodity product is at issue. In appropriate cases, the Commission collects information regarding nonsubject imports and producers in nonsubject countries in order to conduct its analysis.

¹³⁵ *Nucor Corp. v. United States*, 414 F.3d 1331, 1336, 1341 (Fed. Cir. 2005); see also *Mittal Steel*, 542 F.3d at 879 (“*Bratsk* did not read into the antidumping statute a Procrustean formula for determining whether a domestic injury was ‘by reason’ of subject imports.”).

¹³⁶ We provide in our discussion below a full analysis of other factors alleged to have caused any material injury experienced by the domestic industry.

¹³⁷ *Mittal Steel*, 542 F.3d at 873; *Nippon Steel Corp.*, 458 F.3d at 1350, citing *U.S. Steel Group*, 96 F.3d at 1357; S. Rep. 96-249 at 75 (“The determination of the ITC with respect to causation is ... complex and difficult, and is a matter for the judgment of the ITC.”).

¹³⁸ CR/PR at II-21-22.

increased demand, declined in early 2020 due to the COVID-19 pandemic, and then recovered.¹³⁹ The impact of the pandemic on mattress demand was mixed, with demand down from hotels and colleges, which account for a small share of total demand, but up for consumers reportedly due to factors such as increased time spent at home and stimulus checks.¹⁴⁰ Majorities or pluralities of responding domestic producers, importers, and purchasers reported increasing demand for most types of mattresses in the U.S. market during the period of investigation.¹⁴¹

Demand trends differed by type of mattress. Demand for innerspring mattresses declined while demand for non-innerspring and hybrid mattresses increased.¹⁴² Apparent U.S. consumption of MiBs also increased, while apparent U.S. consumption of FPMs declined.¹⁴³ Nevertheless, a majority of responding domestic producers, importers, and purchasers reported that demand for FPMs was stable or increasing, and FPMs accounted for a larger share of apparent U.S. consumption than MiBs throughout the period of investigation.¹⁴⁴

Apparent U.S. consumption of mattresses increased from *** units in 2017 to *** units in 2018 and *** units in 2019, a level *** percent higher than in 2017.¹⁴⁵ Apparent U.S. consumption of mattresses was *** units in interim 2020, up *** percent compared to *** units in interim 2019.¹⁴⁶

¹³⁹ See CR/PR at II-21-22, Figures II-1-3.

¹⁴⁰ Petitioners' Prehearing Brief at 13; Hearing Tr. at 24 (Glassman).

¹⁴¹ CR/PR at II-25, Table II-8a.

¹⁴² See CR/PR at Table II-8a (majorities of responding domestic producers and purchasers reported that demand for innerspring mattresses declined during the period of investigation, although a plurality of responding importers reported that demand for such mattresses increased).

¹⁴³ CR/PR at Tables IV-12, 14. Apparent U.S. consumption of MiBs increased *** percent between 2017 and 2019 and was *** percent higher in interim 2020 compared to interim 2019. *Id.* at Table IV-12. Apparent U.S. consumption of FPMs declined *** percent between 2017 and 2019 and was *** percent lower in interim 2020 compared to interim 2019. *Id.* at Table IV-14.

¹⁴⁴ CR/PR at IV-44, Table II-8a, Table IV-14. U.S. shipments of MiBs increased as a share of apparent U.S. consumption from *** percent in 2017 to *** percent in 2019; it was *** percent in interim 2020, compared to *** percent in interim 2019. CR/PR at Table IV-13. Conversely, U.S. shipments of FPMs declined as a share of apparent U.S. consumption from *** percent in 2017 to *** percent in 2019; it was *** percent in interim 2020, compared to *** percent in interim 2019. *Id.* at Table IV-15.

¹⁴⁵ CR/PR at IV-36-37, Table IV-10.

¹⁴⁶ CR/PR at IV-36-37, Table IV-10.

2. Supply Considerations

The U.S. market for mattresses is served primarily by domestic producers, which accounted for *** percent of apparent U.S. consumption in 2019, and subject imports, which accounted for *** percent of apparent U.S. consumption that same year.¹⁴⁷ Nonsubject imports accounted for the remainder of the U.S. market, *** percent of apparent U.S. consumption in 2019.¹⁴⁸

Fifty-three responding domestic producers reported producing mattresses in the United States.¹⁴⁹ Petitioners Corsicana, Elite, and Kolcraft, together with non-petitioning domestic producers Lippert, Serta Simmons, and Tempur Sealy, accounted for *** percent of domestic production in 2019, and *** domestic producers, Serta Simmons and Tempur Sealy, accounted for *** percent of domestic production that year.¹⁵⁰ Domestic producers supply the U.S. market from production facilities across 36 states.¹⁵¹ Domestic producers generally locate production facilities near customers so as to minimize transportation costs and lead times pursuant to a “just-in-time” delivery model, with the ability to produce and deliver a mattress door-to-door within days of receiving an order.¹⁵²

The domestic industry made commercial U.S. shipments of all types of mattresses during the period of investigation, including innerspring, foam, hybrid, adult, and youth mattresses, packaged as both FPMs and MiBs.¹⁵³ Many domestic producers specialize in particular types of mattresses. For example, ***.¹⁵⁴ Although two of the three largest domestic producers of MiBs produced no FPMs, the three largest producers of FPMs also produced MiBs.¹⁵⁵ Nearly a quarter (12) of responding domestic producers produced both

¹⁴⁷ CR/PR at Tables IV-11, C-2.

¹⁴⁸ CR/PR at Table IV-11.

¹⁴⁹ CR/PR at Table III-1.

¹⁵⁰ CR/PR at Table III-1.

¹⁵¹ Petition at 27-28; CR/PR at Table III-1.

¹⁵² CR/PR at I-15, II-31 (average lead time for a mattress produced to order by domestic producers is five days); Petitioners’ Prehearing Brief at 15-16; *see also Mattresses from China*, USITC Pub. 5000 at 19.

¹⁵³ *See* CR/PR at Tables IV-4-7, F-1, F-3; Hearing Tr. at 50 (Koltun).

¹⁵⁴ Domestic Producers’ Questionnaire Responses of *** at Question II-9; Domestic Producers’ Questionnaire Response of *** at Question II-11.

¹⁵⁵ CR/PR at Table III-1.

FPMs and MiBs in 2019, with these producers accounting for *** percent of MiB production that year, and nearly half (21) of all responding producers reported production of MiBs.¹⁵⁶

The domestic industry underwent consolidation and other changes during the period of investigation. Specifically, *** acquired *** in ***, *** acquired *** in ***, and *** merged with *** in ***.¹⁵⁷ ***.¹⁵⁸ Certain domestic producers also reported capacity expansions during the period of investigation; ***.¹⁵⁹ *** domestic producers reported expansions to their mattress operations, but ***” and ***.”¹⁶⁰ The domestic industry made substantial investments to expand its capacity to produce MiBs during the period of investigation, increasing such capacity by 121.2 percent between 2017 and 2019 and by another 48.6 percent in interim 2020 compared to interim 2019.¹⁶¹ At the same time, the industry’s capacity to produce FPMs declined by a similar quantity.¹⁶² Between various capacity reductions and additions, the domestic industry’s total production capacity declined *** percent between 2017 and 2019, and was *** percent higher in interim 2020 compared to interim 2019.¹⁶³

The country sources of subject imports changed during the period of investigation. In 2017 and 2018, subject imports from China accounted for over *** percent of cumulated subject imports.¹⁶⁴ After the imposition of section 301 duties and provisional measures followed by an antidumping duty order on imports from China, however, subject imports from China declined by *** percent between 2018 to 2019 to account for *** percent of cumulated subject imports in 2019.¹⁶⁵ As subject imports from China declined in the U.S. market, they

¹⁵⁶ CR/PR at III-18, Table III-1. Although *** completed separate domestic producers’ questionnaire responses, ***. *Id.* at III-9-10.

¹⁵⁷ CR/PR at Table III-3.

¹⁵⁸ CR/PR at Table III-3.

¹⁵⁹ CR/PR at Table III-3.

¹⁶⁰ CR/PR at Table III-3.

¹⁶¹ CR/PR at Tables III-3, III-5, VI-6.

¹⁶² *See* CR/PR at Table III-5.

¹⁶³ CR/PR at Table C-2.

¹⁶⁴ CR/PR at IV-9, Table IV-2.

¹⁶⁵ CR/PR at IV-9, Table IV-2. Pursuant to section 301 of the Trade Act of 1974, imports of mattresses from China became subject to an additional duty of 25 percent in May 2019. CR/PR at I-13. The vast majority of responding importers reported that imposition of section 301 duties on imports from China reduced the supply of such imports and increased the supply of imports from other subject countries. *Id.* at II-17-18, Table II-7.

Commerce imposed provisional measures on imports of mattresses from China on June 4, 2019 and imposed an antidumping duty order on such imports on December 6, 2019, with final weighted-average dumping margins ranging from 57.03 to 1,731.75 percent. *Id.* at I-5-6; *Mattresses From the People’s Republic of China: Preliminary Determination of Sales at Less-Than-Fair-Value, Postponement of Final Determination and Affirmative Preliminary Determination of Critical* (Continued...)

were supplanted by subject imports from other country sources, which increased by *** percent between 2018 and 2019 and drove an 11.6 percent increase in total cumulated subject import volume during that time.¹⁶⁶ Subject imports from China were *** percent lower in interim 2020 than in interim 2019, while imports from other subject countries were *** percent higher.¹⁶⁷ Many of the same Chinese-based firms that had supplied the U.S. market from production facilities in China began to export mattresses to the United States from related production facilities in Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam.¹⁶⁸

(...Continued)

Circumstances, 84 Fed. Reg. 25732 (June 4, 2019); *Mattresses From the People's Republic of China: Final Determination of Sales at Less-Than-Fair-Value, and Final Affirmative Determination of Critical Circumstances, in Part*, 84 Fed. Reg. 56761 (Oct. 23, 2019). When asked to describe the impact on the order on the U.S. market, responding U.S. producers, importers, and purchasers often described Chinese mattresses being replaced by mattresses from other subject countries, sometimes after a brief period of higher prices and greater demand for U.S. mattresses. CR/PR at II-20.

¹⁶⁶ CR/PR at IV-10, Table IV-2.

¹⁶⁷ CR/PR at IV-9, Table IV-2.

¹⁶⁸ See Petition at 21-22; CVB's Responses to Staff Questions at 34 (***). According to ***." Petition, Exhibit I-10 at 11-12.

3. Substitutability and Other Conditions

As discussed in section IV.B above, we have found a moderately high degree of substitutability between domestically produced mattresses and subject imports.¹⁶⁹ Nearly all responding domestic producers and most responding importers and purchasers reported that imports from each subject country are always or frequently interchangeable with domestically produced mattresses and imports from every other subject country.¹⁷⁰ Most purchasers rated domestically produced mattresses as comparable to mattresses imported from each subject country with respect to 26 factors that influence purchasing decisions.¹⁷¹ Most purchasers also reported that domestically produced mattresses and mattresses imported from each subject country always or usually met minimum quality specifications.¹⁷² Both domestic producers and importers of mattresses from each subject country offered a complete range of mattresses in 2019, including innerspring, foam, and hybrid mattresses in all sizes, with the exception that there were no imports of ***.¹⁷³ Although most subject imports from all sources consisted of MiBs, the domestic industry shipped substantial quantities of both MiBs and FPMs of all types, and substantial volumes of FPMs were imported from ***.¹⁷⁴

We also find that subject imports of MiBs competed with domestically produced FPMs. Despite the fact that *** percent of domestic industry U.S. shipments consisted of FPMs and *** percent of subject import U.S. shipments consisted of MiBs, the vast majority of responding purchasers reported that domestically produced mattresses were interchangeable with and comparable to subject imported mattresses.¹⁷⁵ Furthermore, MiBs and FPMs can be produced to the same specifications using the same springs and foam, with the exception that innerspring MiBs must omit the border wire that innerspring FPMs may possess.¹⁷⁶

¹⁶⁹ CR/PR at II-30-31. The degree of substitution between domestic and imported mattresses depends upon factors such as relative prices, quality (*e.g.*, grade standards, defect rates, etc.), and conditions of sale (*e.g.*, price discounts/rebates, lead times between order and delivery dates, reliability of supply, product services, etc.). *Id.*

¹⁷⁰ CR/PR at Table II-15.

¹⁷¹ CR/PR at Table II-14.

¹⁷² CR/PR at Table II-16.

¹⁷³ CR/PR at Table IV-4. Substantial volumes of crib mattresses were shipped by the domestic industry and imported from *** in 2019. *Id.* at Table IV-7.

¹⁷⁴ CR/PR at Tables IV-5-6.

¹⁷⁵ CR/PR at Tables II-14-15, Figures IV-7-8.

¹⁷⁶ See CR/PR at V-6-7, Tables V-3-8 (domestic producers and importers reported sales of products 1-6, with products 1, 3, and 5 possessing the same definitions as products 2, 4, and 6 with the exception of packaging; products 1, 3, and 5 are packaged as MiBs and products 2, 4, and 6 are packaged (Continued...))

MiBs and FPMs are also functionally interchangeable once unpackaged, such that consumers often cross-shop MiBs and FPMs.¹⁷⁷ Although we focus our analysis on competition at the wholesale level, demand for mattresses at the wholesale level is derived from consumer demand for mattresses.¹⁷⁸ Consumer research studies of the factors driving consumer mattress purchases from *** and the Better Sleep Council (2020) determined that packaging is among the least important factors,¹⁷⁹ consistent with online mattress retailers such as Amazon.com

(...Continued)

as FPMs); Hearing Tr. at 103 (Glassman) (“{T}o those that we sell components, the innersprings that we sell into a flat pack environment are also identical to the innersprings that are sold in a rolled pack environment, the same thing with foam. So we’re selling foam many times in a component form and that foam could be flat packed, it could be roll pack so I don’t see any benefit or any differentiation of a mattress in a box other than from a shipment perspective.”), 104-05 (Merwin) (“{A}re there different materials in a roll packed mattress versus a flat packed mattress and, you know, 100 percent there’s nothing different in the mattress . . . from a design and material aspect it’s 100 percent the same materials.”), 129 (Merwin) (“{I}nner-springs used to have a real solid border rod around the edge of it, and so, in order to roll-pack a mattress, you have to remake that border rod”), 137 (Merwin) (“{T}here’s a couple little tweaks that a person can do, and you’re putting that mattress in a box. And so, you know, are there any, you know, any special sauce to do that? No, there isn’t. So the components that we use, we’re all using the same components . . .”), 138 (Earley) (I can assure you we’re selling and using the exact same foam products whether it goes into a flat-packed product or a mattress in a box. There’s no difference, and as we as a group talked about earlier, we’re using a lot of pocketed coils in the hybrid solutions which go in a box, which are basically the same springs that would go in a flat-pack mattress. So, by all accounts, all the materials that are going into the different mattresses are the same thing.”), 157 (Douglas) (stating that MiBs and FPMs “may be identical once unpackaged”), 228-29 (Adams) (“{T}he wire that would go all the way around, you’re not able to do that in a rolled and compressed mattress.”).

¹⁷⁷ Hearing Tr. at 157 (Douglas) (“We agree that individual consumers often consider both MiBs and FPMs in making their purchasing decisions.”)

¹⁷⁸ See CR/PR at II-22-24. All factors driving mattress demand influence consumer demand for mattresses.

¹⁷⁹ Petitioners’ Posthearing Brief at 3; Responses to Commissioner Questions at Exhibit 1-47, Exhibits 2, 22-23. ***. *Id.* at Exhibit 22. The 2020 Better Sleep Council study found that over half of surveyed consumers considered “free setup” and “old mattress removal” important in purchasing a new mattress, suggesting a preference for FPMs. Petitioners’ Posthearing Brief at 3, Exhibit 2. Another consumer research study conducted by ***. *Id.* at Exhibit 23. ***. *Id.* Although the Commission requested that the parties submit studies of the extent to which packaging influences consumer purchases of mattresses, the joint respondents were unable to submit any study showing a consumer preference for MiBs. See Joint Respondents’ Responses to Additional Posthearing Questions at 3-4. Instead, they cited data from an article discussing the Better Sleep Council study ***, without submitting a copy of the article. *Id.* Thus, respondents did not submit evidence supporting their argument that apparent U.S. consumption of MiBs increased during the period of investigation for “consumer driven reasons.” Joint Respondents’ Posthearing Brief at 9.

and AshleyFurniture.com not providing search filters for MiB or FPMs.¹⁸⁰

Consumer indifference towards mattress packaging is reflected in purchasing behavior at the wholesale level. Eleven of 19 responding purchasers reported purchasing and/or importing both MiBs and FPMs.¹⁸¹ The advantages of MiBs to purchasers, including the ability to fit more units into a given warehouse or truck and delivery by common carrier from a central location,¹⁸² did not deter many of the largest responding purchasers, including ***, from purchasing significant volumes of FPMs in addition to MiBs in 2019.¹⁸³ Major retailers display MiBs and FPMs side by side on their sales floors and ecommerce websites.¹⁸⁴ Although 11 purchasers reported that packaging was very important to their purchasing decisions, only two purchasers ranked packaging among the top three factors driving their purchasing decisions, consistent with the large number of purchasers reporting purchases of both MiBs and FPMs.¹⁸⁵

We further find that price is an important factor in purchasing decisions for mattresses, although non-price factors are also important.¹⁸⁶ Responding purchasers ranked price among the top three factors influencing their purchasing decisions more than any other factor except quality.¹⁸⁷ Price was also among the listed factors that responding purchasers cited most often as being very important to their purchasing decisions, although a greater number of purchasers cited factors such as availability, quality, delivery time, and reliability of supply as very important purchasing factors.¹⁸⁸ Four responding purchasers reported that they usually or always purchase mattresses at the lowest price, while 16 responding purchasers reported that they sometimes do so.¹⁸⁹ At the hearing, representatives of domestic producers testified that competition in the U.S. mattress market is primarily based on price.¹⁹⁰

¹⁸⁰ Petitioners' Responses to Commissioner Questions at Exhibit 1-5, 1-46, Exhibits 6, 21.

¹⁸¹ CR/PR at II-3; see Purchasers' Questionnaire Responses of *** at Question II-1.

¹⁸² Joint Respondents' Prehearing Brief at 17-18; Hearing Tr. at 145-46 (Adams).

¹⁸³ See Purchasers' Questionnaire Responses of *** at Question II-1 (reporting FPM purchases of *** units by ***, *** units by ***, *** units by ***, *** units by ***, and *** units by ***) .

¹⁸⁴ Hearing Tr. at 63-64 (Earley), 116 (Merwin); Petitioners' Posthearing Brief at 8, Exhibits 4-6; Petitioners' Responses to Commissioner Questions at Exhibit 1-5, Exhibits 4-5.

¹⁸⁵ CR/PR at Tables II-11-12; Purchasers' Questionnaire Responses of *** at Question III-26. Although responding purchasers were free to rank "Packaging (*i.e.*, MiBs or flat packed mattresses)" among their top three purchasing factors, as among the purchasing factors enumerated in the purchasers' questionnaire, only two did so.

¹⁸⁶ CR/PR at Table II-11-12.

¹⁸⁷ CR/PR at Table II-11.

¹⁸⁸ CR/PR at Table II-12.

¹⁸⁹ CR/PR at II-33.

¹⁹⁰ Hearing Tr. at 26 (Glassman) ("Let me reiterate, price dictates in the mattress market."), 33 (Merwin) ("Over and over, I heard from these retailers that there was nothing wrong with our products (Continued...)

We further find that domestically produced mattresses and subject imports are comparable in terms of lead times and channels of distribution. Most domestic industry shipments were made to order (83.7 percent in 2019) with an average lead time of five days, while the balance (16.3 percent) was sold from inventory with an average lead time of three days.¹⁹¹ Most importer shipments were sold from inventory (95.2 percent) with an average lead time of five days, while most of the balance (3.9 percent) were produced to order with an average lead time of 61 days.¹⁹²

Domestically produced mattresses and subject imports were also sold through the same channels of distribution, primarily to retailers, including brick-and-mortar, online, and omni-channel retailers, but also to end users.¹⁹³ Although a majority of domestic industry shipments were made to brick and mortar retailers, the share made to internet and omni-channel retailers increased from 10.6 percent in 2017 to 13.5 percent in 2019 and 15.3 percent in interim 2020, compared to 13.3 percent in interim 2019.¹⁹⁴ The domestic industry shipped a substantial volume of mattresses, *** units, to internet and omni-channel retailers in 2019.¹⁹⁵ Similarly, although a majority of subject import shipments were made to internet and omni-channel retailers, the share of subject import shipments made to brick and mortar retailers ranged from *** to *** percent during the period of investigation,¹⁹⁶ and the volume of subject import shipments to such retailers was a substantial *** units in 2019.¹⁹⁷ There was substantial overlap between the lists of top ten purchasers reported by responding domestic producers and importers, as reflected by the vast majority of responding purchasers (16 of 22) that purchased both domestic and subject imported mattresses.¹⁹⁸ Thus, domestic producers and importers compete for sales to the same purchasers in the same channels of distribution.

(...Continued)

except that they were not priced low enough, and that importers were willing to provide lower prices.”), 40 (Earley) (“Every day we find it difficult to compete with prices of imports on Amazon, Wayfair, Costco.com and Walmart.com.”), 43 (Fallen) (“At the end of the day, our retailer customers are looking for mattresses that meet a variety of consumer profiles and comfort needs at the lowest possible price.”), 50 (Koltun) (“Dumped and subsidized imports took sales and market share from us at retailers’ brick and mortar stores and online. Some of our largest customers sought price reductions from us if we wanted to retain shelf space and prime website placement.”).

¹⁹¹ CR/PR at II-31.

¹⁹² CR/PR at II-31-32.

¹⁹³ CR/PR at Table II-4. ***. *Id.*

¹⁹⁴ CR/PR at Table II-4.

¹⁹⁵ Derived from CR/PR at Table II-4, Appendix D.

¹⁹⁶ CR/PR at Table II-4.

¹⁹⁷ Derived from CR/PR at Tables II-4, IV-10, Appendix D.

¹⁹⁸ See Petitioners’ Posthearing Brief at Exhibit 3; CR/PR at Table V-22.

The domestic industry's raw material costs generally increased during the period of investigation.¹⁹⁹ The domestic industry's average COGS increased between 2017 and 2019, driven by an increase in unit raw material costs from \$123 in 2017 to \$136 in 2019.²⁰⁰ The industry's unit raw material costs were \$130 in interim 2020, compared to \$134 in interim 2019.²⁰¹ Most responding domestic producers and importers reported that the cost of raw materials had increased since January 1, 2017, although the cost of wire rod for innersprings and the chemicals used for foam production fluctuated during the period of investigation with no clear increasing trend.²⁰² Starting in July 2020, a combination of factors, including the COVID-19 pandemic and hurricanes, resulted in shortages and increasing prices for three major chemicals used to produce foam, including MDI, polyols, and TDI.²⁰³ At around the same time, the COVID-19 pandemic resulted in shortages of wire for producing springs and non-wovens for producing certain mattress components.²⁰⁴ Although 17 responding producers reported supply constraints during the period of investigation, usually citing raw material shortages related to the COVID-19 pandemic, petitioners reported that the raw material shortages delayed their shipments and extended lead times without forcing them to forego production.²⁰⁵

¹⁹⁹ See CR/PR at V-1-3.

²⁰⁰ CR/PR at VI-12-13, Table VI-1.

²⁰¹ CR/PR at Table VI-1.

²⁰² CR/PR at V-3, Figures V-1-2.

²⁰³ CR/PR at V-2, Figure V-2; Hearing Tr. at 36 (Mervin), 37-39 (Earley), 46 (Fallen), 52 (Koltun), , 151-52 (Adams); Petitioners' Responses to Commissioner Questions at Exhibit 1-20-21, 1-43. There is little evidence of any significant raw material supply shortages prior to mid-2020. See Hearing Tr. at 203-04 (Adams). ***. See Domestic Producers' Questionnaire Response of *** at Questions II-3d, II-10 n.1, II-16. At the hearing, a representative for one of the largest U.S. producers of foam for mattresses testified that there is no shortage of foam capacity in the United States and that there were no constraints on foam production before mid-2020. Hearing Tr. at 37-39 (Earley). Consistent with this testimony, the cost of the raw materials used to produce foam generally declined from 2018 through mid-2020 before increasing due to the shortages. CR/PR at Figure V-2.

²⁰⁴ Hearing Tr. at 29 (Glassman), 52 (Koltun), 91-92 (Earley), 92-93 (Glassman); Petitioners' Responses to Commissioner Questions at Exhibit 1-43.

²⁰⁵ CR/PR at II-17; Petitioners' Responses to Commissioner Questions at Exhibit 1-44-45. When asked whether raw material shortages had reduced U.S. mattress production, the joint respondents provided no evidence that they had done so. See Joint Respondents' Responses to Commissioner Questions at 1-2.

C. Volume of Subject Imports

Section 771(7)(C)(i) of the Tariff Act provides that the “Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States, is significant.”²⁰⁶

We find that the volume and increase in volume of cumulated subject imports was significant, both absolutely and relative to apparent U.S. consumption, over the period of investigation. Subject import volume increased from 5.5 million units in 2017 to 7.0 million units in 2018 and to 7.8 million units in 2019, a level 40.6 percent higher than in 2017.²⁰⁷ Subject import volume was 7.4 million units in interim 2020, up from 5.3 million units in interim 2019.²⁰⁸ U.S. shipments of subject imports increased from *** units in 2017 to *** units in 2018 and to *** units in 2019, a level *** percent higher than in 2017.²⁰⁹ U.S. shipments of subject imports were *** units in interim 2020, up from *** units in interim 2019.²¹⁰ Subject imports also increased their share of apparent U.S. consumption from *** percent in 2017 to *** percent in 2018 and *** percent in 2019.²¹¹ Subject import market share was *** percent in interim 2020, up from *** percent in interim 2019.²¹²

As subject imports increased their penetration of the U.S. market by *** percentage points between 2017 and 2019 and another *** percentage points in interim 2020 compared to interim 2019, the domestic industry lost a nearly equivalent *** percentage points of market share between 2017 and 2019 and its share was *** percentage points lower in interim 2020 compared to interim 2019.²¹³

We conclude that the volume of subject imports and the increase in that volume are significant both in absolute terms and relative to U.S. consumption.

²⁰⁶ 19 U.S.C. § 1677(7)(C)(i).

²⁰⁷ CR/PR at Table IV-2.

²⁰⁸ CR/PR at Table IV-2.

²⁰⁹ CR/PR at Tables IV-10, C-2.

²¹⁰ CR/PR at Table IV-10.

²¹¹ CR/PR at Table IV-10.

²¹² CR/PR at Table IV-10.

²¹³ CR/PR at Table C-2. The volume of subject imports also increased as a ratio to domestic industry production, from *** percent of U.S. production in 2017 to *** percent in 2018 and *** percent in 2019. The ratio of subject imports to domestic production was *** percent in interim 2020, up from *** percent in interim 2019. Calculated from *id.* at Tables IV-2, C-2.

D. Price Effects of the Subject Imports

Section 771(7)(C)(ii) of the Tariff Act provides that, in evaluating the price effects of the subject imports, the Commission shall consider whether

(I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and

(II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a significant degree.²¹⁴

As addressed in section V.B.3 above, the record indicates that there is a moderately high degree of substitutability between subject imports and the domestic like product and that price is an important consideration in purchasing decisions, among other factors.

Twenty-eight domestic producers and 22 importers provided usable quarterly net U.S. f.o.b. selling price data for eight mattress products, although not all firms reported pricing for all products for all quarters.²¹⁵ Pricing data reported by these firms accounted for

²¹⁴ 19 U.S.C. § 1677(7)(C)(ii).

²¹⁵ CR/PR at V-8 (excluding ***). Product 1 was defined as “Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.” *Id.* at V-7. Product 2 was defined as “Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flatpacked mattress.” *Id.* Product 3 was defined as “Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.” *Id.* Product 4 was defined as “Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flatpacked mattress.” *Id.* Product 5 was defined as “‘Wrapped’ innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.” *Id.* at V-8. Product 6 was defined as “‘Wrapped’ innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flatpacked mattress.” *Id.* Product 7 was defined as “Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (Continued...)

approximately *** percent of U.S. producers' shipments of mattresses in 2019, and 3.1 percent of U.S. imports from Cambodia, 14.7 percent of U.S. imports from China, 3.5 percent of U.S. imports from Indonesia, 33.2 percent of U.S. imports from Malaysia, 12.7 percent of U.S. imports from Serbia, 8.2 percent of U.S. imports from Thailand, 1.6 percent of U.S. imports from Turkey, and 21.8 percent of U.S. imports from Vietnam in 2019.²¹⁶

Subject imports undersold the domestic like product in *** of *** quarterly comparisons, or *** percent of the time, at margins averaging *** percent, and quarters in which there was underselling accounted for *** percent of reported subject import sales volume (*** of *** units).²¹⁷ Subject imports were priced higher than the domestic like product in the remaining *** instances at overselling margins averaging *** percent.²¹⁸

The Commission also collected purchase cost data for the same eight pricing products imported from all subject countries. Eleven importers reported purchase cost data for all eight mattress products, although not all firms reported cost data for all products for all quarters.²¹⁹ Import purchase cost data reported by these firms accounted for 1.8 percent of imports from Cambodia, 4.5 percent of imports from China, 15.6 percent of imports from Indonesia, 4.2 percent of imports from Malaysia, 4.3 percent of imports from Serbia, and 3.5 percent of imports from Vietnam in 2019.²²⁰ Based on the purchase cost data obtained by the Commission, landed duty-paid ("LDP") costs for subject imports were below the sales price for U.S. produced mattresses in *** of *** quarterly comparisons involving *** of *** units (*** percent), at price-cost differentials averaging *** percent.²²¹

We recognize that the import purchase cost data may not reflect the total cost of importing and therefore requested that importers provide additional information regarding the costs and benefits of directly importing mattresses. Six importers providing usable cost data reported they incurred additional costs beyond the LDP cost, while five reported that they did

(...Continued)

(edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress." *Id.* Product 8 was defined as "Foam mattress (without any innersprings), with a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1.0 inch and 6.0 inches inclusive, on a nominal basis, typically designed to fit U.S. standard full size cribs." *Id.*

²¹⁶ CR/PR at V-8, Tables C-2, G-1.

²¹⁷ CR/PR at Table G-3.

²¹⁸ CR/PR at Table G-3.

²¹⁹ CR/PR at V-39.

²²⁰ CR/PR at V-39. No purchase cost data from Thailand or Turkey in 2019 were received.

²²¹ CR/PR at Table G-4.

not incur such additional costs.²²² Additional costs reported by six responding importers ranged from an average of 1 to 9 percent of the LDP value of direct imports.²²³ Given that subject import costs were on average *** percent below domestic sales prices, as noted just above, the inclusion of the additional costs of 1 to 9 percent would still leave the cost of importing subject imports significantly below the domestic sales prices.²²⁴

Based on the moderately high degree of substitutability between subject imports and the domestic like product, the importance of price in purchasing decisions, and the pervasive underselling, as well as the purchase cost data, we find that subject import underselling was significant during the period of investigation. The significant underselling by cumulated subject imports contributed to subject imports gaining sales and market share at the domestic industry's expense during the period of investigation.²²⁵

²²² CR/PR at V-39.

²²³ CR/PR at V-39. Importers described warehousing, logistics, insurance, customs brokerage fees, and labor costs as additional costs. *Id.* Ten importers indicated that they compare costs of importing both to the cost of purchasing from a U.S. producer and to that of purchasing from a U.S. importer in determining whether to import mattresses. *Id.*

²²⁴ Eleven importers estimated that they saved between 5 and 50 percent of LDP value, with an average of 26 percent, by importing directly rather than purchasing from a U.S. producer, while twelve importers estimated that they saved between 5 and 60 percent of LDP value, with an average of 21 percent, by importing directly rather than purchasing from a U.S. importer. CR/PR at V-40. Eleven of 26 importers reported that the cost of purchasing directly from subject producers was lower than purchasing from domestic producers or importers, even including the additional costs of importing. *Id.*

²²⁵ CR/PR at Table C-2. *** of *** responding purchasers reduced the domestic industry's share of their purchases and increased the subject import share of their purchases between 2017 and 2019, by *** to *** percentage points. *Id.* at Table V-22. When asked whether subject import prices were lower than domestic prices, seven responding purchasers responded yes and one did not provide an answer. *Id.* at Table V-23. Overall, responding purchasers reported that between 2017 and 2019, the domestic industry's share of their purchases declined *** percentage points while the subject import share of their purchases increased *** percentage points. *Id.* at Table V-22.

We are unpersuaded by respondents' argument that subject imports could have had no adverse price effects because only 2 of 22 responding purchasers reported switching from domestic producers to subject imports with price as a primary reason for buying *** units of subject imports. Joint Respondents' Prehearing Brief at 52; CR/PR at Table V-23. These responses are in contrast to the majority of responding purchasers reporting that price was among the top three factors influencing their purchasing decisions and a very important purchasing factor and that domestic product and subject imports were comparable across all purchasing factors (with a single exception regarding reliability of supply for subject imports from Cambodia), CR/PR at Tables II-11-12, 14, and pricing data showing that subject imports pervasively undersold the domestic like product. *Id.* at Tables G-3-4. Consistent with the pricing data, all responding purchasers that reported they chose to buy subject imports instead of domestically produced mattresses during the POI also reported that subject imports were priced lower than the domestic mattresses. *Id.* at Table V-23. Furthermore, with the exception of one *** purchaser (***), all responding purchasers that reported shifting purchases from the domestic industry to subject
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We have also considered price trends during the period of investigation. The domestic industry's sales prices declined for six of the eight pricing products between the first and last quarters for which data were collected, including a *** percent decline for product 1, a *** percent decline for product 2, a *** percent decline for product 3, a *** percent decline for product 5, an *** percent decline for product 6, and a *** percent decline for product 8.²²⁶ These declines occurred as apparent U.S. consumption increased by *** percent between 2017 and 2019, and was *** percent greater in interim 2020 compared to interim 2019; the domestic industry experienced increasing production costs between 2017 and 2019; and nonsubject imports declined as a share of apparent U.S. consumption.²²⁷ Based on the foregoing, we find that the significant and growing quantity of low-priced subject imports depressed domestic prices to a significant degree.

We are unpersuaded by respondents' argument that there could be no price depression because the average unit value of the domestic industry's U.S. shipments increased over the period of investigation.²²⁸ Because the U.S. mattress market is characterized by a wide range of mattress types at different price points, we find that the average unit value of the domestic

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imports from 2017 to 2019 ranked price, cost, or profitability among the top three factors influencing their purchasing decisions, and five also reported that price was a "very important" factor influencing such decisions. See Purchasers' Questionnaire Responses of *** at questions III-26-27. Thus, we disagree with respondents' contention that we should predicate our analysis of the adverse price effects of subject imports on purchaser responses to the lost sales question when the weight of other evidence on the record supports the conclusion that low subject import prices contributed to the *** percentage point shift in purchases from domestic producers to subject imports from 2017 to 2019 that purchasers reported in those purchasers questionnaire responses. CR/PR at Table V-22.

Another reason to discount the significance of most responding purchasers reporting that price was not a primary reason for their increased purchases of subject imports is that these purchasers' demand for mattresses derives from consumers' demand. In situations where retailers purchase at the wholesale level the products that their customers demand at retail, retailers' purchasing decisions will be sensitive to consumers' price preferences. The record contains persuasive evidence that mattress consumers consider price an important factor in their purchasing decisions. See Petitioners' Responses to Commissioner Questions at Exhibits 22-23 (Consumer research studies concluding that price was among the most important factors driving consumer mattress purchasing decisions). Accordingly, notwithstanding whether purchasers indicate that their own purchase decisions were primarily influenced by price, evidence indicates that price would have exerted an indirect influence on those decisions.

²²⁶ CR/PR at G-3, Table V-18. The domestic industry's sales prices increased between the first and last quarters for which data were collected by *** percent for product 4 and by *** percent for product 7. *Id.*

²²⁷ CR/PR at V-3, Tables IV-10, C-2.

²²⁸ Joint Respondents' Prehearing Brief at 47-48; *see also* CR/PR at Table C-2.

industry's U.S. shipments would be influenced by changes in product mix over time.²²⁹ Consequently, we do not rely on the average unit value of the domestic industry's U.S. shipments in our evaluation of price depression in this investigation.

We are also unpersuaded by respondents' argument that the declining prices of domestically produced FPM products resulted entirely from declining demand while the declining prices of domestically produced MiB products resulted entirely from declining raw material costs and the entrance of new domestic producers of MiBs at lower sales prices later in the period of investigation.²³⁰ We find that declining demand for FPMs does not explain the extent of the domestic industry's declining prices on sales of FPM products 2 and 6 for two reasons. First, the overall decline in apparent U.S. consumption of FPMs did not prevent domestic prices on sales of FPM products 4 and 7 from increasing.²³¹ Although apparent U.S. consumption data show a decline in shipments of FPMs, a majority of responding domestic producers, importers, and purchasers did not perceive that the market was softening and, in fact, reported that demand for FPMs was stable or increasing during the period of investigation, suggesting those market participants were not using a perceived decline in demand to leverage down prices.²³²

Second, given our finding that imported MiBs compete with domestically produced FPMs, domestic producer sales of FPM products 2 and 6 would have competed not only with subject import sales of FPM products 2 and 6 but also with subject import sales of MiB products 1 and 5, which were identical in all respects but MiB versus FPM format.²³³ Subject imports of MiB products 1 and 5 undersold domestic producer sales of FPM products 2 and 6 in *** of *** quarterly comparisons at margins ranging from *** to *** percent.²³⁴ Given the moderately high degree of substitutability between subject imports and domestic mattresses and the importance of price to purchasers, we find that the significant and increasing volume of low-priced subject imports of FPM products 2 and 6 and MiB products 1 and 5 in the aggregate depressed domestic prices on sales of FPM products 2 and 6 to a significant degree.

²²⁹ See, e.g., CR/PR at Table V-18.

²³⁰ See Joint Respondents' Posthearing Brief at Annex VII.

²³¹ See CR/PR at Table V-18.

²³² CR/PR at Table II-8a. We also observe that U.S. shipments of low-priced subject imports of FPMs increased 27.3 percent between 2017 and 2019, driving an increase in subject imports as a share of apparent U.S. consumption of FPMs from *** percent in 2017 to *** percent in 2019. CR/PR at Table IV-14.

²³³ See CR/PR at V-7-8.

²³⁴ Calculations based on CR/PR at Tables V-3 to V-8.

We also find that neither declining costs nor the entrance of new domestic producers of MiBs can entirely explain the *** to *** percent decline in the domestic prices of MiB products 1, 3, and 5 during the period of investigation.²³⁵ These price declines were far in excess of the *** percent decline in unit COGS between 2017 and 2019 reported by MiB producers, and the unit COGS of these producers was *** percent higher in interim 2020 compared to interim 2019.²³⁶ Nor does the entrance of new domestic producers of MiBs at lower sales prices later in the period of investigation entirely explain declining MiB product prices. Including only responding domestic producers that reported pricing data beginning in 2017, domestic sales prices still declined *** percent for product 1, *** percent for product 3, and *** percent for product 5.²³⁷ In light of the foregoing and given the significant increase in apparent U.S. consumption of MiBs during the period of investigation, including for these three pricing products, we find that the significant and increasing volume of low-priced subject imports caused the domestic industry's declining prices on sales of the MiB products²³⁸

Based on the above, we find that cumulated subject imports significantly undersold the domestic like product leading to lost sales and market share and significant price depression for the domestic industry. We therefore find that subject imports had significant adverse price effects on the prices of the domestic like product.

²³⁵ CR/PR at G-3, Table V-18.

²³⁶ Calculated from the Domestic Producers' Questionnaire Responses of ***.

²³⁷ Calculated from the Domestic Producers' Questionnaire Responses of ***.

²³⁸ We have also considered whether the domestic industry was prevented from raising prices, which otherwise would have occurred, to a significant degree. The domestic industry's ratio of COGS to net sales fluctuated throughout the POI. The COGS to net sell ratio initially increased from *** percent in 2017 to *** percent in 2018, before declining to *** percent in 2019; it was *** percent in interim 2020, compared to *** percent in interim 2019. CR/PR at Table C-2. The industry's per-unit COGS increased by \$*** from 2017 to 2019, while the industry's net sales AUV increased by \$***; per-unit COGS were \$*** lower in interim 2020 than in interim 2019, and the net sales AUV was \$*** higher in interim 2020 than in interim 2019. *Id.*

E. Impact of the Subject Imports²³⁹

Section 771(7)(C)(iii) of the Tariff Act provides that examining the impact of subject imports, the Commission “shall evaluate all relevant economic factors which have a bearing on the state of the industry.”²⁴⁰ These factors include output, sales, inventories, capacity utilization, market share, employment, wages, productivity, gross profits, net profits, operating profits, cash flow, return on investment, return on capital, ability to raise capital, ability to service debts, research and development, and factors affecting domestic prices. No single factor is dispositive and all relevant factors are considered “within the context of the business cycle and conditions of competition that are distinctive to the affected industry.”²⁴¹

Apparent U.S. consumption increased *** percent between 2017 and 2019, and was *** percent higher in interim 2020 compared to interim 2019.²⁴² Despite strong demand

²³⁹ The statute instructs the Commission to consider the “magnitude of the dumping margin” in an antidumping proceeding as part of its consideration of the impact of imports. 19 U.S.C. § 1677(7)(C)(iii)(V). In its final determinations, Commerce found dumping margins of 45.34 percent for mattresses from Cambodia, 2.2 percent for mattresses from Indonesia, 42.92 percent for mattresses from Malaysia, 112.11 percent for mattresses from Serbia, 37.48–763.28 percent for mattresses from Thailand, 20.03 percent for mattresses from Turkey, and 144.92–668.38 percent for mattresses from Vietnam. *Mattresses from Vietnam: Final Affirmative Determination of Sales at Less Than Fair Value*, 86 Fed. Reg. 15889 (March 25, 2021); *Mattresses from Serbia: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical Circumstances*, 86 Fed. Reg. 15892 (March 25, 2021); *Mattresses from Cambodia: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical Circumstances*, 86 Fed. Reg. 15894 (March 25, 2021); *Mattresses from Indonesia: Final Affirmative Determination of Sales at Less Than Fair Value*, 86 Fed. Reg. 15899 (March 25, 2021); *Mattresses from Malaysia: Final Affirmative Less Than Fair Value Determination*, 86 Fed. Reg. 15901 (March 25, 2021); *Mattresses from Turkey: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical Circumstances*, 86 Fed. Reg. 15917 (March 25, 2021); *Mattresses from Thailand: Final Affirmative Determination of Sales at Less Than Fair Value*, 86 Fed. Reg. 15928 (March 25, 2021)). We take into account in our analysis the fact that Commerce has made final findings that all subject producers in Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam are selling subject imports in the United States at less than fair value. In addition to this consideration, our impact analysis has considered other factors affecting domestic prices. Our analysis of the significant underselling and price effects of subject imports, described in both the price effects discussion and below, is particularly probative to an assessment of the impact of the subject imports.

²⁴⁰ 19 U.S.C. § 1677(7)(C)(iii); see also SAA at 851 and 885 (“In material injury determinations, 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 also may demonstrate that an industry is facing difficulties from a variety of sources and is vulnerable to dumped or subsidized imports.”).

²⁴¹ 19 U.S.C. § 1677(7)(C)(iii). This provision was amended by the Trade Preferences Extension Act of 2015, Pub. L. 114-27.

²⁴² CR/PR at Tables IV-10, C-2.

growth and the availability of domestic production capacity, as subject imports captured substantial market share from the domestic industry and depressed domestic prices to a significant degree, the domestic industry's performance weakened according to most measures between 2017 and 2019.²⁴³ Although the industry's performance improved in interim 2020 compared to interim 2019 by some measures, largely due to the imposition of section 301 tariffs and an antidumping order on subject imports from China, the industry remained unable to fully capitalize on strong demand growth due to increasing low-priced subject import competition.

The domestic industry's capacity, production, and rate of capacity utilization declined irregularly between 2017 and 2019, and the industry's higher capacity in interim 2020 compared to interim 2019 was accompanied by flat production and a lower rate of capacity utilization. Specifically, the industry's capacity declined from *** units in 2017 to *** units in 2018 before increasing to *** units in 2019, a level still *** percent lower than in 2017.²⁴⁴ The industry's capacity was *** units in interim 2020, compared to *** units in interim 2019.²⁴⁵ The industry's production declined from *** units in 2017 to *** units in 2018 and to *** units in 2019, a level *** percent lower than in 2017.²⁴⁶ The industry's production was *** units in interim 2020, compared to *** units in interim 2019.²⁴⁷ The industry's rate of capacity utilization declined from *** percent in 2017 to *** percent in 2018 and to *** percent in 2019, a level *** percentage points lower than in 2017.²⁴⁸ The industry's rate of capacity utilization was *** percent in interim 2020, compared to *** percent in interim 2019.²⁴⁹

Consistent with the domestic industry's declining capacity and production, the industry's employment declined from *** production related workers ("PRWs") in 2017 to *** PRWs in 2018 before increasing to *** PRWs in 2019, a level still *** percent lower than in 2017.²⁵⁰ The industry's employment was *** in interim 2020, compared to *** in interim

²⁴³ CR/PR at Table C-2.

²⁴⁴ CR/PR at Table C-2.

²⁴⁵ CR/PR at Table C-2.

²⁴⁶ CR/PR at Table C-2.

²⁴⁷ CR/PR at Table C-2.

²⁴⁸ CR/PR at Table C-2.

²⁴⁹ CR/PR at Table C-2.

²⁵⁰ CR/PR at Table C-2.

2019.²⁵¹ The industry's hours worked and wages paid increased irregularly during the period of investigation, while the industry's productivity declined irregularly.²⁵²

As the domestic industry's production declined between 2017 and 2019, so did its U.S. shipments and market share, and the industry's U.S. shipments were flat in interim 2020 compared to interim 2019 as it continued to lose market share to subject imports. The domestic industry's U.S. shipments declined from *** units in 2017 to *** units in 2018 and 2019, a level *** percent lower than in 2017.²⁵³ U.S. shipments were *** units in interim 2020, compared to *** units in interim 2019.²⁵⁴ The industry's share of apparent U.S. consumption declined from *** percent in 2017 to *** percent in 2018 and to *** percent in 2019, a level *** percentage points lower than in 2017.²⁵⁵ The industry's share of apparent U.S. consumption was *** percent in interim 2020, compared to *** percent in interim 2019.²⁵⁶

The domestic industry's end-of-period inventories increased between 2017 and 2019 and remained flat at an elevated level in interim 2019 and interim 2020. Specifically, the industry's end-of-period inventories increased from *** units in 2017 to *** units in 2018 and to *** units in 2019, a level *** percent higher than in 2017.²⁵⁷ The domestic industry's end-of-period inventories were *** units in interim 2020, compared to *** units in interim 2019.²⁵⁸ Similarly, the industry's end-of-period inventories as a share of total shipments increased from *** percent in 2017 to *** percent in 2018 and to *** percent in 2019.²⁵⁹ The industry's end-of-period inventories as a share of total shipments remained elevated at *** percent in interim 2019 and interim 2020.²⁶⁰

The domestic industry's financial performance also declined between 2017 and 2019, as subject imports captured market share from the domestic industry and depressed prices for

²⁵¹ CR/PR at Table C-2.

²⁵² CR/PR at Table C-2. The domestic industry's wages paid and hours worked increased irregularly by *** percent and *** percent, respectively, between 2017 and 2019. *Id.* In interim 2020 compared to interim 2019, the industry's wages paid were *** percent higher and its hours worked were *** percent lower than in interim 2019. *Id.* The industry's productivity in units per 1,000 hours declined irregularly by *** percent between 2017 and 2019, but was *** percent higher in interim 2020 compared to interim 2019. *Id.*

²⁵³ CR/PR at Table C-2.

²⁵⁴ CR/PR at Table C-2.

²⁵⁵ CR/PR at Table C-2.

²⁵⁶ CR/PR at Table C-2.

²⁵⁷ CR/PR at Table C-2.

²⁵⁸ CR/PR at Table C-2.

²⁵⁹ CR/PR at Table C-2.

²⁶⁰ CR/PR at Table C-2.

domestic products, before improving somewhat in interim 2020 compared to interim 2019.²⁶¹ Specifically, the industry's net sales value declined from \$*** in 2017 to \$*** in 2018 before increasing to \$*** in 2019.²⁶² The industry's net sales value was flat at \$*** in interim 2019 and interim 2020.²⁶³ The industry's operating income declined from \$*** in 2017 to \$*** in 2018 before increasing to \$*** in 2019, a level still *** percent lower than in 2017.²⁶⁴ The industry's operating income was \$*** in interim 2020, compared to \$*** in interim 2019.²⁶⁵ Similarly, the industry's operating income margin declined from *** percent in 2017 to *** percent in 2018 before increasing to *** percent in 2019, a level *** percentage points lower than in 2017.²⁶⁶ The industry's operating income margin was *** percent in interim 2020, compared to *** percent in interim 2019.²⁶⁷ The domestic industry's average operating return on assets declined from *** percent in 2017 to *** percent in 2018 before increasing to *** percent in 2019, a level *** percentage points lower than in 2017.²⁶⁸

The domestic industry's capital expenditures increased irregularly during the period of investigation, while its research and development ("R&D") expenses generally declined.²⁶⁹ Although domestic producers increased their capital expenditures in anticipation of demand growth and relief from unfairly traded imports from China, numerous responding producers reported that the financial returns on their recent investments have been disappointing due to

²⁶¹ See CR/PR at Table C-2.

²⁶² CR/PR at Table C-2.

²⁶³ CR/PR at Table C-2.

²⁶⁴ CR/PR at Table C-2.

²⁶⁵ CR/PR at Table C-2.

²⁶⁶ CR/PR at Table C-2. The domestic industry's gross profit exhibited a similar fluctuating trend, declining from *** in 2017 to \$*** in 2018 before increasing to \$*** in 2019. *Id.* The industry's gross profit was \$*** in interim 2020, compared to \$*** in interim 2019. *Id.* The industry's net income declined throughout the period from \$*** in 2017 to \$*** in 2018 and to \$*** in 2019. *Id.* The industry's net income was *** in interim 2020, compared to \$*** in interim 2019. *Id.* Twenty-four responding domestic producers reported that subject imports had negative effects on their investment and 25 domestic producers reported that subject imports had negative effects on their growth and development. CR/PR at Table VI-9.

²⁶⁷ CR/PR at Table C-2.

²⁶⁸ Derived from CR/PR at Table C-2.

²⁶⁹ CR/PR at Table C-2. The domestic industry's capital expenditures declined from \$*** in 2017 to \$*** in 2018 but increased to \$*** in 2019, a level *** percent higher than in 2017. *Id.* The industry's capital expenditures were \$*** in interim 2020, compared to \$*** in interim 2019. *Id.* The industry's R&D expenses decreased from \$*** in 2017 to \$*** in 2018 and to \$*** in 2019, a level *** percent lower than in 2017. *Id.* The industry's R&D expenses were \$*** in interim 2020, compared to \$*** in interim 2019. *Id.*

unrelenting subject import competition.²⁷⁰ For example, at the hearing, a representative of Brooklyn Bedding testified that the foam cutting equipment that his firm acquired in 2015 was barely used in 2019 and that no more than three of its six roll packing machines were utilized in 2019 and 2020.²⁷¹ A representative of Kolcraft testified that subject import competition has substantially reduced the return on his firm's investments in automation equipment in 2017,²⁷² and ***."273 ***."274

We find a causal nexus between subject imports and the domestic industry's declining performance between 2017 and 2019 and the industry's weak performance relative to demand growth in interim 2020 compared to interim 2019. Subject import volume increased significantly in absolute terms and relative to apparent U.S. consumption throughout the period of investigation, driven by significant subject import underselling.²⁷⁵ The increasing volume of low-priced subject imports captured *** percentage points of market share from the domestic industry between 2017 and 2019 and another *** percentage points of market share in interim 2020 compared to interim 2019.²⁷⁶ Consequently, the domestic industry suffered declining capacity, production, capacity utilization, employment, and U.S. shipments between 2017 and 2019, despite strong demand growth that would have been expected to boost these measures of industry performance.²⁷⁷ As significant volumes of low-priced subject imports depressed domestic product prices to a significant degree during the period of investigation,²⁷⁸ the industry's declining prices and increasing costs translated directly into stagnant net sales

²⁷⁰ See CR/PR at Table VI-10; see also Hearing Tr. at 46 (Fallen) ("After the initial China investigation and the resulting antidumping duty order, we thought we had made it through the worst. We were well positioned to benefit from our existing capacity and our investments in products such as rolled mattresses. Instead, we lost even more sales and had to close some of our plants because of the continued influx of unfairly low-priced imports from even more countries."), 50 (Koltun) ("After the previous mattress investigation, we invested in new equipment to package crib mattresses in a box. We made that investment because we anticipated we could get the appropriate return if Chinese imports could no longer rely on dumped prices. Despite the new duties on imports from China, there continued to be new entrants into the U.S. mattress market from new source countries. We did not realize foreign producers would simply shift production to other countries and continue to dump into the U.S. market. Even with the antidumping order on China in place, we continued losing sales and were unable to fully capitalize on our investments.").

²⁷¹ Hearing Tr. at 34 (Merwin).

²⁷² Hearing Tr. at 48-49 (Koltun).

²⁷³ See CR/PR at Table VI-10.

²⁷⁴ CR/PR at Table VI-10.

²⁷⁵ CR/PR at Tables IV-2, C-2, and D-9.

²⁷⁶ CR/PR at Table C-2.

²⁷⁷ CR/PR at Tables IV-8, C-2.

²⁷⁸ CR/PR at Table C-2.

revenues and gross profits, and declining operating income and net income, between 2017 and 2019.²⁷⁹

Although many measures of the domestic industry's performance began to improve in 2019, the industry's performance in 2019 remained weaker than in 2017 and the industry's improved performance in interim 2020 compared to interim 2019 was much weaker than would have been expected in light of strong demand growth.²⁸⁰ We also would expect to see improvement in the domestic industry's performance following the antidumping duty investigation and imposition of an order on subject imports from China at the end of 2019, given that China was by far the largest source of subject imports through 2019.²⁸¹

Representatives of domestic producers testified at the hearing that the trade measures on subject imports from China benefitted their firms initially, but that the benefit was short lived as low-priced imports from other subject countries surged to replace, and ultimately exceed, subject imports from China.²⁸²

Subject import competition prevented the domestic industry from fully capitalizing on the trade measures imposed on subject imports from China and the *** percent increase in apparent U.S. consumption in interim 2020 compared to interim 2019.²⁸³ As the domestic industry continued to lose market share to subject imports, the industry's production and U.S. shipments were flat in interim 2020 compared to interim 2019, while its capacity utilization rate and employment were lower.²⁸⁴ The industry's gross profit and operating income were higher in interim 2020 compared to interim 2019, both in absolute terms and relative to net sales, but lower than they would have been had subject imports not captured market share from the industry and depressed the industry's sales prices to a significant degree. The domestic

²⁷⁹ CR/PR at Table C-2.

²⁸⁰ CR/PR at Table C-2.

²⁸¹ CR/PR at Table IV-2. The petition in the antidumping duty investigation on imports from China was filed in September 2018, provisional duties were imposed in June 2019, and an antidumping order imposed in December 2019. CR/PR at I-5; *Mattresses From the People's Republic of China: Preliminary Determination of Sales at Less-Than-Fair-Value, Postponement of Final Determination and Affirmative Preliminary Determination of Critical Circumstances*, 84 Fed. Reg. 25732 (June 4, 2019); *Mattresses From the People's Republic of China: Final Determination of Sales at Less-Than-Fair-Value, and Final Affirmative Determination of Critical Circumstances, in Part*, 84 Fed. Reg. 56761 (Oct. 23, 2019).

²⁸² See Hearing Tr. at 27-28, 30-31 (Glassman), 34-35 (Merwin), 46 (Fallen), 50-51 (Koltun)

²⁸³ CR/PR at Table C-2.

²⁸⁴ CR/PR at Table C-2.

industry also suffered a substantial net loss in interim 2020, \$***, that was equivalent to negative *** percent of net sales.²⁸⁵

We are unpersuaded by the joint respondents' argument that subject import competition is significantly attenuated by differences in market segmentation.²⁸⁶ They argue that there is no causal link between subject imports and declines in the domestic industry's performance because those declines were entirely caused by domestic producers of FPMs, which did not compete with subject imports in their view.²⁸⁷ Joint respondents further argue that even though domestic producers of MiBs competed directly with subject imports, these domestic producers gained market share and improved their performance.²⁸⁸ The joint respondents attribute the declining performance of domestic producers of FPMs to what they characterize as the "increasing consumer preference for MiBs."²⁸⁹ The record does not support respondents' arguments.

As discussed in section V.B.3 above, we have found that subject imports of MiB compete with domestically produced FPMs, contrary to respondents' argument. Most responding purchasers reported that subject imports are interchangeable with and comparable to domestically produced mattresses, despite the fact that most subject imports consisted of MiBs and most domestically produced mattresses consisted of FPMs.²⁹⁰ The record also shows that MiBs and FPMs are functionally interchangeable, as they are generally made from the same materials to the same specifications, and cross-shopped by consumers whose purchases are motivated primarily by price and not by packaging.²⁹¹ Rather than being motivated by any "increasing consumer preference for MiBs," as the joint respondents claim, we have found price to be a primary motivating factor for purchasing subject imports rather than domestic

²⁸⁵ CR/PR at Table C-2. We recognize that the domestic industry's net loss in interim 2020 was ***. *Id.* at VI-15 n.12, Table III-1. ***." CR/PR at VI-15 n.12, Table III-1. ***." *Id.* at Table VI-6; *see also id.* at III-18 n.6, III-29, Table VI-10. ***." *Id.* at III-18 n.6.

²⁸⁶ They argue that there is no "real competition" between subject imports, primarily consisting of MiBs, and domestically produced FPMs because consumers purchasing mattresses online will generally receive MiBs, even if they have not specified MiBs, and because purchasers at the wholesale level are generally committed to either FPMs or MiBs. Joint Respondents' Prehearing Brief at 11; Joint Respondents' Posthearing Brief at 4-5.

²⁸⁷ Joint Respondents' Prehearing Brief at 55-57, 60-64; Joint Respondents' Posthearing Brief at 12-14.

²⁸⁸ Joint Respondents' Prehearing Brief at 55-57, 60-64; Joint Respondents' Posthearing Brief at 12-14.

²⁸⁹ Joint Respondents' Prehearing Brief at 63-64.

²⁹⁰ CR/PR at Table II-14.

²⁹¹ *See* section V.B.3 above.

product. While importers may have an economic incentive to import primarily MiBs from subject countries rather than FPMs because the smaller size of MiBs relative to FPMs minimizes ocean freight, inland transportation, and warehousing costs, any such incentive does not attenuate competition between domestic product and subject imports given our findings that FPMs and MiBs compete²⁹² and that domestic producers produce and ship significant quantities of MiBs.²⁹³

Nor does the record support respondents' contention that purchasers are committed to either MiBs or FPMs. The record shows that most responding purchasers, including many of the largest purchasers, reported purchasing both MiBs and FPMs, and that major purchasers displayed MiBs and FPMs side by side on their sales floors and websites.²⁹⁴ Indeed, domestic producers ***.²⁹⁵ Furthermore, domestic producers and importers competed for sales to the same purchasers in the same channels of distribution, as reflected in the seven responding purchasers that increased subject imports as a share of their purchases by 27.4 percentage points between 2017 and 2019 at the direct expense of the domestic industry.²⁹⁶ Thus, the record shows that subject imported MiBs and domestically produced FPMs compete for sales to the same purchasers.²⁹⁷

Based on the preceding considerations, we find that the significant increase in low-priced subject imports came at the expense of domestic producers of all mattresses, irrespective of packaging. The record shows that subject imports of MiBs were priced significantly lower than comparable domestically produced FPMs.²⁹⁸ Given the importance of

²⁹² See Section V.B.3 above for a discussion regarding competition between FPMs and MiBs.

²⁹³ Hearing Tr. at 61 (Baisburd), 103-04 (Glassman), 145-46 (Adams), 226 (Grimson); *see also* Respondents' Prehearing Brief at 17; Joint Respondents' Responses to Commissioner Questions, Annex III at 2-4.

²⁹⁴ CR/PR at II-3; Hearing Tr. at 63-64 (Earley), 116 (Merwin); Petitioners' Posthearing Brief at 8, Exhibits 4-6; Petitioners' Responses to Commissioner Questions at Exhibit 1-5, Exhibits 4-5.

²⁹⁵ Petitioners' Responses to Commissioner Questions at Exhibit 1-4.

²⁹⁶ *See* section V.B.3 above; CR/PR at Table V-22; Petitioners' Posthearing Brief at Exhibit 3.

²⁹⁷ We recognize that MiBs offer purchasers certain logistical advantages, such as the ability to fit more mattresses into a given warehouse or truck and delivery by common carrier from a central location, and that these advantages may cause certain purchasers to favor MiBs over FPMs. Hearing Tr. at 145-46 (Adams). Yet, only two responding purchasers ranked packaging among the top three factors influencing their purchasing decisions, while nearly all cited price or price-related factors. CR/PR at Table II-12; Purchasers' Questionnaire Responses of *** at Question III-26.

²⁹⁸ *See* section V.D above. The record also shows that subject imports of FPMs were priced lower than domestically produced FPMs and that subject imports of MiBs were priced lower than domestically produced MiBs. CR/PR at Tables V-3, V-5 and V-7.

price to purchasers and the moderately high degree of substitutability between subject imports and domestically produced mattresses, the significantly lower price of subject imports would have encouraged purchasers to increase their purchases of subject imported MiBs at the expense of domestically produced mattresses, including FPMs.²⁹⁹ Five of the seven responding purchasers that shifted their purchases from domestic producers to subject imports purchased both MiBs and FPMs.³⁰⁰ Furthermore, the importance of price to retail consumers means that consumers seeking out mattresses at low prices, as they cross-shopped different types of mattresses across channels of distribution, would have spurred increased purchases of lower-priced subject imports of MiBs at the expense of domestically produced FPMs at the wholesale level.³⁰¹ The greater importance that both purchasers and consumers placed on price relative to packaging indicates that the significant increase in apparent U.S. consumption of MiBs was driven more by the low prices of subject imports packaged as MiBs than by any shift in consumer or purchaser preferences from FPMs to MiBs for non-price reasons. Thus, the increasing volumes of low-priced subject imports significantly contributed to the significant decline in the domestic industry's production and U.S. shipments of FPMs over the period of investigation.³⁰²

Given the competition we have found between subject imported MiBs and domestically produced FPMs, we do not find it appropriate or instructive to focus our impact analysis on domestic producers of MiBs, as advocated by the joint respondents.³⁰³ Focusing our impact analysis on domestic producers of MiBs would also be inappropriate in light of the substantial number of domestic producers that produced both FPMs and MiBs during the period of investigation, which included the largest producers of FPMs and accounted for *** of MiB production in 2019.³⁰⁴ There is no discrete segment of the domestic industry that produces only MiBs, and only *** domestic producers continued to specialize in MiBs at the end of the

²⁹⁹ See Hearing Tr. at 198 (Dougan) (“{N}ot all of the MiB increase is attributable to a straight replacement of an FPM, but there is -- I think we have to concede that there is some.”).

³⁰⁰ CR/PR at Table V-22; Purchasers' Questionnaire Responses of *** at Question II-1; Purchasers' Questionnaire Response of *** at Question II-5 (***); Petitioners' Posthearing Brief at Exhibit 4 (***). ***. See Confidential Views, *Mattresses from China*, EDIS Doc. No. 708415, at 48 n.223.

³⁰¹ See section V.B.3 above.

³⁰² CR/PR at Tables III-5, IV-14.

³⁰³ See Joint Respondents' Prehearing Brief at 60; Joint Respondents' Posthearing Brief at 12-13.

³⁰⁴ See section V.B.2 above.

period of investigation.³⁰⁵ Accordingly, we base our impact analysis on the domestic industry as a whole.

Although we base our impact analysis entirely on the domestic industry as a whole, we note that subject imports also had an impact on domestic producers that exclusively produced MiBs. Domestic producers of MiBs improved their performance by most measures during the period of investigation, as would be expected in light of the domestic industry's increases in U.S. shipments of MiBs and its substantial investments in MiB capacity during the period of investigation.³⁰⁶ Nevertheless, the performance of domestic MiB producers would have been appreciably stronger during the period of investigation but for the significant volume and increase in volume of low-priced subject imports that displaced domestic industry shipments from the U.S. market and depressed domestic like product prices to a significant degree, including the prices of MiB products.³⁰⁷ Moreover, despite the substantial increase in apparent U.S. consumption of MiBs during the period of investigation, domestic producers' MiBs capacity utilization remained low over the POI. Capacity utilization was 57.2 percent in 2017, 62.0 percent in 2018, and 60.3 percent in 2019, and 49.8 percent in interim 2020, down from 64.7 percent in interim 2019.³⁰⁸

³⁰⁵ See CR/PR at III-9-10, Table III-1. Responding domestic producers that produced MiBs but no FPMs in 2019 included ***. See *Id.*

³⁰⁶ Compiled from Domestic Producers' Questionnaire Responses of ***; CR/PR at Table IV-12 (all U.S. producers' U.S. shipments of MiB mattresses increased by *** percent from *** units in 2017 to *** units in 2019, and were *** percent larger in interim 2020 than in interim 2019).

³⁰⁷ See section V.D above.

³⁰⁸ CR/PR at Table III-5. While we recognize that the domestic MiB producers' reduced rate of capacity utilization in interim 2020 partly reflects raw material shortages, their capacity utilization rates remained low both in absolute terms and relative to domestic FPM producers throughout the period of investigation, and there is no evidence that MiB producers were incapable of utilizing more of their reported capacity, as the joint respondents contend. *Id.* We are unpersuaded by the joint respondents' argument that the domestic industry was incapable of increasing its production and U.S. shipments of MiBs further during the period due to their inferior selection, reliability, and quality compared to subject imports. Joint Respondents' Prehearing Brief at 45-46; Joint Respondents' Posthearing Brief at 8. Non-price differences cannot explain the MiB producers' low rates of capacity utilization because a majority of responding purchasers reported that domestically produced mattresses were comparable to subject imports in terms of product range, quality, and reliability of supply. See CR/PR at Table II-14. According to petitioners, domestic producers of MiBs experienced low warranty return rates in 2019, including ***. Petitioners' Prehearing Brief at 42 n.167. Nor does the record support the joint respondents' argument that the relatively weak capacity utilization rates of domestic producers of MiBs resulted from their rapid expansion of MiB capacity or their misreporting of MiB capacity. See Joint Respondents' Posthearing Brief at 1-2, Annex X at 16-18. The domestic producers' questionnaire instructions requested "average production capacity" defined as "{t}he level of production that your establishment(s) could reasonably have expected to attain during the specified periods." Domestic (Continued...)

Given the magnitude of the unused capacity possessed by domestic MiB producers throughout the period of investigation, domestic producers of MiBs could have increased their U.S. shipments and market share more than they did during the period but for subject import competition.³⁰⁹ Although the domestic industry increased its share of apparent U.S. consumption of MiBs during the period of investigation, subject imports of MiBs increased their share of overall apparent U.S. consumption by more than domestically produced MiBs during the period.³¹⁰ Imports from subject sources increased in every year of the POI; as imports of MiBs from China retreated from the market in 2019 in response to the imposition of an antidumping duty order, subject imports from new sources surged into the market, displacing domestically produced MiBs and significantly depressing U.S. prices.³¹¹ Consequently, domestic producers of MiBs could have had greater sales revenues and operating and net income than they did during the period of investigation but for subject import competition.³¹² *** responding domestic MiB producers accounting for *** percent of domestic MiB production in 2019 reported that subject imports adversely impacted the returns on their investments during

(...Continued)

Producers' Questionnaires at Question II-7. Thus, responding domestic producers reported, and certified as accurate, the MiB capacity that they could have reasonably utilized for production of MiBs. Furthermore, the domestic industry's increased capacity to produce MiBs is consistent with the industry's substantial capital investments to expand MiB capacity. CR/PR at Tables III-3, VI-5-6. We also note that the high variable cost nature of mattress production would enable domestic producers to operate at rates of capacity utilization that would be considered low in other industries. See Hearing Tr. at 45 (Fallen); Petitioners' Prehearing Brief at 21. For these reasons, we do not view the low capacity utilization rates reported by certain domestic producers as evidence that they misreported or exaggerated their MiB capacity.

³⁰⁹ Compiled from Domestic Producers' Questionnaire Responses of ***; see also CR/PR at Table III-5.

³¹⁰ See CR/PR at Tables IV-12, F-1-2. The ratio of the domestic industry's U.S. shipments of MiBs to apparent U.S. consumption increased *** percentage points between 2017 and 2019 and was *** percentage points higher in interim 2020 compared to interim 2019. *Id.* at Table F-1. By contrast, the ratio of U.S. shipments of subject imported MiBs to apparent U.S. consumption increased *** percentage points between 2017 and 2019 and was *** percentage points higher in interim 2020 compared to interim 2019. *Id.* at Table F-2.

³¹¹ See CR/PR at Table IV-12 (showing MiBs from China declining by over *** units from 2018 to 2019 and their share of MiB consumption declining by *** percentage points, while subject imports from new sources increased by over *** units and gained *** percentage points of market share during the same period).

³¹² Compiled financial data from Domestic Producers' Questionnaire Responses of ***. ***. Compare *id.* with CR/PR at Table C-2.

the period of investigation.³¹³ Thus, we find that the increased volumes of low-priced subject imports had a significant impact on domestic producers of all types of mattresses, including MiBs.

We have also considered whether there are other factors that may have had an adverse impact on the domestic industry during the period of investigation to ensure that we are not attributing injury from such other factors to the subject imports. Neither demand trends nor nonsubject imports explain the industry's declining performance. Apparent U.S. consumption increased *** percent between 2017 and 2019 and was *** percent higher in interim 2020 compared to interim 2019.³¹⁴ The volume of nonsubject imports in the U.S. market was flat during the period of investigation and significantly smaller than the volume of cumulated subject imports throughout the period.³¹⁵ Furthermore, nonsubject imports declined as a share of apparent U.S. consumption throughout the period, never accounting for more than *** percent of such consumption.³¹⁶

In sum, we find that during the period of investigation, the significant volume of subject imports, the increase in subject import volume, and significant subject import underselling, which depressed domestic prices to a significant degree and enabled subject imports to gain market share at the expense of the domestic industry, significantly impacted the domestic industry.

VI. Conclusion

For the reasons stated above, we determine that an industry in the United States is materially injured by reason of imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam found by Commerce to be sold in the United States at less than fair value and imports of the subject merchandise from China found by Commerce to be subsidized by the government of China.

³¹³ CR/PR at Tables III-1, VI-10 (***). In addition, one domestic producer that produced MiBs almost exclusively, ***, reported negative effects on its investment returns and three domestic producers that produced both MiBs and FPMs, ***, reported negative effects specific to their MiB investments. *Id.*

³¹⁴ CR/PR at Tables IV-11, C-2.

³¹⁵ CR/PR at Table IV-2.

³¹⁶ CR/PR at Tables IV-11, C-2; *see also* section V.B.2 above.

Part I: Introduction

Background

These investigations result from petitions filed with the U.S. Department of Commerce (“Commerce”) and the U.S. International Trade Commission (“USITC” or “Commission”) on March 31, 2020, by Brooklyn Bedding, Phoenix, Arizona; Corsicana Mattress Co. (“Corsicana”), Dallas, Texas; Elite Comfort Solutions (“Elite”), Newnan, Georgia; FXI, Inc. (“FXI”), Media, Pennsylvania; Innocor, Inc. (“Innocor”), Media, Pennsylvania; Kolcraft Enterprises, Inc. (“Kolcraft”), Chicago, Illinois; Leggett & Platt, Inc. (“Leggett & Platt”), Carthage, Missouri; the International Brotherhood of Teamsters, Washington, DC; and United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union, AFL-CIO, Washington, DC, alleging that an industry in the United States is materially injured and threatened with material injury by reason of subsidized imports of mattresses from China and less-than-fair-value (“LTFV”) imports of mattresses¹ from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam. The following tabulation provides information relating to the background of these investigations.^{2 3}

Effective date	Action
March 31, 2020	Petitions filed with Commerce and the Commission; institution of Commission investigations (85 FR 19503, April 7, 2020)
April 20, 2020	Commerce’s notices of initiation (85 FR 22998, April 24, 2020 (countervailing duty), and 85 FR 23002, April 24, 2020 (antidumping duty))
May 15, 2020	Commission’s preliminary determinations (85 FR, May 21, 2020)
September 11, 2020	Commerce’s preliminary countervailing duty determination and alignment with final antidumping duty determinations (85 FR 56216 (China), September 11, 2020)

¹ See the section entitled “The subject merchandise” in Part I of this report for a complete description of the merchandise subject in this proceeding.

² Pertinent *Federal Register* notices are referenced in appendix A, and may be found at the Commission’s website (www.usitc.gov).

³ Appendix B is reserved for the witnesses appearing at the Commission’s hearing.

Effective date	Action
November 3, 2020	Commerce's preliminary antidumping duty determinations (85 FR 69568 (Thailand), 69571 (Turkey), 69574 (Malaysia), 69589 (Serbia), 69591 (Vietnam), 69594 (Cambodia), and 69597 (Indonesia), November 3, 2020); scheduling of final phase of Commission investigations (85 FR 76105, November 27, 2020)
March 18, 2021	Commission's hearing
March 25, 2021	Commerce's final determinations (86 FR 15889 (Vietnam), 15892 (Serbia), 15894 (Cambodia), 15899 (Indonesia), 15901 (Malaysia), 15910 (China), 15917 (Turkey), 15928 (Thailand), March 25, 2021)
April 21, 2021	Commission's vote
May 10, 2021	Commission's views

Statutory criteria

Section 771(7)(B) of the Tariff Act of 1930 (the "Act") (19 U.S.C. § 1677(7)(B)) provides that in making its determinations of injury to an industry in the United States, the Commission--

shall consider (I) the volume of imports of the subject merchandise, (II) the effect of imports of that merchandise on prices in the United States for domestic like products, and (III) the impact of imports of such merchandise on domestic producers of domestic like products, but only in the context of production operations within the United States; and. . . may consider such other economic factors as are relevant to the determination regarding whether there is material injury by reason of imports.

Section 771(7)(C) of the Act (19 U.S.C. § 1677(7)(C)) further provides that--⁴

In evaluating the volume of imports of merchandise, the Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States is significant. . . In evaluating the effect of imports of such merchandise on prices, the Commission shall consider whether. . . (I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and (II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a

⁴ Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

significant degree. . . In examining the impact required to be considered under subparagraph (B)(i)(III), the Commission shall evaluate (within the context of the business cycle and conditions of competition that are distinctive to the affected industry) all relevant economic factors which have a bearing on the state of the industry in the United States, including, but not limited to. . . (I) actual and potential decline in output, sales, market share, gross profits, operating profits, net profits, ability to service debt, productivity, return on investments, return on assets, and utilization of capacity, (II) factors affecting domestic prices, (III) actual and potential negative effects on cash flow, inventories, employment, wages, growth, ability to raise capital, and investment, (IV) actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and (V) in {an antidumping investigation}, the magnitude of the margin of dumping.

In addition, Section 771(7)(J) of the Act (19 U.S.C. § 1677(7)(J)) provides that—⁵

(J) EFFECT OF PROFITABILITY.—The Commission may not determine that there is no material injury or threat of material injury to an industry in the United States merely because that industry is profitable or because the performance of that industry has recently improved.

Organization of report

Part I of this report presents information on the subject merchandise, subsidy and dumping margins, and domestic like product. Part II of this report presents information on conditions of competition and other relevant economic factors. Part III presents information on the condition of the U.S. industry, including data on capacity, production, shipments, inventories, and employment. Parts IV and V present the volume of subject imports and pricing of domestic and imported products, respectively. Part VI presents information on the financial experience of U.S. producers. Part VII presents the statutory requirements and information obtained for use in the Commission’s consideration of the question of threat of material injury as well as information regarding nonsubject countries.

⁵ Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

Market summary

Mattresses are generally used by people for sleeping. The leading U.S. producers of mattresses are ***, while the leading producers of mattresses outside the United States include *** in Cambodia, *** in China, *** in Indonesia, *** in Malaysia, *** in Serbia, *** in Thailand, *** in Turkey, and *** in Vietnam. The leading U.S. importers of mattresses include *** (Cambodia); *** (China); *** (Indonesia); *** (Malaysia); *** (Serbia); *** (Thailand); *** (Turkey); *** (Vietnam); and *** from nonsubject countries (primarily ***). U.S. purchasers of mattresses are mostly firms that purchase domestically produced mattresses and imported mattresses and sell them for retail either in brick and mortar establishments or over the internet; leading purchasers include ***.

Apparent U.S. consumption of mattresses totaled approximately *** mattresses (\$*** in 2019. Currently, at least 60 firms are known to produce mattresses in the United States.⁶ U.S. producers' U.S. shipments of mattresses totaled 18.3 million mattresses (\$5.3 billion) in 2019 and accounted for *** percent of apparent U.S. consumption by quantity and *** percent by value. U.S. importers' U.S. shipments from the eight subject sources combined totaled 8.0 million mattresses (\$1.0 billion) in 2019 and accounted for *** percent of apparent U.S. consumption by quantity and *** percent by value. U.S. importers' U.S. shipments from nonsubject sources totaled *** mattresses (\$*** in 2019 and accounted for *** percent of apparent U.S. consumption by quantity and *** percent by value.

⁶ As discussed in Part III, the Commission received completed responses to its U.S. producers' questionnaire from 53 firms on a timely basis, but there were several other firms that provided incomplete or late responses to the Commission's U.S. producers' questionnaire.

Summary data and data sources

A summary of data collected in these investigations is presented in appendix C, table C-1 (total U.S. market), and table C-2 (U.S. market excluding ***). Except as noted, U.S. industry data are based on questionnaire responses of 53 firms that accounted for most U.S. production of mattresses during 2019. U.S. imports are based on questionnaire responses of 49 firms that accounted for most U.S. imports from the subject countries, according to data submitted in response to the Commission questionnaires and official import statistics.⁷

Previous and related investigations

Mattresses have been the subject of one prior antidumping duty investigation in the United States. That investigation resulted from a petition filed by nine U.S. producers of mattresses on September 18, 2018, alleging that an industry in the United States was materially injured and threatened with material injury by reason of LTFV imports of mattresses from China.⁸ On October 23, 2019, Commerce determined that imports of mattresses from China were being sold at LTFV⁹ and on December 9, 2019, the Commission determined that the domestic industry was materially injured by reason of LTFV imports of mattresses from China.¹⁰ On December 16, 2019, Commerce issued its antidumping duty order on imports of mattresses

⁷ As discussed in Part IV, questionnaire responses represent greater than 100 percent of U.S. imports from Cambodia, China, Indonesia, Serbia, Thailand, Vietnam, and nonsubject sources in 2019 under HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, which are the primary HTS statistical reporting numbers for the subject merchandise. Responding importers may have reported U.S. imports of mattresses entered under secondary HTS numbers. Questionnaire responses represent *** percent from Malaysia and *** percent from Turkey in 2019 under the 6 primary HTS statistical reporting numbers.

⁸ The nine petitioners were Corsicana Mattress Company, Elite Comfort Solutions, Future Foam Inc., FXI, Inc., Innocor, Inc., Kolcraft Enterprises Inc., Leggett & Platt, Incorporated, Serta Simmons Bedding, LLC, and Tempur Sealy International, Inc. Mattresses from China, Inv. No. 731-TA-1424 (Final), USITC Publication 5000, December 2019 (“China final publication”), p. I-1. The scope of the investigation of mattresses from China was virtually identical to the scope of these investigations. See *id.* at pp. I-8-10. Three of those petitioning firms (Future Foam Inc., Serta Simmons Bedding, and Tempur Sealy International, Inc.) are not part of the petitioning group in these current investigations.

⁹ 84 FR 56761, October 23, 2019. Commerce also determined that critical circumstances existed with respect to imports of mattresses from all non-individually examined companies that received a separate rate and the China-wide entity.

¹⁰ 84 FR 67958, December 12, 2019. The Commission also found that imports subject to Commerce's affirmative critical circumstances determination were not likely to undermine seriously the remedial effect of the antidumping duty order on China.

from China with the final weighted-average dumping margins ranging from 57.03 to 1,731.75 percent.¹¹

The Commission has also conducted several antidumping duty investigations on uncovered innerspring units, a product related to mattresses. Commenced in 2008, antidumping investigations regarding uncovered innerspring units from China, South Africa, and Vietnam resulted in affirmative determinations and the imposition of antidumping duty orders in 2008 (South Africa and Vietnam) and 2009 (China).¹² The orders were continued in 2014 following first five-year reviews¹³ and were continued again in 2019 following the second five-year reviews.¹⁴

Nature and extent of subsidies and sales at LTFV

Subsidies

On March 25, 2021, Commerce published a notice in the *Federal Register* of its affirmative final determination of countervailable subsidies for producers and exporters of mattresses from China.¹⁵ Table I-1 presents Commerce’s findings of subsidization of mattresses in China.

Table I-1
Mattresses: Commerce’s final subsidy determination with respect to imports from China

Entity	Final countervailable subsidy margin (percent)
Kewei Furniture Co., Ltd.	97.78
Zinus Xiamen	97.78
Ningbo Megafeat Bedding Co., Ltd./Megafeat Bedding Co., Ltd.	97.78
Healthcare Co., Ltd.	97.78
All others	97.78

Source: 86 FR 15920, March 25, 2021.

¹¹ 84 FR 68395, December 16, 2019. The China-wide entity rate was 1,731.75 percent, Healthcare Co. Ltd. was 57.03 percent, Zinus Inc. 192.04 percent, and remaining 36 individual entities 162.76 percent.

¹² 73 FR 75390, December 11, 2008; 73 FR 75391, December 11, 2008; 74 FR 7661, February 19, 2009; Uncovered Innerspring Units from South Africa and Vietnam, Inv. Nos. 731-TA-1141-1142 (Final), USITC Publication 4051, December 2008; Uncovered Innerspring Units from China, Inv. Nos. 731-TA-1140 (Final), USITC Publication 4061, February 2009.

¹³ 79 FR 22624, April 23, 2014.

¹⁴ 84 FR 55285, October 16, 2019.

¹⁵ 86 FR 15920, March 25, 2021.

Commerce identified the following government programs in China to be countervailable:¹⁶

1. Export Loans from Chinese State-Owned Banks
2. Export Seller's Credit
3. Export Buyer's Credit
4. Income Tax Reduction for High or New Technology Enterprises
5. Income Tax Deductions for Research and Development Expenses Under the Enterprise Income Tax Law
6. Income Tax Deductions/Credits for Purchase of Special Equipment
7. Tax Incentives for Businesses in the Guangdong Province Special Economic Zone
8. VAT Rebates on Domestically Produced Equipment
9. Foreign Trade Fund Development Grants
10. Grants for Energy Conservation and Emission Reduction
11. SME Technology Innovation Fund
12. Government Provision of Land-Use Rights in Special Economic Zones for Less Than Adequate Remuneration ("LTAR")
13. Government Provision of Electricity in Guangdong Province for LTAR

Sales at LTFV

On March 25, 2021, Commerce published notice in the *Federal Register* of its affirmative final determinations of sales at LTFV with respect to imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam.¹⁷ Tables I-2 through I-8 present Commerce's dumping margins with respect to imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam.

¹⁶ Decision Memorandum for the Preliminary Determination in the Countervailing Duty Investigation of Mattresses from the People's Republic of China, August 28, 2020, pp. 17-23. Commerce made no changes to the subsidy programs and rates found in its preliminary determination. It drew adverse inferences and relied solely on facts available in its final determination because neither the Government of China, nor any of the selected mandatory respondents, participated in the investigation. 86 FR 15910, March 25, 2021.

¹⁷ 86 FR 15889 (Vietnam), 15892 (Serbia), 15894 (Cambodia), 15899 (Indonesia), 15901 (Malaysia), 15917 (Turkey), 15920 (China), 15928 (Thailand), March 25, 2021. In its final determinations with respect to Cambodia, Serbia, and Turkey, Commerce also found that critical circumstances do not exist with respect to imports of mattresses from Cambodia, Serbia, and Turkey.

Table I-2**Mattresses: Commerce's final weighted-average LTFV margins with respect to imports from Cambodia**

Exporter/producer	Final dumping margin (percent)
Best Mattresses International Co., Ltd./Rose Lion Furniture International	45.34
All others	45.34

Source: 86 FR 15894, March 25, 2021.

Table I-3**Mattresses: Commerce's final weighted-average LTFV margins with respect to imports from Indonesia**

Exporter/producer	Final dumping margin (percent)
PT Zinus Global Indonesia	2.22
All others	2.22

Source: 86 FR 15899, March 25, 2021.

Table I-4**Mattresses: Commerce's final weighted-average LTFV margins with respect to imports from Malaysia**

Exporter/producer	Final dumping margin (percent)
Delandis Furniture (M) Sdn Bhd	42.92
Far East Foam Industries Sdn Bhd	42.92
Vision Foam Ind. Sdn Bhd	42.92
All others	42.92

Source: 86 FR 15901, March 25, 2021.

Table I-5**Mattresses: Commerce's final weighted-average LTFV margins with respect to imports from Serbia**

Exporter/producer	Final dumping margin (percent)
Healthcare Europe DOO Ruma	112.11
All others	112.11

Source: 86 FR 15892, March 25, 2021.

Table I-6**Mattresses: Commerce's final weighted-average LTFV margins with respect to imports from Thailand**

Exporter/producer	Final dumping margin (percent)
Nisco (Thailand) Co., Ltd.	763.28
Saffron Living Co., Ltd.	37.48
All others	37.48

Source: 86 FR 15928, March 25, 2021.

Table I-7**Mattresses: Commerce's final weighted-average LTFV margins with respect to imports from Turkey**

Exporter/producer	Final dumping margin (percent)
BRN Yatak Baza Ev Tekstili Insaat Sanayi Ticaret A.S.	20.03
All others	20.03

Source: 86 FR 15917, March 25, 2021.

**Table I-8
Mattresses: Commerce’s final weighted-average LTFV margins with respect to imports from Vietnam**

Producer	Exporter	Final dumping margin (percent)
Cong Ty TNHH Nem Thien Kim (a.k.a. Better Z’s, Ltd.)	Dockter China Ltd.	144.92
Hava’s Co., Ltd.	Hava’s Co., Ltd.	144.92
Cong Ty TNHH Nem Thien Kim (a.k.a. Better Z’s, Ltd.)	Healthcare Sleep Products Ltd.	144.92
Gesin Vietnam Co., Ltd.	Hong Kong Gesin Technology Ltd.	144.92
Sinomax (Vietnam) Household Products Ltd.	Sinomax International Trading Ltd.	144.92
Sinomax (Vietnam) Household Products Ltd.	Sinomax Macao Commercial Offshore Ltd.	144.92
Super Foam Vietnam Ltd.	Super Foam Vietnam Ltd.	144.92
Taimei Co. Ltd. (a.k.a. Taimei Co, Ltd.)	Taimei Co. Ltd. (a.k.a. Taimei Co., Ltd.)	144.92
Tong Li Vietnam Industrial Co., Ltd.	Tong Li Vietnam Industrial Co., Ltd.	144.92
Vietnam Glory Home Furnishings Co., Ltd./Glory (Viet Nam) Industry Co., Ltd.	Vietnam Glory Home Furnishings Co., Ltd./Glory (Viet Nam) Industry Co., Ltd.	668.38
Wanek Furniture Co., Ltd./Millennium Furniture Co., Ltd./Comfort Bedding Co. Ltd.	Wanek Furniture Co., Ltd./Millennium Furniture Co., Ltd./Comfort Bedding Co. Ltd.	144.92
Vietnam-wide entity	Vietnam-wide entity	668.38

Source: 86 FR 15889, March 25, 2021.

The subject merchandise

Commerce’s scope

In its final determinations, Commerce has defined the scope as follows:¹⁸

The products covered by this investigation are all types of youth and adult mattresses. The term “mattress” denotes an assembly of materials that at a minimum includes a “core,” which provides the main support system of the mattress, and may consist of innersprings, foam, other resilient filling, or a combination of these materials. Mattresses may also contain: (1) “upholstery,” the material between the core and the top panel of the ticking on a single-sided mattress; or between the core and the top and bottom panel of the ticking on a double-sided mattress; and/or (2) “ticking,” the outermost layer of fabric or other material (e.g., vinyl) that encloses the core and any upholstery, also known as a cover.

¹⁸ 86 FR 15889 (Vietnam), 15892 (Serbia), 15894 (Cambodia), 15899 (Indonesia), 15901 (Malaysia), 15910 (China), 15917 (Turkey), and 15928 (Thailand), March 25, 2021.

The scope of this investigation is restricted to only “adult mattresses” and “youth mattresses.” “Adult mattresses” are frequently described as “twin,” “extra-long twin,” “full,” “queen,” “king,” or “California king” mattresses. “Youth mattresses” are typically described as “crib,” “toddler,” or “youth” mattresses. All adult and youth mattresses are included regardless of size and size description.

The scope encompasses all types of “innerspring mattresses,” “non-innerspring mattresses,” and “hybrid mattresses.” “Innerspring mattresses” contain innersprings, a series of metal springs joined together in sizes that correspond to the dimensions of mattresses. Mattresses that contain innersprings are referred to as “innerspring mattresses” or “hybrid mattresses.” “Hybrid mattresses” contain two or more support systems as the core, such as layers of both memory foam and innerspring units.

“Non-innerspring mattresses” are those that do not contain any innerspring units. They are generally produced from foams (e.g., polyurethane, memory (viscoelastic), latex foam, gel-infused viscoelastic (gel foam), thermobonded polyester, polyethylene) or other resilient filling.

Mattresses covered by the scope of this investigation may be imported independently, as part of furniture or furniture mechanisms (e.g., convertible sofa bed mattresses, sofa bed mattresses imported with sofa bed mechanisms, corner group mattresses, day-bed mattresses, roll-away bed mattresses, high risers, trundle bed mattresses, crib mattresses), or as part of a set in combination with a “mattress foundation.” “Mattress foundations” are any base or support for a mattress. Mattress foundations are commonly referred to as “foundations,” “boxsprings,” “platforms,” and/or “bases.” Bases can be static, foldable, or adjustable. Only the mattress is covered by the scope if imported as part of furniture, with furniture mechanisms, or as part of a set in combination with a mattress foundation.

Excluded from the scope of this investigation are “futon” mattresses. A “futon” is a bi-fold frame made of wood, metal, or plastic material, or any combination thereof, that functions as both seating furniture (such as a couch, love seat, or sofa) and a bed. A “futon mattress” is a tufted mattress, where the top covering is secured to the bottom with thread that goes completely through the mattress from the top through to the bottom, and it does not contain innersprings or foam. A futon mattress is both the bed and seating surface for the futon.

Also excluded from the scope are airbeds (including inflatable mattresses) and waterbeds, which consist of air- or liquid-filled bladders as the core or main support system of the mattress.

Also excluded is certain multifunctional furniture that is convertible from seating to sleeping, regardless of filler material or components, where that filler material or components are upholstered, integrated into the design and construction of, and inseparable from, the furniture framing, and the outermost layer of the multifunctional furniture converts into the sleeping surface. Such furniture may, and without limitation, be commonly referred to as “convertible sofas,” “sofabeds,” “sofa chaise sleepers,” “futons,” “ottoman sleepers” or a like description.

Also excluded from the scope of this investigation are any products covered by the existing antidumping duty orders on uncovered innerspring units from China or Vietnam. See Uncovered Innerspring Units from the People’s Republic of China: Notice of Antidumping Duty Order, 74 FR 7661 (February 19, 2009); Antidumping Duty Order: Uncovered Innerspring Units from the Socialist Republic of Vietnam, 73 FR 75391 (December 11, 2008).

Also excluded from the scope of this investigation are bassinet pads with a nominal length of less than 39 inches, a nominal width less than 25 inches, and a nominal depth of less than 2 inches.

Additionally, also excluded from the scope of this investigation are “mattress toppers.” A “mattress topper” is a removable bedding accessory that supplements a mattress by providing an additional layer that is placed on top of a mattress. Excluded mattress toppers have a height of four inches or less.

Tariff treatment

Based upon the scope set forth by Commerce, information available to the Commission indicates that the merchandise subject to these investigations is imported under statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087 of the Harmonized Tariff Schedule of the United States (“HTS”).¹⁹ The 2021 general rate of duty is 3 percent ad valorem for HTS subheadings 9404.21.00 and 9404.29.10 and 6 percent ad valorem for HTS subheading 9404.29.90. Subheadings 9404.21.00 and 9404.29.90 are designated as covering articles eligible for duty-free entry under the Generalized System of Preferences (GSP) produced in Cambodia, Indonesia, and Serbia, but those produced in Thailand, Malaysia, Turkey, and Vietnam are not designated for GSP benefits. Subheading 9404.29.10 (mattresses of cotton) is designated as covering only eligible goods from least-developed GSP beneficiaries, and only Cambodia is such a beneficiary, among the respondent countries. Decisions on the tariff classification and treatment of imported goods are within the authority of U.S. Customs and Border Protection.

Section 301 tariff treatment

Merchandise classifiable under subheadings 9404.21.00, 9404.29.10, and 9404.29.90 were included among the products of China that are subject to an additional duty of 10 percent ad valorem effective September 24, 2018 and increased to 25 percent ad valorem effective May 10, 2019,²⁰ under HTS subheading 9903.88.03.²¹

The product

Description and applications

In the industry, the term “mattress” generally means a resilient material or combination of materials generally enclosed by ticking that is intended or promoted for sleeping upon by people. Mattresses generally consist of (1) a core, (2) upholstery material, and (3) ticking. The core provides the main support system of the mattress. The core may consist of innersprings, non-innerspring materials (e.g., foam), an air or water bladder,²² other resilient filling, or a

¹⁹ Secondary statistical reporting numbers under which subject merchandise may be imported include 9404.21.0095, 9404.29.1095, 9404.29.9095, 9401.40.0000, and 9401.90.5081.

²⁰ United State Trade Representative, “[Statement By U.S. Trade Representative Robert Lighthizer on Section 301 Action](#),” United State Trade Representative.

²¹ HTSUS (2020) Revision 9, USITC Publication No. 5051, April 2020, p. 94-12.

²² Airbeds and waterbeds are excluded from the scope of the investigations.

combination of these materials. “Upholstery” refers to the material between the core and the ticking.²³ “Ticking” refers to the cover or the outermost layer of fabric or other material that encloses the core and any upholstery material.

A mattress may be used alone or in combination with other products, such as foundations commonly referred to as box springs, platforms, bases, and/or cribs. Mattresses may be sold independently, as part of furniture (examples are convertible sofa bed mattresses, corner group mattresses, day-bed mattresses, roll-away bed mattresses, high risers, and trundle bed mattresses), or as part of a set in combination with a mattress foundation.

“Adult mattresses” and “youth mattresses” are covered by the scope of this petition. Youth mattresses are generally grouped together in size descriptions that include “crib,” “toddler,” or “youth.”

Mattresses are covered by the scope of this petition even if imported without ticking, such as any foam mattresses that are imported without ticking (i.e., the outermost cover). Products covered by this petition include mattresses packed and sold to end users in boxes, such as those marketed as “bed(s)-in-a-box,” “mattress(es)-in-a-box,” and/or “compressed mattress(es).”

Manufacturing processes

The manufacturing process for all types of mattresses is similar in that it consists of the assembly of components into finished mattresses that are ready for use by the ultimate purchaser.

Innerspring, non-innerspring, and hybrid mattresses are assembled from various components that differ based on the particular mattress design. Components of mattresses generally consist of the core (innerspring units, foam (e.g., polyurethane, memory (viscoelastic), latex, or gel), or other resilient fillings or a combination of the same²⁴) and the upholstery materials.

For both innerspring and hybrid mattresses, the innerspring unit may be produced internally or purchased from a supplier.²⁵ Depending on the particular design, layers of fabric,

²³ Materials used in upholstery include cotton, wool, leather, linen, silk, polyester, olefin fiber, velvet, chenille fabric, and rayon.

²⁴ This report will refer to these types of mattresses as “innerspring,” “hybrid,” and “foam,” or “non-innerspring.”

²⁵ There are two main varieties of mattress innerspring units: non-pocketed (e.g., Bonnell springs) and pocketed. Bonnell springs, which are the most commonly used type of non-pocketed innerspring unit, have an hour-glass shape and are assembled to the size of the innerspring unit and interconnected (continued...)

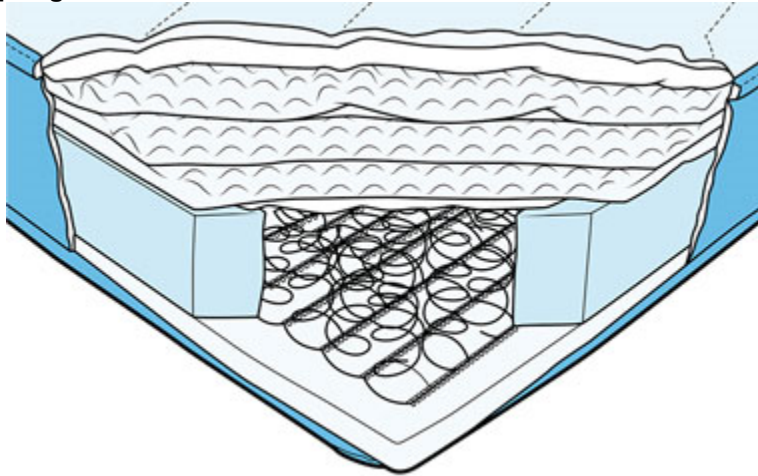
upholstery, and/or foam are assembled around the core unit as operators “build-up” the mattress on an assembly table or production line. Separately, sewers run quilting machines that produce the ticking (also known as a “cover”), which may include a backing material.²⁶ In some instances, the cover is cut into panels for the top, bottom, and sides (also referred to as “borders”) on a panel cutting machine. A flange is sewn to the edge of the cover piece(s) and can be attached using a “hog ring” to the innerspring unit to prevent the cover and filling material from shifting once the border is attached and the mattress is sewn shut. A “tape,” which is a fabric that covers the edge where the top and bottom panels are joined to the border panel, is then sewn around the top and bottom edges of the mattress. In other instances, a simple “zippered” cover is used, which does not require a flange, hog ring, or tape. Both innerspring and hybrid mattresses may be shipped compressed or uncompressed (figure I-1). Manufacturers can package mattresses flat compressed, or package the mattress using a machine that compresses, then rolls the mattress. Mattresses that are compressed and rolled are shipped as mattresses-in-a-box (“MIB”) to the end consumer, but flat compressed mattresses are not always shipped to the end consumer in the flat compressed state. Flat compressed mattresses typically use a just-in-time manufacturing process. MIBs require investment in warehouses and inventory to store mattresses.²⁷

with a mesh of metal. Pocketed innerspring units manufactured from pocketed coils (a.k.a., Marshall coils, wrapped coils, or encased coils) generally include cylindrically shaped steel wire coils that are individually covered by non-woven synthetic material and then assembled to the size of the innerspring unit and held together by glue. Uncovered Innerspring Units from China, South Africa, and Vietnam, Inv. Nos. 731-TA-1140-1142 (Second Review), USITC Publication 4974, September 2019, pp. I-9 – I-11.

²⁶ The borders, or vertical sides of the mattress, may be constructed on separate border machines that combine ticking, a backing material, foam and/or other upholstery.

²⁷ Hearing transcript, pp. 61-62 (Baisburd); Petitioners’ posthearing brief, exh. 1, p. 9.

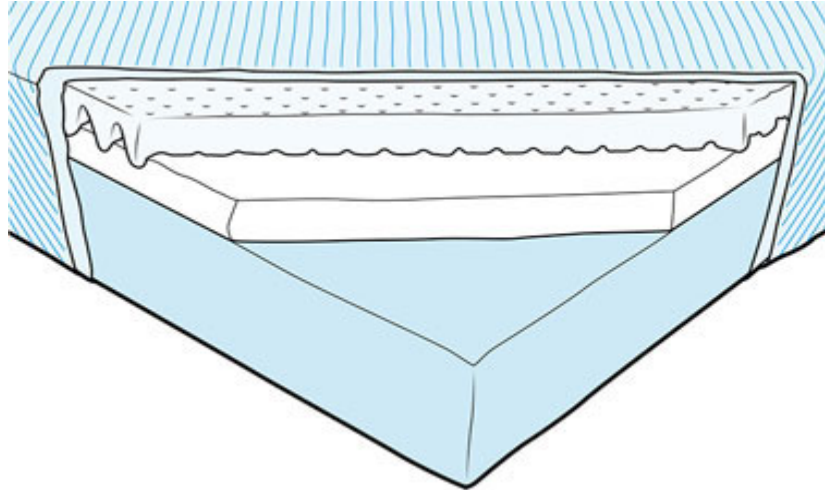
Figure I-1
Mattresses: Innerspring mattress construction



Source: *Mattress Buying Guide: How to Choose the Right Mattress*, Consumer Reports (March 2018), <https://www.consumerreports.org/cro/mattresses/buying-guide/index.htm>, retrieved February 24, 2021.

For non-innerspring foam mattresses, the manufacturing process begins with production of the foam. Foam mattress manufacturers may be vertically integrated (producing both the foam and foam mattress themselves) or they may purchase foam from unaffiliated foam suppliers. During foam production, precursor chemicals are combined based on the specific formulation for the type of foam. For example, polyurethane foam is generally comprised of a polyol (complex alcohol) and isocyanate that are kept in separate storage tanks. These materials are mixed with catalysts and a surfactant and heated, which begins a reaction to form a polyurethane polymer that is combined with carbon dioxide and sprayed or “poured” onto a plastic covered conveyor belt. The reaction generates carbon dioxide gas which causes the material to expand as it moves down the conveyor belt. Once the foam has fully expanded and partially cured, it is cut into large blocks which are allowed to fully cure for up to 72 hours. After product properties are tested and confirmed to meet specifications, the cured blocks are then cut into trimmed rectangular sheets (or plates) of various thicknesses that correspond to finished mattress sizes. The foam mattress may consist of a single slab of foam, but typically consist of multiple layers (plates) that have been bound together. The foam mattress may then be encased in a fabric “sock” and inserted into the cover (i.e., the ticking). The final step is packaging. As with innerspring and hybrid mattresses, foam mattresses may be shipped compressed or uncompressed (figure I-2). For compressed mattresses, U.S. producers use capital intensive machines that enclose the foam mattress in plastic, compress the mattress, then roll the mattress to be put into a box. Respondents in their postconference briefs stated that ***

Figure I-2
Mattresses: Foam mattress construction



Source: *Mattress Buying Guide: How to Choose the Right Mattress*, Consumer Reports (March 2018), <https://www.consumerreports.org/cro/mattresses/buying-guide/index.htm>, retrieved February 24, 2021.

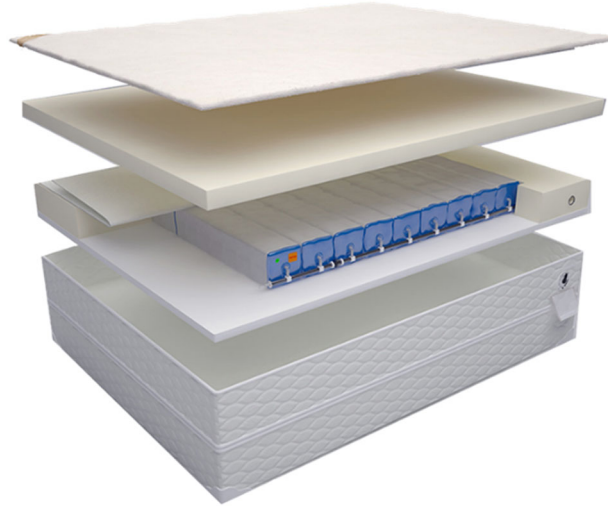
The manufacturing process for youth mattresses is similar to that for adult mattresses but can differ slightly by not using flange material to attach the panels to the innerspring. The covers can be pre-sewn with only one open end, and the core and upholstery materials inserted into the cover with the aid of a stuffing machine. The cover opening is then sewn shut (instead of stitching around the entire perimeter of the mattress). Youth mattresses can use vinyl material in addition to cloth materials as the ticking as a barrier to wetness.

The manufacturing process for out-of-scope air-adjustable foam mattresses is distinguished by the inclusion of a layer with an air support system. The top layer can consist of cotton or wool. The second layer varies in density and is made of either memory foam, latex, or polyurethane foam and can come with multiple foam layers. The third layer has the air support system. Most air-adjustable foam mattresses have separate air support systems for each side of the bed that can be manually or electronically adjusted to increase or decrease the amount of air in the system. The air support system is used to adjust the firmness of the mattress based on

²⁸ Joint respondents' postconference brief, exh. 3, pp. 1-2.

the support needs of the user. The three layers are housed in an enclosure made of different material depending on the manufacturer and sits on a foundation (figure I-3).

Figure I-3
Mattresses: Air adjustable foam mattress construction



Source: *Adjustable Firmness Mattress Tips Before Buying*, Natural Form, <https://naturalform.com/adjustable-firmness-mattress/>, retrieved February 24, 2021.

Domestic like product issues

The petitioners argue in these investigations that the domestic like product should be defined as all mattresses, co-extensive with the scope of the investigations, consistent with the Commission's determination in the prior mattress investigation.²⁹ In the preliminary phase of these investigations, joint respondents Classic Brands, LLC, CVB, Inc., Sinomax USA, Inc., Healthcare Europe DOO Ruma, Saffron Living, Ltd., Diglant Malaysia Sdn Bhd, and Ashley Furniture Industries noted that they accepted the definition of the domestic like product as contained in the petitions³⁰ and respondents H Mattress and Stork Craft indicated that they took no position on the definition of the domestic like product proposed in the petitions.³¹ In the final phase of these investigations, joint respondents Classic Brands, LLC, CVB, Inc., and Ashley Furniture Industries, LLC note that they accept the definition of the domestic like product as co-extensive with Commerce's scope.³²

No party requested data or other information necessary for arguing for a different definition of the domestic like product in these final phase investigations.³³

²⁹ Petitions, pp. 13-14; petitioners' postconference brief, pp. 4-7; and petitioners' prehearing brief, pp. 2-5. In the preliminary phase of the previous investigation of mattresses from China, the Commission concluded that all mattresses are generally similar in terms of their physical characteristics and uses; channels of distribution; manufacturing facilities, production employees, and, to some extent, production processes and producer and customer perceptions. The Commission further observed that in-scope mattresses generally differ from out-of-scope futons, air mattresses, and waterbeds in terms of physical characteristics; manufacturing facilities, production processes, and employees; channels of distribution; producer and customer perceptions; and price, despite some overlap with respect to uses and interchangeability. Consequently, the Commission defined the domestic like product as all mattresses coextensive with the scope of the investigation. *Mattresses from China, Inv. No. 731-TA-1424 (Preliminary)*, USITC Publication 4842, November 2018 ("China preliminary publication"), p. 11. In the final phase of the previous China investigation, the Commission found no new information on the record to indicate that it should revisit the domestic like product definition. The Commission therefore defined a single domestic like product consisting of all mattresses coextensive with the scope of the investigation. *China final publication*, p. 9.

³⁰ Joint respondents' postconference brief, p. 5.

³¹ H Mattress and Stork Craft postconference brief, p. 6.

³² Joint respondents' prehearing brief, p. 1.

³³ Comments on draft questionnaires on behalf of petitioners, July 21, 2020; Comments on draft questionnaires on behalf of H Mattress Inc. and Stork Craft Manufacturing (USA) Inc., July 21, 2020; Comments on draft questionnaires on behalf of Classic Brands, LLC, CVB, Inc., Sinomax USA, Inc., Healthcare Europe DOO Ruma, Saffron Living, Ltd. and Diglant Malaysia Sdn Bhd, July 21, 2020; and Comments on draft questionnaires on behalf of PT Zinus Global Indonesia, July 21, 2020.

Importer Cozy Comfort LLC (“Cozy Comfort”) argued in the preliminary phase of these investigations that the product that it imports, known as a “Seat-to-Sleep” furniture component (“STS furniture component”),³⁴ should be found to be a separate domestic like product.³⁵ Rejecting this argument, and consistent with its determination in the prior antidumping duty investigation concerning Mattresses from China, the Commission in its preliminary determinations for these investigations defined a single domestic like product consisting of mattresses, coextensive with the scope of the investigations.³⁶ In these final phase investigations, Cozy Comfort did not provide comments on the draft questionnaires requesting data or other information necessary for arguing for a different definition of the domestic like

³⁴ The mattress sub-component of Cozy Comfort’s STS furniture component is an 8.5-inch pillow top mattress and is described by the company on its website as “The Most Comfortable and Durable Sofa Bed System in the World.” It is “a real bed system engineered for everyday use. . . We basically have engineered the same bed that you sleep on every night to fit within the cavity of a sofa.” The queen-sized mattress includes a total of 131 springs--the Bonnell innerspring system is utilized in most of the mattress area (from the head to knee area) and the telescopic Cozy patented Z spring system is used from the knee to foot area of the mattress. The Cozy mattress is attached to the sofa bed mechanism via two metal mattress mounting tubes that are secured with bolts to the underside of the mattress. If needed, replacement mattresses can be shipped to customers separately from the STS furniture component. “Cozy Mattress for Hotels” and “Replacing Your Mattress,” CozyComfort company website, <http://cozymattress.com/home-5/>, March 24, 2021.

³⁵ Cozy Comfort explained that it imports the sub-component “seating deck and articulation mechanism” that forms an STS furniture component, which is then incorporated into sofas, chaises, and chairs as part of the seating surface and can be converted into a sleeping platform. Concerning the six like product factors, Cozy Comfort argued that its STS furniture component (1) is used exclusively in sofas, chaises, and chairs, and is “not individually usable, marketable, or offered for sale;” (2) is not available from any other supplier, and the “seating deck subcomponent” cannot be used in any other type of furniture component or as a mattress when placed on any flat surface other than in conjunction with the STS furniture component; (3) is sold only to furniture manufacturers to be installed into furniture specifically designed to accept the component and is not sold directly to individual consumers; (4) provides consumers with “a significant quality upgrade” over “{m}ost sleeper sofas fitted with a mattress . . . with heavy, robust and plush sub-components;” (5) is *** using patented technology; and (6) *** resulting in *** compared to all other in-scope mattresses. Cozy Comfort’s postconference brief, pp. 1-4.

³⁶ According to Cozy Comfort, there is no domestic production of STS furniture components. As the Commission explained in its preliminary determinations, in the absence of domestic production of STS furniture components (and thus a domestic industry), such components are not capable of examination under the Commission’s traditional domestic like product analysis. Instead, the Commission defined a single domestic like product that included the domestically produced article “most similar” to the imported STS furniture components within the scope of the investigations, which was domestically produced sleep sofa mattresses. Mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam, Inv. Nos. 701-TA-645 and 731-TA-1495-1501 (Preliminary), Publication 5059, May 2020 (“Preliminary publication”), pp. 11-12.

product than found by the Commission in its preliminary determinations, but continued to argue that the Commission should define STS furniture components as a separate domestic like product in its prehearing and posthearing briefs.³⁷

Importer Night & Day Furniture LLC (“Night & Day”) also did not provide comments on the draft questionnaires requesting data or other information necessary for arguing for a different definition of the domestic like product, but provided separate domestic like product arguments in its prehearing and posthearing briefs in the final phase of these investigations. Night & Day argues that the product that it imports, trifold memory foam mattresses, should be found to be a separate domestic like product.³⁸

³⁷ Cozy Comfort began importing the STS furniture component in *** and entered an appearance in these investigation on January 15, 2021. Cozy Comfort’s prehearing brief, p. 10; Cozy Comfort entry of appearance, January 15, 2021. In the final phase of these investigations, Cozy Comfort argues that the domestically produced articles “most similar” to its imported STS furniture components are not in-scope sleep sofa mattresses, but out-of-scope futons. Concerning the six like product factors, Cozy Comfort argues that its STS furniture component (1) is most similar to a futon in its characteristics and uses in that it is foldable, adjustable, pliable, and can be used for sitting and that in-scope mattresses do not possess these similar key physical attributes; (2) may be used interchangeably with a futon in that it may be used for sleeping and sitting; (3) is sold directly to individual consumers, like a futon, which is sold only to “specialized retailers that do not purchase or offer in-scope mattresses;” (4) is viewed by consumers as a distinct product category that is separate from mattresses, like a futon; (5) is produced in different manufacturing facilities with different employees using different production processes, like a futon but unlike in-scope sleeper sofa mattresses; and (6) *** between Cozy Comfort’s STS component and all the other mattresses (out-of-scope futons, despite some overlap, differ from in-scope mattresses in price). Cozy Comfort’s prehearing brief, pp. 7-9; Cozy Comfort’s posthearing brief, p. 1.

³⁸ Concerning the six like product factors, Night & Day argues that trifold memory foam mattresses (1) are three equally sized rectangular foam components, each encased in a separate pocket of a three-pocket cover, and are distinguishable physically from in-scope mattresses based on the assembly method that allows for folding and unfolding; (2) have different end uses than in-scope mattresses in that the trifold mattresses for Murphy Cabinet Beds are less durable, light-duty “guest” mattresses that are not intended for and are not suitable for everyday use; (3) are not interchangeable with in-scope mattresses due to the differences in foldability, the sewn-together smaller pieces, and end-use periodic applications; (4) are not sold individually but are incorporated into a cabinet specifically designed to accept the trifold mattress and, thus, “are not usable, marketable, or offered for sale individually either through wholesalers or retailers;” (5) are perceived by customers as “uncomfortable” and are “lower quality than in-scope mattresses;” and (6) are not sold separately for use other than in the Murphy Cabinet, and there is no individual price for just a trifold memory foam mattress. Night & Day’s prehearing brief, pp. 3-5; Night & Day’s posthearing brief, pp. 4-5 and 8. Trifold memory foam mattresses are not produced domestically. Hearing transcript, pp. 179-180 (Gallawa).

Part II: Conditions of competition in the U.S. market

U.S. market characteristics

Mattresses are typically sold in the United States in standard sizes, such as king, queen, twin, double, full, or youth (crib), and come in a variety of thicknesses. They can be of the innerspring variety, foam only (i.e., non-innerspring, including standard polyurethane, viscoelastic (“memory foam”), or latex), or a hybrid consisting of innersprings and foam. Innerspring mattresses also typically contain some foam. Most mattresses in the United States are sold individually or as part of a set including a mattress foundation/box spring, but can also be sold as part of a sofa sleeper/sofa bed, roll-away bed, or for specialty markets such as recreational vehicles or trucks.

In recent years, including since 2017, the mattress market has seen an increase in the popularity of mattresses sold via e-commerce, particularly mattresses-in-a-box (“MiBs”). MiB-style mattresses are typically compressed and rolled for ease of shipment.¹

Respondents argued that there is market segmentation between MiBs and flat-pack mattresses (FPMs), and that the two types of mattresses do not compete in a “meaningful” way, allegedly due to some retailer purchasers preferring to purchase MiBs.² According to them, some large purchasers, like Amazon, want to purchase only MiBs to reduce transportation and storage costs and delivery time.³ Respondents also alleged that some consumers may have a preference for MiBs or FPMs,⁴ and that consumers increasingly prefer the relatively new experience of shopping for MiBs on the internet, where consumers can compare other customer reviews.⁵

On the other hand, petitioners argued that a recent study showed that price is the main factor consumers consider in purchasing a mattress, while packaging was not mentioned as a factor influencing purchasing decisions.⁶ They described retailers as having a variety of preferences between stocking MiBs, FPMs, or both,⁷ and stated that consumers often do not

¹ *Mattresses from China*, Inv. No. 731-TA-1424 (Final), USITC Publication 5000, December 2019 (“China final publication”), p. II-1. See also table II-4 below.

² For example, see hearing transcript, pp. 151-52 (Douglas) and 253 (Robertson).

³ Hearing transcript, p. 190 (Adams).

⁴ For example, see hearing transcript, pp. 42-43 (Fallen).

⁵ Joint respondents’ posthearing brief, annex X, pp. 1-2.

⁶ Petitioners’ posthearing brief, pp. 2-3, Exhibit 2.

⁷ Petitioners’ posthearing brief, exhibit I-1-2.

know whether the mattress they buy will arrive as an MiB or an FPM.⁸ Petitioners alleged that the recent increased U.S. consumption of MiBs is more a result of increased subject imports in the form of MiBs, as necessary for transoceanic shipment, than of retailer or consumer demand for MiBs relative to such demand for FPMs.⁹

Petitioners also alleged that a larger share of consumers cross-shop both brick-and-mortar and online retailers, and consult reviews by other consumers.¹⁰ However, respondents alleged that retailers try to make such cross-shopping difficult by not offering the same selections through different retail channels.¹¹

Apparent U.S. consumption of mattresses increased *** percent during 2017-19. It was *** percent higher in the first three quarters of 2020 compared to the first three quarters of 2019. These trends are broadly consistent with increases in Gross Domestic Product (“GDP”) and housing starts, as well as consumer reaction to the COVID-19 lockdowns, as discussed below in “U.S. demand.”

U.S. purchasers

The Commission received 22 usable questionnaire responses from firms that had purchased mattresses during January 2017-September 2020. Twelve responding purchasers were omni-channel (both brick-and-mortar and online) retailers, six were online retailers, three were brick-and-mortar retailers, and three were distributors. Responding U.S. purchasers were located across the United States. Large purchasers of mattresses include retailers ***. Mattress purchasers that also submitted importer questionnaires include ***. *** also submitted a U.S. producers’ questionnaire.

Nine of 13 responding purchasers indicated that they compete with their suppliers for sales to brick-and-mortar retailers and/or on-line. Some of these purchasers named Tempur Sealy or Serta Simmons as manufacturers with which they compete. Purchaser *** stated that while it sometimes competes with its suppliers, the competing products from suppliers are not always the same.

⁸ For example, see hearing transcript, pp. 56 (Merwin) and 60 (Glassman), and joint respondents’ prehearing brief, p. 19.

⁹ Petitioners’ posthearing brief, exhibit I-8.

¹⁰ Petitioners’ posthearing brief, exhibit I-45-46.

¹¹ Joint respondents’ posthearing brief, annex VI, pp. 2-3.

Since many purchasers were retailers, they reported their customers mostly as end user residential consumers, although a few purchasers also reported customers such as hotels, other institutions, or recreational vehicle manufacturers. Distributor purchasers generally supplied retailers.

Reported purchases and imports by all purchasers covered mattresses from the United States and all subject countries, and totaled 14.3 million mattresses in 2019. Responding purchasers reported purchasing and/or importing an estimated 8.5 million MiBs and 2.2 million FPMs (from all sources) in 2019.¹² Six purchasers reported only importing and/or purchasing MiBs, 2 reported only importing and/or purchasing FPMs, and 11 reported importing and/or purchasing both MiBs and FPMs.

Marketing of mattresses

Changes in product range, mix, or marketing

As shown in table II-1, a majority of firms reported that there have not been significant changes with respect to the product range, product mix, or marketing of most mattresses since January 1, 2017. (Some of the MiB-related changes discussed above began before January 1, 2017.) However, some firms cited changes (including a majority of U.S. producers and purchasers when describing MiBs), such as a continued increase of direct-to-consumer sales, increased advertising of MiBs, increased consumer acceptance of MiBs sold over the internet, lower prices on imported mattresses, increased digital sales and marketing, and an increased variety of brands. For example, importer *** described an increase in the number of brands because entry into the mattress business no longer requires showrooms and national warehouses, but instead simply websites for online sales.

Firms that reported changes with regard to branding and private label programs indicated that the use of these programs had increased. Importers *** indicated that some large retailers had increased use of private labels to prevent online cross-shopping of brands they sell. U.S. producer *** stated that, while its internet sales of MiBs had increased, they were still a small share of its overall sales. It added that internet sales of FPMs were also increasing.

Among firms reporting significant changes to the allocation of floor slots at brick and mortar retail establishments, some reported increases, while others reported decreases, to such allocations. For example, importer *** described fewer slots at lower price points

¹² Not all purchasers were able to respond to this question.

(perhaps due to online competition) even though there had been an increase in slots at higher price points. Importer *** described Target as putting some of Target’s online brands on the floor of its brick-and-mortar stores as well, to make those brands omni-channel. However, other firms also described online competition as reducing floor slots at brick-and-mortar retailers.

Table II-1
Mattresses: Firms’ responses regarding significant changes to product range, product mix, and marketing in different areas since January 2017, by number of responding firms

Item	U.S. producers		U.S. importers		U.S. purchasers	
	Yes	No	Yes	No	Yes	No
MiBs	22	19	19	22	16	4
Other direct-to-consumer internet sales	13	25	14	23	6	13
Branding	9	29	11	26	8	10
Private label programs	10	28	11	24	8	11
Floor slots at brick and mortar retailers	12	26	9	28	7	12
Location in consumer search results on e-commerce sites	13	23	7	28	5	14
Other	2	16	2	16	0	8

Source: Compiled from data submitted in response to Commission questionnaires.

Floor space allocation

U.S. producers, importers, and purchasers were also asked specifically if the allocation of floor space for mattresses had changed since January 1, 2017. As shown in table II-2, a plurality of U.S. producers described floor space for U.S. product as decreasing, while floor space for subject imports increased. However, pluralities of importers described floor space for mattresses from all sources as unchanged.¹³ Pluralities or majorities of purchasers described floor space for U.S. product as unchanged and floor space for subject imports as increasing or unchanged for all country sources but China, for which a majority reported decreasing floor space.

In further comments, U.S. producer *** stated that mattresses from other subject countries had taken floor space previously used for Chinese product, especially in the *** segment. Importer *** stated that overall retail space for mattresses is decreasing. Importers *** stated that they had seen new imports from Taiwan. Purchaser *** stated that it had increased floor space for U.S. product because of an

¹³ Many firms of all types responded “not applicable.”

arrangement with ***. Purchaser *** stated that it had increased floor spots for product from Serbia and decreased such slots for product from the United States, Thailand, and Vietnam due to issues of quality and value. *** described moving slots from Chinese mattresses to nonsubject-country mattresses due to the antidumping duties (discussed more below), as well as increasing purchases of U.S. mattresses due to new partnerships.

U.S. producers, importers, and purchasers were asked to explain the factors that determine the selection of mattresses that are displayed on the floor of brick-and-mortar establishments and their location on the sales floors of such establishments. Importers and purchasers cited numerous factors including quality, sales velocity, lead time, brand recognition, supplier relationships, reviews, vendor support, profit margins/value, ability to get customer attention when displayed on the floor, the ability of supplier to cover different price points, marketing, and warranties. U.S. producers answered similarly, but often were not retailers and did not have as much information. U.S. producer *** stated that if product is not displayed prominently on a showroom floor, it will have lower sales. Importer *** added that low-price-point mattresses account for about 40 percent of retailers' sales volume but 25 percent of sales value, mid-price-point mattresses account for about 35 percent of sales volume and 40 percent of sales value, and high-price point mattresses account for about 25 percent of sales value and 35 percent of sales volume, as well as higher profit margins.

Table II-2
Mattresses: Firms' responses regarding changes in floor space allocation since January 2017, by number of responding firms

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
United States	1	9	13	2
Cambodia	5	3	0	1
China	11	2	0	2
Indonesia	8	3	0	1
Malaysia	9	3	0	1
Serbia	6	3	0	1
Thailand	7	4	0	1
Turkey	7	3	0	1
Vietnam	9	4	0	1
Other sources	2	3	0	1
Overall	1	6	0	1
Importers:				
United States	5	12	1	6
Cambodia	3	5	1	2
China	2	12	7	4
Indonesia	4	6	0	2
Malaysia	2	8	1	3
Serbia	2	6	0	2
Thailand	2	7	2	3
Turkey	2	7	0	2
Vietnam	2	11	1	4
Other sources	3	7	0	2
Overall	3	13	2	2
Purchasers:				
United States	5	6	2	1
Cambodia	0	2	1	0
China	0	3	5	0
Indonesia	1	0	0	0
Malaysia	0	1	0	0
Serbia	2	0	0	0
Thailand	1	1	1	0
Turkey	1	0	0	0
Vietnam	1	3	1	0
Other sources	1	1	0	0
Overall	3	4	1	0

Note: Producers and importers were asked about overall floor space for mattresses generally. Purchasers were asked about floor space allocations specifically for their firm.

Source: Compiled from data submitted in response to Commission questionnaires.

E-commerce placement

As shown in table II-3, U.S. producers and importers had mixed responses when asked to describe changes in e-commerce placement for mattresses from various country sources. Pluralities of U.S. producers indicated that mattresses from most subject countries had increased, but U.S. producers were also split on whether e-commerce placement of U.S. product had increased or decreased. Four U.S. producers added that subject imports had increased e-commerce placement at the expense of U.S. product. Pluralities of U.S. importers indicated that e-commerce placement of U.S. and Indonesian product had increased, but that such placement for most subject countries was unchanged. A plurality of U.S. purchasers described online placement of U.S.-produced mattresses had increased, but otherwise pluralities of U.S. purchasers (that did not answer “not applicable”) indicated that there had been no change in online placement for mattresses from most subject sources.

U.S. producers, importers, and purchasers were also asked to explain the factors that determine the rankings of mattresses yielded by consumer search results on the website of e-commerce retailers. U.S. producer *** stated that internet retailers’ websites often rank products according to price, putting U.S. product lower on the list (as higher priced), and thus hurting sales of U.S. product. Importers and purchasers described numerous factors, often similar to those described for brick-and-mortar retail, including customer reviews, web traffic, sales velocity, price, profit margin, quality, delivery speed, visual appeal of product, marketing, and in-stock status. *** described the importance of customer ranking, as well as having readily available photos and online materials, as uniquely important to e-commerce. *** stated that while it does sell online, customers that want to cross-shop mattresses prefer to try out the product in a showroom. U.S. producers described similar factors to those described by most importers and purchasers, but often were not e-commerce retailers and did not have as much information.

Table II-3

Mattresses: Firms' responses regarding changes in e-commerce placement since January 2017, by number of responding firms

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
United States	9	2	6	2
Cambodia	4	3	0	0
China	9	0	0	0
Indonesia	5	2	0	0
Malaysia	7	2	0	0
Serbia	5	2	0	0
Thailand	3	3	0	0
Turkey	5	3	0	0
Vietnam	8	2	0	0
Other sources	0	2	0	0
Overall	4	2	0	0
Importers:				
United States	10	9	0	6
Cambodia	2	4	0	4
China	2	11	7	5
Indonesia	5	3	0	4
Malaysia	4	7	1	4
Serbia	2	3	0	4
Thailand	3	6	1	4
Turkey	2	4	0	3
Vietnam	4	9	2	5
Other sources	4	6	0	2
Overall	5	10	1	5
Purchasers:				
United States	7	6	1	3
Cambodia	1	4	1	1
China	0	5	4	2
Indonesia	1	2	0	1
Malaysia	0	3	0	1
Serbia	2	2	0	1
Thailand	1	3	1	1
Turkey	1	3	0	1
Vietnam	1	4	1	1
Other sources	3	3	0	1
Overall	2	6	1	1

Note: Producers and importers were asked about overall changes in e-commerce placement for mattresses generally. Purchasers were asked about changes in e-commerce placement specifically for their firm.

Source: Compiled from data submitted in response to Commission questionnaires.

Channels of distribution

U.S. producers and importers sold mainly into the retail channel, as shown in table II-4. Within the retail channel, U.S. producers sold mainly into the brick-and-mortar sub-channel, while most importers sold mainly into the internet/online sub-channel. However, importers of *** product showed larger sales into the brick-and-mortar sub-channel than importers of mattresses from other countries.¹⁴ Data on the channels of distribution by mattress type (MiB versus FPM) is presented in Appendix D.

¹⁴ Importers of mattresses from *** showed a high share of sales to distributors in 2017 and 2018, but overall import volumes were miniscule in these years.

Table II-4
Mattresses: U.S. producers' and importers' U.S. shipments, by sources and channels of distribution, January 2017-September 2020

Item	Period				
	Calendar year			January-September	
	2017	2018	2019	2019	2020
Share of reported shipments (percent)					
U.S. producers' U.S. shipments of mattresses:					
Retail:					
Brick and mortar	77.8	74.0	69.4	69.8	67.9
Internet/online	3.7	4.3	6.4	5.8	9.1
Omni-channel	6.9	6.8	7.1	7.5	6.2
Subtotal, retail	88.3	85.1	82.9	83.0	83.2
Distributors	2.6	2.9	4.6	4.5	4.7
End users	9.1	12.0	12.5	12.4	12.2
U.S. importers' U.S. shipments of mattresses from Cambodia:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from China:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from Indonesia:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***

Table continued on next page.

Table II-4--Continued

Mattresses: U.S. producers' and importers' U.S. shipments, by sources and channels of distribution, January 2017-September 2020

Item	Period				
	Calendar year			January-September	
	2017	2018	2019	2019	2020
Share of reported shipments (percent)					
U.S. importers' U.S. shipments of mattresses from Malaysia:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from Serbia:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from Thailand:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from Turkey:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***

Table continued on next page.

Table II-4--Continued

Mattresses: U.S. producers' and importers' U.S. shipments, by sources and channels of distribution, January 2017-September 2020

Item	Period				
	Calendar year			January-September	
	2017	2018	2019	2019	2020
Share of reported shipments (percent)					
U.S. importers' U.S. shipments of mattresses from Vietnam:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from all subject countries:					
Retail:					
Brick and mortar	15.1	20.0	16.8	17.1	14.8
Internet/online	73.1	65.1	68.0	66.9	69.6
Omni-channel	9.9	13.6	13.7	14.3	14.2
Subtotal, retail	98.1	98.7	98.5	98.3	98.7
Distributors	***	***	***	***	***
End users	***	***	***	***	***
U.S. importers' U.S. shipments of mattresses from nonsubject countries:					
Retail:					
Brick and mortar	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
Subtotal, retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Geographic distribution

U.S. producers and importers (from all subject sources) reported selling mattresses to all regions in the United States (table II-5). For U.S. producers, 31 percent of sales were within 100 miles of their production facility, 62 percent were between 101 and 1,000 miles, and 7 percent were over 1,000 miles. Importers sold 16 percent within 100 miles of their U.S. point of shipment, 69 percent between 101 and 1,000 miles, and 15 percent over 1,000 miles.

Table II-5
Mattresses: Geographic market areas in the United States served by U.S. producers and importers since January 1, 2017

Region	U.S. producers	Cambodia	China	Indonesia	Malaysia
Northeast	32	5	27	5	10
Midwest	38	5	26	5	10
Southeast	34	5	30	6	10
Central					
Southwest	31	5	28	5	10
Mountain	31	5	28	5	10
Pacific Coast	26	5	25	6	9
Other	17	6	18	5	7
All regions (except Other)	24	5	23	5	9
Reporting firms	49	6	33	6	10
Region	Serbia	Thailand	Turkey	Vietnam	Subject
Northeast	3	10	3	17	31
Midwest	3	12	3	16	31
Southeast	3	12	3	21	38
Central					
Southwest	3	11	3	21	36
Mountain	3	12	3	19	33
Pacific Coast	3	10	3	15	29
Other	2	8	2	12	22
All regions (except Other)	3	9	3	14	27
Reporting firms	3	12	3	24	42

Note: "Other" U.S. markets includes AK, HI, PR, and VI.

Note: "Subject" means at least one subject country.

Source: Compiled from data submitted in response to Commission questionnaires.

Supply and demand considerations

U.S. supply

Table II-6 provides a summary of the supply factors regarding mattresses from U.S. producers and from subject countries. While some of the subject countries' industries showed moderately high or high capacity utilization, many showed large and rapid increases in capacity over 2017 to 2019, as discussed further below.

Table II-6
Mattresses: Supply factors that affect the ability to increase shipments to the U.S. market

Country	Capacity (number of mattresses)		Capacity utilization (percent)		Ratio of inventories to total shipments (percent)		Shipments by market, 2019 (percent)		Able to shift from alternate products
	2017	2019	2017	2019	2017	2019	Home market shipments	Exports to non-U.S. markets	No. of firms reporting "yes"
United States	***	***	***	***	***	***	***	***	***
Cambodia	***	***	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***	***	***
Indonesia	***	***	***	***	***	***	***	***	***
Malaysia	***	***	***	***	***	***	***	***	***
Serbia	***	***	***	***	***	***	***	***	***
Thailand	***	***	***	***	***	***	***	***	***
Turkey	***	***	***	***	***	***	***	***	***
Vietnam	***	***	***	***	***	***	***	***	***

Note: Responding U.S. producers accounted for the vast majority of U.S. production of mattresses in 2019. Data for Cambodia, Serbia, and Thailand come from the preliminary phase questionnaires. Responding foreign producer/exporter firms accounted for a small share of U.S. imports of mattresses from Cambodia, about one-third of imports from China, most or all imports from Indonesia, about half of imports from Malaysia, most or all imports from Serbia, most imports from Thailand, most or all imports from Turkey, and most or all imports from Vietnam during 2019. For additional data on the number of responding firms and their share of U.S. production and of U.S. imports from each subject country, please refer to Part I, "Summary data and data sources."

Source: Compiled from data submitted in response to Commission questionnaires.

Domestic production

Based on available information, U.S. producers of mattresses have the ability to respond to changes in demand with moderate-to-large changes in the quantity of shipments of U.S.-produced mattresses to the U.S. market. The main contributing factor to this degree of responsiveness of supply is the availability of unused capacity, restrained by low inventories and little ability to shift shipments from alternate markets. There is some reported ability to shift production to or from alternate products. However, some purchasers also indicated an

inability to obtain specific products or large quantities from U.S. producers (as discussed in “Substitutability” below).

In their prehearing brief, joint respondents argued that because some raw materials were in short supply and because production of FPMs cannot be converted easily into production of MiBs, the U.S. industry would have a more constrained response to changes in price.¹⁵ Additionally, at the hearing, Ashley described several examples of new investment in or expansion of U.S. production facilities for MiBs, including by Zinus (an importer in these investigations).¹⁶

Subject imports from Cambodia

Based on available information, producers of mattresses in Cambodia have the ability to respond to changes in demand with large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the demonstrated ability of Cambodian suppliers to increase supply to the United States from 2018 to 2019, in the absence of additional information on the majority of mattresses supplied from Cambodia.

Subject imports from China

Based on available information, producers of mattresses in China have the ability to respond to changes in demand with large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factor to this degree of responsiveness of supply is the demonstrated ability of Chinese suppliers to supply substantially more mattresses in 2018 than they did in 2019 (when antidumping duties began). Additionally, data from responding Chinese foreign producers indicate that there is unutilized capacity available for production.

Subject imports from Indonesia

Based on available information, producers of mattresses in Indonesia have the ability to respond to changes in demand with moderate-to-large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factor to this degree of responsiveness of supply is the demonstrated ability of Indonesian producers to increase capacity and production quickly from 2018 to 2019. However, this ability is constrained by the lack of exports to non-U.S. markets, an inability to shift production from alternate products, and the lack of

¹⁵ Joint respondents’ prehearing brief, pp. 32-36.

¹⁶ Hearing transcript, pp. 147-9 (Adams).

inventories, although Indonesian producers did indicate they had some spare production capacity.

Subject imports from Malaysia

Based on available information, producers of mattresses in Malaysia have the ability to respond to changes in demand with moderate-to-large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the demonstrated ability of Malaysian producers to increase capacity quickly from 2018 to 2019. However, this ability might be constrained somewhat by the lack of exports to non-U.S. markets, an inability to shift production from alternate products, and the lack of inventories. There is some unused capacity.

Subject imports from Serbia

Based on available information, producers of mattresses in Serbia have the ability to respond to changes in demand with large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the demonstrated ability of Serbian producers to increase capacity quickly in every year from 2017 to 2019, as well as the availability of unused capacity in the Serbian industry, the ability to shift production from alternate products, and the existence of some exports to non-U.S. markets.

Subject imports from Thailand

Based on available information, producers of mattresses in Thailand have the ability to respond to changes in demand with large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factors to this degree of responsiveness of supply is the demonstrated ability of Thai producers to increase production each year from 2017 to 2019. However, this ability is constrained by the lack of exports to non-U.S. markets, an inability to shift production from alternate products, and the lack of inventories, although Thai producers did indicate they had some spare production capacity.

Subject imports from Turkey

Based on available information, producers of mattresses from Turkey have the ability to respond to changes in demand with moderate-to-large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the availability of unused capacity, the existence of some inventories, and the

high level of exports to other countries. However, this ability may be constrained somewhat by an inability to shift production from alternate products.

Subject imports from Vietnam

Based on available information, producers of mattresses in Vietnam have the ability to respond to changes in demand with large changes in the quantity of shipments of mattresses to the U.S. market. The main contributing factors to this degree of responsiveness of supply is the demonstrated ability of Vietnamese producers to increase capacity every year from 2017 to 2019. However, this ability is constrained by the lack of exports to non-U.S. markets, restrained ability to shift production from alternate products, the high level of capacity utilization, and the lack of inventories.

Imports from nonsubject sources

Nonsubject imports declined in quantity and as a share of the U.S. market over 2017-19, declined again from the first three quarters of 2019 to the first three quarters of 2020, and never accounted for more than *** percent of the U.S. market. The largest source of nonsubject imports during 2017-19 was Mexico.

Supply constraints

Most mattress suppliers (29 U.S. producers and 32 importers) indicated that they had not refused, declined, or been unable to supply mattresses since January 1, 2017. Seventeen U.S. producers indicated that they had experienced such supply constraints, usually citing a scarcity of raw materials due to the COVID-19 outbreak, which has diverted some raw materials into production of masks and medical equipment. Twelve importers also described experiencing supply constraints, attributing such constraints to global supply chain disruptions due to the COVID-19 outbreak, and also to the various tariffs or other requirements (section 301 tariffs, antidumping duties on China, and these investigations) imposed on imported mattresses.

Among purchasers, eleven stated that the availability of U.S.-produced product in the U.S. market had not changed since January 1, 2017, but eleven stated that it had. Those describing changes usually described U.S. production not being able to meet demand, either because demand had grown or because the COVID-19 outbreak had limited the supply of raw

materials used to produce mattresses.¹⁷ Eleven purchasers stated that the availability of subject imports had changed, citing various changes. Four described imports from China rising until the antidumping duties went into effect, and then falling as imports from other subject countries rose. One described subject import volumes as not being sufficient to meet demand, while two described subject imports as rising due to increased demand, especially for MiBs. Eight importers stated that there had been no changes in the availability of subject imports. Regarding nonsubject imports, nine importers stated that the availability of such imports had not changed, while five stated that it had, usually citing increased demand.

Fourteen purchasers stated that none of their suppliers had refused, declined, or been unable to supply mattresses since January 1, 2017. However, eight indicated some suppliers had done so. Two of these purchasers stated that U.S. producers had been unable to supply mattresses. The others did not specifically name a source that was unable to supply mattresses, but listed causes such as raw material supply disruptions, hurricanes causing supply disruptions, and the COVID-19 outbreak causing supply and/or raw material disruptions.

Impact of Section 301 investigation and tariffs

Firms were asked if the announcement in March 2018 and subsequent imposition of tariffs on mattresses imported from China pursuant to the section 301 investigation concerning China had affected their firm's mattress business and/or the U.S. mattress market as a whole. As shown in table II-7, many firms indicated that the supply of Chinese mattresses had decreased and the supply of mattresses imported from other countries had increased.

Among U.S. producers, a majority or plurality indicated that the section 301 tariffs caused a decrease in the U.S. supply of Chinese mattresses, an increase in the U.S. supply of other imported mattresses, and no change to the U.S. supply of mattresses from domestic producers, the price of mattresses, demand for mattresses, or the raw material costs for producing mattress. In additional comments, U.S. producer *** described prices of Chinese mattresses rising only slightly, and *** stated that mattress supply from other countries quickly replaced Chinese supply, at even lower prices. However, *** stated that U.S. supply did not increase because U.S. producers had no spare capacity. U.S. purchaser *** stated that it shifted purchases away from China after the section 301 tariffs, but that ***.

¹⁷ Ten purchasers described decreased availability of U.S.-produced product. *** described COVID-19 as disrupting supply but also stated that more MiB brands were available.

Pluralities or majorities of importers also indicated that the section 301 tariffs had caused a decrease in the U.S. supply of Chinese mattresses, an increase in the U.S. supply of other imported mattresses, and no change to demand for mattresses. However, majorities or pluralities of importers indicated that the section 301 tariffs had caused an increase in the supply of U.S.-produced mattresses, the price of mattresses, and the cost of raw materials used to make mattresses.

Pluralities or majorities of purchasers indicated that the section 301 tariffs had had no change on the supply of U.S.-produced mattresses, had decreased the supply of mattresses from China, had increased the supply of mattresses from other countries, had increased or left unchanged the price of mattresses, left demand unchanged, and increased the prices of raw materials.

Table II-7
Mattresses: Firms' responses regarding impact in the U.S. market of the announcement and subsequent imposition of tariffs on mattresses imported from China pursuant to the section 301 investigation concerning China, by number of responding firms

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
Impact on supply of U.S.-produced mattresses	4	7	2	5
Impact on supply of mattresses imported from China	1	3	11	3
Impact on supply of mattresses imported from other countries	8	6	1	4
Impact on prices	2	7	1	7
Impact on overall U.S. demand	4	8	0	6
Impact on raw material costs	8	8	0	2
Importers				
Impact on supply of U.S.-produced mattresses	11	7	1	6
Impact on supply of mattresses imported from China	0	1	25	2
Impact on supply of mattresses imported from other countries	21	1	0	3
Impact on prices	19	5	1	2
Impact on overall U.S. demand	7	9	3	8
Impact on raw material costs	15	6	0	5
Purchasers:				
Impact on supply of U.S.-produced mattresses	1	9	0	1
Impact on supply of mattresses imported from China	0	2	9	0
Impact on supply of mattresses imported from other countries	8	3	0	0
Impact on prices	6	6	0	0
Impact on overall U.S. demand	3	6	2	0
Impact on raw material costs	6	5	0	0

Source: Compiled from data submitted in response to Commission questionnaires.

Impact of the antidumping duties on China

U.S. producers, importers, and purchasers were asked to describe the impact that the antidumping duty order imposed on mattresses from China has had on the U.S. market for mattresses since December 16, 2019 (the effective date of the order). Responding U.S. producers, importers, and purchasers often described Chinese mattresses being replaced by mattresses from other subject countries, sometimes after a brief period of higher prices and greater demand for U.S. mattresses. U.S. producer *** stated that it is difficult to distinguish the effect of the antidumping duties from the impact of the COVID-19 outbreak. Importer *** described purchasers as even more cost-conscious now than in 2019, because of the COVID-19 outbreak. Importer *** stated that U.S. producers' participation in the e-commerce channel has not changed much since the duties went into effect. Several purchasers described demand increasing relative to supply due to the effects of the antidumping duties, although some added that the effect was mitigated by imports from other subject countries.

Private label supply

Twenty-six U.S. producers and 13 importers indicated that they produce or import private label mattresses, i.e. mattresses sold to a purchaser for sale at retail under the purchaser's own brand name. Those U.S. producers estimated that they produced 3.4 million private label mattresses in the United States in 2019, and those importers estimated that they imported 2.4 million private label mattresses in 2019.¹⁸ Additionally, nine purchasers indicated that they purchased mattresses through a private label program, and estimated that they ordered 1.1 million mattresses through such a program in 2019. Twenty U.S. producers and 30 importers stated that they did not produce private label mattresses, and 13 purchasers indicated that they did not purchase mattresses through a private label program.

No U.S. producers or importers stated that they had refused to sell, or limited its sale of, private label mattresses to any wholesale purchaser because the purchaser sells its private label mattresses to the same retailers. Twenty purchasers stated that no U.S. producer or importer had refused to supply or limited the supply of private label mattresses. However, two did. *** stated that its current sourcing from U.S. producers is ***

¹⁸ U.S. producers and importers were asked to estimate the number of private label mattresses that they produced and sold, or imported and sold, in 2019. Some firms reported shares of their production or imports. Staff applied this share to those firms' 2019 commercial shipments (of subject imports, for importers) to calculate the total.

***. *** stated that domestic producers, ***, had refused to sell or quote mattresses, sometimes because ***. However, it added that domestic producer *** had continued to supply mattresses ***.

New suppliers

Fifteen purchasers indicated that no new suppliers entered the U.S. market since January 1, 2017. However, seven did, naming numerous new suppliers, including U.S.-produced mattresses, imports from subject countries, and imports from nonsubject countries.

U.S. demand

Based on available information, the overall demand for mattresses is likely to experience small changes in response to changes in price. The main contributing factor is the lack of widely used substitute products.

End uses and cost share

Mattresses are used for support during sleep and are also sometimes sold as parts of a bed or adjustable bed, or with a frame. End users of mattresses include retail consumers and, to a lesser extent, institutional (e.g., hotels, hospitals, etc.) customers. While mattresses make up a moderate-to-large share of the cost of a mattress and foundation set, they typically make up a small-to-moderate share of the cost of end-use products that incorporate mattresses.¹⁹

Business cycles

In the preliminary phase, U.S. producer *** described the traditional consumer cycle for purchasing a mattress as 10 years but stated that the introduction of online mattress sales may have shortened that cycle.

Firms were split over whether the mattress market was subject to distinctive business cycles or conditions of competition. Twenty-five U.S. producers, 18 importers, and 8 purchasers indicated that the market was subject to business cycles and/or distinctive conditions of competition. However, 22 U.S. producers, 26 importers, and 14 purchasers indicated that the market was not subject to such conditions. Most firms describing distinctive conditions of competition or business cycles described the U.S. mattress market as slowing in the winter, and then showing increases in demand during tax refund season, during holidays (when retailers

¹⁹ See also China final publication, p. II-13.

offer discounts), and/or during the back-to-school period. *** described sales during promotional periods as often two to three times what sales are at other times. A smaller number of firms also described consumer purchasing patterns as tied to home buying. U.S. producer *** and importer *** described demand for youth beds as based on birthrates, and *** described such demand as slowing because of “the Millennial generation having less children than any other generation.” One U.S. producer and two importers indicated that the COVID-19 outbreak had slowed sales.

Sixteen of 25 responding U.S. producers, 15 of 20 responding U.S. importers, and 6 of 12 responding purchasers stated that there had been changes to the conditions of competition in the U.S. mattress market since January 1, 2017. Firms indicating changes most often cited the increase in online sales of MiBs. Other firms described a wide variety of changes, including impacts from the COVID outbreak (described as both positive and negative for demand), the stimulus checks to consumers (described as increasing demand), the presence of low-priced imports (for some U.S. producers), and (for some importers) the various tariffs on mattresses constraining supply.

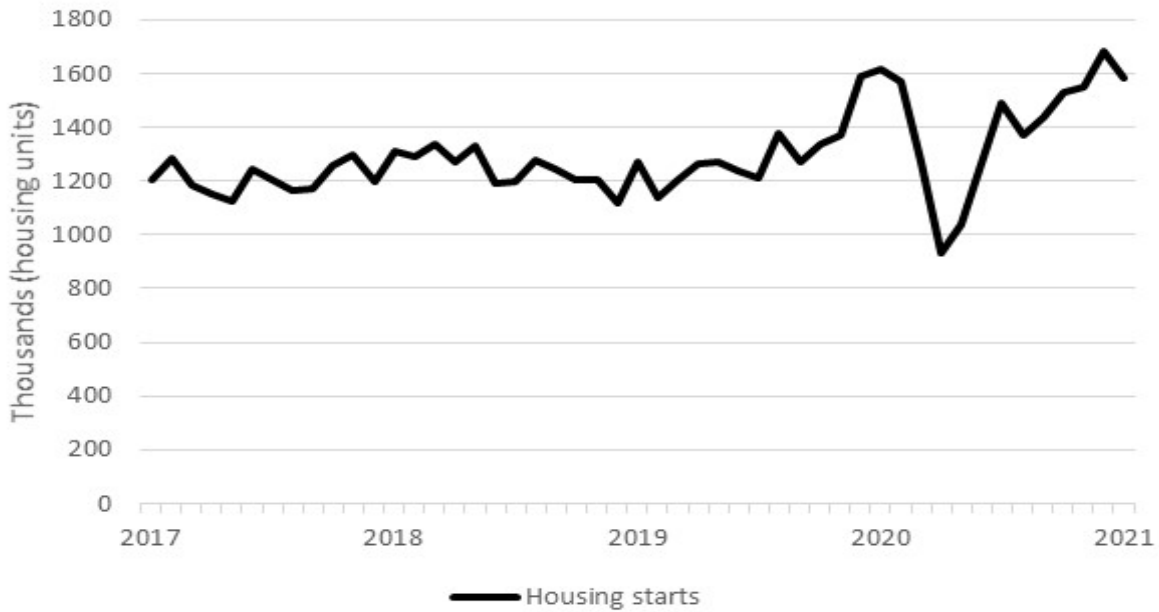
Demand trends

Demand for mattresses is correlated with housing activity (exemplified by housing starts), interest rates, GDP, and consumer sentiment.²⁰ During 2017-19, these factors generally indicated increased demand. The recent COVID-19 outbreak and related lockdowns in early 2020 caused a sharp downturn in these demand indicators. Since then, these indicators have shown modest (consumer sentiment) to strong (housing starts) recovery, as discussed below.

Overall, housing starts increased 31.0 percent between January 2017 and January 2021 (figure II-1), although most of the increase began in December 2019. Initially, housing starts plunged when the lockdowns began in March 2020, but they quickly recovered and then rose to their highest levels of the period in December 2020.

²⁰ China final publication, p. II-15. See also U.S. producers’ questionnaires of ***.

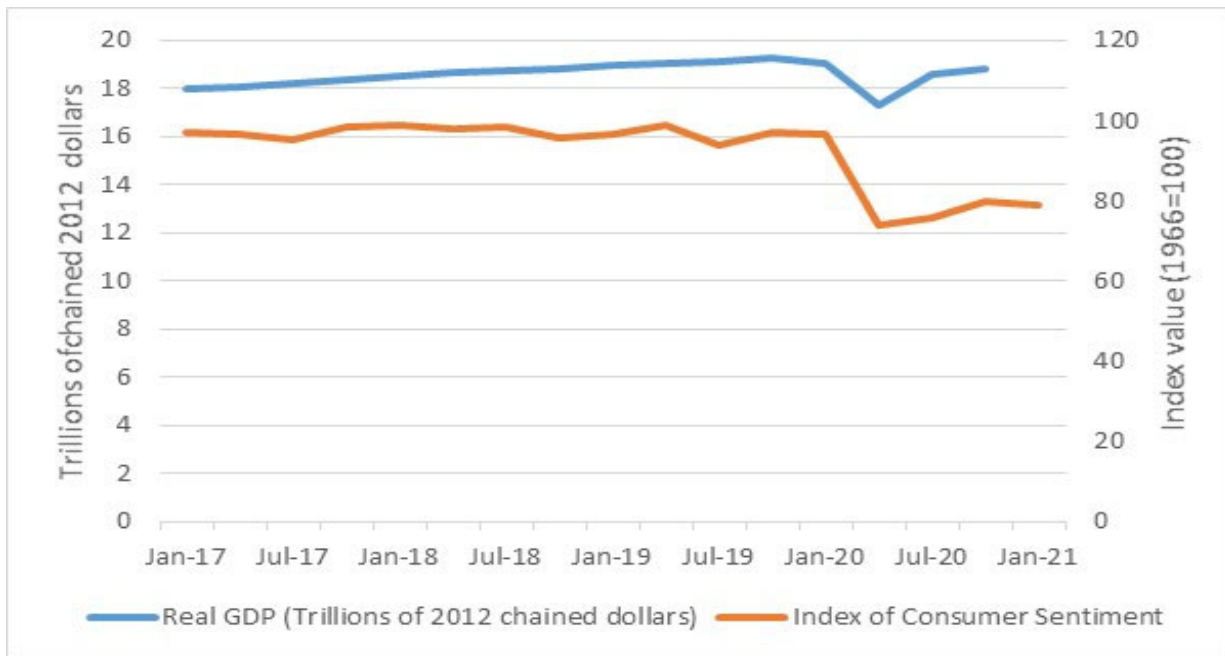
Figure II-1
Housing activity: Housing starts (seasonally adjusted annual rate), monthly, January 2017- January 2021



Sources: Census Bureau, Federal Reserve Bank of St. Louis (FRED economic data), retrieved March 16, 2021.

Consumer sentiment and real GDP both increased during January (or first quarter) 2017 through February (or first quarter) 2020 (figure II-2). After the onset of lockdowns in early 2020, both recovered somewhat, although consumer sentiment (up 10.0 percent from April 2020 to December 2020) remained almost 20 percent lower in January 2021 than in January 2017. Real GDP was 4.5 percent higher in the fourth quarter of 2020 than in the first quarter of 2017, although it was also up 8.6 percent from its level in the second quarter of 2020.

Figure II-2
GDP and consumer sentiment: Current GDP (seasonally adjusted), and index of consumer sentiment (3 month average), quarterly, January 2017-January 2021



Sources: Bureau of Economic Analysis (GDP through 4th quarter 2020), and University of Michigan consumer surveys (through January 2021), via Federal Reserve Bank of St. Louis (FRED economic data), retrieved March 16, 2021.

The 30-year fixed average mortgage rate fluctuated and then rose during January 2017-November 2018, nearly reaching 5.0 percent in November 2018. After that, it decreased through January 2021, hitting period lows in December 2020 and January 2021 (figure II-3). There has been a slight increase since then. All else equal, a lower rate would lower the cost of buying a home, as well as the cost of financing a mattress purchase directly, and thus may be correlated with higher mattress demand.

Figure II-3
Interest rates: 30-year fixed rate mortgage average in the United States, weekly, January 5, 2017-
March 11, 2021



Source: Federal Reserve Bank of St. Louis (FRED economic data), retrieved March 16, 2021.

A plurality or majority of U.S. producers, importers, and purchasers reported an increase in U.S. demand for most types of mattresses since January 1, 2017 (table II-8a), although a plurality of U.S. producers reported a decrease in demand for innerspring mattresses and no change in demand for FPMs. Similarly, a plurality of importers reported a decrease in demand for FPMs. A majority of purchasers reported a decrease in demand for innerspring mattresses and an increase in most other types of mattresses (except FPMs).²¹

²¹ In the preliminary phase of these investigations, U.S. producer and importer ***, ***, described the mattress market as divided into three broad segments based on consumer age: consumers aged 20-29, who prioritize price and favor online purchases of MiBs; consumers aged 30-59, who prioritize design and quality; and consumers over 59, who prioritize luxury products. It added that as the larger Baby Boom cohort of older consumers is replaced by the smaller Generation X cohort, demand for traditional mattresses is no longer sustaining higher prices. It continued that the large generations younger than Generation X prefer online sales of MiBs to traditional mattresses.

Table II-8a
Mattresses: Firms' responses regarding current demand for mattresses in the United States

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
Innerspring	8	9	15	6
Non-innerspring	23	6	7	5
Hybrid	27	5	2	4
Rolled and compressed MiBs	26	4	3	4
Flat-packed non-MiBs	9	12	9	4
Other	---	3	---	2
Importers:				
Innerspring	15	5	9	4
Non-innerspring	20	5	2	6
Hybrid	24	4	1	4
Rolled and compressed MiBs	27	3	1	3
Flat-packed non-MiBs	9	6	10	1
Other	---	1	---	2
Purchasers:				
Innerspring	4	3	9	1
Non-innerspring	9	5	1	2
Hybrid	12	5	---	---
Rolled and compressed MiBs	15	1	1	1
Flat-packed non-MiBs	3	5	6	1
Other	---	1	---	1

Source: Compiled from data submitted in response to Commission questionnaires.

Describing demand changes for multiple types of mattresses, numerous U.S. producers, importers, and purchasers cited the COVID-19 outbreak as having increased demand as consumers, spending more time at home, have spent more money on home furnishings (like mattresses).²² Similarly, some firms cited stimulus checks as having increased demand. On the other hand, some firms (especially among purchasers) described the outbreak as having hurt demand, with some importers providing the example of reduced demand at hotels and colleges.²³ Still other firms described mattress demand as generally increasing over a long period of time, including because of an increased popular interest in improving sleep quality. U.S. producer Kolcraft, a crib mattress producer, described COVID-19 as having increased demand for its online sales, and added that it was not clear whether the pandemic would lead to a baby boom or baby bust.²⁴

²² Nonetheless, two importers also indicated that this increase in demand was temporary and has since ended.

²³ One purchaser (***) stated that it had not noticed a change in demand for mattresses due to COVID-19.

²⁴ Hearing transcript, pp. 51-52 (Koltun).

Regarding demand for innerspring mattresses compared to demand for non-innerspring, hybrid, and MiB mattresses, multiple firms (including U.S. producers, importers, and purchasers) described a continuing trend away from innerspring mattresses and toward these other types, especially those sold online. Some of these firms described the COVID-19 outbreak as having increased the trend of consumers wanting to purchase mattresses online. Others described the increased use of hybrid and MiB mattresses as stemming from the ease with which suppliers can store, package, and ship such mattresses. Some U.S. producers described imported mattresses as gaining market share due to lower prices. Purchaser *** stated that foam mattresses are becoming more popular than innerspring mattresses. On the other hand *** stated that demand for hybrid mattresses is replacing demand for foam mattresses.

Firms generally anticipated an increase or no change in demand for most types of mattresses, as shown in table II-8b. Majorities of U.S. producers and importers anticipated an increase in demand for hybrid and MiB mattresses, but pluralities of U.S. producers anticipated no change in the demand for innerspring mattresses even though a plurality of importers anticipated an increase. Firms stated that their anticipation for a slower increase or decrease in demand would be due to any opening of the economy, which some firms thought might mean a shift in consumer spending away from home furnishings. Other factors firms cited included any additional stimulus spending, the impact of these investigations on the ability of imports to meet demand, and factors cited above as impacting current demand (e.g., increased online sales of MiBs). *** described the lockdowns as closing many brick-and-mortar establishments and forcing sales over the internet. It continued that, as consumers have made such internet purchases, they have become more comfortable with doing so. As *** stated elsewhere that MiBs sold over the internet are already accounting for an increasing share of all mattress sales, it described the lockdown effect as a “catalyst to an already existing trend.” Other purchasers described demand increasing for hybrid and MiB mattresses as part of a longer trend, and purchaser *** also described consumers as becoming more aware of hybrid mattresses.

Table II-8b
Mattresses: Firms' responses regarding anticipated demand for mattresses in the United States

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
Innerspring	6	11	9	11
Non-innerspring	12	14	3	11
Hybrid	21	6	2	8
Rolled and compressed MiBs	24	6	3	4
Flat-packed non-MiBs	8	13	6	6
Other	0	3	1	2
Importers:				
Innerspring	13	9	4	6
Non-innerspring	17	7	3	7
Hybrid	21	5	0	7
Rolled and compressed MiBs	24	5	1	4
Flat-packed non-MiBs	5	9	8	2
Other	0	3	0	2
Purchasers:				
Innerspring	6	4	5	1
Non-innerspring	9	6	0	1
Hybrid	12	4	0	0
Rolled and compressed MiBs	14	1	0	1
Flat-packed non-MiBs	4	6	5	2
Other	0	1	0	0

Source: Compiled from data submitted in response to Commission questionnaires.

Regarding demand outside the United States, responding firms answered similarly as they did for the U.S. market, with majorities of U.S. producers and importers describing demand for hybrid and MiB mattresses as increasing (table II-9a). Pluralities described demand for other types of mattresses either increasing or unchanged. Firms described the same reasons for these demand trends (COVID-19 lockdowns and shifting supplier and/or consumer preference for MiBs over innerspring mattresses) as reasons for the trends. Few purchasers expressed knowledge of overseas demand, but the answers of majorities or pluralities of purchasers were similar to those of U.S. producers.

Table II-9a
Mattresses: Firms' responses regarding current demand for mattresses outside the United States

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
Innerspring	2	8	---	3
Non-innerspring	5	5	---	3
Hybrid	7	3	---	3
Rolled and compressed MiBs	8	3	---	3
Flat-packed non-MiBs	1	8	1	3
Other	---	1	---	2
Importers:				
Innerspring	5	4	---	3
Non-innerspring	4	5	---	4
Hybrid	5	3	---	4
Rolled and compressed MiBs	7	2	---	4
Flat-packed non-MiBs	3	3	3	3
Other	---	---	---	1
Purchasers:				
Innerspring	1	2	2	---
Non-innerspring	1	3	1	---
Hybrid	2	2	1	---
Rolled and compressed MiBs	3	1	1	---
Flat-packed non-MiBs	---	3	1	---
Other	---	1	---	---

Source: Compiled from data submitted in response to Commission questionnaires.

As shown in table II-9b, firms answered broadly similarly for anticipated future demand overseas, with some noting that trends toward hybrid mattresses, online sales, and demand impacts from COVID-19 and related lockdowns were similar to those within the U.S. market.

Table II-9b
Mattresses: Firms' responses regarding anticipated demand for mattresses outside the United States

Item	Increase	No change	Decrease	Fluctuate
U.S. producers:				
Innerspring	1	6	1	2
Non-innerspring	3	6	1	2
Hybrid	6	3	1	2
Rolled and compressed MiBs	6	3	1	2
Flat-packed non-MiBs	0	6	2	2
Other	0	2	0	1
Importers:				
Innerspring	5	3	1	5
Non-innerspring	4	4	1	6
Hybrid	5	3	1	4
Rolled and compressed MiBs	6	3	1	4
Flat-packed non-MiBs	4	3	2	5
Other	0	0	0	3
Purchasers:				
Innerspring	2	3	0	0
Non-innerspring	1	4	0	0
Hybrid	2	3	0	0
Rolled and compressed MiBs	3	2	0	0
Flat-packed non-MiBs	0	3	1	0
Other	0	2	0	0

Source: Compiled from data submitted in response to Commission questionnaires.

Substitute products

Forty-six U.S. producers, 36 importers, and 19 purchasers stated that there were no substitutes for mattresses, but 3 U.S. producers, 9 importers, and 4 purchasers stated that there were. Substitutes listed included futons, air mattresses, and waterbeds, although only one of the U.S. producers or importers (and none of the purchasers) listing substitutes described changes in the price of substitutes as affecting the price of mattresses. Importer *** described lower prices for air mattresses as having put downward price pressure on the prices of other mattresses. All four purchasers listed futons as substitutes for mattresses, but *** added “realistically, adult, non-college customers want a real mattress.”

Substitutability issues

The degree of substitution between domestic and imported mattresses depends upon factors such as relative prices, quality (e.g., grade standards, defect rates, etc.), and conditions of sale (e.g., price discounts/rebates, lead times between order and delivery dates, reliability of supply, product services, etc.). Based on available data, staff believes that there is a moderately high degree of substitutability between domestically produced mattresses and mattresses imported from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam.

U.S. producers generally described substitutability as quite high. Importers and purchasers, while describing U.S. mattresses and subject imports as generally interchangeable and/or comparable, also indicated that factors other than price were often important differences between U.S. product and subject imports. They sometimes described subject imports as higher quality than U.S. product, available in larger quantities than U.S. product, and/or more available in the form of MiBs than U.S. product.

Lead times

U.S. producers mostly sold mattresses produced-to-order, while importers primarily made sales from inventory. U.S. producers shipped 83.7 percent of their 2019 shipments produced-to-order,²⁵ and 16.3 percent from inventory. On the other hand, importers shipped 95.2 percent of their sales from their U.S. inventories and 0.9 percent from foreign inventory, while 3.9 percent of their sales were produced-to-order.²⁶

For U.S. producers' produced-to-order sales, lead times averaged five days. For importers' produced-to-order sales, lead times averaged 61 days. For U.S. producers' sales from inventory, lead times averaged three days, and for importers, lead times for sales from inventory averaged five days. For importers sales from foreign inventories, lead times averaged 59 days.

Knowledge of country sources

Twenty purchasers indicated they had marketing/pricing knowledge of domestic mattresses, 5 of mattresses from Cambodia, 10 of mattresses from China, 4 of mattresses from Indonesia, 4 of mattresses from Malaysia, 3 of mattresses from Serbia, 5 of mattresses from Thailand, 2 of mattresses from Turkey, 6 of mattresses from Vietnam, and 6 of nonsubject countries, including Taiwan and Italy (each named by three purchasers), Canada, India, and Mexico (each named by two purchasers), and various European countries.

Seventeen purchasers stated that they did not specifically order mattresses from one country in particular over other sources of supply, but five stated that they did. *** stated that they preferred to purchase domestic product, but *** added that

²⁵ Petitioners stated that many U.S. producers keep showrooms with display models of mattresses, but produce mattresses only when ordered by a consumer. Petitioners' posthearing brief, exhibit I-9.

²⁶ Petitioners stated that some mattress retailers keep their own inventories, some do not make many sales out of inventories, and some have suppliers keep inventories for them. Petitioners' posthearing brief, p. I-47.

only for small quantities, and *** stated that only some customers have a domestic preference. *** stated it buys from Vietnam due to price. *** stated that they purchase from unnamed countries for reasons of quality and availability, and *** added price was also a factor.

Purchasers were asked if certain grades, types, or sizes of mattresses were only available from a single country source. Eighteen stated that they were not, and three answered that there were such types. *** stated that some capabilities are not available in some countries. *** stated that U.S. producers have limited capacity to turn foam into MiB mattresses. *** was the other purchaser to indicate that there were such types, but did not explain other than to ***.

As shown in table II-10, purchasers had a wide variety of answers about whether they based their purchasing decisions on the mattress producer, but a majority of purchasers stated that they never made decisions based on the country of origin of a mattress. Majorities of purchasers described their customers as sometimes making purchasing decisions based on the producer or country of origin. Purchasers described both themselves and their customers as citing the importance of brand, quality, price, producer reputation, and capability as reasons why decisions might be made based on producer or country of origin. Additionally, some purchasers indicated that some retail customers have a domestic preference.

Table II-10
Mattresses: Purchasing decisions based on producer and country of origin

Purchaser/customer decision	Always	Usually	Sometimes	Never
Purchaser makes decision based on producer	6	4	7	5
Purchaser's customers make decision based on producer	1	2	12	6
Purchaser makes decision based on country	3	1	5	13
Purchaser's customers make decision based on country	---	---	13	8

Source: Compiled from data submitted in response to Commission questionnaires.

Factors affecting purchasing decisions

The most often cited top three factors firms consider in their purchasing decisions for mattresses were quality (18 firms), price (15 firms), and availability (12 firms) as shown in table II-11. In additional comments, some purchasers named numerous other factors, usually those listed in the table. Purchaser *** stated that price becomes a factor only after numerous other factors (including capacity, technical capability, and quality) are met.

Table II-11

Mattresses: Ranking of factors used in purchasing decisions as reported by U.S. purchasers, by factor

Factor	First	Second	Third	Total
Quality	9	6	3	18
Price/Value	3	4	8	15
Availability/Capacity/Scalability	5	5	2	12
Range/Product Line/Features/Assortment	1	2	4	7
Brand/Marketability	2	1	1	4
Reliability	1	1	0	2
Delivery	0	1	1	2
Service	0	0	1	1

Note: Other factors include level of partnership/relationship, competition with supplier, and logistics.

Source: Compiled from data submitted in response to Commission questionnaires.

Purchasers described mattress quality as meaning coil quality, compression percentage, foam density, foam type, look, thickness, raw material specifications, and recovery time from compression.

Sixteen purchasers reported that they only sometimes purchase the lowest-priced product, three stated that they never did, three stated that they usually did, and one stated that it always does.

Importance of specified purchase factors

Purchasers were asked to rate the importance of 26 factors in their purchasing decisions (table II-12). The factors rated as very important by a majority of responding purchasers were availability (overall and of different sizes), delivery time, foam density, packaging (MiB or flat-packed), price, product consistency, quality (meeting and exceeding industry standards), and reliability of supply.

Table II-12
Mattresses: Importance of purchase factors, as reported by U.S. purchasers, by factor

Factor	Very important	Somewhat important	Not important
Ability to ship by common carrier (e.g., UPS, FedEx, USPS)	9	5	7
Availability, overall	18	2	2
Availability of different sizes	14	4	4
Consumer in-home trials	---	3	19
Consumer in-store trials	3	5	13
Consumer online ratings	8	8	5
Delivery terms	9	9	3
Delivery time	16	5	1
Direct-to-consumer delivery	9	4	9
Discounts offered	7	8	7
Foam density	12	5	5
Foam type	11	6	5
Minimum quantity requirements	7	5	10
Online sales	9	6	7
Packaging (i.e., MiBs or flat-packed mattresses)	11	8	3
Payment terms	9	8	5
Price	13	7	1
Product consistency	17	3	2
Product range	11	9	2
Quality meets industry standards	17	3	1
Quality exceeds industry standards	14	6	2
Reliability of supply	19	2	1
Spring quantity	7	7	8
Spring type	7	7	8
Technical support/service	7	8	7
U.S. transportation costs	9	5	8

Source: Compiled from data submitted in response to Commission questionnaires.

Supplier certification

Thirteen purchasers stated that they do not require their suppliers to become certified or qualified to sell mattresses to their firm. Nine did, reporting that the time to qualify a new supplier ranged from 30 to 180 days. Qualification procedures range from checking that mattresses meet government regulations, to testing (including for flammability) and purchasing sample lots, to visiting supplier factories and inspecting their production processes. Twenty purchasers reported that no domestic or foreign supplier had failed in its attempt to qualify mattresses, or had lost its approved status, since January 1, 2017; two did. *** reported certification ***. *** reported suppliers from *** failing due to quality and/or technical issues.

Changes in purchasing patterns

Purchasers were asked about changes in their purchasing patterns from different sources since January 1, 2017 (table II-13). While nearly the same number of purchasers reported increasing as decreasing purchases of U.S.-produced mattresses, a majority of responding purchasers indicated decreasing purchases of Chinese mattresses, and majorities of those purchasers that purchased other subject imports reported increasing such purchases. Reasons reported for changes in sourcing included increased use of subject imports over U.S. product (on the one hand), increased partnerships with U.S. producers (on the other hand), the antidumping and section 301 tariffs on Chinese product, suppliers moving production out of China, the COVID-19 outbreak, and assortment changes.

Table II-13
Mattresses: Changes in purchase patterns from U.S., subject, and nonsubject countries

Source of purchases	Did not purchase	Decreased	Increased	Constant	Fluctuated
United States	---	6	8	5	3
Cambodia	10	2	3	---	1
China	3	14	3	---	---
Indonesia	11	---	4	---	1
Malaysia	11	---	5	---	---
Serbia	10	---	5	---	1
Thailand	8	1	5	1	1
Turkey	11	---	4	---	1
Vietnam	5	1	7	1	1
Other	8	2	8	1	1

Source: Compiled from data submitted in response to Commission questionnaires.

Importance of purchasing domestic product

Almost all purchasers reported that all of their purchases did not require purchasing U.S.-produced product. One purchaser reported that it purchased domestic product as a company decision, and another reported that it purchased domestic product because of customer requirements.

Comparisons of domestic products, subject imports, and nonsubject imports

Purchasers were asked a number of questions comparing mattresses produced in the United States, subject countries, and nonsubject countries. First, purchasers were asked for a country-by-country comparison on the same 26 factors (table II-14) for which they were asked to rate the importance. As shown in the table, majority of purchasers reported that U.S. mattresses were comparable with subject and nonsubject mattresses in most factors.

Table II-14

Mattresses: Purchasers' comparisons between U.S.-produced and imported product

Factor	U.S. vs. Cambodia			U.S. vs. China			U.S. vs. Indonesia		
	S	C	I	S	C	I	S	C	I
Ability to ship by common carrier (e.g., UPS, FedEx, USPS)	1	3	2	1	8	4	---	3	1
Availability, overall	---	4	3	1	10	3	---	5	---
Availability of different sizes	---	7	---	---	13	1	---	5	---
Consumer in-home trials	---	6	1	2	12	---	---	5	---
Consumer in-store trials	---	6	1	1	13	---	---	5	---
Consumer online ratings	---	5	2	---	13	1	---	5	---
Delivery terms	1	5	1	3	10	1	1	4	---
Delivery time	2	4	1	5	6	3	2	3	---
Direct-to-consumer delivery	1	4	2	2	8	4	1	4	---
Discounts offered	---	6	1	---	12	2	---	5	---
Foam density	---	6	1	1	11	2	---	5	---
Foam type	---	6	1	1	11	2	---	5	---
Minimum quantity requirements	1	6	---	2	11	1	---	5	---
Online sales	---	4	3	1	8	4	---	4	1
Packaging (i.e., MiBs or flat-packed mattresses)	---	4	3	---	10	4	---	4	1
Payment terms	2	3	2	3	9	2	1	3	1
Price	1	4	2	1	9	4	1	3	1
Product consistency	---	5	2	2	10	2	---	4	1
Product range	---	6	1	1	12	1	---	5	---
Quality meets industry standards	---	6	1	2	10	2	---	4	---
Quality exceeds industry standards	---	6	1	2	10	2	---	5	---
Reliability of supply	1	3	3	3	8	3	1	3	1
Spring quantity	---	5	2	1	12	1	---	5	---
Spring type	---	5	2	1	12	1	---	5	---
Technical support/service	---	4	3	2	7	5	---	4	1
U.S. transportation costs	1	5	1	4	10	---	1	4	---

Table continued on next page.

Table II-14--Continued

Mattresses: Purchasers' comparisons between U.S.-produced and imported product

Factor	U.S. vs. Malaysia			U.S. vs. Serbia			U.S. vs. Thailand		
	S	C	I	S	C	I	S	C	I
Ability to ship by common carrier (e.g., UPS, FedEx, USPS)	---	4	1	---	4	2	---	4	3
Availability, overall	---	5	---	---	4	2	---	4	3
Availability of different sizes	---	5	---	---	6	---	---	7	---
Consumer in-home trials	---	5	---	---	5	1	---	6	1
Consumer in-store trials	---	5	---	---	5	1	---	6	1
Consumer online ratings	---	5	---	---	5	1	---	5	2
Delivery terms	1	4	---	1	5	---	1	5	1
Delivery time	2	3	---	1	4	1	1	5	1
Direct-to-consumer delivery	2	3	---	1	4	1	1	4	2
Discounts offered	---	5	---	---	6	---	---	6	1
Foam density	---	5	---	---	5	1	---	5	2
Foam type	---	5	---	---	5	1	---	5	2
Minimum quantity requirements	---	5	---	---	6	---	---	7	---
Online sales	---	5	---	---	5	2	---	4	3
Packaging (i.e., MiBs or flat-packed mattresses)	---	4	1	---	4	2	---	4	3
Payment terms	1	4	---	2	4	---	2	5	1
Price	---	4	1	1	4	1	1	4	2
Product consistency	---	4	1	---	5	1	---	5	2
Product range	---	5	---	---	5	1	---	6	1
Quality meets industry standards	---	5	---	---	6	---	---	6	1
Quality exceeds industry standards	---	5	---	---	6	---	---	6	1
Reliability of supply	1	3	1	1	4	1	1	4	2
Spring quantity	---	5	---	---	6	---	---	6	1
Spring type	---	5	---	---	6	---	---	6	1
Technical support/service	---	4	1	---	4	2	---	4	3
U.S. transportation costs	1	4	---	1	4	1	1	5	1

Table continued on next page.

Table II-14--Continued
Mattresses: Purchasers' comparisons between U.S.-produced and imported product

Factor	U.S. vs. Turkey			U.S. vs. Vietnam			U.S. vs. nonsubject		
	S	C	I	S	C	I	S	C	I
Ability to ship by common carrier (e.g., UPS, FedEx, USPS)	---	4	1	---	7	4	---	6	5
Availability, overall	---	4	1	---	8	3	---	8	3
Availability of different sizes	---	5	---	---	11	---	---	11	---
Consumer in-home trials	---	5	---	---	10	1	---	10	1
Consumer in-store trials	---	5	---	---	9	2	---	10	1
Consumer online ratings	---	5	---	---	9	2	---	9	2
Delivery terms	1	4	---	1	8	2	1	8	2
Delivery time	2	3	---	4	5	2	3	6	2
Direct-to-consumer delivery	---	4	1	1	6	4	1	5	5
Discounts offered	---	5	---	---	9	2	---	9	2
Foam density	---	5	---	---	10	1	---	10	1
Foam type	---	5	---	---	10	1	---	10	1
Minimum quantity requirements	---	5	---	---	10	1	---	11	---
Online sales	---	4	1	---	7	4	1	6	4
Packaging (i.e., MiBs or flat-packed mattresses)	---	4	1	---	8	3	---	8	3
Payment terms	1	4	---	2	7	1	2	8	1
Price	---	3	2	1	7	3	1	7	3
Product consistency	---	4	1	---	9	2	---	9	2
Product range	---	5	---	---	10	1	---	9	2
Quality meets industry standards	---	5	---	---	9	2	---	10	1
Quality exceeds industry standards	---	5	---	---	7	3	---	8	2
Reliability of supply	1	3	1	1	6	4	1	7	3
Spring quantity	---	5	---	---	10	1	---	10	1
Spring type	---	5	---	---	10	1	---	10	1
Technical support/service	---	4	1	---	7	4	---	6	4
U.S. transportation costs	1	4	---	1	8	2	2	7	1

Note: A rating of superior means that price/U.S. transportation cost is generally lower. For example, if a firm reported "U.S. superior," it meant that the U.S. product was generally priced lower than the imported product.

Note: S=first listed country's product is superior; C=both countries' products are comparable; I=first list country's product is inferior.

Source: Compiled from data submitted in response to Commission questionnaires.

Comparison of U.S.-produced and imported mattresses

In order to determine whether U.S.-produced mattresses can generally be used in the same applications as imports from subject and nonsubject countries, U.S. producers, importers, and purchasers were asked whether the products can always, frequently, sometimes, or never be used interchangeably. As shown in table II-15, majorities of U.S. producers described U.S. product and imports as always interchangeable, while majorities of importers and purchasers described all comparisons as always or frequently interchangeable.

Table II-15

Mattresses: Interchangeability between mattresses produced in the United States and in other countries, by country pair

Country pair	Number of U.S. producers reporting				Number of U.S. importers reporting				Number of purchasers reporting			
	A	F	S	N	A	F	S	N	A	F	S	N
U.S. vs. subject countries:												
U.S. vs. Cambodia	18	6	1	1	6	3	4	---	4	3	1	---
U.S. vs. China	18	6	1	1	9	10	16	1	6	6	3	1
U.S. vs. Indonesia	18	6	1	1	6	4	4	---	4	2	1	---
U.S. vs. Malaysia	18	6	---	2	6	6	6	---	3	2	1	---
U.S. vs. Serbia	17	6	---	2	6	3	2	---	4	3	---	---
U.S. vs. Thailand	18	6	1	1	7	4	6	---	4	4	1	---
U.S. vs. Turkey	17	6	---	1	6	3	1	---	4	2	---	---
U.S. vs. Vietnam	18	6	1	1	8	10	11	3	4	5	3	1
Subject countries comparisons:												
Cambodia vs. China	15	5	1	1	5	3	4	---	3	3	1	---
Cambodia vs. Indonesia	15	5	1	1	5	3	2	---	3	2	1	---
Cambodia vs. Malaysia	15	5	---	1	5	3	1	---	3	2	---	---
Cambodia vs. Serbia	15	5	---	1	5	3	1	---	3	3	---	1
Cambodia vs. Thailand	15	5	1	1	6	3	4	---	3	3	1	---
Cambodia vs. Turkey	15	5	---	1	5	3	1	---	3	2	---	---
Cambodia vs. Vietnam	15	5	1	1	6	3	4	---	3	3	1	---
China vs. Indonesia	15	5	1	1	5	4	5	---	3	3	1	1
China vs. Malaysia	15	5	---	1	6	4	5	---	3	2	1	---
China vs. Serbia	15	5	---	1	5	3	3	---	3	4	---	---
China vs. Thailand	15	5	1	1	7	4	7	---	3	4	1	---
China vs. Turkey	15	5	---	1	5	3	2	---	3	2	---	---
China vs. Vietnam	15	5	1	1	7	7	10	---	4	4	2	---
Indonesia vs. Malaysia	15	5	---	1	5	4	---	---	3	2	---	---
Indonesia vs. Serbia	15	5	---	1	5	3	3	---	3	2	---	---
Indonesia vs. Thailand	15	5	1	1	6	4	4	---	3	2	1	---
Indonesia vs. Turkey	15	5	---	1	5	3	2	---	3	2	---	---
Indonesia vs. Vietnam	15	5	1	2	6	4	4	---	3	2	1	1
Malaysia vs. Serbia	15	5	---	1	5	3	---	---	3	1	---	---
Malaysia vs. Thailand	15	5	---	1	7	4	2	---	3	2	---	---
Malaysia vs. Turkey	15	5	---	1	5	3	1	---	3	2	---	---
Malaysia vs. Vietnam	15	5	---	1	8	4	3	---	3	2	1	---
Serbia vs. Thailand	15	5	---	1	6	3	---	---	3	3	---	---
Serbia vs. Turkey	15	5	---	1	5	3	1	---	3	2	---	---
Serbia vs. Vietnam	15	5	---	1	6	3	2	---	3	3	---	---
Thailand vs. Turkey	15	5	---	1	5	3	---	---	3	2	---	---
Thailand vs. Vietnam	15	5	1	1	7	3	3	---	3	3	1	---
Turkey vs. Vietnam	15	5	---	1	6	3	---	---	3	2	---	---

Table continued on next page.

Table II-15—Continued.

Mattresses: Interchangeability between mattresses produced in the United States and in other countries, by country pair

Country pair	Number of U.S. producers reporting				Number of U.S. importers reporting				Number of purchasers reporting			
	A	F	S	N	A	F	S	N	A	F	S	N
Nonsubject countries comparisons: U.S. vs. nonsubject	14	6	1	1	7	6	6	---	4	5	2	---
Cambodia vs. nonsubject	12	5	1	1	4	3	5	---	3	3	1	---
China vs. nonsubject	12	5	1	1	5	4	6	---	4	4	2	---
Indonesia vs. nonsubject	12	5	1	1	4	3	4	---	3	2	1	1
Malaysia vs. nonsubject	12	5	---	1	4	3	3	---	3	2	1	---
Serbia vs. nonsubject	12	5	---	1	4	3	2	---	3	3	---	---
Thailand vs. nonsubject	12	5	1	1	4	3	5	---	3	3	1	---
Turkey vs. nonsubject	12	5	---	1	5	2	2	---	3	2	---	---
Vietnam vs. nonsubject	12	5	---	1	4	5	---	---	3	3	---	---

Note: A=Always, F=Frequently, S=Sometimes, N=Never.

Source: Compiled from data submitted in response to Commission questionnaires.

In additional comments, importers *** stated that U.S. and Vietnamese product are never interchangeable because the sizes are different. Importer *** described quality as a differentiating factor between U.S. product and subject imports. Importer *** stated that mattresses are sometimes interchangeable unless specific materials not available from U.S. producers are required. Importer *** stated that U.S.-produced mattresses had quality and warranty issues that product from China and Vietnam did not have. Importer *** stated that the *** mattresses it required were not available from U.S. producers, due to *** and capacity constraints. It continued that product from China and Malaysia did comply with regulations. Importers *** described MiBs as not interchangeable with traditional flat-packed mattresses because of transportation and logistics issues. Importer *** described imported mattresses as sometimes having advantages, such as herbal infusion into foam, over U.S. product. Importer *** stated that the packaging of Chinese and Vietnamese mattresses made them smaller and easier to transport. *** described interchangeability as limited by manufacturer capabilities, the cost of local materials, and the capabilities of labor. Importer *** stated that its long-term partnerships with suppliers make it difficult for it to switch among supply sources. *** stated that consumers do not see imported MiBs as interchangeable with domestic flat-packed mattresses.

As can be seen from table II-16, among purchasers that knew whether mattresses from different sources met minimum quality specifications, a majority stated that U.S. and imported mattresses always or usually did so. When describing other sources, purchasers listed these sources as Bulgaria, Canada, India, Italy, Kosovo, Mexico, Spain, and Taiwan.

Table II-16
Mattresses: Ability to meet minimum quality specifications, by source

Source	Always	Usually	Sometimes	Rarely or never
United States	7	9	3	1
Cambodia	2	2	2	1
China	7	6	1	1
Indonesia	2	2	1	1
Malaysia	1	2	1	1
Serbia	1	3	---	1
Thailand	2	3	---	1
Turkey	1	3	---	1
Vietnam	6	4	1	1
Other sources	5	---	2	1

Note: Purchasers were asked how often domestically produced or imported mattresses meets minimum quality specifications for their own or their customers' uses.

Source: Compiled from data submitted in response to Commission questionnaires.

In addition, U.S. producers, importers, and purchasers were asked to assess how often differences other than price were significant in sales of mattresses from the United States, subject, or nonsubject countries. As seen in table II-17, majorities of U.S. producers indicated that differences other than price were never significant in choosing between U.S. mattresses and imports from each subject country. However, importers and purchasers had varying responses depending on comparison, generally indicating that differences other than price were always, frequently, or sometimes important.

Table II-17

Mattresses: Significance of differences other than price between mattresses produced in the United States and in other countries, by country pair

Country pair	Number of U.S. producers reporting				Number of U.S. importers reporting				Number of purchasers reporting				
	A	F	S	N	A	F	S	N	A	F	S	N	
U.S. vs. subject countries:													
U.S. vs. Cambodia	3	1	8	13	5	2	4	3	3	2	1	2	
U.S. vs. China	3	1	8	13	10	8	12	6	5	5	3	4	
U.S. vs. Indonesia	3	1	8	13	5	4	4	2	3	1	1	2	
U.S. vs. Malaysia	2	1	8	13	5	4	5	4	2	---	2	2	
U.S. vs. Serbia	2	2	6	13	4	2	3	2	2	2	1	2	
U.S. vs. Thailand	2	1	8	13	6	3	6	3	3	2	1	2	
U.S. vs. Turkey	2	1	7	13	4	2	2	2	2	1	1	2	
U.S. vs. Vietnam	3	1	8	13	7	8	11	5	4	2	3	4	
Subject countries comparisons:													
Cambodia vs. China	2	1	3	12	3	2	5	2	3	1	1	2	
Cambodia vs. Indonesia	2	1	3	12	3	2	3	2	3	---	1	2	
Cambodia vs. Malaysia	1	1	3	12	2	2	3	2	2	---	1	2	
Cambodia vs. Serbia	1	1	3	12	2	2	3	2	2	1	1	2	
Cambodia vs. Thailand	1	1	3	12	3	2	5	2	3	1	1	2	
Cambodia vs. Turkey	1	1	3	12	2	2	3	2	2	---	1	2	
Cambodia vs. Vietnam	2	1	3	12	3	2	5	2	3	1	1	2	
China vs. Indonesia	2	1	3	12	4	4	5	2	3	---	1	2	
China vs. Malaysia	1	1	3	12	3	3	8	2	2	---	2	2	
China vs. Serbia	1	1	3	12	3	2	4	2	2	1	1	2	
China vs. Thailand	1	1	3	12	4	2	9	2	3	1	1	2	
China vs. Turkey	1	1	3	12	3	2	3	2	2	---	1	2	
China vs. Vietnam	2	1	3	12	4	3	13	3	3	1	3	3	
Indonesia vs. Malaysia	1	1	3	12	2	3	5	2	2	---	1	2	
Indonesia vs. Serbia	1	1	3	12	2	2	4	2	2	---	1	2	
Indonesia vs. Thailand	1	1	3	12	3	2	5	2	3	---	1	2	
Indonesia vs. Turkey	1	1	3	12	2	2	3	2	2	---	1	2	
Indonesia vs. Vietnam	2	1	3	12	3	2	4	2	3	---	1	2	
Malaysia vs. Serbia	2	---	3	12	2	2	4	2	2	---	1	2	
Malaysia vs. Thailand	1	1	3	12	2	2	6	2	2	---	1	2	
Malaysia vs. Turkey	1	1	3	12	2	2	3	2	2	---	1	2	
Malaysia vs. Vietnam	1	1	3	12	2	2	8	2	2	---	2	2	
Serbia vs. Thailand	1	1	3	12	2	2	4	2	2	1	1	2	
Serbia vs. Turkey	1	1	3	12	2	2	3	2	2	---	1	2	
Serbia vs. Vietnam	1	1	3	12	2	2	4	2	2	1	1	2	
Thailand vs. Turkey	1	1	3	12	2	2	3	2	2	---	1	2	
Thailand vs. Vietnam	2	1	3	12	3	2	7	2	3	1	1	2	
Turkey vs. Vietnam	1	1	3	12	2	2	4	2	2	---	1	2	

Table continued on next page.

Table II-17—Continued.

Mattresses: Significance of differences other than price between mattresses produced in the United States and in other countries, by country pair

Country pair	Number of U.S. producers reporting				Number of U.S. importers reporting				Number of purchasers reporting			
	A	F	S	N	A	F	S	N	A	F	S	N
Nonsubject countries comparisons: U.S. vs. nonsubject	3	1	6	11	5	5	7	2	3	2	3	3
Cambodia vs. nonsubject	2	1	3	10	4	2	4	2	3	1	1	2
China vs. nonsubject	2	1	3	10	4	4	7	2	3	1	2	3
Indonesia vs. nonsubject	2	1	3	10	4	3	2	2	3	---	1	2
Malaysia vs. nonsubject	1	1	3	10	3	3	3	2	2	---	2	2
Serbia vs. nonsubject	1	1	3	10	3	2	2	2	2	1	1	2
Thailand vs. nonsubject	2	1	3	10	4	2	4	2	3	1	1	2
Turkey vs. nonsubject	1	1	3	10	3	2	2	2	3	---	1	2
Vietnam vs. nonsubject	2	1	3	10	4	3	5	2	3	1	2	3

Note: A=Always, F=Frequently, S=Sometimes, N=Never.

Source: Compiled from data submitted in response to Commission questionnaires.

In additional comments, importers and purchasers described non-price factors including quality, features, availability, packaging, product range, payment terms, and delivery options as important factors in comparing mattresses from different sources. Seven importers indicated that subject imports (especially from China and/or Vietnam) were superior to product from the United States, describing imported mattresses as superior to U.S. mattresses in terms of quality, design, packaging, durability, reliability, and/or communication. However, importer *** stated that delivery times from U.S. suppliers were shorter than those from Vietnamese suppliers. Additionally, *** stated that important non-price factors include the ability to produce MiBs to proper specifications, the ability to produce multiple types of MiBs, and the ability to increase production quickly (flexibility) for promotional periods. Purchaser *** stated that U.S. product is superior to that of China in terms of quality, lead times, bulk purchase requirements, transit times, and technical support.

Elasticity estimates

This section discusses elasticity estimates; parties were encouraged to comment on these estimates in their briefs. Their comments are discussed below.

U.S. supply elasticity

The domestic supply elasticity for mattresses measures the sensitivity of the quantity supplied by U.S. producers to changes in the U.S. market price of mattresses. The elasticity of domestic supply depends on several factors including the level of excess capacity, the ease with which producers can alter capacity, producers' ability to shift to production of other products, the existence of inventories, and the availability of alternate markets for U.S.-produced mattresses. Analysis of these factors above indicates that the U.S. industry has some ability to increase or decrease shipments to the U.S. market; an estimate in the range of 2 to 5 is suggested.²⁷

U.S. demand elasticity

The U.S. demand elasticity for mattresses measures the sensitivity of the overall quantity demanded to a change in the U.S. market price of mattresses. This estimate depends on factors discussed above such as the existence, availability, and commercial viability of substitute products, as well as the component share of the mattresses in the production of any downstream products. Based on the available information, the aggregate demand for mattresses is likely to be moderately inelastic; a range of -0.25 to -0.75 is suggested. While there are limited viable substitutes for mattresses, which would indicate a lower level of demand elasticity, the variability of products' life-spans may temper this degree of (in)elasticity.

Substitution elasticity

The elasticity of substitution depends upon the extent of product differentiation between the domestic and imported products.²⁸ Product differentiation, in turn, depends upon such factors as quality (e.g., chemistry, appearance, etc.) and conditions of sale (e.g., availability, sales terms/discounts/promotions, etc.). Based on available information, the elasticity of substitution between U.S.-produced mattresses and imported mattresses is likely

²⁷ This range has been adjusted downward somewhat from the prehearing report to reflect joint respondents' points that the availability of raw materials and the production interchangeability of FPMs and MiBs may somewhat constrain U.S. supply responsiveness. See joint respondents' prehearing brief, pp. 32-36.

²⁸ The substitution elasticity measures the responsiveness of the relative U.S. consumption levels of the subject imports and the domestic like products to changes in their relative prices. This reflects how easily purchasers switch from the U.S. product to the subject products (or vice versa) when prices change.

to be in the range of 3 to 6, depending on issues such as availability of specific products, the importance of any perceived differences in supply chain reliability, and lead times.

Part III: U.S. producers' production, shipments, and employment

The Commission analyzes a number of factors in making injury determinations (see 19 U.S.C. §§ 1677(7)(B) and 1677(7)(C)). Information on the subsidies and dumping margins was presented in *Part I* of this report and information on the volume and pricing of imports of the subject merchandise is presented in *Part IV* and *Part V*. Information on the other factors specified is presented in this section and/or *Part VI* and (except as noted) is based on the questionnaire responses of 53 firms that accounted for the vast majority of U.S. production of mattresses during 2019.

U.S. producers

The Commission issued a U.S. producer questionnaire to almost 300 firms for which valid contact information was obtained based on information contained in the petitions, in the Commission's recent investigation on mattresses from China, and in the preliminary phase of these investigations. Fifty-three firms provided usable and timely data on their operations.¹

¹ A number of the 53 responding U.S. producers provided usable data in the trade section of the questionnaire but did not provide usable data in the financial or pricing sections. The following 10 additional firms submitted unusable and/or untimely responses to the Commission's U.S. producers' questionnaire and thus are not incorporated into the aggregate data presentations in this report, unless otherwise noted: ***. These additional 10 firms together produced *** mattresses in 2019 (equivalent to almost *** percent of reported U.S. mattress production).

Table III-1 lists U.S. producers of mattresses, their production locations, positions on the petitions, and shares of total reported mattress production. *** is the largest U.S. producer of mattresses, accounting for *** percent of total domestic mattress production in 2019, followed by **, accounting for *** percent of the total. Also presented in the table are the shares of total mattress production held by U.S. producers, and share of production by type of mattress packaging (i.e., mattress-in-a-box (“MiB”) versus flat-packed mattresses (“FPM”).² *** are similarly the largest U.S. producers of FPMs, accounting for *** percent and *** percent of total domestic FPM production in 2019, respectively. *** is the largest U.S. producer of MiBs, accounting for *** percent of total MiB domestic mattress production in 2019, followed by **, accounting for *** percent of the MiB total.

More than one-half (29 of 53) of responding U.S. producers, representing *** percent of reported U.S. production of mattresses in 2019, indicated that they were in support, in whole or in part, of the petitions. More than one-third (20 of 53) of U.S. producers (***), collectively representing *** percent of reported U.S. production of mattresses in 2019, indicated that they had no position on the petitions. Three U.S. producers, representing *** percent of U.S. production, reported that they were opposed to the petitions and one U.S. producer, representing *** percent of U.S. production, did not indicate its position on the petitions.³

² For purposes of the tables presented throughout this report, “MiBs” are mattresses of any size, with or without innersprings, that are rolled and compressed, whether or not further packaged in plastic or other packaging material for delivery in the compressed state to the ultimate consumer purchaser. These mattresses may be referred to in the industry by a variety of names, including “mattresses in a box,” “MiBs,” or “bed in a box.” For purposes of table presentation throughout this report, “FPMs” are all mattresses not covered by the definition of MiBs above. They include mattresses of any size, with or without innersprings, that are not both rolled and compressed for delivery to the ultimate consumer in a compressed state.

³ Of the 10 additional U.S. producers of mattresses that submitted wholly unusable and/or untimely responses, 5 firms, together accounting for *** percent of 2019 U.S. production, indicated that they were in support, in whole or in part, of the petitions, 4 firms, together accounting for *** percent of 2019 U.S. production, indicated that they had no position on the petitions, and 1 firm (***), accounting for *** percent of 2019 U.S. production, indicated that it was opposed to the petitions concerning ***, and did not indicate its position on the petitions concerning ***.

Table III-1

Mattresses: U.S. producers, their position on the petitions, location of production, and share of reported production, 2019

Firm	Position on petition	Production location(s)	Share of production (percent)	Share of MiB production (percent)	Share of FPM production (percent)
Acme	***	Norton Shores, MI	***	***	***
American	***	Athens, TN	***	***	***
APPF	***	Garden Grove, CA	***	***	***
Ashley	***	Verona, MS Advance, NC Saltillo, MS	***	***	***
AW Industries	***	Hyattsville, MD	***	***	***
Brooklyn	Petitioner	Phoenix, AZ	***	***	***
Capital	***	Verona, MS	***	***	***
Carpenter	***	Conover, NC Temple, TX Elkhart, IN Riverside, CA Lakeland, FL Fogelsville, PA	***	***	***
Comfort	***	Belmont, MS	***	***	***
Corsicana	Petitioner	Corsicana, TX Shelbyville, TN Aurora, IL Glendale, AZ Bartow, FL Winlock, WA Greensboro, NC Newington, CT Michigan City, IN	***	***	***
Dreamland	***	Haleyville, AL	***	***	***
Elite	Petitioner	Americus, GA Newnan, GA Conover, NC Fort Smith, AR Verona, MS Ontario, CA	***	***	***
England	***	New Tazewell, TN	***	***	***
Estee	***	Chicago, IL	***	***	***

Table continued on next page.

Table III-1--Continued

Mattresses: U.S. producers, their position on the petitions, location of production, and share of reported production, 2019

Firm	Position on petition	Production location(s)	Share of production (percent)	Share of MiB production (percent)	Share of FPM production (percent)
Everton	***	Filer, ID	***	***	***
Future Foam	***	Middleton, WI Dallas, TX Archdale, NC Council Bluffs, IA Fullerton, CA Newton, KS	***	***	***
FXI	Petitioner	Auburn, IN Portland, OR	***	***	***
Hawn	***	Lees Summit, MO	***	***	***
Heritage	***	Orwell, OH	***	***	***
Holder	***	Kokomo, IN	***	***	***
Innocor	Petitioner	West Chicago, IL Baldwyn, MS	***	***	***
Jeffco	***	Webster, MA Woodstock, CT Millbury, MA Worcester, MA	***	***	***
Justice	***	Lebanon, MO	***	***	***
Kolcraft	Petitioner	Aberdeen, NC	***	***	***
Leggett & Platt	Petitioner	Tupelo, MS	***	***	***
Leisure	***	Boise, ID	***	***	***
Lions	***	Morristown, TN	***	***	***
Lippert	***	Goshen, IN Nampa, ID	***	***	***
Mark's Mattress	***	Evansville, IN	***	***	***
Mattress Mill	***	Bozeman, MT	***	***	***
McKinney	***	Springfield, MO	***	***	***
Midwest Sleep	***	Toledo, IA	***	***	***
Old West	***	Aurora, CO	***	***	***
Pennsylvania	***	Old Forge, PA	***	***	***
Pittsburgh	***	Ellenton, FL	***	***	***
Portland Mattress	***	Biddeford, ME	***	***	***
Prestige	***	Asheboro, NC	***	***	***
Purple	***	Lehi, UT	***	***	***
Rest Assured	***	Rochester MN	***	***	***

Table continued on next page.

Table III-1—Continued

Mattresses: U.S. producers, their position on the petitions, location of production, and share of reported production, 2019

Firm	Position on petition	Production location(s)	Share of production (percent)	Share of MiB production (percent)	Share of FPM production (percent)
Restwell	***	Eden Prairie, MN	***	***	***
Royal-Pedic	***	Wilmington, CA	***	***	***
Salt Lake	***	Salt Lake City, UT	***	***	***
Serenity	***	Haleyville, AL	***	***	***
Serta Restokraft	***	Romulus, MI	***	***	***
		Doraville, GA Phoenix, AZ Aurora, CO Tolleson, AZ Moreno Valley, CA Kapolei, HI Puyallup, WA West Coxsackie, NY Fredericksburg, VA Hazleton, PA Windsor Locks, CT Jamestown, NY Beloit, WI Monroe, OH Clear Lake, IA Janesville, WI Riviera Beach, FL Cullman, AL Charlotte, NC Trujillo Alto, PR Grovetown, GA Waycross, GA Houston, TX Shawnee Mission, KS			
Serta Simmons	***		***	***	***
		Orlando, FL Carrollton, TX Walton, KY Tolleson, AZ			
Sherwood	***		***	***	***
Sleepworthy	***	Pinetops, NC	***	***	***
		Columbus OH Tampa FL Gallatin TN Mt Pocono PA Hutchins TX			
Solstice	***		***	***	***
		Richmond, VA Reading, PA Jasper, AL Orlando, FL Watertown, WI Olive Branch, MS			
Symbol	***		***	***	***

Table continued on next page.

Table III-1—Continued

Mattresses: U.S. producers, their position on the petitions, location of production, and share of reported production, 2019

Firm	Position on petition	Production location(s)	Share of production (percent)	Share of MiB production (percent)	Share of FPM production (percent)
Tempur Sealy	***	Phoenix, AZ Richmond, CA Aurora, CO Orlando, FL Conyers, GA Plainfield, IL	***	***	***
Therapedic	***	Brockton, MA	***	***	***
Upper Midwest	***	Grand Forks, ND	***	***	***
Yankee	***	Agawam, MA	***	***	***
Producers in support, in whole or in part	29		***	***	***
Producers in opposition, to all	3		***	***	***
Producers with no response	1		***	***	***
Producers with no position	20		***	***	***
All firms	53		***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: Shading highlights firms holding the largest share of U.S. production. Dark shading identifies firms that account for the largest share; medium shading identifies firms that account for the second largest share; light shading identifies firms that account for the third largest share.

Source: Compiled from data submitted in response to Commission questionnaires.

Serta Simmons, ***, was one of the petitioners in the recently completed investigation concerning China but is not a petitioner in these current investigations. The firm reported that it ***. It reported in its questionnaire response that “***.”

Tempur Sealy, ***, was also a petitioner in the completed antidumping investigation concerning China but is not a petitioner in these current investigations. The firm indicated in its response to the Commission’s questionnaire that it *** in these investigations. In the preliminary phase of these investigations, it explained *** why it chose not to join as a petitioner as follows: “***.”

*** responding U.S. mattress producer (***) is related to mattress producers in a subject country⁴ and *** responding U.S. producers (***) are related to U.S. importers of the subject merchandise.⁵ In addition, as discussed in greater detail later in this

⁴ In the preliminary phase of these investigations, *** additional responding U.S. producers (***) were also identified as being related to mattress producers in subject foreign countries; however, neither U.S. producer nor their related foreign producers provided responses to the Commission’s questionnaires in the final phase of these investigations. ***. ***. ***.

⁵ ***.

part of the report, *** U.S. producers directly import mattresses from subject countries. Table III-2 presents information on U.S. producers' ownership and related and/or affiliated firms.

**Table III-2
Mattresses: U.S. producers' ownership, related and/or affiliated firms**

Item / Firm	Firm name	Affiliated/Ownership
Ownership:		
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
Related importers/exporters:		
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***

Table continued on next page.

Table III-2—Continued
Mattresses: U.S. producers' ownership, related and/or affiliated firms

Item / Firm	Firm name	Affiliated/Ownership
Related producers:		
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table III-3 presents U.S. producers' reported changes in operations since January 1, 2017. In addition to other reported changes, several firms reported relocations, expansions, and acquisitions that increased their individual firms' capacity for MiB production relative to production of FPMs. Specifically, ***. ***. In addition, ***.

***. ***.

**Table III-3
Mattresses: U.S. producers' reported changes in operations, since January 1, 2017**

Item / Firm	Reported changed in operations
Plant openings:	
***	***
***	***
***	***
***	***
***	***
Plant closings:	
***	***
***	***
***	***
Relocations:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table III-3—Continued

Mattresses: U.S. producers' reported changes in operations, since January 1, 2017

Item / Firm	Reported changed in operations
Expansions:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
Acquisitions:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table III-3—Continued

Mattresses: U.S. producers' reported changes in operations, since January 1, 2017

Item / Firm	Reported changed in operations
Consolidations:	
***	***
***	***
***	***
***	***
***	***
Prolonged shutdowns or curtailments:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table III-3—Continued

Mattresses: U.S. producers' reported changes in operations, since January 1, 2017

Item / Firm	Reported changed in operations
Prolonged shutdowns or curtailments--Continued	
***	***
***	***
***	***
Revised labor agreements:	
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table III-3—Continued

Mattresses: U.S. producers' reported changes in operations, since January 1, 2017

Item / Firm	Reported changed in operations
Other:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. producers were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, production, employment, and sales relating to mattresses. Ten U.S. producers reported that no changes related to these areas resulted from the COVID-19 pandemic and 43 U.S. producers reported that they had experienced such changes. U.S. producers' narrative responses to this question are presented in appendix E (table E-1).

U.S. production, capacity, and capacity utilization

Table III-4 and figure III-1 present U.S. producers' production, capacity, and capacity utilization. The top six U.S. producers accounted for more than two-thirds of reported mattress production in during 2019.

Table III-4
Mattresses: U.S. producers' capacity, production, and capacity utilization, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Capacity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	25,465,851	24,921,072	25,456,891	19,301,122	19,868,198
	Production (units)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	19,117,584	18,472,178	18,436,244	14,156,364	14,134,447

Table continued on next page.

Table III-4--Continued

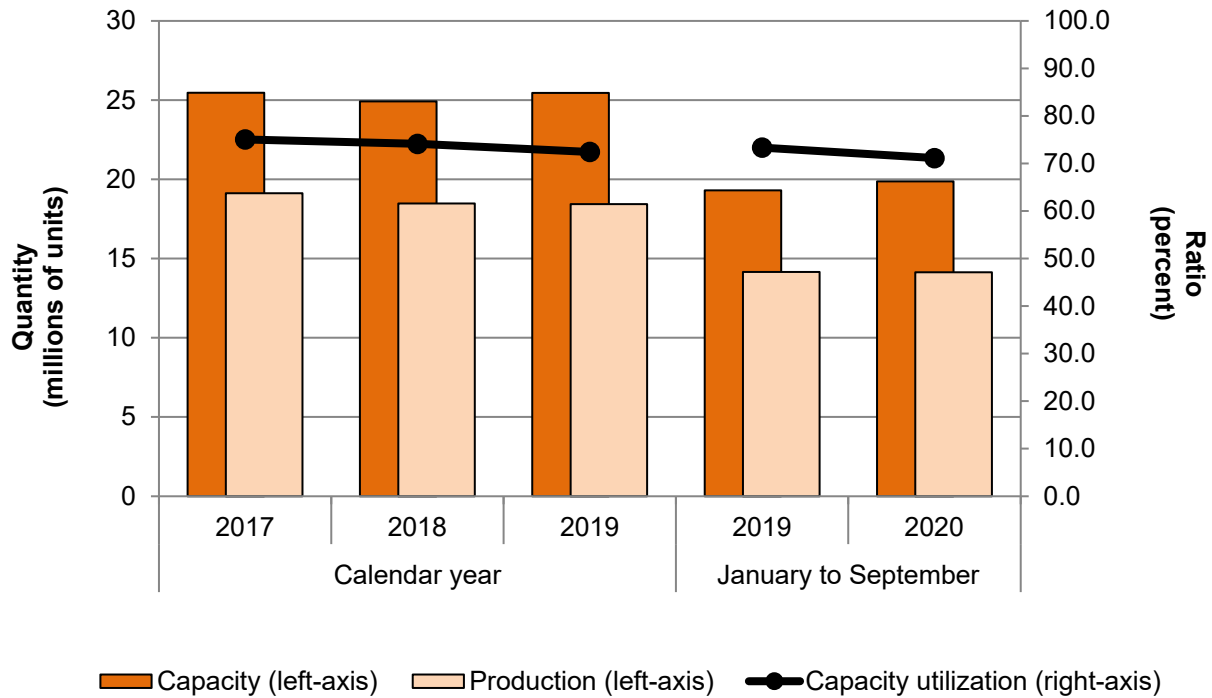
Mattresses: U.S. producers' capacity, production, and capacity utilization, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Capacity utilization (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	75.1	74.1	72.4	73.3	71.1
	Share of production (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	100.0	100.0	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure III-1
Mattresses: U.S. producers' capacity, production, and capacity utilization, 2017-19, January to September 2019, and January to September 2020



Source: Compiled from data submitted in response to Commission questionnaires.

The responding U.S. producers' aggregate annual production capacity decreased by 2.1 percent from 2017 to 2018 but increased by 2.2 percent from 2018 to 2019 to a level only marginally lower than reported in 2017. Responding U.S. producers' annual capacity was 2.9 percent higher during January-September ("interim") 2020 than in interim 2019. Although a substantial number of U.S. producers (24 out of 53) reported an increase in capacity from 2017 to 2019, (including three of the five largest producers), these firms' increases in production capacity were balanced by decreases in capacity reported by ***. According to ***, the decrease in its production capacity was due to ***

***.⁶ The decrease in *** production capacity was attributed to ***.

The U.S. production of mattresses declined by 3.4 percent from 2017 to 2018 and by 0.2 percent from 2018 to 2019, to a level 3.6 percent lower than in 2017, and was 0.2 percent lower in interim 2020 compared with interim 2019. A majority (33 of 53) of the responding U.S. producers of mattresses reported lower production in 2019 than in 2017.⁷ U.S. producers' average capacity utilization decreased from 75.1 percent in 2017 to 74.1 percent in 2018 and to 72.4 percent in 2019. Capacity utilization was lower in interim 2020 at 71.1 percent compared with interim 2019, at 73.3 percent.

U.S. production and capacity by packaging type

Table III-5 presents U.S. producers' production, capacity, and capacity utilization by packaging type (i.e., MiB versus FPM). Of the 53 U.S. mattress producers that provided usable responses to the Commission's questionnaire, 46 firms reported production of FPMs at any point since January 1, 2017 and 21 reported production of MiBs. U.S. production of MiBs increased by 133.2 percent from 2017 to 2019, while U.S. production of FPMs declined by 16.1 percent over the same period. U.S. production of MiBs was higher in interim 2020 compared with interim 2019, whereas U.S. production of FPMs was lower. Trends in the capacity of U.S. producers to produce MiBs and FPMs were similar to production trends. Although MiBs represented only 8.4 percent of total U.S. production of mattresses in 2017, the share of total U.S. mattress production represented by MiBs increased to 20.3 percent in 2019. The share of total U.S. mattress production represented by MiBs was also higher in interim 2020 at 22.9 percent, than in interim 2019. *** accounted for the largest share of the increase in MiB production. *** accounted for the largest share of the decrease in FPM production.

⁶ ***. *** reported that "****."

⁷ *** accounted for the *** of the decrease during this period.

Table III-5

Mattresses: U.S. producers' capacity and production by packaging type, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
MiB capacity	2,811,715	3,704,635	6,220,228	4,378,578	6,505,381
MiB production	1,607,769	2,295,300	3,749,485	2,831,947	3,237,319
	Ratios and shares (percent)				
MiB capacity utilization	57.2	62.0	60.3	64.7	49.8
	Quantity (units)				
FPM capacity	22,654,136	21,216,437	19,236,663	14,922,544	13,362,817
FPM production	17,509,815	16,176,878	14,686,759	11,324,417	10,897,128
	Ratios and shares (percent)				
FPM capacity utilization	77.3	76.2	76.3	75.9	81.5
	Share of all mattress production (percent)				
MiB production	8.4	12.4	20.3	20.0	22.9
FPM production	91.6	87.6	79.7	80.0	77.1
All mattress production	100.0	100.0	100.0	100.0	100.0

Note: MiB = mattress-in-a-box; FPM = flat-packed mattress.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

As shown in table III-6, mattresses accounted for greater than 90.0 percent of the total production on shared equipment in each full year during 2017-19 and during interim 2019 and interim 2020. Almost one-third (17 of 53) of responding U.S. producers reported the production of out-of-scope merchandise on the same machinery used to produce mattresses. In addition to the production of mattresses, these U.S. producers also produced *** on shared equipment.

Table III-6

Mattresses: U.S. producers' overall capacity and production on the same equipment as subject production, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall capacity	26,626,102	26,294,179	26,967,061	20,410,632	20,901,923
Production:					
Mattresses	19,117,584	18,472,178	18,436,244	14,156,364	14,134,447
Out-of-scope production	922,847	1,311,055	1,297,838	977,095	979,125
Total production on same machinery	20,040,431	19,783,233	19,734,082	15,133,459	15,113,572
	Ratios and shares (percent)				
Overall capacity utilization	75.3	75.2	73.2	74.1	72.3
Share of production:					
Mattresses	95.4	93.4	93.4	93.5	93.5
Out-of-scope production	4.6	6.6	6.6	6.5	6.5
Total production on same machinery	100.0	100.0	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. producers' U.S. shipments and exports

Table III-7 presents U.S. producers' U.S. shipments,⁸ export shipments, and total shipments. By both quantity and value, U.S. producers' U.S. shipments accounted for more than 99 percent of U.S. producers' total shipments in each year during 2017-19 and during the interim periods. The quantity of U.S. producers' U.S. shipments decreased by 5.3 percent from 2017 to 2018, but increased by 0.3 percent from 2018 to 2019, ending 4.9 percent lower in 2019 than in 2017. U.S. shipments were 0.3 percent lower in interim 2020 compared with interim 2019. Among the 53 firms that reported U.S. shipments of mattresses during 2017-19, 34 firms reported a lower quantity of U.S. shipments in 2019 than in 2017.⁹ However, with the increase in average unit values of U.S. shipments from \$265 per mattress in 2017 to \$290 per mattress in 2019, the value of U.S. producers' U.S. shipments was 3.8 percent higher in 2019 than in 2017. The value of U.S. producers' U.S. shipments was 1.0 percent higher in interim 2020 compared with interim 2019.

While the majority of the responding U.S. producers reported unit values of U.S. shipments between \$200 and \$600 per mattress, there was some variance in the unit values reported by responding U.S. producers. Five firms reported a unit value of more than \$1,000 per mattress, while seven firms reported a unit value of under \$100 per mattress. Kolcraft, which ***, specializes in producing crib mattresses, while Royal Pedic, Holder Mattress Co., Mattress Mill, and Pittsburgh Mattress Factory, which specialize in the production of high-end, custom, luxury mattresses reported ***.¹⁰

⁸ U.S. producers were asked to report U.S. shipments broken out by U.S. commercial shipments, internal consumption, and transfers to related U.S. parties. Almost all U.S. shipments (96.8 percent in 2019) were reported as U.S. commercial shipments.

⁹ ***, accounted for the vast majority of the decrease in U.S. shipments during 2017-19 and the interim periods.

¹⁰ Royal Pedic, <https://royalpedic.com/>, retrieved February 18, 2021; Holder Mattress Co., <https://holdermattress.com/>, retrieved April 26, 2020; Mattress Mill, <https://www.mattressmill.com/our-story/factory-tour>, retrieved April 26, 2020; Pittsburgh Mattress Factory, <https://www.pittsburghmattressfactory.com/home>, retrieved April 26, 2020. ***.

Table III-7

Mattresses: U.S. producers' U.S. shipments, export shipments, and total shipments, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. shipments	19,236,908	18,226,947	18,286,554	13,963,203	14,011,538
Export shipments	101,363	100,285	98,139	73,715	60,736
Total shipments	19,338,271	18,327,232	18,384,693	14,036,918	14,072,274
	Value (1,000 dollars)				
U.S. shipments	5,103,659	5,032,747	5,298,044	3,991,781	4,030,633
Export shipments	39,153	38,481	35,938	26,211	26,175
Total shipments	5,142,812	5,071,228	5,333,982	4,017,992	4,056,808
	Unit value (dollars per unit)				
U.S. shipments	265	276	290	286	288
Export shipments	386	384	366	356	431
Total shipments	266	277	290	286	288
	Share of quantity (percent)				
U.S. shipments	99.5	99.5	99.5	99.5	99.6
Export shipments	0.5	0.5	0.5	0.5	0.4
Total shipments	100.0	100.0	100.0	100.0	100.0
	Share of value (percent)				
U.S. shipments	99.2	99.2	99.3	99.3	99.4
Export shipments	0.8	0.8	0.7	0.7	0.6
Total shipments	100.0	100.0	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Twelve firms reported export shipments during 2017-19.¹¹ U.S. producers' export shipments, which accounted for less than 1 percent of U.S. producers' total shipments by quantity and value, decreased by 3.2 percent in terms of quantity from 2017 to 2019 and were 17.6 percent lower in interim 2020 compared with interim 2019. The average unit values of export shipments decreased from \$386 per mattress in 2017 to \$366 per mattress in 2019, but were higher in interim 2020 at \$431 per mattress than in interim 2019. U.S. producers reporting exports of mattresses indicated that their primary export markets include Australia, Belize, Bermuda, Canada, China, Colombia, Hong Kong, Korea, and Mexico.

¹¹ *** accounted for the majority of export shipments during January 2017-September 2020.

U.S. producers' inventories

Table III-8 presents U.S. producers' end-of-period inventories and the ratio of these inventories to U.S. producers' production, U.S. shipments, and total shipments. End-of-period inventories held by U.S. producers increased by 33.4 percent from 2017 to 2018, and increased further by 9.4 percent from 2018 to 2019, ending 45.9 percent higher in 2019 than in 2017. End-of-period inventories were 0.9 percent lower in interim 2020 than in interim 2019. The ratios of U.S. producers' end-of-period inventories to U.S. production increased from 2.0 percent in 2017 to 3.0 percent in 2019, and remained steady at 3.2 percent in interim 2019 and interim 2020. Although a majority of responding U.S. producers (28 of 53) reported holding end-of-period inventories of mattresses, U.S. producers mostly sold mattresses produced-to-order. As indicated earlier in Part II of this report, U.S. producers shipped 83.7 percent of their 2019 shipments produced-to-order, and 16.3 percent from inventory. *** accounted for *** percent of mattress inventories held by U.S. producers at the end of 2019.

Table III-8

Mattresses: U.S. producers' U.S. shipments, export shipments, and total shipments, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. producers' end-of-period inventories	374,097	498,910	545,677	611,919	606,614
	Ratio (percent)				
Ratio of inventories to.--					
U.S. production	2.0	2.7	3.0	3.2	3.2
U.S. shipments	1.9	2.7	3.0	3.3	3.2
Total shipments	1.9	2.7	3.0	3.3	3.2

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. producers' imports and purchases

U.S. producers' direct imports of mattresses are presented in table III-9 and U.S. producers' domestic purchases of mattresses are presented in table III-10. Five U.S. producers (***) reported direct U.S. imports of subject merchandise. Nine U.S. producers (***) reported U.S. purchases of mattresses from other domestic producers and two U.S. producers (***) reported U.S. purchases of mattresses imported from ***.

Table III-9
Mattresses: U.S. producers' imports, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
*** U.S. production	***	***	***	***	***
*** U.S. imports from.-- ***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All imports sources	***	***	***	***	***
	Ratio (percent)				
*** ratio to U.S. production of imports from.-- ***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All imports sources	***	***	***	***	***
	Narrative				
*** reason for importing	***				

Table continued on next page.

Table III-9—Continued

Mattresses: U.S. producers' imports, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
*** U.S. production	***	***	***	***	***
*** U.S. imports from subject sources (***)	***	***	***	***	***
	Ratio (percent)				
*** ratio to U.S. production of imports from subject sources (***)	***	***	***	***	***
	Narrative				
*** reason for importing	***				
	Quantity (units)				
*** U.S. production	***	***	***	***	***
*** U.S. imports from.--	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
	Ratio (percent)				
*** ratio to U.S. production of imports from.--	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
*** reason for importing	***				

Table continued on next page.

Table III-9—Continued

Mattresses: U.S. producers' imports, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
*** U.S. production	***	***	***	***	***
*** U.S. imports from subject sources (***)	***	***	***	***	***
	Ratio (percent)				
*** ratio to U.S. production of imports from subject sources (***)	***	***	***	***	***
	Narrative				
*** reason for importing	***				
	Quantity (units)				
*** U.S. production	***	***	***	***	***
*** U.S. imports from subject sources (***)	***	***	***	***	***
	Ratio (percent)				
*** ratio to U.S. production of imports from subject sources (***)	***	***	***	***	***
	Narrative				
*** reason for importing	***				

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Table III-10

Mattresses: U.S. producers' purchases, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				

Table continued on next page.

Table III-10--Continued

Mattresses: U.S. producers' purchases, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2020	2019	2019	2020
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				
	Quantity (units)				
***	***	***	***	***	***
***	***	***	***	***	***
	Narrative				
***	***				

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. employment, wages, and productivity

Table III-11 shows U.S. producers' employment-related data. The number of production related workers ("PRWs") decreased by 3.8 percent from 2017 to 2018, but increased by 1.1 percent from 2018 to 2019, ending 2.8 percent lower in 2019 than in 2017. The number of PRWs was 0.2 percent higher in interim 2020 than in interim 2019. Out of 53 responding U.S. producers, 12 producers reported fewer PRWs in 2019 than in 2017. *** accounted for most of the decline in the number of PRWs, explaining that it has "****." Hours worked, total wages paid, and hourly wages paid increased irregularly from 2017 to 2019, while productivity declined irregularly from 2017 to 2019. Unit labor costs increased in each year from 2017 to 2019. All employment indicators other than total hours worked and hours worked per PRW were higher in interim 2020 compared with interim 2019.

Table III-11

Mattresses: U.S. producers' employment related data, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Production and related workers (PRWs) (number)	13,091	12,590	12,724	12,224	12,243
Total hours worked (1,000 hours)	25,352	23,832	25,700	20,147	19,161
Hours worked per PRW (hours)	1,937	1,893	2,020	1,648	1,565
Wages paid (\$1,000)	512,388	503,496	539,840	393,310	409,810
Hourly wages (dollars per hour)	\$20.21	\$21.13	\$21.01	\$19.52	\$21.39
Productivity (units per 1,000 hours)	754.1	775.1	717.4	702.7	737.7
Unit labor costs (dollars per unit)	\$26.80	\$27.26	\$29.28	\$27.78	\$28.99

Source: Compiled from data submitted in response to Commission questionnaires.

Part IV: U.S. imports, apparent U.S. consumption, and market shares

U.S. importers

The Commission issued importer questionnaires to 144 firms believed to be importers of subject mattresses for which valid contact information was obtained, as well as to approximately 300 firms believed to produce mattresses in the United States.¹ Usable questionnaire responses were received from 49 companies, representing most U.S. imports from each of the subject sources individually and all other nonsubject countries combined in 2019 under primary HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087 as follows:²

Cambodia: *** percent
China: *** percent
Indonesia: *** percent
Malaysia: *** percent
Serbia: *** percent
Thailand: *** percent
Turkey: *** percent
Vietnam: *** percent
All other sources: *** percent

¹ The Commission issued questionnaires to those firms identified as U.S. importers in the petitions and from other sources *** reported under HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087 in 2019.

² Other secondary HTS statistical reporting numbers under which U.S. imports of subject mattresses may enter the United States include: 9401.40.0000, 9401.90.5081, 9404.21.0000, 9404.21.0090, 9404.21.0095, 9404.29.1095, 9404.29.9050, 9404.29.9091, and 9404.29.9095. Entries of U.S. imports under secondary HTS numbers explain the greater than 100 percent coverage data presented for certain sources.

Table IV-1 lists all responding U.S. importers of mattresses from subject countries and other sources, their locations, and their shares of U.S. imports, in 2019.

Table IV-1
Mattresses: U.S. importers, their headquarters, and share of total imports by source, 2019

Firm	Headquarters	Share of imports by source (percent)				
		Cambodia	China	Indonesia	Malaysia	Serbia
Amazon	Seattle, WA	***	***	***	***	***
American Furniture	Englewood, CO	***	***	***	***	***
Americanstar International	Commerce, CA	***	***	***	***	***
Americanstar Mattress	Houston, TX	***	***	***	***	***
Ashley	Arcadia, WI	***	***	***	***	***
AW Industries	Hyattsville, MD	***	***	***	***	***
Bed & Bath	Naples, FL	***	***	***	***	***
Berrios	Cidra, PR	***	***	***	***	***
Best Price	San Leandro, CA	***	***	***	***	***
Big Lots	Columbus, OH	***	***	***	***	***
Bob's Discount	Mancheste, CT	***	***	***	***	***
Boyd	Maryland Heights, MO	***	***	***	***	***
Comptree	City Of Industry, CA	***	***	***	***	***
Continental	Houston, TX	***	***	***	***	***
Costco	Issaquah, WA	***	***	***	***	***
Cozy Comfort	Lexington, NC	***	***	***	***	***
CVB	Logan, UT	***	***	***	***	***
Deep Blue	Palatine, IL	***	***	***	***	***
Dickson	Houston, TX	***	***	***	***	***
Dorel Home	Wright City, MO	***	***	***	***	***
Dorel Asia	Wright City, MO	***	***	***	***	***
Glideaway	St. Louis, MO	***	***	***	***	***
Global Sleep	Jensen Beach, FL	***	***	***	***	***
Haynes	Virginia Beach, VA	***	***	***	***	***
Homelegance	Freemont, CA	***	***	***	***	***
IKEA	Pratteln, BL	***	***	***	***	***
Intercon	Salt Lake City, UT	***	***	***	***	***
Jonathan Louis	Gardena, CA	***	***	***	***	***
Keetsa	San Francisco, CA	***	***	***	***	***
Kittrich	Pomona, CA	***	***	***	***	***

Table continued on next page.

Table IV-1—Continued

Mattresses: U.S. importers, their headquarters, and share of total imports by source, 2019

Firm	Headquarters	Share of imports by source (percent)				
		Cambodia	China	Indonesia	Malaysia	Serbia
Legends	Tolleson, AZ	***	***	***	***	***
Leggett & Platt	Carthage, MO	***	***	***	***	***
Live and Sleep	Las Vegas, NV	***	***	***	***	***
LLYTech	Houston, TX	***	***	***	***	***
Martin	Saint Paul, MN	***	***	***	***	***
Night and Day	Vancouver, WA	***	***	***	***	***
Resource	New York, NY	***	***	***	***	***
RTG	Seffner, FL	***	***	***	***	***
Sarton	Carolina, PR	***	***	***	***	***
Solstice	Columbus, OH	***	***	***	***	***
South Bay	Rancho Cucamonga, CA	***	***	***	***	***
Storkcraft	Las Vegas, NV	***	***	***	***	***
Synergy	Ripely, MS	***	***	***	***	***
University	Garland, TX	***	***	***	***	***
Vispring	Las Vegas, NV	***	***	***	***	***
Walmart	Bentonville, AR	***	***	***	***	***
Wayfair	Boston, MA	***	***	***	***	***
Williams-Sonoma	San Francisco, CA	***	***	***	***	***
Zinus	Tracy, CA	***	***	***	***	***
All firms		***	***	***	***	***

Table continued on next page.

Table IV-1—Continued

Mattresses: U.S. importers, their headquarters, and share of total imports by source, 2019

Firm	Share of imports by source (percent)					
	Thailand	Turkey	Vietnam	Subject sources	Nonsubject sources	All import sources
Amazon	***	***	***	***	***	***
American Furniture	***	***	***	***	***	***
Americanstar International	***	***	***	***	***	***
Americanstar Mattress	***	***	***	***	***	***
Ashley	***	***	***	***	***	***
AW Industries	***	***	***	***	***	***
Bed & Bath	***	***	***	***	***	***
Berrios	***	***	***	***	***	***
Best Price	***	***	***	***	***	***
Big Lots	***	***	***	***	***	***
Bob's Discount	***	***	***	***	***	***
Boyd	***	***	***	***	***	***
Comptree	***	***	***	***	***	***
Continental	***	***	***	***	***	***
Costco	***	***	***	***	***	***
Cozy Comfort	***	***	***	***	***	***
CVB	***	***	***	***	***	***
Deep Blue	***	***	***	***	***	***
Dickson	***	***	***	***	***	***
Dorel Home	***	***	***	***	***	***
Dorel Asia	***	***	***	***	***	***
Glideaway	***	***	***	***	***	***
Global Sleep	***	***	***	***	***	***
Haynes	***	***	***	***	***	***
Homelegance	***	***	***	***	***	***
IKEA	***	***	***	***	***	***
Intercon	***	***	***	***	***	***
Jonathan Louis	***	***	***	***	***	***
Keetsa	***	***	***	***	***	***
Kittrich	***	***	***	***	***	***

Table continued on next page.

Table IV-1—Continued

Mattresses: U.S. importers, their headquarters, and share of total imports by source, 2019

Firm	Share of imports by source (percent)					
	Thailand	Turkey	Vietnam	Subject sources	Nonsubject sources	All import sources
Legends	***	***	***	***	***	***
Leggett & Platt	***	***	***	***	***	***
Live and Sleep	***	***	***	***	***	***
LLYTech	***	***	***	***	***	***
Martin	***	***	***	***	***	***
Night and Day	***	***	***	***	***	***
Resource	***	***	***	***	***	***
RTG	***	***	***	***	***	***
Sarton	***	***	***	***	***	***
Solstice	***	***	***	***	***	***
South Bay	***	***	***	***	***	***
Storkcraft	***	***	***	***	***	***
Synergy	***	***	***	***	***	***
University	***	***	***	***	***	***
Vispring	***	***	***	***	***	***
Walmart	***	***	***	***	***	***
Wayfair	***	***	***	***	***	***
Williams-Sonoma	***	***	***	***	***	***
Zinus	***	***	***	***	***	***
All firms	***	***	***	***	***	***

Note: Shares shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: Shading highlights firms holding the largest share of imports for each source. Dark shading identifies firms that account for the largest share; medium shading identifies firms that account for the second largest share; light shading identifies firms that account for the third largest share.

Note: ***.

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. importers were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, importation, employment, and sales relating to mattresses. Eighteen U.S. importers reported that no changes related to these areas resulted from the COVID-19 pandemic and 30 U.S. importers reported that they had experienced such changes. Narrative responses to this question submitted by U.S. importers are presented in appendix E (table E-3).

U.S. imports

Table IV-2 and figure IV-1 present data for U.S. imports of mattresses from subject countries and all other sources as compiled from data submitted in response to Commission questionnaires.

Table IV-2
Mattresses: U.S. imports, by source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	5,544,408	6,982,307	7,795,477	5,295,371	7,441,669
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
	Value (1,000 dollars)				
U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	607,606	720,150	794,405	532,905	692,378
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Table continued on next page.

Table IV-2—Continued

Mattresses: U.S. imports, by source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Unit value (dollars per unit)				
U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	110	103	102	101	93
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
	Share of quantity (percent)				
U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Table continued on next page.

Table IV-2—Continued

Mattresses: U.S. imports, by source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of value (percent)				
U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
	Ratio to U.S. production				
U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	29.0	37.8	42.3	37.4	52.6
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-1

Mattresses: U.S. import quantities and average unit values, 2017-19, January to September 2019, and January to September 2020

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Imports from China, by quantity, accounted for the majority of imports of mattresses from all sources during 2017 and 2018 (**% percent, respectively), but fell to **% percent of total U.S. imports in 2019, after section 301 duties and antidumping duties on mattresses from China were imposed and as U.S. imports of mattresses from other countries (especially Indonesia and Vietnam) increased. According to data collected in the final phase of these investigations, the quantity of U.S. imports from China increased by **% percent from ** mattresses in 2017 to ** mattresses in 2018 before declining by **% percent to ** mattresses in 2019. The quantity of U.S. imports from China during interim 2020, which amounted to ** mattresses, was **% percent lower than during interim 2019. The value of U.S. imports from China increased by **% percent from 2017 to 2018 but declined by **% percent from 2018 to 2019, ending **% percent lower in 2019 than in 2017. The value of U.S. imports from China during interim 2020 was **% percent lower than during interim 2019. The unit value of U.S. imports from China decreased from \$** per mattress in 2017 to \$** per mattress in 2018, but increased to \$** per

mattress in 2019. The unit value of mattresses imported from China was \$*** per mattress in interim 2020.

Imports from all subject countries other than China increased by more than the decline in imports from China during 2018-19, resulting in an overall increase in U.S. imports from all subject countries combined of 11.6 percent from 7.0 million mattresses in 2018 to 7.8 million mattresses in 2019, a level 40.6 percent higher than in 2017. Imports from all subject countries other than China were higher in interim 2020 compared with interim 2019, whereas imports from China were lower. Similarly, the value of U.S. imports from all subject countries increased 30.7 percent from 2017 to 2019 and was higher in interim 2020 compared with interim 2019. The unit values of U.S. imports from all subject countries declined from \$110 per mattress in 2017 to \$102 per mattress in 2019 and were lower at \$93 per mattress in interim 2020 compared with \$101 per mattress in interim 2019. Only Indonesia (in 2019 at \$*** per mattress), Turkey (in 2017 and 2018 at \$*** per mattress) and Vietnam (in January-September 2019 at \$*** per mattress) reported import unit values greater than or equal to the unit values of imports from China.

Forty-seven firms reported imports of mattresses from subject countries since January 1, 2017, with the following five accounting for more than four-fifths of total reported subject imports in 2019 (listed in descending order of 2019 import quantity): ***. Imports of subject mattresses from China by four of the five largest importers (***) declined in 2019 as their imports of mattresses from other subject countries increased. Importer Zinus, which sourced *** of its imported mattresses from China during 2017-18, sourced *** of its imports from other subject sources in 2019.

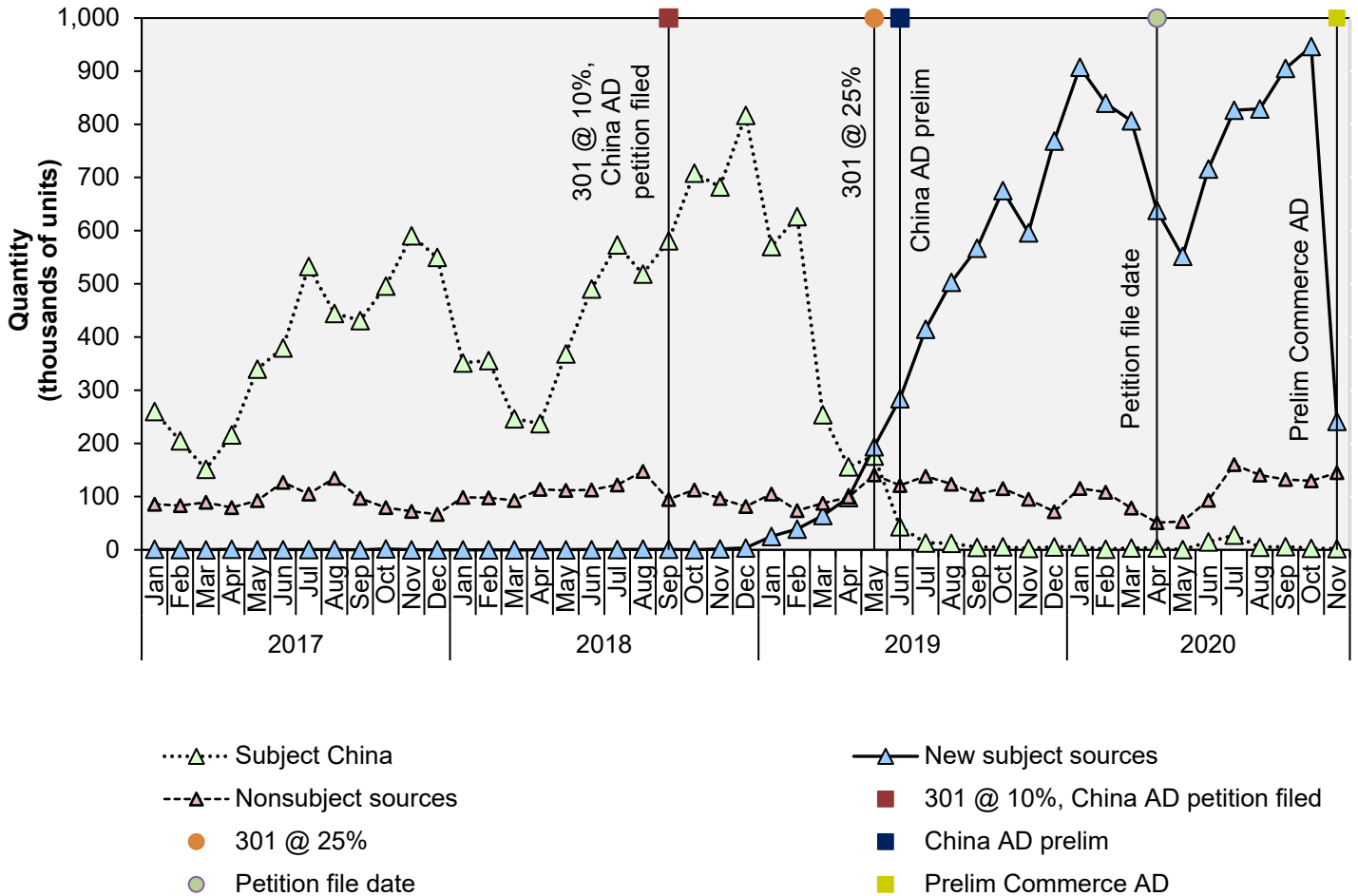
Imports from nonsubject sources, by quantity, accounted for *** percent, *** percent, *** percent, *** percent, and *** percent of all imports in 2017, 2018, 2019, January-September 2019, and January-September 2020, respectively. The quantity of imports from nonsubject sources declined by *** percent from 2017 to 2018 but increased by *** percent from 2018 to 2019, ending *** percent higher in 2019 than in 2017. The quantity of imports from nonsubject sources were *** percent lower in interim 2020 compared with interim 2019. The value of imports from nonsubject sources showed similar trends. Nine firms reported imports of mattresses from nonsubject sources during 2019, with *** accounting for the overwhelming majority (*** percent) of reported imports from nonsubject sources. According to official import statistics (under the six primary HTS statistical

reporting numbers for mattresses), Mexico was the largest source of mattresses imported from nonsubject countries in 2019, followed by Taiwan, Canada, Philippines, and Italy. Nonsubject countries for which import data were reported in questionnaire responses include Italy, Mexico, Poland, Slovenia, Taiwan, and the United Kingdom. The average unit value of imports from nonsubject sources was less than the average unit value of imports from China in each year during 2017-19, but fluctuated in relation to all other subject countries individually depending on the year. During 2019, the average unit value of imports from nonsubject sources was less than the average unit value of imports from China, Indonesia, and Vietnam but was more than the average unit value of imports from Cambodia, Malaysia, Serbia, Thailand, and Turkey.

Figures IV-2 and IV-3 present monthly official U.S. import statistics. Following two years of overall increases in imports of mattresses from China in 2017 and 2018, a sharp decline in monthly imports from China began in December 2018, several months after the September 2018 filing of the petition concerning the antidumping duty investigation on imports of mattresses from China. As imports of mattresses from China sharply declined throughout 2019 and into the beginning of 2020, imports of mattresses from the other subject countries increased. Monthly imports of mattresses from nonsubject sources fluctuated within a relatively narrow range from January 2017 to November 2020.

Figure IV-2

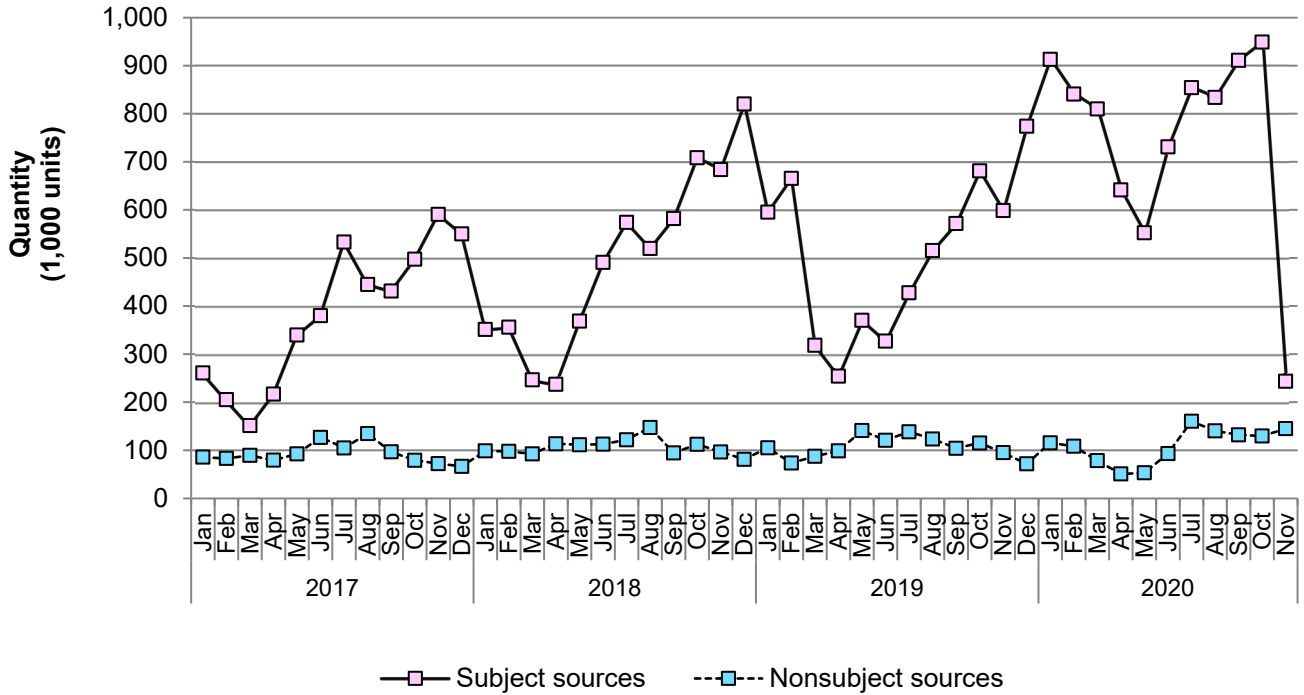
Mattresses: Subject and nonsubject U.S. imports aggregated by newly investigated sources and previously investigated sources, by month, January 2017 through November 2020



Note: China CVD preliminary Commerce determination in this case (August 21, 2020) not shown in this graph.

Source: Official U.S. import statistics for HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, accessed January 13, 2021. Other secondary HTS statistical reporting numbers under which U.S. imports of subject mattresses may enter the United States include: 9401.40.0000, 9401.90.5081, 9404.21.0000, 9404.21.0090, 9404.21.0095, 9404.29.1095, 9404.29.9050, 9404.29.9091, and 9404.29.9095. Entries of U.S. imports under secondary HTS numbers explain the greater than 100 percent coverage data in questionnaire responses for certain sources.

Figure IV-3
Mattresses: U.S. imports from aggregated subject and nonsubject sources, by month, January 2017 through November 2020



Source: Official U.S. import statistics for HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, accessed January 13, 2021. Other secondary HTS statistical reporting numbers under which U.S. imports of subject mattresses may enter the United States include: 9401.40.0000, 9401.90.5081, 9404.21.0000, 9404.21.0090, 9404.21.0095, 9404.29.1095, 9404.29.9050, 9404.29.9091, and 9404.29.9095. Entries of U.S. imports under secondary HTS numbers explain the greater than 100 percent coverage data in questionnaire responses for certain sources.

Negligibility

The statute requires that an investigation be terminated without an injury determination if imports of the subject merchandise are found to be negligible.³ Negligible imports are generally defined in the Act, as amended, as imports from a country of merchandise corresponding to a domestic like product where such imports account for less than 3 percent of the volume of all such merchandise imported into the United States in the most recent 12-month period for which data are available that precedes the filing of the petition or the initiation of the investigation. However, if there are imports of such merchandise from a number of countries subject to investigations initiated on the same day that individually account for less than 3 percent of the total volume of the subject merchandise, and if the imports from those countries collectively account for more than 7 percent of the volume of all such merchandise imported into the United States during the applicable 12-month period, then imports from such countries are deemed not to be negligible.⁴ Imports of mattresses from each of the subject countries accounted for more than 3 percent of the total volume of U.S. imports of mattresses during the most recent 12-month period preceding the filing of the petitions (March 2019 through February 2020). Table IV-3 presents the shares of total U.S. imports, by quantity, attributable to each subject country during March 2019 through February 2020 as compiled from data submitted in response to Commission questionnaires.⁵

³ Sections 703(a)(1), 705(b)(1), 733(a)(1), and 735(b)(1) of the Act (19 U.S.C. §§ 1671b(a)(1), 1671d(b)(1), 1673b(a)(1), and 1673d(b)(1)).

⁴ Section 771 (24) of the Act (19 U.S.C § 1677(24)).

⁵ The shares of total U.S. imports attributable to each subject country during March 2019 through February 2020 as compiled from official import statistics using the six primary HTS statistical reporting numbers (9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087) are as follows: Cambodia (7.9 percent), China (8.6 percent), Indonesia (17.6 percent), Malaysia (7.6 percent), Serbia (5.0 percent), Thailand (4.0 percent), Turkey (5.5 percent), and Vietnam (27.2 percent).

Table IV-3**Mattresses: U.S. imports in the twelve month period preceding the filing of the petitions, March 2019 through February 2020**

Item	March 2019 through February 2020	
	Quantity (units)	Share quantity (percent)
U.S. imports from.--		
Cambodia	***	***
China	***	***
Indonesia	***	***
Malaysia	***	***
Serbia	***	***
Thailand	***	***
Turkey	***	***
Vietnam	***	***
Subject sources	7,622,198	***
Nonsubject sources	***	***
All import sources	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Critical circumstances

On September 21, 2020, petitioners filed allegations of critical circumstances with respect to imports of mattresses from Cambodia and Serbia and, on October 7, 2020, petitioners filed allegations of critical circumstances with respect to imports of mattresses from Turkey.⁶ On November 3, 2020, Commerce issued negative preliminary determinations with respect to the critical circumstances allegations concerning Serbia and Turkey.⁷ Commerce also issued on November 3, 2020, its preliminary affirmative determination that critical circumstances exist with regard to imports from Cambodia of mattresses from Best Mattresses International Co. Ltd. and Rose Lion Furniture International Co. Ltd. (collectively, Best Mattresses/Rose Lion).⁸ On March 25, 2021, Commerce issued negative final determinations with respect to the critical circumstances allegations concerning Cambodia, Serbia, and Turkey.⁹

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. Information regarding channels of distribution, market areas, and interchangeability appear in Part II. Additional information concerning fungibility, geographical markets, and simultaneous presence in the market is presented below.

⁶ Mattresses from Cambodia: Mattress Petitioners' Allegation of Critical Circumstances, September 21, 2020; Mattresses from Serbia: Mattress Petitioners' Allegation of Critical Circumstances, September 21, 2020; and Mattresses from Turkey: Mattress Petitioners' Allegation of Critical Circumstances, October 7, 2020. When petitioners file timely allegations of critical circumstances, Commerce examines whether there is a reasonable basis to believe or suspect that (1) either there is a history of dumping and material injury by reason of dumped imports in the United States or elsewhere of the subject merchandise, or the person by whom, or for whose account, the merchandise was imported knew or should have known that the exporter was selling the subject merchandise at LTFV and that there was likely to be material injury by reason of such sales; and (2) there have been massive imports of the subject merchandise over a relatively short period.

⁷ 85 FR 69571, November 3, 2020; 85 FR 69589, November 3, 2020.

⁸ 85 FR 69594, November 3, 2020.

⁹ 86 FR 15892 (Serbia), 15894 (Cambodia), and 15917 (Turkey), March 25, 2021.

Fungibility

U.S. shipments by product type

U.S. shipments of all mattresses by product type

Table IV-4 and figure IV-4 present data on U.S. producers' and U.S. importers' U.S. shipments by mattress type (i.e., innerspring, non-innerspring, and hybrid)¹⁰ during 2019.¹¹ During 2019, *** percent of all mattresses shipped in the United States were innerspring mattresses, *** percent were non-innerspring mattresses, and *** percent were hybrid mattresses. The overwhelming majority (*** percent) of U.S. shipments of innerspring mattresses during 2019 were manufactured in the United States, while *** percent were imported from subject countries and *** percent were imported from nonsubject sources. Mattresses produced in the United States accounted for *** and *** percent of total U.S. shipments of non-innerspring and hybrid mattresses in 2019, respectively. Non-innerspring mattresses accounted for the largest share of total U.S. shipments by importers from China, Indonesia, Malaysia, Serbia, and Vietnam during 2019, whereas hybrid mattresses accounted for the majority of total U.S. shipments of mattresses imported from Cambodia and Turkey, and innerspring mattresses accounted for the largest share of total U.S. shipments of U.S. product and total U.S. shipments of mattresses imported from Thailand. With the exception of U.S. shipments of imports from Serbia, there were reported U.S. shipments of all three types of mattresses from each of the subject countries during 2019. Only U.S. shipments of non-innerspring mattresses were reported by U.S. importers from Serbia during 2019, with no U.S. shipments of imports of innerspring or hybrid mattresses from Serbia.

¹⁰ For purposes of presentation of data in this report, “innerspring mattresses” are mattresses that contain innersprings, which are a series of metal springs joined together in sizes that correspond to the dimensions of finished mattresses. Innersprings may be comprised of wrapped coils or open/non-wrapped coils. Wrapped innerspring coils consist of coils that are individually encased in a nonwoven or woven material in rows, which rows are then bound together to form an innerspring. Open/non-wrapped coils are generally joined together by helical wire. “Non-innerspring mattresses” are mattresses that do not contain any innerspring units. They are generally produced from foams (e.g., polyurethane, memory (viscoelastic), latex foam, gel-infused viscoelastic (gel foam), thermobonded polyester, polyethylene) or other resilient filling. “Hybrid mattresses” contain two or more support systems as the core, such as layers of both memory foam and innerspring units.

¹¹ U.S. producers' and U.S. importers' U.S. shipments by mattress type during 2017-19, January to September 2019, and January to September 2020 are presented in appendix F (tables F-1 (U.S. producers) and F-2 (U.S. importers)).

Table IV-4
Mattresses: U.S. producers' and U.S. importers' U.S. shipments by product type, 2019

Source	U.S. shipments			
	Innerspring	Non-innerspring	Hybrid	All product types
	Quantity (units)			
U.S. producers	10,016,382	6,034,105	2,236,067	18,286,554
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	986,926	4,506,536	2,490,826	7,984,288
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***
	Share across (percent)			
U.S. producers	54.8	33.0	12.2	100.0
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	12.4	56.4	31.2	100.0
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***
	Share down (percent)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-4
Mattresses: U.S. producers' and U.S. importers' U.S. shipments by product type, 2019

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. shipments of MiBs by product type

Table IV-5 and figure IV-5 present data on U.S. producers' and U.S. importers' U.S. shipments of MiBs by mattress type (i.e., innerspring, non-innerspring, and hybrid) during 2019.¹² During 2019, *** percent of all MiB mattresses shipped in the United States were non-innerspring mattresses, *** percent were hybrid mattresses, and *** percent were innerspring mattresses. The majority (*** percent) of total U.S. shipments of MiBs in 2019 were imported from subject countries, while U.S. producers' MiB shipments and U.S. shipments of nonsubject country MiB imports accounted for smaller shares (*** percent and *** percent, respectively). Likewise, the majority of U.S. shipments of innerspring, non-innerspring, and hybrid MiBs (*** percent, *** percent, and *** percent, respectively) during 2019 were subject country imports. Domestic producers accounted for *** percent, *** percent, and *** percent of total U.S. MiB shipments of innerspring, non-innerspring, and hybrid mattresses in 2019, respectively. Non-innerspring MiBs accounted for the largest share of total U.S. shipments by U.S. producers and importers from China, Indonesia, Malaysia, Serbia, and Vietnam during 2019, whereas hybrid MiBs accounted for the majority of total U.S. shipments of mattresses imported from Cambodia and Turkey, and innerspring MiBs accounted for the largest share of total U.S. shipments of imports from Thailand. With the exception of U.S. shipments of imports from Serbia and Turkey, there were U.S. shipments of all three types of MiBs from U.S. producers and U.S. importers from each of the subject countries during 2019. There were no U.S. shipments of imports of innerspring or hybrid MiBs from Serbia and no U.S. shipments of imports of innerspring MiBs from Turkey.

¹² U.S. producers' and U.S. importers' U.S. shipments of MiBs by mattress type during 2017-19, January to September 2019, and January to September 2020 are presented in appendix F (tables F-1 (U.S. producers) and F-2 (U.S. importers)).

Table IV-5
Mattresses: U.S. producers' and U.S. importers' U.S. shipments of MiBs by product type, 2019

Source	MiB U.S. shipments			
	Innerspring	Non-innerspring	Hybrid	All product types
	Quantity (units)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***
	Share across (percent)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***
	Share down (percent)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-5
Mattresses: U.S. producers' and U.S. importers' U.S. shipments of MiBs by product type, 2019

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. shipments of FPMs by product type

Table IV-6 and figure IV-6 present data on U.S. producers' and U.S. importers' U.S. shipments of FPMs by mattress type (i.e., innerspring, non-innerspring, and hybrid) during 2019.¹³ During 2019, *** percent of all FPMs shipped in the United States were innerspring mattresses, *** percent were non-innerspring mattresses, and *** percent were hybrid mattresses. The overwhelming majority (***) of U.S. shipments of all three types of FPMs during 2019 were manufactured in the United States. There were relatively smaller amounts of imports of FPMs from Cambodia, China, Indonesia, Turkey, Vietnam, and nonsubject countries and no reported imports of FPMs in 2019 from Malaysia, Serbia, and Thailand. Innerspring FPMs accounted for the largest share of total U.S. FPM shipments by U.S. producers and importers from Cambodia, Turkey, and Vietnam during 2019, whereas non-innerspring FPMs accounted for the majority of total U.S. FPM shipments imported from China and Indonesia. The U.S. producers and importers from China and Vietnam reported U.S. shipments of all three types of FPMs during 2019. Importers from Cambodia reported U.S. shipments of innerspring and hybrid FPMs in 2019 (no non-innerspring FPMs), Indonesia reported U.S shipments of non-innerspring and hybrid FPMs in 2019 (no innerspring FPMs), and Turkey reported U.S. shipments of innerspring FPMs in 2019 (no non-innerspring and hybrid FPMs).

¹³ U.S. producers' and U.S. importers' U.S. shipments of FPMs by mattress type during 2017-19, January to September 2019, and January to September 2020 are presented in appendix F (tables F-1 (U.S. producers) and F-2 (U.S. importers)).

Table IV-6
Mattresses: U.S. producers' and U.S. importers' U.S. shipments of FPMs by product type, 2019

Source	FPM U.S. shipments			
	Innerspring	Non-innerspring	Hybrid	All product types
	Quantity (units)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***
	Share across (percent)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***
	Share down (percent)			
U.S. producers	***	***	***	***
Imports from.--				
Cambodia	***	***	***	***
China	***	***	***	***
Indonesia	***	***	***	***
Malaysia	***	***	***	***
Serbia	***	***	***	***
Thailand	***	***	***	***
Turkey	***	***	***	***
Vietnam	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
U.S. producers and U.S. importers	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-6
Mattresses: U.S. producers' and U.S. importers' U.S. shipments of FPMs by product type, 2019

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Figures IV-7 and IV-8 illustrate the shares of total quantities of U.S. producers' and U.S. importers' U.S. shipments of mattresses, by type (i.e., innerspring, non-innerspring, and hybrid) and packaging (MiBs and FPMs) during 2019.

Figure IV-7

Mattresses: U.S. producers' U.S. shipments of MiBs and FPMs, shares of quantity by product type and packaging, 2019

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Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-8

Mattresses: Subject U.S. importers' U.S. shipments of MiBs and FPMs, shares of quantity by product type and packaging, 2019

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. shipments by product size

Table IV-7 and figure IV-9 present data on U.S. producers' and U.S. importers' U.S. shipments by mattress size (i.e., crib and all other)¹⁴ during 2019.¹⁵ Of the 53 U.S. producers and 49 U.S. importers that provided usable responses to the Commission's questionnaire, 2 firms reported U.S. production of crib mattresses at any point since January 1, 2017 (***) and 6 firms reported U.S. imports of crib mattresses (***). During 2019, only *** percent of all mattresses shipped in the United States were crib mattresses. The majority (***) percent of U.S. shipments of crib mattresses during 2019 were manufactured in the United States, while smaller shares were imported from subject countries (***) percent) and nonsubject countries (***) percent). China, Malaysia, and Vietnam were the only subject countries that reported imports of crib mattresses in 2019; however, the majority of each countries' U.S. shipments of imports were of mattresses other than crib-sized mattresses. U.S. shipments of crib mattresses accounted for*** percent, *** percent, and *** percent of total U.S. shipments of mattress imports from China, Malaysia, and Vietnam and *** percent of total U.S. producers' U.S. shipments of mattresses during 2019.

¹⁴ For purposes of this report, "crib mattresses" have a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1 inch and 6 inches inclusive, on a nominal basis. Such mattresses are typically designed to fit USA standard full-size cribs.

¹⁵ U.S. producers' and U.S. importers' U.S. shipments by mattress size during 2017-19, January to September 2019, and January to September 2020 are presented in appendix F (tables F-3 (U.S. producers) and F-4 (U.S. importers)).

Table IV-7
Mattresses: U.S. producers' and U.S. importers' U.S. shipments by size, 2019

Source	U.S. shipments		
	Crib	All other	All sizes
	Quantity (units)		
U.S. producers	***	***	***
Imports from.--	***	***	***
Cambodia			
China	***	***	***
Indonesia	***	***	***
Malaysia	***	***	***
Serbia	***	***	***
Thailand	***	***	***
Turkey	***	***	***
Vietnam	***	***	***
Subject sources	***	***	***
Nonsubject sources	***	***	***
All import sources	***	***	***
U.S. producers and U.S. importers	***	***	***
	Share across (percent)		
U.S. producers	***	***	***
Imports from.--	***	***	***
Cambodia			
China	***	***	***
Indonesia	***	***	***
Malaysia	***	***	***
Serbia	***	***	***
Thailand	***	***	***
Turkey	***	***	***
Vietnam	***	***	***
Subject sources	***	***	***
Nonsubject sources	***	***	***
All import sources	***	***	***
U.S. producers and U.S. importers	***	***	***
	Share down (percent)		
U.S. producers	***	***	***
Imports from.--	***	***	***
Cambodia			
China	***	***	***
Indonesia	***	***	***
Malaysia	***	***	***
Serbia	***	***	***
Thailand	***	***	***
Turkey	***	***	***
Vietnam	***	***	***
Subject sources	***	***	***
Nonsubject sources	***	***	***
All import sources	***	***	***
U.S. producers and U.S. importers	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-9
Mattresses: U.S. producers' and U.S. importers' U.S. shipments by size, 2019

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Geographical markets

Mattresses produced in the United States and imported into the United States are shipped nationwide.¹⁶ Table IV-8 presents U.S. import quantities of mattresses by source and border of entry during 2019.¹⁷ In 2019, U.S. import statistics for the primary HTS statistical reporting numbers for imports of mattresses (9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087) show that imports from each subject country entered all U.S. regions in 2019. The Western border of entry accounted for the largest share of total imports from Cambodia, China, Malaysia, and Vietnam, whereas the Eastern border of entry accounted for the largest share of total imports from Indonesia, Serbia, and Thailand, and the Northern border of entry accounted for the largest share of total imports from Turkey.

¹⁶ Domestic producers providing responses in these investigations reported that they manufacture mattresses in 33 states. Petitioners noted that the U.S. mattress industry has the geographic reach to deliver a mattress anywhere in the United States within days of receiving an order. Petitioners' postconference brief, pp. 22-23. Respondents indicate that imports from subject countries are available in all geographic regions of the United States, as well. Joint respondents' postconference brief, response to staff questions, p. 12. See Part II for additional information on geographical markets.

¹⁷ The "East" border of entry includes the following Customs entry districts for imports of mattresses from subject countries during 2019: Baltimore, MD; Boston, MA; Buffalo, NY; Charleston, SC; New York, NY; Norfolk, VA; Ogdensburg, NY; Philadelphia, PA; San Juan, PR; Savannah, GA; St. Albans, VT; and Washington, DC. The "North" border of entry includes the following Customs entry districts for imports of mattresses from subject countries during 2019: Chicago, IL; Cleveland, OH; Detroit, MI; Duluth, MN; Great Falls, MT; Minneapolis, MN; and St. Louis, MO. The "South" border of entry includes the following Customs entry districts for imports of mattresses from subject countries during 2019: Dallas-Fort Worth, TX; Houston-Galveston, TX; Miami, FL; Mobile, AL; New Orleans, LA; and Tampa, FL. The "West" border of entry includes the following Customs entry districts for imports of mattresses from subject countries during 2019: Columbia-Snake, OR; Honolulu, HI; Los Angeles, CA; San Francisco, CA; and Seattle, WA.

Table IV-8
Mattresses: U.S. imports by border of entry, 2019

Item	Border of entry				
	East	North	South	West	All borders
	Quantity (units)				
U.S. imports from.--					
Cambodia	84,794	74,079	18,240	333,715	510,828
China	588,033	364,674	157,225	759,777	1,869,709
Indonesia	368,406	104,931	182,165	284,563	940,065
Malaysia	110,798	57,714	7,357	195,918	371,787
Serbia	129,428	95,072	32,571	24,295	281,366
Thailand	76,396	52,360	12,466	53,376	194,598
Turkey	95,062	119,284	26,683	379	241,408
Vietnam	549,665	375,984	91,739	671,853	1,689,241
Subject sources	2,002,582	1,244,098	528,446	2,323,876	6,099,002
Nonsubject sources	70,026	39,228	579,329	585,843	1,274,426
All import sources	2,072,608	1,283,326	1,107,775	2,909,719	7,373,428
	Share across (percent)				
U.S. imports from.--					
Cambodia	16.6	14.5	3.6	65.3	100.0
China	31.5	19.5	8.4	40.6	100.0
Indonesia	39.2	11.2	19.4	30.3	100.0
Malaysia	29.8	15.5	2.0	52.7	100.0
Serbia	46.0	33.8	11.6	8.6	100.0
Thailand	39.3	26.9	6.4	27.4	100.0
Turkey	39.4	49.4	11.1	0.2	100.0
Vietnam	32.5	22.3	5.4	39.8	100.0
Subject sources	32.8	20.4	8.7	38.1	100.0
Nonsubject sources	5.5	3.1	45.5	46.0	100.0
All import sources	28.1	17.4	15.0	39.5	100.0
	Share down (percent)				
U.S. imports from.--					
Cambodia	4.1	5.8	1.6	11.5	6.9
China	28.4	28.4	14.2	26.1	25.4
Indonesia	17.8	8.2	16.4	9.8	12.7
Malaysia	5.3	4.5	0.7	6.7	5.0
Serbia	6.2	7.4	2.9	0.8	3.8
Thailand	3.7	4.1	1.1	1.8	2.6
Turkey	4.6	9.3	2.4	0.0	3.3
Vietnam	26.5	29.3	8.3	23.1	22.9
Subject sources	96.6	96.9	47.7	79.9	82.7
Nonsubject sources	3.4	3.1	52.3	20.1	17.3
All import sources	100.0	100.0	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Official U.S. import statistics for HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, accessed April 6, 2020. Other secondary HTS statistical reporting numbers under which U.S. imports of subject mattresses may enter the United States include: 9401.40.0000, 9401.90.5081, 9404.21.0000, 9404.21.0090, 9404.21.0095, 9404.29.1095, 9404.29.9050, 9404.29.9091, and 9404.29.9095. Entries of U.S. imports under secondary HTS numbers explain the greater than 100 percent coverage data in questionnaire responses for certain sources.

Presence in the market

Table IV-9 and figure IV-10 present monthly official U.S. import statistics for subject countries and nonsubject sources. The monthly import statistics indicate that U.S. imports of mattresses from China were present in each month during January 2017 to December 2019. As imports of mattresses from China increased during 2017-18, monthly imports of mattresses from the other subject countries were sporadically present in the U.S. market. During the 24 months of 2017-18, imports from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam were present in the U.S. market in 10, 2, 1, 0, 1, 10, and 7 months, respectively. However, as imports of mattresses from China sharply declined throughout 2019, imports of mattresses from the other subject countries increased and were largely present in the U.S. market in most months. During the 12 months of January-December 2019, imports of mattresses from Cambodia, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam were present in the U.S. market in 12, 9, 11, 9, 7, 11, and 12 months, respectively. Imports of mattresses from all subject countries combined were present in the U.S. market every month from June 2019 through November 2020.

Table IV-9

Mattresses: U.S. imports by month, January 2017 through November 2020

U.S. imports	Cambodia	China	Indonesia	Malaysia	Serbia	Thailand
Quantity (units)						
2017.--						
January	1,008	259,964	---	---	---	---
February	448	204,860	---	---	---	---
March	---	151,486	1	---	---	---
April	919	216,019	---	---	---	---
May	---	339,692	---	---	---	---
June	---	379,622	---	---	---	---
July	125	532,724	---	---	---	10
August	---	444,498	---	---	---	---
September	---	431,090	---	---	---	---
October	1,376	496,017	---	---	---	---
November	---	590,440	---	---	---	---
December	---	549,885	---	---	---	---
2018.--						
January	---	351,304	---	---	---	---
February	---	355,835	---	---	---	---
March	---	246,461	---	2	---	---
April	---	237,227	---	---	---	---
May	---	368,489	---	---	---	---
June	147	490,330	---	---	---	---
July	300	573,482	---	---	---	---
August	1,150	518,574	---	---	---	---
September	985	580,930	---	---	---	---
October	---	708,352	---	---	---	---
November	1,430	682,280	3	---	---	---
December	---	816,939	---	---	---	---
2019.--						
January	3,246	570,225	---	---	---	---
February	4,316	626,633	---	527	---	---
March	8,766	253,970	---	1,000	---	---
April	20,996	156,054	1	609	325	---
May	25,374	176,425	12,596	5,677	24,303	---
June	46,755	43,253	86,950	27,194	13,795	3,898
July	64,387	12,856	119,307	30,731	28,691	4,577
August	80,244	12,315	125,187	45,088	38,819	8,803
September	81,370	4,611	159,501	44,737	33,578	34,059
October	75,932	5,551	156,147	64,800	56,410	26,571
November	39,931	2,480	128,170	65,327	49,657	49,470
December	59,511	5,336	152,206	86,097	35,788	67,220
2020.--						
January	57,026	5,675	215,581	113,108	52,631	68,376
February	64,683	1,132	233,568	117,275	59,041	52,777
March	76,756	3,272	216,392	102,563	35,876	36,221
April	53,318	3,455	165,581	65,203	74,237	25,095
May	111,566	435	161,249	47,443	34,855	29,479
June	65,231	14,733	171,353	84,989	68,103	46,366
July	95,473	27,580	57,827	136,248	58,594	61,842
August	124,958	4,877	72,095	187,256	36,326	47,387
September	82,757	5,766	95,795	123,612	70,795	77,410
October	80,502	2,778	88,599	135,943	41,470	80,229
November	702	2,125	31,484	43,987	10,905	1,622

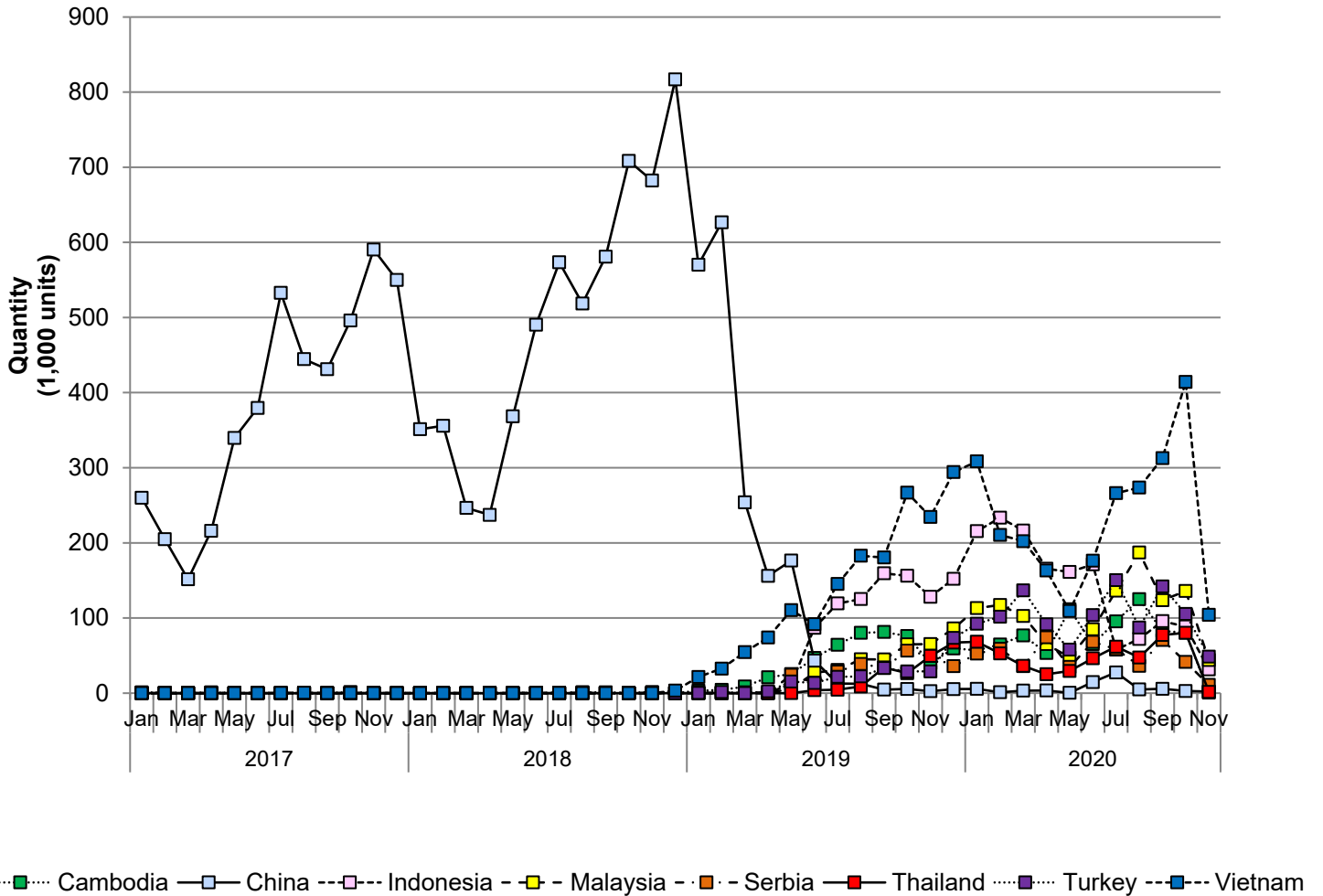
Table continued on next page.

Table IV-9—Continued
Mattresses: U.S. imports by month, January 2017 through November 2020

U.S. imports	Turkey	Vietnam	Subject sources	Nonsubject sources	All import sources
Quantity (units)					
2017.--					
January	---	---	260,972	85,690	346,662
February	---	---	205,308	83,013	288,321
March	---	---	151,487	89,316	240,803
April	---	---	216,938	79,356	296,294
May	27	---	339,719	92,471	432,190
June	212	---	379,834	126,863	506,697
July	---	200	533,059	104,918	637,977
August	18	360	444,876	134,560	579,436
September	---	---	431,090	96,709	527,799
October	---	166	497,559	79,282	576,841
November	2	1	590,443	72,272	662,715
December	---	---	549,885	66,535	616,420
2018.--					
January	---	---	351,304	98,620	449,924
February	---	---	355,835	97,695	453,530
March	---	---	246,463	92,588	339,051
April	26	---	237,253	113,570	350,823
May	---	---	368,489	111,553	480,042
June	---	145	490,622	112,635	603,257
July	---	156	573,938	121,846	695,784
August	42	---	519,766	147,299	667,065
September	35	---	581,950	94,534	676,484
October	109	---	708,461	112,558	821,019
November	123	---	683,836	96,459	780,295
December	126	3,281	820,346	81,237	901,583
2019.--					
January	305	21,543	595,319	104,950	700,269
February	1,453	32,581	665,510	73,644	739,154
March	---	54,633	318,369	87,394	405,763
April	2,274	74,023	254,282	98,675	352,957
May	15,395	110,435	370,205	140,944	511,149
June	13,539	91,784	327,168	120,833	448,001
July	21,723	145,383	427,655	138,387	566,042
August	22,161	182,791	515,408	123,427	638,835
September	33,261	180,498	571,615	104,211	675,826
October	28,881	266,765	681,057	115,188	796,245
November	28,900	234,543	598,478	94,987	693,465
December	73,516	294,262	773,936	71,786	845,722
2020.--					
January	92,333	308,426	913,156	115,531	1,028,687
February	101,739	210,579	840,794	108,333	949,127
March	136,696	202,224	810,000	78,391	888,391
April	91,561	163,121	641,571	50,935	692,506
May	57,878	109,311	552,216	53,173	605,389
June	103,754	176,339	730,868	93,190	824,058
July	150,323	266,211	854,098	160,165	1,014,263
August	87,366	273,596	833,861	140,430	974,291
September	141,962	312,846	910,943	132,153	1,043,096
October	105,334	414,196	949,051	129,577	1,078,628
November	48,476	104,278	243,579	145,022	388,601

Source: Official U.S. import statistics for HTS statistical reporting number 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, accessed January 13, 2021.

Figure IV-10
Mattresses: U.S. imports from individual subject sources, by month, January 2017 through November 2020



Source: Official U.S. import statistics for HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087, accessed April 6, 2020.

Apparent U.S. consumption and U.S. market shares

All mattresses

Table IV-10, table IV-11, and figure IV-11 present data on apparent U.S. consumption and U.S. market shares for mattresses. Apparent U.S. consumption in terms of quantity increased by *** percent from 2017 to 2018 and by *** percent from 2018 to 2019, ending *** percent higher in 2019 than in 2017.¹⁸ Apparent U.S. consumption was *** percent higher in interim 2020 compared with interim 2019. The increase in apparent U.S. consumption was captured entirely by U.S. importers' increased U.S. shipments of mattresses from subject countries, which increased by 52.2 percent from 2017 to 2019 and were 29.0 percent higher in interim 2020 compared with interim 2019, as U.S. shipments by producers and importers from nonsubject countries declined from 2017 to 2019. U.S. shipments by producers were marginally higher in interim 2020 compared with interim 2019 but U.S. shipments of imports from nonsubject sources were lower. The value of apparent U.S. consumption largely mirrored the change in the quantity of apparent U.S. consumption.

U.S. producers' market share, by quantity, decreased from *** percent in 2017 to *** percent in 2018 and to *** percent in 2019. The share of the U.S. market held by U.S. producers was lower at *** percent in interim 2020 compared with *** percent in interim 2019.¹⁹ Conversely, the market share of imports from all subject countries combined increased from *** percent in 2017 to *** percent in 2019 and was higher at *** percent in interim 2020 compared with *** percent in interim 2019. The market share of imports from China alone increased from *** percent in 2017 to *** percent in 2018. However, while the market shares of imports from countries other than China increased between 2018 and 2019, the market share of imports from China decreased from *** percent in 2018 to *** percent in 2019 and was lower at *** percent in interim 2020. The aggregate share of the U.S. market held by imports from the seven subject countries other than China was *** percent in 2017, *** percent in 2018, and *** percent in 2019, *** percent in interim 2019, and ***

¹⁸ According to petitioners and respondents, demand for mattresses can be influenced by gross domestic product, consumer sentiment, and the housing market. Petitioners' postconference brief, response to staff questions, p. 6.; Petitioners' prehearing brief, pp. 12-13; Joint respondents' postconference brief, response to staff questions, p. 5; and joint respondents' prehearing brief, p. 77.

¹⁹ The decrease in U.S. producers' market share largely reflects decreased U.S. shipments by ***. See Part III for additional information on responding U.S. producers' operations.

percent in interim 2020. The market share of nonsubject imports decreased from *** percent in 2017 to *** percent in 2019, and was lower at *** percent in interim 2020 compared with interim 2019.

Table IV-10
Mattresses: Apparent U.S. consumption, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. producers' U.S. shipments	19,236,908	18,226,947	18,286,554	13,963,203	14,011,538
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	5,246,403	6,754,207	7,984,288	5,665,403	7,306,008
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
Apparent U.S. consumption	***	***	***	***	***
	Value (1,000 dollars)				
U.S. producers' U.S. shipments	5,103,659	5,032,747	5,298,044	3,991,781	4,030,633
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	677,335	836,988	1,042,647	726,253	928,040
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
Apparent U.S. consumption	***	***	***	***	***

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

Table IV-11

Mattresses: Market shares, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Apparent U.S. consumption	***	***	***	***	***
	Share of quantity (percent)				
U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
	Value (1,000 dollars)				
Apparent U.S. consumption	***	***	***	***	***
	Share of value (percent)				
U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-11
Mattresses: Apparent U.S. consumption, 2017-19, January to September 2019, and January to September 2020

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

MiB mattresses

Table IV-12 and figure IV-12 present data on U.S. producers' and U.S. importers' U.S. shipments of MiBs, and table IV-13 presents data on the share of the entire mattress market held by MiBs. Combined U.S. producers' and U.S. importers' U.S. shipments of MiBs increased by *** percent from 2017 to 2019, and were *** percent higher in interim 2020 compared with interim 2019. These MiB combined shipments also accounted for an increasing share of apparent U.S. consumption of all mattresses, increasing from *** percent of apparent U.S. consumption of mattresses in 2017 to *** percent in 2019, and higher at *** percent in interim 2020 compared with *** percent in interim 2019. The subject countries held *** of combined U.S. producer and importer MiB shipments in 2019 and U.S. producers held ***. U.S. producers' share of combined U.S. MiB shipments increased from *** percent in 2017 to *** percent in 2019, but was *** percentage points lower in interim 2020 (at *** percent) than in interim 2019 (at *** percent). The share held by imports from all subject countries combined increased from *** percent in 2017 to *** percent in 2018, but declined to *** percent in 2019. Imports from subject countries held a higher share (*** percent) in interim 2020 compared with interim 2019 (*** percent). The MiB share held by imports from China alone increased from *** percent in 2017 to *** percent in 2018, but decreased to *** percent in 2019, and was lower at *** percent in interim 2020 compared with *** percent in interim 2019. The aggregate share of total U.S. MiB shipments held by imports from the seven subject countries other than China was *** percent in 2017, *** percent in 2018, *** percent in 2019, and *** percent in interim 2020 compared with *** percent in interim 2019. The MiB share held by nonsubject imports decreased from *** percent in 2017 to *** percent in 2019, and was lower in interim 2020 compared with interim 2019.

Table IV-12

MiB mattresses: U.S. producers' and U.S. importers' U.S. shipments, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. producers' U.S. shipments	1,691,800	2,181,182	3,720,877	2,767,582	3,310,344
U.S. importers' U.S. shipments from.-- Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	4,904,645	6,267,657	7,549,278	5,339,842	6,988,907
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
U.S. producers and U.S. importers combined	***	***	***	***	***
	Share of quantity (percent)				
U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments from.-- Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
U.S. producers and U.S. importers combined	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-12
MiB mattresses: U.S. producers' and U.S. importers' U.S. shipments, 2017-19, January to September 2019, and January to September 2020

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Table IV-13

MiB mattresses: Shares of apparent consumption for MiBs, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall apparent consumption: All mattresses	***	***	***	***	***
Combined producers and importers: MiB mattresses	***	***	***	***	***
	Ratio to overall apparent consumption quantity (percent)				
U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments from.-- Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
U.S. producers and U.S. importers combined MiBs	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

FPM mattresses

Table IV-14 and figure IV-13 present data on U.S. producers' and U.S. importers' U.S. shipments of FPMs, and table IV-15 and figure IV-14 present data on the share of the entire mattress market held by FPMs. Combined U.S. producers' and U.S. importers' U.S. shipments of FPMs decreased by *** percent from 2017 to 2019, and were *** percent lower in interim 2020 compared with interim 2019. These FPM combined shipments also accounted for an decreasing share of apparent U.S. consumption of all mattresses, decreasing from *** percent of apparent U.S. consumption of mattresses in 2017 to *** percent in 2019, and *** percent in interim 2020 compared with *** percent in interim 2019. The vast majority of U.S. shipments of FPMs were domestically produced during the period of investigation. U.S. producers' share of combined U.S. FPM shipments decreased slightly from *** percent in 2017 to *** percent in 2019, and remained unchanged at *** percent in interim 2019 and 2020. The share held by imports from all subject countries combined increased from *** percent in 2017 to *** percent in 2018 and 2019, and remained roughly unchanged at *** percent in interim 2020 compared with *** percent in interim 2019. The share held by imports from China alone increased from *** percent in 2017 to *** percent in 2018, but decreased to *** percent in 2019, and was lower at *** percent in interim 2020 compared with *** percent in interim 2019. Cambodia, Indonesia, Turkey, and Vietnam were the only other subject sources of imported FPMs. The aggregate share of total U.S. FPM shipments held by imports from the subject countries other than China was *** percent in 2017, *** percent in 2018, *** percent in 2019, and *** percent in interim 2020 compared with *** percent in interim 2019. The share of combined U.S. FPM shipments held by nonsubject imports increased from *** percent in 2017 to *** percent in 2019, but was lower in interim 2020 (***) compared with interim 2019 (**).

Table IV-14

FPM mattresses: U.S. shipments of domestic product, U.S. shipments of imports, and apparent U.S. consumption, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. producers' U.S. shipments	17,545,108	16,045,765	14,565,677	11,195,621	10,701,194
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	341,758	486,550	435,010	325,561	317,101
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
U.S. producers and U.S. importers combined	***	***	***	***	***
	Share of quantity (percent)				
U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
U.S. producers and U.S. importers combined	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-13
FPM mattresses: U.S. producers' and U.S. importers' U.S. shipments, 2017-19, January to September 2019, and January to September 2020

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Table IV-15

FPM mattresses: Shares of apparent consumption for FPMs, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall apparent consumption: All mattresses	***	***	***	***	***
Combined producers and importers: FPM mattresses	***	***	***	***	***
	Ratio to overall apparent consumption quantity (percent)				
U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Of which previously investigated source	***	***	***	***	***
Of which newly investigated sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
U.S. producers and U.S. importers combined flat pack mattresses	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: "Previously investigated" subject source is China. "Newly investigated" subject sources include all subject sources other than China.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure IV-14
FPM mattresses: U.S. producers' U.S. shipments and U.S. importers' U.S. shipments, 2019

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires.

Part V: Pricing data

Factors affecting prices

Raw material costs

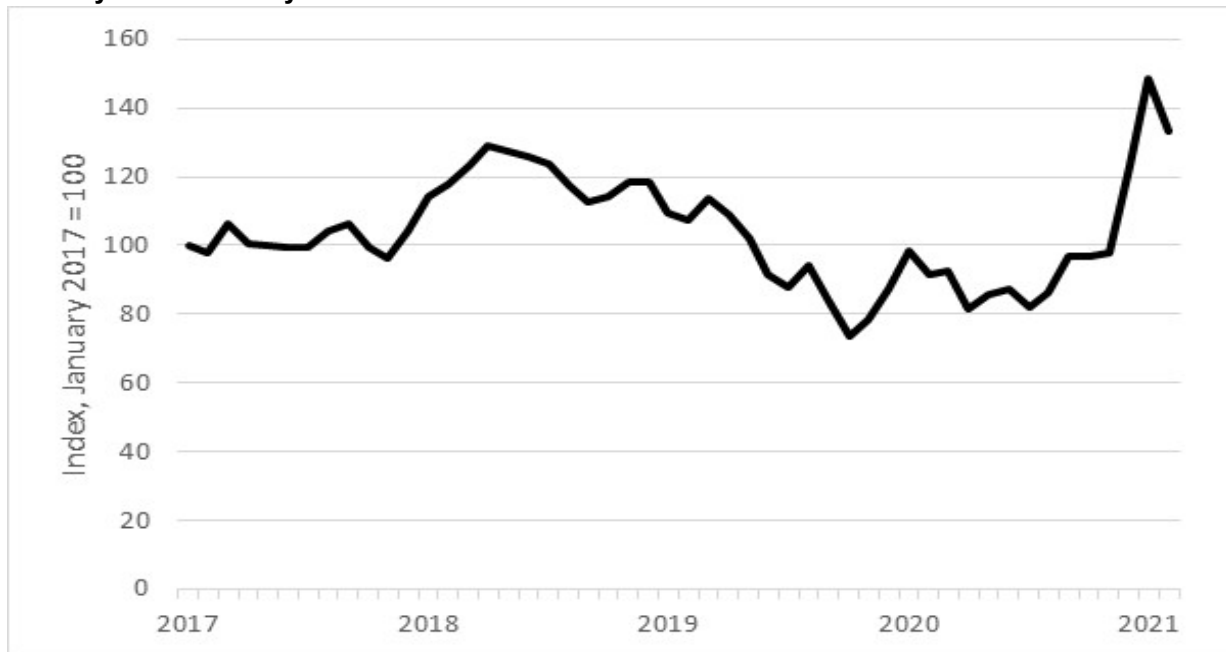
During 2017 to 2019, raw materials ranged from 75.9 percent (in 2019) to 77.9 percent (in 2018) of costs of goods sold for mattresses. (This ratio was 74.3 percent in the first three quarters of 2020.) The major raw materials used in the production of mattresses vary depending on the type of mattress being produced. Innerspring and hybrid mattresses use springs of iron or steel, usually made of wire rod, while foam mattresses do not. All three mattress types typically use some foam in various thicknesses, densities, and in various amounts, with foam mattresses consisting exclusively of one or more types of foam. The three primary types of foam used are polyurethane, viscoelastic (i.e., “memory foam”), and latex.¹ The raw materials used to make foam include TDI (toluene diisocyanate), MDI (methylene diphenyl diisocyanate), and polyol.²

Wire rod costs are approximated by the costs of iron and steel scrap. The producers’ price index for iron and steel scrap increased irregularly from January 2017 to April 2018, then decreased irregularly through October 2019, before rising again through January 2021, ending 33.1 percent higher in February 2021 than in January 2017 (figure V-1).

¹ China final publication, p. I-1.

² Hearing transcript, p. 38 (Earley), petitioners’ prehearing brief, pp. 22-23.

Figure V-1
Raw materials costs: Iron and steel scrap, producer price index, monthly, not seasonally adjusted, January 2017-February 2021



Source: Bureau of Labor Statistics via Federal Reserve Bank of St. Louis, retrieved March 16, 2021.

The cost of MDI, polyols, and TDI initially increased from January 2017 through January-March 2019 (for pure MDI), from September-November 2018 (for polyols), and from March-August 2018 (for TDI). Costs of these chemicals then decreased through approximately July-September 2020, before increasing through March 2021 (figure V-2).

The increases in the costs of these chemicals that occurred from July 2020 through March 2021³ reflected shortages of all three chemicals. Petitioners and Ashley attributed the shortages to the COVID-19 outbreak in April-May 2020, chemical manufacturers misjudging the amount of inventories they would need as the economy recovered, and hurricanes in the Gulf of Mexico (where some chemical manufacturers are based) during August-November 2020. Additionally, a deep freeze in Texas in early 2021 caused additional chemical shortages. Mattress and foam producer FXI described the freezing weather in Texas in early 2021 as disrupting the globally-sourced supply of polyol used to make foam. Similarly, mattress and

³ See petitioners' posthearing brief, exhibit I-22.

foam producer Leggett and Platt described placing foam customers on allocation recently, although it expected such conditions to ease soon.⁴

However, respondents argued that foam shortages were a frequent occurrence even before 2020, and argued that there had been force majeure put in place for polyol and TDI in 2018 and 2019. They also alleged that section 301 tariffs on TDI, and demand for TDI and polyols from other industries, had contributed to raw material shortages or increased prices.⁵ Petitioners contend that there was no shortage of foam or innersprings before mid-2020.⁶

Figure V-2
Raw materials costs: Polyols, TDI, and pure MDI, weekly, not seasonally adjusted, January 4, 2017-March 27, 2021

* * * * *

Source: ICIS data as presented in petitioners' posthearing brief, exhibit 8.

Forty U.S. producers and 22 importers indicated that the costs of the raw materials used to make mattresses had increased since January 1, 2017. These firms cited increases in the costs of steel (innersprings), foam, and/or paper and cardboard. Importers described cost increases as ranging from 10-40 percent. U.S. producer *** stated that it increased prices twice on mattresses to offset these raw material cost increases. Six U.S. producers and

⁴ Hearing transcript, pp. 29 (Glassman), 38-39 (Earley), and 151-52 (Adams). See also petitioners' prehearing brief pp. 22-23 and exhibit 1, and petitioners' posthearing brief at exhibit I-21.

⁵ Hearing transcript, pp. 151-52, 203-4 (Adams). See also Joint Respondents' posthearing brief, annex II p. 3 and annex V, pp. 1-2, 5-9.

⁶ Petitioners' posthearing brief, p.4, Exhibit 1-43-45; Hearing transcript, pp. 37-38, 91 (Earley).

12 importers described raw material costs as fluctuating. These firms often described either raising their selling prices for mattresses to cover increased costs, absorbing the higher costs in lost profits, or both. Six importers indicated that there had been no change in raw material costs.

Twelve of 21 responding purchasers stated that they were familiar with the costs of raw materials used in the production of mattresses, and eleven purchasers stated that information on raw material prices affected their firm's negotiations or contracts to purchase mattresses since January 1, 2017. Some of these firms, like ***, were also producers and/or importers. These firms described considering their knowledge of raw material price changes when negotiating prices for mattresses.

Transportation costs to the U.S. market

Transportation costs for mattresses shipped from subject countries to the United States averaged 4.2 percent for Cambodia, 7.3 percent for China, 7.0 percent for Indonesia, 5.7 percent for Malaysia, 6.3 percent for Serbia, 9.9 percent for Thailand, 7.1 percent for Turkey, and 8.8 percent for Vietnam during 2019. These estimates were derived from official import data and represent the transportation and other charges on imports.⁷

U.S. inland transportation costs

Most responding U.S. producers (33 of 43 responding) and importers (27 of 34 responding) reported that they typically arrange transportation to their customers, with the remaining responding firms indicating that purchasers arrange transportation.⁸ Eleven U.S. producers and 7 importers reported that their U.S. inland transportation costs ranged from 7 to 14 percent, while 12 U.S. producers and 17 importers reported that such costs ranged from 1 to 6 percent.⁹ An additional 2 importers reported U.S. inland transportation costs of 15 to 18 percent.

⁷ The estimated transportation costs were obtained by subtracting the customs value from the c.i.f. value of the imports for 2019 and then dividing by the customs value based on the HTS subheadings 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087.

⁸ Twenty-six importers indicated that they shipped imported mattresses from a storage facility, while 7 indicated that they did so from their point of importation.

⁹ Other U.S. producers and importers did not answer or reported unreasonable answers (e.g., 100 percent).

Pricing practices

Pricing methods

U.S. producers and importers reported using a variety of price setting methods, including transaction-by-transaction negotiations, contracts, price lists, and other methods. As presented in table V-1, U.S. producers and importers sell primarily based on set price lists and transaction-by-transaction negotiations. “Other methods” included setting prices for a larger piece of furniture in which the mattress was included, as well as pricing on a customer by customer basis.

Table V-1
Mattresses: U.S. producers’ and importers’ reported price setting methods, by number of responding firms

Method	U.S. producers	Importers
Transaction-by-transaction	25	17
Contract	14	6
Set price list	29	18
Other	7	3
Responding firms	50	32

Note: The sum of responses down may not add up to the total number of responding firms as each firm was instructed to check all applicable price setting methods employed.

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. producers reported selling nearly half of their mattresses on the spot market, with approximately a quarter of their remaining shipments being sold through annual contracts, and another approximate quarter split between short- and long-term contracts (table V-2). U.S. importers reported that approximately two-thirds of their mattresses are sold through spot sales, with about one quarter of their shipments being sold through short-term contracts, and most of the remainder as annual contracts.

Table V-2
Mattresses: U.S. producers’ and importers’ shares of U.S. commercial shipments by type of sale, 2019

Type of sale	U.S. producers	Importers
Long-term contracts	***	***
Annual contracts	***	***
Short-term contracts	***	***
Spot sales	***	***
Total	100.0	100.0

Note: Because of rounding, figures may not add to the totals shown.

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. producers and importers reported short-term contracts ranging from 7 days to 6 months. Two U.S. producers reported that the lengths of their long-term contracts were

between two and three years. Most responding U.S. producers and importers reported that their contracts are not indexed to raw materials, and that contracts generally fix prices, or fix prices and quantities. Regarding annual and short-term contracts, three U.S. producers' contracts and four importers' contracts did allow price renegotiation, while four U.S. producers' contracts and three importers' contracts did not. Regarding long-term contracts, two U.S. producers indicated that their contracts allowed price renegotiation, while two U.S. producers stated that their long-term contracts did not.

Eight purchasers reported that they purchase product daily, 13 purchase weekly, and 1 purchases quarterly. Seventeen of 22 responding purchasers reported that their purchasing frequency had not changed since January 1, 2017, including because of COVID-19. Five did report changes in their purchasing frequency, with three reporting increased purchases and two reporting purchasing disruptions. Most purchasers contact 1 to 5 suppliers before making a purchase, although a few contact more.

Fourteen purchasers stated that their purchases of mattress usually involved negotiations with their suppliers, while seven stated that they did not. Negotiations involved numerous factors, including quality, price, discounts, payment terms, features, production capacity, service, and delivery time. *** explained that, since it normally only negotiates with firms with which it has relationships, it and its suppliers have already determined payment terms, delivery time, and product terms before purchases. Six purchasers stated that they rarely or never share competing price information with suppliers.

Sixteen purchasers stated that they had changed suppliers since January 1, 2017, and five stated that they had not. Purchasers cited meeting growing demand, expanding product assortment, having particular brands or warranties, and adding alternate suppliers as reasons for adding suppliers. Purchasers cited an inability to meet requirements or quantities demanded as reasons for dropping suppliers.

Sales terms and discounts

A majority of U.S. producers reported quoting prices on a delivered basis, while a majority of importers reported quoting prices on an f.o.b. basis. Specifically, 31 U.S. producers and 11 importers reported quoting prices on a delivered basis, while 21 U.S. producers and 23 importers reported quoting on an f.o.b. basis.

Pluralities of U.S. producers (22) and importers (15) reported having no specific discount policy. Among those that did report offering discounts, 17 U.S. producers and 4 importers reported offering annual total volume discounts, 9 U.S. producers and 7 importers reported offering quantity discounts, and 18 U.S. producers and 9 importers reported offering other

types of discounts. These other discounts included customer-specific discounts, early payment discounts, discounts based on customer relationships, and seasonal discounts.

Price leadership

Purchasers named a variety of price leaders. Three purchasers named Serta Simmons, three purchasers named Mattress Firm (a purchaser ***), and three named Tempur-Sealy. Additionally, one purchaser named U.S. producer Innocor. One purchaser each named retailers Amazon, Ashley, Corsicana, and Walmart. Purchasers described price leaders as leading by being large suppliers or purchasers, and by setting prices that other firms follow.

Price data

The Commission requested U.S. producers and importers to provide quarterly data for the total quantity and f.o.b. value of the following mattress products shipped to unrelated U.S. customers during January 2017-September 2020.

Product 1.— Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Product 2.-- Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Product 3.— Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a Box.

Product 4.— Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-packed mattress.

Product 5.— “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Product 6.— “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Product 7.-- Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Product 8.-- Foam mattress (without any innersprings), with a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1.0 inch and 6.0 inches inclusive, on a nominal basis, typically designed to fit U.S. standard full size cribs.

Twenty-nine U.S. producers and 22 importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all quarters.¹⁰ Pricing data reported by these firms accounted for approximately 20.1 percent of U.S. producers’ shipments of mattresses, 3.1 percent of U.S. imports from Cambodia, 14.7 percent of U.S. imports from China, 3.5 percent of U.S. imports from Indonesia, 33.2 percent of U.S. imports from Malaysia, 12.7 percent of U.S. imports from Serbia, 8.2 percent of U.S. imports from Thailand, 1.6 percent of U.S. imports from Turkey, and 21.8 percent of U.S. imports from Vietnam in 2019.¹¹

Price data for products 1-8 are presented in tables V-3 to V-10 and figures V-3 to V-10.¹² Within pricing products, there is sometimes a large spread between prices from individual

¹⁰ Per-unit pricing data are calculated from total quantity and total value data provided by U.S. producers and importers. The precision and variation of these figures may be affected by rounding, limited quantities, and producer or importer estimates.

¹¹ Pricing coverage is based on U.S. shipments reported in questionnaires.

¹² Importers *** provided both pricing and import cost data but are retailers that did not sell many or any mattresses commercially at the wholesale level of trade. Staff removed their pricing data. Importers
(continued...)

firms. Some of these spreads may be due to channels of distribution differences; for example, some commercial sales are to retailers, and some are to end user customers (such as hotels and institutions). Some of the spreads may also be due to brand differences.

Pricing data excluding U.S. producer *** are presented in appendix G.

Table V-3
Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Table continued on next page.

(...continued)

*** provided data for price and cost but are mostly or entirely selling to other firms. Staff removed their cost data. U.S. producer *** provided data for very high-priced mattresses that were not exactly the same specifications as the product categories. Staff removed its pricing data. Staff also removed price data from U.S. producers ***. Finally, staff removed pricing data from importer ***.

Table V-3--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Indonesia			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-3--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Thailand			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-3--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2018:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2019:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2020:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-4

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		China			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	221.11	6,092	***	***	***	***	***	***
Apr.-June	229.73	6,104	***	***	***	***	***	***
July-Sept.	213.61	4,933	***	***	***	***	***	***
Oct.-Dec.	208.29	4,557	***	***	***	***	***	***
2018:								
Jan.-Mar.	219.20	3,185	***	***	***	***	***	***
Apr.-June	212.62	3,423	***	***	***	***	***	***
July-Sept.	214.26	4,736	***	***	***	***	***	***
Oct.-Dec.	208.13	4,607	***	***	***	***	***	***
2019:								
Jan.-Mar.	188.73	4,097	***	***	***	***	***	***
Apr.-June	190.19	4,483	***	***	***	***	***	***
July-Sept.	191.78	3,809	***	***	***	***	***	***
Oct.-Dec.	171.30	3,945	***	***	***	***	***	***
2020:								
Jan.-Mar.	180.03	4,401	***	***	***	***	***	***
Apr.-June	174.68	4,313	***	***	***	***	***	***
July-Sept.	181.84	6,172	***	***	***	***	***	***

Note: Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Table V-4--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:					
Jan.-Mar.	221.11	6,092	***	***	***
Apr.-June	229.73	6,104	***	***	***
July-Sept.	213.61	4,933	***	***	***
Oct.-Dec.	208.29	4,557	***	***	***
2018:					
Jan.-Mar.	219.20	3,185	***	***	***
Apr.-June	212.62	3,423	***	***	***
July-Sept.	214.26	4,736	***	***	***
Oct.-Dec.	208.13	4,607	***	***	***
2019:					
Jan.-Mar.	188.73	4,097	***	***	***
Apr.-June	190.19	4,483	***	***	***
July-Sept.	191.78	3,809	***	***	***
Oct.-Dec.	171.30	3,945	***	***	***
2020:					
Jan.-Mar.	180.03	4,401	***	***	***
Apr.-June	174.68	4,313	***	***	***
July-Sept.	181.84	6,172	***	***	***

Note: Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-5

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-5--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Indonesia			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

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Table V-5--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Serbia			Thailand		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

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Table V-5--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Turkey			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

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Table V-5--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:					
Jan.-Mar.	378.09	10,763	***	***	***
Apr.-June	347.24	20,649	***	***	***
July-Sept.	339.68	27,235	***	***	***
Oct.-Dec.	***	***	***	***	***
2018:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2019:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2020:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-6

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 4 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Vietnam			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	306.20	24,203	***	***	***	***	***	***
Apr.-June	391.82	52,258	***	***	***	***	***	***
July-Sept.	407.53	48,861	***	***	***	***	***	***
Oct.-Dec.	411.30	43,281	***	***	***	***	***	***
2018:								
Jan.-Mar.	433.93	28,316	***	***	***	***	***	***
Apr.-June	478.71	24,766	***	***	***	***	***	***
July-Sept.	471.20	24,372	***	***	***	***	***	***
Oct.-Dec.	454.94	20,098	***	***	***	***	***	***
2019:								
Jan.-Mar.	471.27	19,271	***	***	***	***	***	***
Apr.-June	480.77	14,902	***	***	***	***	***	***
July-Sept.	468.47	17,680	***	***	***	***	***	***
Oct.-Dec.	402.27	11,789	***	***	***	***	***	***
2020:								
Jan.-Mar.	413.57	10,226	***	***	***	***	***	***
Apr.-June	422.76	8,981	***	***	***	***	***	***
July-Sept.	440.52	12,600	***	***	***	***	***	***

Note: Product 4: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-pack mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-7

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-7--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Indonesia			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-7--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Serbia			Thailand		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in Queen size. Shipped as a Mattress-in-a-Box.

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Table V-7--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Turkey			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-7--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2018:					
Jan.-Mar.	480.42	8,287	***	***	***
Apr.-June	504.34	9,130	***	***	***
July-Sept.	482.49	11,437	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***
2019:					
Jan.-Mar.	253.12	27,258	***	***	***
Apr.-June	282.58	46,338	***	***	***
July-Sept.	330.70	46,899	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***
2020:					
Jan.-Mar.	319.72	41,039	***	***	***
Apr.-June	335.15	39,416	***	***	***
July-Sept.	309.72	60,094	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-8

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 6 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		China			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	279.04	312,853	***	***	***	***	***	***
July-Sept.	266.74	318,695	***	***	***	***	***	***
Oct.-Dec.	276.09	224,174	***	***	***	***	***	***
2020:								
Jan.-Mar.	265.85	206,872	***	***	***	***	***	***
Apr.-June	250.50	190,763	***	***	***	***	***	***
July-Sept.	244.69	239,871	***	***	***	***	***	***

Note: Product 6: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Table continued on next page.

Table V-8--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 6 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2018:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2019:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	279.04	312,853	***	***	***
July-Sept.	266.74	318,695	***	***	***
Oct.-Dec.	276.09	224,174	***	***	***
2020:					
Jan.-Mar.	265.85	206,872	***	***	***
Apr.-June	250.50	190,763	***	***	***
July-Sept.	244.69	239,871	***	***	***

Note: Product 6: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-9

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 7 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Vietnam			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	130.67	183,885	***	***	***	***	***	***
Apr.-June	148.43	177,996	***	***	***	***	***	***
July-Sept.	153.70	175,087	***	***	***	***	***	***
Oct.-Dec.	147.38	172,895	***	***	***	***	***	***
2018:								
Jan.-Mar.	139.48	195,298	***	***	***	***	***	***
Apr.-June	146.53	200,747	***	***	***	***	***	***
July-Sept.	151.19	206,912	***	***	***	***	***	***
Oct.-Dec.	150.24	200,543	***	***	***	***	***	***
2019:								
Jan.-Mar.	140.74	226,652	***	***	***	***	***	***
Apr.-June	154.45	203,784	***	***	***	***	***	***
July-Sept.	151.48	214,486	***	***	***	***	***	***
Oct.-Dec.	144.41	196,231	***	***	***	***	***	***
2020:								
Jan.-Mar.	133.41	220,772	***	***	***	***	***	***
Apr.-June	141.97	201,430	***	***	***	***	***	***
July-Sept.	143.66	215,751	***	***	***	***	***	***

Note: Product 7: Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-10

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 8 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		China			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 8: Foam mattress (without any innersprings), with a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1.0 inch and 6.0 inches inclusive, on a nominal basis, typically designed to fit U.S. standard full size cribs.

Table continued on next page.

Table V-10--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product 8 and margins of underselling/(overselling), by quarter, January 2017-September 2020

Period	United States		Vietnam			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 8: Foam mattress (without any innersprings), with a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1.0 inch and 6.0 inches inclusive, on a nominal basis, typically designed to fit U.S. standard full size cribs.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-3
Mattresses: Weighted-average prices and quantities of domestic and imported product 1, by quarter, January 2017-September 2020

* * * * *

Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-4
Mattresses: Weighted-average prices and quantities of domestic and imported product 2, by quarter, January 2017-September 2020

* * * * *

Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-5
Mattresses: Weighted-average prices and quantities of domestic and imported product 3, by quarter, January 2017-September 2020

* * * * *

Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-6
Mattresses: Weighted-average prices and quantities of domestic and imported product 4, by quarter, January 2017-September 2020

* * * * *

Product 4: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-pack mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-7
Mattresses: Weighted-average prices and quantities of domestic and imported product 5, by quarter, January 2017-September 2020

* * * * *

Product 5: “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in Queen size. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-8
Mattresses: Weighted-average prices and quantities of domestic and imported product 6, by quarter, January 2017-September 2020

* * * * *

Product 6: “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in Queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-9
Mattresses: Weighted-average prices and quantities of domestic and imported product 7, by quarter, January 2017-September 2020

* * * * *

Product 7: Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in Queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-10

Mattresses: Weighted-average prices and quantities of domestic and imported product 8, by quarter, January 2017-September 2020

* * * * *

Product 8: Foam mattress (without any innersprings), with a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1.0 inch and 6.0 inches inclusive, on a nominal basis, typically designed to fit U.S. standard full size cribs.

Source: Compiled from data submitted in response to Commission questionnaires.

Import purchase cost data

Importers that did not re-sell their imports to unrelated retailers, wholesalers, or distributors were asked to provide import cost data (landed duty-paid values and quantities) for the same eight pricing products listed above. Eleven importers provided such data. These data, along with prices from U.S. producers, are presented in tables V-11 to V-18 and figures V-11 to V-18.¹³

Purchase cost data accounted for 1.8 percent of imports from Cambodia, 4.5 percent of imports from China, 15.6 percent of imports from Indonesia, 4.2 percent of imports from Malaysia, 4.3 percent of imports from Serbia, and 3.5 percent of imports from Vietnam in 2019. No purchase cost data from Thailand or Turkey in 2019 were received.

Importers reporting import cost data were asked to provide additional information regarding the costs and benefits of directly importing mattresses. Six importers providing useable cost data reported that they incurred additional costs beyond landed duty-paid costs by importing mattresses directly rather than purchasing from a U.S. producer or U.S. importer. These six importers estimated their additional costs of importing mattresses, with their answers in the range of 1 to 9 percent.¹⁴ Importers described warehousing, logistics, insurance, customs brokerage fees, and labor as additional costs.

Firms were also asked to describe how these additional costs incurred by importing mattresses compare with any additional costs incurred when purchasing from a U.S. producer or U.S. importer. Responding firms generally described the additional costs of holding inventory of imports, which they often described as not necessary if they had purchased from an unrelated supplier in the United States. Other costs described included logistics, overseas transportation costs, and duties.

Ten importers indicated that they compare costs of importing both to the cost of purchasing from a U.S. producer and to that of purchasing from a U.S. importer in determining whether to import mattresses. Five reported comparing costs only to those of purchasing from a U.S. producer, and six importers reported comparing costs to purchasing from a U.S. importer. Eight importers do not compare costs of purchasing from either U.S. producers or importers.

¹³ LDP import value does not include any potential additional costs that a purchaser may incur by importing rather than purchasing from another importer or U.S. producer. Price-cost differentials are based on LDP import values whereas margins of underselling/overselling are based on importer sales prices.

¹⁴ One additional importer described such costs as 773 percent, mostly due to ***.

When asked to identify benefits from importing mattresses directly instead of purchasing from U.S. producers or importers, importers' answers included statements that only MiBs are available from import sources, that U.S. producers were not willing or able to provide the product demanded, and/or that U.S. producers' prices were higher than the cost of importing.

When asked whether the import cost (excluding additional costs) of mattresses they imported are lower than the price of purchasing mattresses from a U.S. producer or importer, 11 importers stated that the import costs were lower, and 15 stated that they were higher. When asked whether the import cost (including additional costs) of mattresses they imported are lower than the price of purchasing mattresses from a U.S. producer or importer, 11 importers stated that the import costs were lower, and 15 stated that they were higher.

Finally, importers were asked to estimate their firms' savings from importing mattresses rather than purchasing from a U.S. producer or importer. Eleven importers provided estimates of their savings from importing rather than purchasing from a U.S. producer. Their estimates ranged from 5 to 50 percent of the purchase price from a U.S. producer, with an average of 26 percent. Twelve importers provided estimates of their savings from importing rather than purchasing from a U.S. importer. Their estimates ranged from 5 to 60 percent of the purchase price from a U.S. importer, with an average of 21 percent.

Table V-11

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 1, landed duty-paid costs and quantities of imported product 1, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		China			Indonesia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-11--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 1, landed duty-paid costs and quantities of imported product 1, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Malaysia			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Table continued on next page.

Table V-11--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 1, landed duty-paid costs and quantities of imported product 1, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2018:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2019:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2020:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***

Note: Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-12

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 2, landed duty-paid costs and quantities of imported product 2, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		China			Indonesia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	221.11	6,092	***	***	***	***	***	***
Apr.-June	229.73	6,104	***	***	***	***	***	***
July-Sept.	213.61	4,933	***	***	***	***	***	***
Oct.-Dec.	208.29	4,557	***	***	***	***	***	***
2018:								
Jan.-Mar.	219.20	3,185	***	***	***	***	***	***
Apr.-June	212.62	3,423	***	***	***	***	***	***
July-Sept.	214.26	4,736	***	***	***	***	***	***
Oct.-Dec.	208.13	4,607	***	***	***	***	***	***
2019:								
Jan.-Mar.	188.73	4,097	***	***	***	***	***	***
Apr.-June	190.19	4,483	***	***	***	***	***	***
July-Sept.	191.78	3,809	***	***	***	***	***	***
Oct.-Dec.	171.30	3,945	***	***	***	***	***	***
2020:								
Jan.-Mar.	180.03	4,401	***	***	***	***	***	***
Apr.-June	174.68	4,313	***	***	***	***	***	***
July-Sept.	181.84	6,172	***	***	***	***	***	***

Note: Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Table continued on next page.

Table V-12--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 2, landed duty-paid costs and quantities of imported product 2, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:					
Jan.-Mar.	221.11	6,092	***	***	***
Apr.-June	229.73	6,104	***	***	***
July-Sept.	213.61	4,933	***	***	***
Oct.-Dec.	208.29	4,557	***	***	***
2018:					
Jan.-Mar.	219.20	3,185	***	***	***
Apr.-June	212.62	3,423	***	***	***
July-Sept.	214.26	4,736	***	***	***
Oct.-Dec.	208.13	4,607	***	***	***
2019:					
Jan.-Mar.	188.73	4,097	***	***	***
Apr.-June	190.19	4,483	***	***	***
July-Sept.	191.78	3,809	***	***	***
Oct.-Dec.	171.30	3,945	***	***	***
2020:					
Jan.-Mar.	180.03	4,401	***	***	***
Apr.-June	174.68	4,313	***	***	***
July-Sept.	181.84	6,172	***	***	***

Note: Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-13

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 3, landed duty-paid costs and quantities of imported product 3, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		China			Indonesia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

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Table V-13--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 3, landed duty-paid costs and quantities of imported product 3, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Malaysia			Serbia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

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Table V-13--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 3, landed duty-paid costs and quantities of imported product 3, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Vietnam			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	378.09	10,763	***	***	***	***	***	***
Apr.-June	347.24	20,649	***	***	***	***	***	***
July-Sept.	339.68	27,235	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-14

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 4, landed duty-paid costs and quantities of imported product 4, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		China			Indonesia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	306.20	24,203	***	***	***	***	***	***
Apr.-June	391.82	52,258	***	***	***	***	***	***
July-Sept.	407.53	48,861	***	***	***	***	***	***
Oct.-Dec.	411.30	43,281	***	***	***	***	***	***
2018:								
Jan.-Mar.	433.93	28,316	***	***	***	***	***	***
Apr.-June	478.71	24,766	***	***	***	***	***	***
July-Sept.	471.20	24,372	***	***	***	***	***	***
Oct.-Dec.	454.94	20,098	***	***	***	***	***	***
2019:								
Jan.-Mar.	471.27	19,271	***	***	***	***	***	***
Apr.-June	480.77	14,902	***	***	***	***	***	***
July-Sept.	468.47	17,680	***	***	***	***	***	***
Oct.-Dec.	402.27	11,789	***	***	***	***	***	***
2020:								
Jan.-Mar.	413.57	10,226	***	***	***	***	***	***
Apr.-June	422.76	8,981	***	***	***	***	***	***
July-Sept.	440.52	12,600	***	***	***	***	***	***

Note: Product 4: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-pack mattress.

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Table V-14--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 4, landed duty-paid costs and quantities of imported product 4, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:					
Jan.-Mar.	306.20	24,203	***	***	***
Apr.-June	391.82	52,258	***	***	***
July-Sept.	407.53	48,861	***	***	***
Oct.-Dec.	411.30	43,281	***	***	***
2018:					
Jan.-Mar.	433.93	28,316	***	***	***
Apr.-June	478.71	24,766	***	***	***
July-Sept.	471.20	24,372	***	***	***
Oct.-Dec.	454.94	20,098	***	***	***
2019:					
Jan.-Mar.	471.27	19,271	***	***	***
Apr.-June	480.77	14,902	***	***	***
July-Sept.	468.47	17,680	***	***	***
Oct.-Dec.	402.27	11,789	***	***	***
2020:					
Jan.-Mar.	413.57	10,226	***	***	***
Apr.-June	422.76	8,981	***	***	***
July-Sept.	440.52	12,600	***	***	***

Note: Product 4: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-pack mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-15

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 5, landed duty-paid costs and quantities of imported product 5, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

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Table V-15--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 5, landed duty-paid costs and quantities of imported product 5, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Indonesia			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

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Table V-15--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 5, landed duty-paid costs and quantities of imported product 5, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Thailand			Turkey		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

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Table V-15--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 5, landed duty-paid costs and quantities of imported product 5, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Vietnam			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	480.42	8,287	***	***	***	***	***	***
Apr.-June	504.34	9,130	***	***	***	***	***	***
July-Sept.	482.49	11,437	***	***	***	***	***	***
Oct.-Dec.	299.11	11,781	***	***	***	***	***	***
2019:								
Jan.-Mar.	253.12	27,258	***	***	***	***	***	***
Apr.-June	282.58	46,338	***	***	***	***	***	***
July-Sept.	330.70	46,899	***	***	***	***	***	***
Oct.-Dec.	346.14	54,073	***	***	***	***	***	***
2020:								
Jan.-Mar.	319.72	41,039	***	***	***	***	***	***
Apr.-June	335.15	39,416	***	***	***	***	***	***
July-Sept.	309.72	60,094	***	***	***	***	***	***

Note: Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-16

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 6, landed duty-paid costs and quantities of imported product 6, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	279.04	312,853	***	***	***	***	***	***
July-Sept.	266.74	318,695	***	***	***	***	***	***
Oct.-Dec.	276.09	224,174	***	***	***	***	***	***
2020:								
Jan.-Mar.	265.85	206,872	***	***	***	***	***	***
Apr.-June	250.50	190,763	***	***	***	***	***	***
July-Sept.	244.69	239,871	***	***	***	***	***	***

Note: Product 6: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Table continued on next page.

Table V-16--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 6, landed duty-paid costs and quantities of imported product 6, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		Indonesia			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	279.04	312,853	***	***	***	***	***	***
July-Sept.	266.74	318,695	***	***	***	***	***	***
Oct.-Dec.	276.09	224,174	***	***	***	***	***	***
2020:								
Jan.-Mar.	265.85	206,872	***	***	***	***	***	***
Apr.-June	250.50	190,763	***	***	***	***	***	***
July-Sept.	244.69	239,871	***	***	***	***	***	***

Note: Product 6: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-17

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product 7, landed duty-paid costs and quantities of imported product 7, and price-cost differentials, by quarter, January 2017-September 2020

Period	United States		China			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	130.67	183,885	***	***	***	***	***	***
Apr.-June	148.43	177,996	***	***	***	***	***	***
July-Sept.	153.70	175,087	***	***	***	***	***	***
Oct.-Dec.	147.38	172,895	***	***	***	***	***	***
2018:								
Jan.-Mar.	139.48	195,298	***	***	***	***	***	***
Apr.-June	146.53	200,747	***	***	***	***	***	***
July-Sept.	151.19	206,912	***	***	***	***	***	***
Oct.-Dec.	150.24	200,543	***	***	***	***	***	***
2019:								
Jan.-Mar.	140.74	226,652	***	***	***	***	***	***
Apr.-June	154.45	203,784	***	***	***	***	***	***
July-Sept.	151.48	214,486	***	***	***	***	***	***
Oct.-Dec.	144.41	196,231	***	***	***	***	***	***
2020:								
Jan.-Mar.	133.41	220,772	***	***	***	***	***	***
Apr.-June	141.97	201,430	***	***	***	***	***	***
July-Sept.	143.66	215,751	***	***	***	***	***	***

Note: Product 7: Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-11

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 1, by quarter, January 2017-September 2020

* * * * *

Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-12

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 2, by quarter, January 2017-September 2020

* * * * *

Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-13

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 3, by quarter, January 2017-September 2020

* * * * *

Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-14

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 4, by quarter, January 2017-September 2020

* * * * *

Product 4: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-pack mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-15

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 5, by quarter, January 2017-September 2020

* * * * *

Product 5: "Wrapped" innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-16

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 6, by quarter, January 2017-September 2020

* * * * *

Product 6: “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-17

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 7, by quarter, January 2017-September 2020

* * * * *

Product 7: Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-18

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 1, by quarter, January 2017-September 2020

* * * * *

Product 1: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-19

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 2, by quarter, January 2017-September 2020

* * * * *

Product 2: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 8.0 inches but less than 10.0 inches. Foam density in a top/comfort layer of greater than or equal to 3 lbs per cubic foot but less than or equal to 5 lbs per cubic foot. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-20

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 3, by quarter, January 2017-September 2020

* * * * *

Product 3: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-21

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 4, by quarter, January 2017-September 2020

* * * * *

Product 4: Memory foam mattress (without any innersprings), queen size, height (edge to edge) greater than or equal to 10.0 inches but less than 12.0 inches. Foam density in a top/comfort layer of greater than or equal to 2 lbs per cubic foot but less than 3 lbs per cubic foot. Shipped as a flat-pack mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-22

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 5, by quarter, January 2017-September 2020

* * * * *

Product 5: “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a Mattress-in-a-Box.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-23

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 6, by quarter, January 2017-September 2020

* * * * *

Product 6: “Wrapped” innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-24

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 7, by quarter, January 2017-September 2020

* * * * *

Product 7: Open/non-wrapped innerspring mattress (including mattresses with multiple cores and/or foam in addition to the innerspring), queen size, height (edge to edge) greater than or equal to 9.0 inches but less than or equal to 12.0 inches. Coil count less than 1200 coils in queen size. Shipped as a flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure V-25

Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product 8, by quarter, January 2017-September 2020

* * * * *

Product 8: Foam mattress (without any innersprings), with a width exceeding 27 inches, a length exceeding 51 inches, and a depth between 1.0 inch and 6.0 inches inclusive, on a nominal basis, typically designed to fit U.S. standard full size cribs.

Source: Compiled from data submitted in response to Commission questionnaires.

Price and import purchase cost trends

In general, prices decreased during January 2017-September 2020. Table V-18 summarizes price trends, by country and by product. Prices of U.S. product decreased for 6 of 8 pricing products. Among import sources, only China had 10 or more quarters of data, and showed mixed increases and decreases. Prices for subject imports in the aggregate decreased for 6 of 8 pricing products.

Table V-18
Mattresses: Summary of weighted-average f.o.b. prices for products 1-8 from the United States, Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Item	Number of quarters	Low price (\$ per mattress)	High price (\$ per mattress)	Change in price (percent)
Product 1 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***
Product 2 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***
Product 3 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***

Table continued on next page.

Table V-18--Continued

Mattresses: Summary of weighted-average f.o.b. prices for products 1-8 from the United States, Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Item	Number of quarters	Low price (\$ per mattress)	High price (\$ per mattress)	Change in price (percent)
Product 4 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***
Product 5 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***
Product 6 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***

Table continued on next page.

Table V-18--Continued

Mattresses: Summary of weighted-average f.o.b. prices for products 1-8 from the United States, Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Item	Number of quarters	Low price (\$ per mattress)	High price (\$ per mattress)	Change in price (percent)
Product 7 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***
Product 8 – price				
United States	***	***	***	***
Cambodia-price	***	***	***	***
China-price	***	***	***	***
Indonesia-price	***	***	***	***
Malaysia-price	***	***	***	***
Serbia-price	***	***	***	***
Thailand-price	***	***	***	***
Turkey-price	***	***	***	***
Vietnam-price	***	***	***	***
All subject-price	15	***	***	***

Note: Percentage change from the first quarter in which data were available to the last quarter in which price data were available.

Note: “All subject” refers to the weighted averages of all subject import prices in that quarter. Thus, minima, maxima, and trends in “all subject” may not be the same as those for costs from individual countries.

Source: Compiled from data submitted in response to Commission questionnaires.

In general, import purchase costs increased during January 2017-September 2020. Table V-19 summarizes the cost trends, by country and by product. As with the price data, generally only the Chinese product had reported data for 10 or more quarters.

Table V-19

Mattresses: Summary of weighted-average f.o.b. import costs for products 1-8 from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Item	Number of quarters	Low cost (\$ per mattress)	High cost (\$ per mattress)	Change in cost (percent)
Product 1 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	15	***	***	***
Product 2 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	12	***	***	***
Product 3 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	***	***	***	***
Product 4 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	***	***	***	***

Table continued on next page.

Table V-19--Continued

Mattresses: Summary of weighted-average f.o.b. import costs for products 1-8 from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Item	Number of quarters	Low cost (\$ per mattress)	High cost (\$ per mattress)	Change in cost (percent)
Product 5 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	15	***	***	***
Product 6 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	14	***	***	***
Product 7 – cost				
Cambodia-cost	***	***	***	***
China-cost	***	***	***	***
Indonesia-cost	***	***	***	***
Malaysia-cost	***	***	***	***
Serbia-cost	***	***	***	***
Thailand-cost	***	***	***	***
Turkey-cost	***	***	***	***
Vietnam-cost	***	***	***	***
All subject-cost	***	***	***	---

Note: Percentage change from the first quarter in which data were available to the last quarter in which price data were available.

Note: “All subject” refers to the weighted averages of all subject costs in that quarter. Thus, minima, maxima, and trends in “all subject” may not be the same as those for costs from individual countries.

Source: Compiled from data submitted in response to Commission questionnaires.

Price and cost comparisons

Price comparisons

As shown in table V-20, prices for product imported from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam were below those for U.S.-produced product in 227 of 235 instances (3.1 million mattresses); margins of underselling ranged from 1.6 to 71.4 percent. In the remaining 8 instances (13,622 mattresses), prices for product from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam were between 1.0 and 18.7 percent above prices for the domestic product.

Table V-20
Mattresses: Instances of underselling/(overselling) and the range and average of margins, by country, January 2017-September 2020

Source	Underselling				
	Number of quarters	Quantity (mattresses)	Average margin (percent)	Margin range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	227	3,141,492	37.6	1.6	71.4
Source	(Overselling)				
	Number of quarters	Quantity ¹ (mattresses)	Average margin (percent)	Margin range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	8	13,622	(7.5)	(1.0)	(18.7)

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Source: Compiled from data submitted in response to Commission questionnaires.

Price-cost comparisons

As shown in table V-21, landed duty-paid costs for product imported from subject countries were below those for U.S.-produced product in 144 of 147 instances (1.3 million mattresses); price-cost differentials ranged from 1.1 to 78.9 percent. In the remaining three instances, (6,672 mattresses), landed duty-paid costs for product from subject imports were 1.5 to 12.1 percent above prices for the domestic product.

Table V-21
Mattresses: Comparisons of import purchase costs and U.S.-producer sales prices, by country, January 2017-September 2020

Source	Import purchase cost lower than U.S. sales price				
	Number of quarters	Quantity (mattresses)	Average price-cost difference (percent)	Price-cost difference range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	144	1,264,177	46.1	1.1	78.9
Source	Import purchase cost higher than U.S. sales price				
	Number of quarters	Quantity ¹ (mattresses)	Average price-cost difference (percent)	Price-cost difference range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	3	6,672	(5.8)	(1.5)	(12.1)

Note: These data include only quarters in which there is a comparison between the U.S. and subject product

Source: Compiled from data submitted in response to Commission questionnaires.

Lost sales and lost revenue

In the preliminary phase of these investigations, the Commission requested that U.S. producers of mattresses report purchasers with which they experienced instances of lost sales or revenue due to competition from imports of mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and/or Vietnam during January 2017 to December 2019. In the petition, seven U.S. producers submitted 28 lost sales or lost revenue allegations.¹⁵ The allegations did not always include the specific values of the sales allegedly lost, but some estimates reached into the hundreds of millions of dollars of lost sales, from all subject countries.

In the final phase of these investigations, of the 48 responding U.S. producers, 22 reported that they had to reduce prices, and 16 reported that they had to roll back announced price increases, due to subject imports. Twenty-eight of 47 responding U.S. producers reported that they had lost sales to subject imports.

Staff contacted 84 purchasers and received responses from 22 purchasers.¹⁶ Responding purchasers reported purchasing 57.9 million mattresses during January 2017-September 2020 (table V-22).

Of the 22 responding purchasers, 8 reported that, since 2017, they had purchased imported mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and/or Vietnam instead of U.S.-produced product. Seven of these purchasers reported that subject import prices were lower than U.S.-produced product, and three (***) of these purchasers reported that price was a primary reason for the decision to purchase imported product rather than U.S.-produced product. Two purchasers estimated the quantity of mattresses from China purchased instead of domestic product; quantities ranged from *** mattresses (tables V-23 and V-24). Purchasers identified availability, quality, lead times, and service as non-price reasons for purchasing imported rather than U.S.-produced product.

Of the nine responding purchasers, one reported that U.S. producers had reduced prices in order to compete with lower-priced imports from Cambodia, China, Indonesia, Malaysia,

¹⁵ In addition to seven petitioners that submitted lost sales/lost revenue allegations, three U.S. producers (***) submitted a combined 30 lost sales and lost revenue allegations in their questionnaires. ***.

¹⁶ Three contacted firms stated that they did not purchase mattresses.

Serbia, Thailand, Turkey, and/or Vietnam; most reported that they did not know (table V-25). Additionally, *** indicated that U.S. producers had dropped their prices by 49 percent but had also indicated that U.S. producers did not lower prices to compete with subject imports. It stated that its domestic supplier had been unable to keep up supply due to raw material shortages in turn caused by the COVID-19 outbreak.

Table V-22
Mattresses: Purchasers' reported purchases and imports, January 2017-September 2020

Purchaser	Purchases in January 2017-September 2020 (mattresses)			Change in domestic share (pp, 2017-19)	Change in subject country share (pp, 2017-19)
	Domestic	Subject	All other		
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Total	26,080,380	28,313,537	3,507,226	(31.2)	27.4

Note: All other includes all other sources and unknown sources.
 Note: Purchasers' purchases from the United States fell *** percent from 2017 to 2019. Over the same period, purchasers' purchases plus imports fell *** percent from China, and rose from each other subject country, for an overall increase of *** percent from all subject countries.
 Note: Percentage points (pp) change: Change in the share of the firm's total purchases of domestic and/or subject country imports between first and last years.

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-23

Mattresses: Purchasers' responses to purchasing subject imports instead of domestic product

Purchaser	Purchased imports instead of domestic (Y/N)	Imports priced lower (Y/N)	If purchased imports instead of domestic, was price a primary reason		
			Y/N	If Yes, quantity purchased instead of domestic (mattresses)	If No, non-price reason
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***

Table continued on next page.

Table V-23--Continued

Mattresses: Purchasers' responses to purchasing subject imports instead of domestic product

Purchaser	Purchased imports instead of domestic (Y/N)	Imports priced lower (Y/N)	If purchased imports instead of domestic, was price a primary reason		
			Y/N	If Yes, quantity purchased instead of domestic (mattresses)	If No, non-price reason
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Total	Yes--8; No--14	Yes--7; No--0	Yes--3; No--6	***	

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-24

Mattresses: Purchasers' responses to purchasing subject instead of domestic, by country

Source	Count of purchasers reporting subject instead of domestic	Count of purchasers reported that imports were priced lower	Count of purchasers reporting that price was a primary reason for shift	Quantity subject purchased (mattresses)
Cambodia	4	2	---	***
China	8	7	3	***
Indonesia	2	---	---	***
Malaysia	---	---	---	***
Serbia	2	1	---	***
Thailand	3	2	---	***
Turkey	2	1	---	***
Vietnam	4	2	---	***
Any subject source	8	7	3	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table V-25
Mattresses: Purchasers' responses to U.S. producer price reductions

Purchaser	U.S. producers reduced priced to compete with subject imports (Y/N)	If U.S. producers reduced prices	
		Estimated U.S. price reduction (percent)	Additional information, if available
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
Total / average	Yes--1; No--9	***	

Note: ***.

Source: Compiled from data submitted in response to Commission questionnaires.

Part VI: Financial experience of U.S. producers

Background

Forty-six U.S. producers provided usable financial data.¹ Most of the reporting producers have a fiscal year that ends on December 31 and reported on the basis of generally accepted accounting principles (“GAAP”); others reported on a tax or cash basis.² Net sales consisted primarily of commercial sales; however, eleven producers reported internal consumption and three reported transfers to related firms. These non-commercial sales combined accounted for *** percent of total net sales by quantity in 2019. Non-commercial sales are included but not presented separately in this section of the report. In 2019, *** accounted for *** percent of the U.S. producers’ net sales by quantity, *** accounted for *** percent, *** accounted for *** percent, *** accounted for *** percent, *** accounted for *** percent, *** accounted for *** percent, and all other firms accounted for *** percent.

Staff conducted a verification of ***’s U.S. producer questionnaire response. The verification adjustments were incorporated into this report. ***.³

¹ *** submitted incomplete U.S. producer questionnaires in the financial section and their partial responses are not included in the aggregated financial data. These seven companies accounted for *** percent of total shipments in 2019. *** filed its U.S. producers’ questionnaire response late and incomplete (it omitted certain relevant costs needed to determine profitability). Had the response been used, the firm would have represented approximately *** percent of total net sales, by quantity, in 2019.

² *** used tax and *** used cash as their accounting bases. The firms with fiscal year ends other than December 31 are ***.

³ Staff verification report, ***, March 29, 2021. ***.

Operations on mattresses

Table VI-1 presents aggregated data on U.S. producers' operations in relation to mattresses over the period examined. Table VI-2 shows the changes in average unit values ("AUVs") of sales and costs. Table VI-3 presents selected company-specific financial data.⁴

Table VI-1

Mattresses: Results of operations of U.S. producers, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Total net sales	18,758,994	17,732,138	17,733,600	13,555,946	13,573,510
	Value (1,000 dollars)				
Total net sales	5,050,280	4,979,222	5,220,167	3,930,606	3,961,539
Cost of goods sold.--					
Raw materials	2,316,053	2,369,097	2,408,312	1,820,548	1,767,816
Direct labor	350,301	328,599	355,602	271,167	256,119
Other factory costs	337,042	344,703	410,261	307,378	354,160
Total COGS	3,003,396	3,042,399	3,174,175	2,399,093	2,378,095
Gross profit	2,046,884	1,936,823	2,045,992	1,531,513	1,583,444
SG&A expense	1,357,123	1,308,010	1,383,236	1,011,315	1,030,288
Operating income or (loss)	689,761	628,813	662,756	520,198	553,156
Other expenses/(income), net	290,245	341,314	535,759	268,732	881,278
Net income or (loss)	399,516	287,499	126,997	251,466	(328,122)
Depreciation/amortization	181,767	187,090	206,768	154,657	180,707
Cash flow	581,283	474,589	333,765	406,123	(147,415)
	Ratio to net sales (percent)				
Cost of goods sold.--					
Raw materials	45.9	47.6	46.1	46.3	44.6
Direct labor	6.9	6.6	6.8	6.9	6.5
Other factory costs	6.7	6.9	7.9	7.8	8.9
Average COGS	59.5	61.1	60.8	61.0	60.0
Gross profit	40.5	38.9	39.2	39.0	40.0
SG&A expense	26.9	26.3	26.5	25.7	26.0
Operating income or (loss)	13.7	12.6	12.7	13.2	14.0
Net income or (loss)	7.9	5.8	2.4	6.4	(8.3)

Table continued on next page.

⁴ ***. U.S. producers' questionnaire response of ***, question II-2a.

Table VI-1—Continued

Mattresses: Results of operations of U.S. producers, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Ratio to total COGS (percent)				
Cost of goods sold.--					
Raw materials	77.1	77.9	75.9	75.9	74.3
Direct labor	11.7	10.8	11.2	11.3	10.8
Other factory costs	11.2	11.3	12.9	12.8	14.9
Average COGS	100.0	100.0	100.0	100.0	100.0
	Unit value (dollars per unit)				
Total net sales	269	281	294	290	292
Cost of goods sold.--					
Raw materials	123	134	136	134	130
Direct labor	19	19	20	20	19
Other factory costs	18	19	23	23	26
Average COGS	160	172	179	177	175
Gross profit	109	109	115	113	117
SG&A expense	72	74	78	75	76
Operating income or (loss)	37	35	37	38	41
Net income or (loss)	21	16	7	19	(24)
	Number of firms reporting				
Operating losses	6	11	9	7	7
Net losses	8	14	15	14	12
Data	45	45	46	46	46

Source: Compiled from data submitted in response to Commission questionnaires.

Table VI-2

Mattresses: Changes in AUVs, between fiscal years and between partial year periods

Item	Between fiscal years			Between partial year period
	2017-19	2017-18	2018-19	2019-20
Change in AUVs (percent)				
Total net sales	▲9.3	▲4.3	▲4.8	▲0.7
Cost of goods sold.--				
Raw materials	▲10.0	▲8.2	▲1.6	▼(3.0)
Direct labor	▲7.4	▼(0.8)	▲8.2	▼(5.7)
Other factory costs	▲28.8	▲8.2	▲19.0	▲15.1
Average COGS	▲11.8	▲7.2	▲4.3	▼(1.0)
Change in AUVs (dollars per unit)				
Total net sales	▲25	▲12	▲14	▲2
Cost of goods sold.--				
Raw materials	▲12	▲10	▲2	▼(4)
Direct labor	▲1	▼(0)	▲2	▼(1)
Other factory costs	▲5	▲1	▲4	▲3
Average COGS	▲19	▲11	▲7	▼(2)
Gross profit	▲6	▲0	▲6	▲4
SG&A expense	▲6	▲1	▲4	▲1
Operating income or (loss)	▲1	▼(1)	▲2	▲2
Net income or (loss)	▼(14)	▼(5)	▼(9)	▼(43)

Note.--AUV changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

Source: Compiled from data submitted in response to Commission questionnaires.

Table VI-3

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Total net sales (units)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	14,035,750	13,151,705	12,773,566	9,810,305	9,672,180
All other firms	4,723,244	4,580,433	4,960,034	3,745,641	3,901,330
All firms	18,758,994	17,732,138	17,733,600	13,555,946	13,573,510
	Total net sales (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	4,004,758	3,804,994	3,820,443	2,889,537	2,786,174
All other firms	1,045,522	1,174,228	1,399,724	1,041,069	1,175,365
All firms	5,050,280	4,979,222	5,220,167	3,930,606	3,961,539
	Cost of goods sold (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	2,260,711	2,220,609	2,212,651	1,688,069	1,594,080
All other firms	742,685	821,790	961,524	711,024	784,015
All firms	3,003,396	3,042,399	3,174,175	2,399,093	2,378,095

Table continued on next page.

Table VI-3—Continued

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Gross profit or (loss) (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	1,744,047	1,584,385	1,607,792	1,201,468	1,192,094
All other firms	302,837	352,438	438,200	330,045	391,350
All firms	2,046,884	1,936,823	2,045,992	1,531,513	1,583,444
	SG&A expenses (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	1,147,396	1,068,653	1,101,480	806,699	795,466
All other firms	209,727	239,357	281,756	204,616	234,822
All firms	1,357,123	1,308,010	1,383,236	1,011,315	1,030,288
	Operating income or (loss) (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	596,651	515,732	506,312	394,769	396,628
All other firms	93,110	113,081	156,444	125,429	156,528
All firms	689,761	628,813	662,756	520,198	553,156

Table continued on next page.

Table VI-3—Continued

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Net income or (loss) (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	319,224	190,680	19,506	155,055	(384,115)
All other firms	80,292	96,819	107,491	96,411	55,993
All firms	399,516	287,499	126,997	251,466	(328,122)
	COGS to net sales ratio (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	56.5	58.4	57.9	58.4	57.2
All other firms	71.0	70.0	68.7	68.3	66.7
All firms	59.5	61.1	60.8	61.0	60.0
	Gross profit or (loss) to net sales ratio (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	43.5	41.6	42.1	41.6	42.8
All other firms	29.0	30.0	31.3	31.7	33.3
All firms	40.5	38.9	39.2	39.0	40.0

Table continued on next page.

Table VI-3—Continued

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	SG&A expense to net sales ratio (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	28.7	28.1	28.8	27.9	28.6
All other firms	20.1	20.4	20.1	19.7	20.0
All firms	26.9	26.3	26.5	25.7	26.0
	Operating income or (loss) to net sales ratio (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	14.9	13.6	13.3	13.7	14.2
All other firms	8.9	9.6	11.2	12.0	13.3
All firms	13.7	12.6	12.7	13.2	14.0
	Net income or (loss) to net sales ratio (percent)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	8.0	5.0	0.5	5.4	(13.8)
All other firms	7.7	8.2	7.7	9.3	4.8
All firms	7.9	5.8	2.4	6.4	(8.3)

Table continued on next page.

Table VI-3—Continued

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Unit net sales value (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	285	289	299	295	288
All other firms	221	256	282	278	301
All firms	269	281	294	290	292
	Unit raw materials (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	125	134	135	134	127
All other firms	118	132	137	135	138
All firms	123	134	136	134	130
	Unit direct labor (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	20	19	20	20	19
All other firms	16	18	21	20	18
All firms	19	19	20	20	19

Table continued on next page.

Table VI-3—Continued

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Unit other factory costs (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	16	16	18	18	19
All other firms	23	30	36	34	45
All firms	18	19	23	23	26
	Unit COGS (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	161	169	173	***	***
All other firms	157	179	194	***	***
All firms	160	172	179	***	***
	Unit gross profit or (loss) (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	124	120	126	122	123
All other firms	64	77	88	88	100
All firms	109	109	115	113	117

Table continued on next page.

Table VI-3—Continued

Mattresses: Select results of operations of U.S. producers, by company, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Unit SG&A expenses (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	82	81	86	82	82
All other firms	44	52	57	55	60
All firms	72	74	78	75	76
	Unit operating income or (loss) (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	43	39	40	40	41
All other firms	20	25	32	33	40
All firms	37	35	37	38	41
	Unit net income or (loss) (dollars per unit)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	23	14	2	16	(40)
All other firms	17	21	22	26	14
All firms	21	16	7	19	(24)

Note: ***. Emails from ***, February 16, 2021 and ***, February 18, 2021.

Source: Compiled from data submitted in response to Commission questionnaires.

Net sales

Total net sales quantity irregularly declined by 5.5 percent from 2017 to 2019 while total net sales value irregularly increased by 3.4 percent. Both total net sales quantity and value were somewhat higher in January-September 2020 (“interim 2020”) than in January-September 2019 (“interim 2019”). As shown in table VI-3, three firms *** accounted for most of the decline in net sales quantity from 2017 to 2019 while three firms *** accounted for most of the increase in net sales value over the same period.⁵ ***.⁶ As shown in table VI-3, the average unit sales value increased from \$269 in 2017 to \$294 in 2019 and was higher in interim 2020 than in interim 2019. ***.⁷

Cost of goods sold and gross profit or loss

Total cost of good sold (“COGS”) increased by 5.7 percent from 2017 to 2019 but was somewhat lower in interim 2020 than in interim 2019. Per-unit COGS increased from 2017 to 2019 but was lower in interim 2020 than in interim 2019. As shown in table VI-3, *** reported increasing total COGS from 2017 to 2019, while *** reported increasing unit COGS during the period. As a ratio to net sales, COGS increased irregularly from 59.5 percent in 2017 to 60.8 percent in 2019 and was lower in interim 2020 than in interim 2019.

As shown in table VI-1, raw materials represent the single largest component of total COGS, and ranged from 74.3 percent of total COGS in interim 2020 to 77.9 percent of total

⁵ ***. See footnote 3.

⁶ ***. U.S. producers’ questionnaire response of ***, question II-2.

⁷ Email from ***, February 16, 2021.

COGS in 2018. Per-unit raw material costs increased each year from \$123 in 2017 to \$136 in 2019 and were lower in interim 2020 than in interim 2019.⁸ Raw materials consisted of foam or other resilient materials, innersprings, chemicals and other additives, and other material inputs such as ***. Table VI-4 presents a break-out of the raw material costs, by type, for fiscal year 2019.⁹

Table VI-4
Mattresses: Raw material costs, by type, 2019

Raw materials	Fiscal 2019	
	Value (1,000 dollars)	Share of value (percent)
Innersprings	400,207	16.6
Foam or other resilient material	820,502	34.1
Upholstery materials and ticking	680,957	28.3
Chemicals and other additives	221,436	9.2
Other material inputs	285,209	11.8
Total, raw materials	2,408,312	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

As a share of total COGS, direct labor costs ranged from 10.8 percent in 2018 and interim 2020 to 11.7 percent in 2017, while other factory costs ranged from 11.2 percent in 2017 to 14.9 percent in interim 2020. The average per unit direct labor costs increased from \$19 in 2017 and 2018 to \$20 in 2019 and were lower in interim 2020 than in interim 2019. The average per unit other factory costs increased from \$18 in 2017 to \$23 in 2019 and were higher in interim 2020 than in interim 2019.

⁸ ***. Email from ***, February 16, 2021. ***. U.S. producers' questionnaire response of ***, question III-10 and email from ***, February 17, 2021.

⁹ Seven U.S. producers reported purchasing inputs from related suppliers: ***. U.S. producer questionnaires, questions III-6, III-7, and III-8.

As shown in table VI-3, average raw material costs, direct labor, and other factory costs varied greatly from company to company. These cost differences reflect underlying differences in input costs (e.g., foam, upholstery, innersprings, and chemicals) and product mix (e.g., recreation vehicle sizes, sofa beds, child, twin, full, queen, and/or king), and variations in manufacturing processes, as well as customer requirements.

Table VI-1 shows that U.S. producers' aggregate gross profits somewhat declined from 2017 to 2018 but increased from 2018 to 2019, resulting in a decline of 0.04 percent because the increase in total COGS was greater than the increase in total net sales value. The industry's gross profit was higher in interim 2020 than in interim 2019 due to the combined effects of the increase in total net sales value and the decline in total COGS. Gross profit margin (gross profit as a ratio to net sales) declined from 40.5 percent in 2017 to 38.9 percent in 2018 but increased to 39.2 percent in 2019. Gross profit margin was higher in interim 2020 than in interim 2019.

Selling, general, and administrative expenses and operating income or loss

As shown in table VI-1, the U.S. industry's selling, general, and administrative ("SG&A") expenses increased irregularly from 2017 to 2019 and were somewhat higher in interim 2020 than in interim 2019.¹⁰ SG&A expenses ratio (i.e., total SG&A expenses divided by net sales) irregularly declined from 26.9 percent in 2017 to 26.5 percent in 2019 and was somewhat higher in interim 2020 than in interim 2019.¹¹ On a per-unit basis, SG&A expenses increased from \$72 in 2017 to \$78 in 2019 and were higher in interim 2020 than in interim 2019 for producers as a whole.

Table VI-1 shows that U.S. producers' aggregate operating income irregularly declined from 2017 to 2019 by 3.9 percent and was higher in interim 2020 than in interim 2019. Operating income margin (operating income divided by total net sales) exhibited the same trend.

¹⁰ ***. See footnote 3.

¹¹ ***. U.S. producers' questionnaire response of ***, question III-10.

Other expenses and net income or loss

Classified below the operating income level are interest expense, other expense, and other income. In table VI-1, these items are aggregated and only the net amount is shown. The all other expenses increased from 2017 to 2019 and were higher in interim 2020 than in interim 2019. ***.^{12 13}

As shown in table VI-1, net income declined from 2017 to 2019 and was lower in interim 2020 (a net loss) than in interim 2019 (a net profit). Net income margin (net income as a ratio to net sales) exhibited the same trend.

Appendix E-2 provides the U.S. producers' narrative responses regarding effects on financial performance of COVID-19.

¹² ***. U.S. producers' questionnaire response of ***, questions III-10, III-11 and III-19.

¹³ ***. U.S. producers' questionnaire response of ***, question III-10.

Variance analysis

A variance analysis is most useful for products that do not have substantial changes in product mix over the period investigated and the methodology is most sensitive at the plant or firm level, rather than the aggregated industry level. Because of the wide variation in product mix and unit values between firms in this proceeding, a variance analysis is not presented.

Capital expenditures and research and development expenses

Table VI-5 presents U.S. producers' capital expenditures and research and development ("R&D") expenses related to their mattress operations and table VI-6 presents corresponding narrative descriptions.

Table VI-5
Mattresses: Capital expenditures and R&D expenses for U.S. producers, by firm, 2017-19, January to September 2019, and January to September 2020

Item	Fiscal year			January to September	
	2017	2018	2019	2019	2020
	Capital expenditures (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	76,030	65,180	83,546	57,277	76,570
All other firms	29,726	18,634	28,678	19,011	39,860
All firms	105,756	83,814	112,224	76,288	116,430
	R&D expenses (1,000 dollars)				
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
Top six firms in 2019	36,298	31,523	26,749	20,387	19,052
All other firms	4,068	4,914	7,794	5,828	7,659
All firms	40,366	36,437	34,543	26,215	26,711

Source: Compiled from data submitted in response to Commission questionnaires.

Table VI-6

Mattresses: Nature and focus of capital expenditures and R&D expenses for U.S. producers, by firm, 2017-19, January to September 2019, and January to September 2020

Item	Narrative responses
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table VI-6—Continued

Mattresses: Nature and focus of capital expenditures and R&D expenses for U.S. producers, by firm, 2017-19, January to September 2019, and January to September 2020

Item	R&D nature and focus
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Assets and return on assets

Table VI-7 presents data on the U.S. producers' total assets and their return on assets (operating income divided by total assets) related to operations on mattresses and table VI-8 presents corresponding narrative descriptions.¹⁴

Table VI-7
Mattresses: Value of assets used in production, warehousing, and sales, and return on assets for U.S. producers, by firm, 2017-19

Firm	Fiscal years		
	2017	2018	2019
	Total net assets (1,000 dollars)		
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
Top six firms in 2019	4,599,613	4,504,929	4,415,962
All other firms	303,682	365,529	465,955
All firms	4,903,295	4,870,458	4,881,917
	Operating return on assets (percent)		
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
Top six firms in 2019	13.0	11.4	11.5
All other firms	30.7	30.9	33.6
All firms	14.1	12.9	13.6

Source: Compiled from data submitted in response to Commission questionnaires.

¹⁴ The return on assets is calculated as operating income divided by total assets. With respect to a firm's overall operations, the total asset value reflects an aggregation of a number of assets which are generally not product specific. Thus, high-level allocations are generally required in order to report a total asset value for the subject product.

Table VI-8
Mattresses: Asset description responses for U.S. producers, by firm, 2017-19

Item	Narrative responses
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Capital and investment

The Commission requested that U.S. producers of mattresses describe any actual or potential negative effects of imports of mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam on their firms' growth, investment, ability to raise capital, development and production efforts, or the scale of capital investments since January 1, 2017. Table VI-9 presents the number of firms reporting an impact in each category and table VI-10 provides the U.S. producers' narrative responses.

Table VI-9
Mattresses: Actual and anticipated negative effects of imports on investment and growth and development

Item	No	Yes
Negative effects on investment	24	22
Cancellation, postponement, or rejection of expansion projects		5
Denial or rejection of investment proposal		1
Reduction in the size of capital investments		6
Return on specific investments negatively impacted		12
Other		10
Negative effects on growth and development	25	21
Rejection of bank loans		1
Lowering of credit rating		2
Problem related to the issue of stocks or bonds		0
Ability to service debt		5
Other		19
Anticipated negative effects of imports	16	30

Source: Compiled from data submitted in response to Commission questionnaires.

Table VI-10

Mattresses: Narratives relating to actual and anticipated negative effects of imports on investment and growth and development, since January 1, 2017

Item / Firm	Narrative
Cancellation, postponement, or rejection of expansion projects:	
***	***
***	***
***	***
***	***
***	***
Denial or rejection of investment proposal:	
***	***
Reduction in the size of capital investments:	
***	***
***	***
***	***
***	***
***	***
***	***
Return on specific investments negatively impacted:	
***	***
***	***
***	***
***	***
***	***

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Table VI-10--Continued

Mattresses: Narratives relating to actual and anticipated negative effects of imports on investment and growth and development, since January 1, 2017

***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
Other negative effects on investments:	
***	***
***	***
***	***
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***	***
***	***

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Table VI-10--Continued

Mattresses: Narratives relating to actual and anticipated negative effects of imports on investment and growth and development, since January 1, 2017

***	***
Rejection of bank loans:	
***	***
Lowering of credit rating:	
***	***
***	***
Ability to service debt:	
***	***
***	***
***	***
***	***
***	***

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**Table VI-10--Continued
Mattresses: Narratives relating to actual and anticipated negative effects of imports on
investment and growth and development, since January 1, 2017**

Other effects on growth and development:	
***	***
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Table VI-10--Continued

Mattresses: Narratives relating to actual and anticipated negative effects of imports on investment and growth and development, since January 1, 2017

Anticipated effects of imports:	
***	***
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Table VI-10--Continued
Mattresses: Narratives relating to actual and anticipated negative effects of imports on investment and growth and development, since January 1, 2017

***	***
***	***
***	***
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***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Part VII: Threat considerations and information on nonsubject countries

Section 771(7)(F)(i) of the Act (19 U.S.C. § 1677(7)(F)(i)) provides that—

In determining whether an industry in the United States is threatened with material injury by reason of imports (or sales for importation) of the subject merchandise, the Commission shall consider, among other relevant economic factors¹--

- (I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement), and whether imports of the subject merchandise are likely to increase,*
- (II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,*
- (III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,*
- (IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices, and are likely to increase demand for further imports,*
- (V) inventories of the subject merchandise,*

¹ Section 771(7)(F)(ii) of the Act (19 U.S.C. § 1677(7)(F)(ii)) provides that “The Commission shall consider {these factors} . . . as a whole in making a determination of whether further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted under this title. The presence or absence of any factor which the Commission is required to consider . . . shall not necessarily give decisive guidance with respect to the determination. Such a determination may not be made on the basis of mere conjecture or supposition.”

- (VI) *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,*
- (VII) *in any investigation under this title which involves imports of both a raw agricultural product (within the meaning of paragraph (4)(E)(iv)) and any product processed from such raw agricultural product, the likelihood that there will be increased imports, by reason of product shifting, if there is an affirmative determination by the Commission under section 705(b)(1) or 735(b)(1) with respect to either the raw agricultural product or the processed agricultural product (but not both),*
- (VIII) *the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and*
- (IX) *any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).²*

Information on the nature of the subsidies was presented earlier in this report; information on the volume and pricing of imports of the subject merchandise is presented in *Parts IV* and *V*; and information on the effects of imports of the subject merchandise on U.S. producers' existing development and production efforts is presented in *Part VI*. Information on inventories of the subject merchandise; foreign producers' operations, including the potential for "product-shifting;" any other threat indicators, if applicable; and any dumping in third-country markets, follows. Also presented in this section of the report is information obtained for consideration by the Commission on nonsubject countries.

² Section 771(7)(F)(iii) of the Act (19 U.S.C. § 1677(7)(F)(iii)) further provides that, in antidumping investigations, ". . . the Commission shall consider whether dumping in the markets of foreign countries (as evidenced by dumping findings or antidumping remedies in other WTO member markets against the same class or kind of merchandise manufactured or exported by the same party as under investigation) suggests a threat of material injury to the domestic industry."

The industry in Cambodia

The Commission issued foreign producer/exporter questionnaires to six firms for which valid contact information was obtained that are believed to produce and/or export mattresses from Cambodia.³ No response to the Commission’s questionnaire in the final phase of these investigations was submitted by any foreign producer or exporter in Cambodia. However, one usable response to the Commission’s questionnaire was received during the preliminary phase of these investigations from Chius Polyurethane Material (Cambodia) Co., Ltd. (“Chius”). Unless otherwise noted, the information in this section of the report concerning Cambodia is based on the preliminary phase questionnaire response of Chius. This firm’s exports to the United States accounted for *** percent of reported U.S. imports of mattresses from Cambodia in 2019.⁴ Table VII-1 presents information on the mattress operations submitted by Chius in Cambodia.

Table VII-1
Cambodia: Summary data for producer in Cambodia, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Chius	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires in the preliminary phase of these investigations.

³ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

⁴ The coverage number presented was calculated using importer data submitted in response to Commission questionnaires in the final phase of these investigations. Chius reported that *** percent of its exports to the United States were imported by its related U.S. importer, ***. Other responding U.S. importers reported that producers of their mattress imports from Cambodia include ***.

Changes in operations

Cambodian producer/exporter Chius did not report any changes in the nature of its mattress operations since January 1, 2017. Further, the firm indicated that it does not anticipate any changes in the character of its operations or organization relating to the production of mattresses in the future.

Operations on mattresses

Table VII-2 presents information on the mattress operations of Cambodian producer/exporter Chius. During 2017-19, Chius' capacity to produce mattresses remained constant, while its annual production of *** mattresses during 2017-18 increased by *** percent to *** mattresses in 2019. Calculated capacity utilization, therefore, increased by *** percentage points from *** percent in 2017 and 2018 to *** percent in 2019. Chius reported that its capacity and production are projected to remain constant during 2020 and 2021. Chius was asked about constraints on its production capacity. It reported that its capacity is limited by its "****."

Chius' export shipments to the United States accounted for *** shipments of its mattresses during 2017-19. Export shipments to the United States mirrored the company's reported production data, increasing by *** percent from *** mattresses during 2017 and 2018 to *** mattresses in 2019. Like production, export shipments to the United States are projected to remain constant and are expected to continue to account for *** Chius' mattress shipments throughout 2020-21.

Table VII-2

Mattresses: Data for Cambodian producer Chius, 2017-19 and projected calendar years 2020 and 2021

	Actual experience			Projections	
	Calendar year			Calendar year	
	2017	2018	2019	2020	2021
	Quantity (units)				
Capacity	***	***	***	***	***
Production	***	***	***	***	***
End-of-period inventories	***	***	***	***	***
Shipments:					
Home market shipments:					
Internal consumption/ transfers	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***
Total home market shipments	***	***	***	***	***
Export shipments to:					
United States	***	***	***	***	***
All other markets	***	***	***	***	***
Total exports	***	***	***	***	***
Total shipments	***	***	***	***	***
	Ratios and shares (percent)				
Capacity utilization	***	***	***	***	***
Inventories/production	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***
Share of shipments:					
Home market shipments:					
Internal consumption/ transfers	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***
Total home market shipments	***	***	***	***	***
Export shipments to:					
United States	***	***	***	***	***
All other markets	***	***	***	***	***
Total exports	***	***	***	***	***
Total shipments	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

. The firm indicated *** "."

Exports

According to GTA, the leading export market, by value, for “articles of bedding”⁵ from Cambodia is the United States (table VII-3). During 2019, the United States was the largest export market for articles of bedding from Cambodia, accounting for 97.1 percent, followed by Canada as a distant second, accounting for 2.8 percent.

Table VII-3
Articles of bedding: Cambodia exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Value (1,000 dollars)		
United States	1,914	2,456	44,023
Canada	474	673	1,279
China	---	4	14
United Kingdom	---	---	13
Hong Kong	---	---	1
Costa Rica	---	---	1
All other destination markets	3	4	1
All destination markets	2,391	3,137	45,332
	Share of Value (percent)		
United States	80.1	78.3	97.1
Canada	19.8	21.4	2.8
China	---	0.1	0.0
United Kingdom	---	---	0.0
Hong Kong	---	---	0.0
Costa Rica	---	---	0.0
All other destination markets	0.1	0.1	0.0
All destination markets	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data. Quantity data are not available.

Source: Official imports statistics of imports from Cambodia (constructed export statistics for Cambodia) under HS subheadings 9404.21 and 9404.29 as reported by various statistical reporting authorities in the Global Trade Atlas database, accessed February 18, 2020.

⁵ Throughout this report, the presentation of GTA export data is for “articles of bedding” reported at the 6-digit HS level, which includes not only in-scope mattresses, but also other mattresses and bedding articles that are not included in the scope of these investigations, such as specifically excluded mattresses, as well as mattress toppers, pillows, comforters, bedsheets, and other bedding items.

The industry in China

China is reported to be ***. *** were produced by manufacturers in China in that year, *** of which were innerspring mattresses. There are hundreds of mattress producers in China, with the largest *** accounting for *** of total mattress production in China.⁶

The Commission issued foreign producers'/exporters' questionnaires to 35 firms for which valid contact information was obtained that are believed to produce and/or export mattresses from China.⁷ A usable response to the Commission's questionnaire was received from one firm: Zinus (Xiamen) Inc. ("Zinus"), ***.⁸ Zinus' exports to the United States accounted for *** percent of reported U.S. imports of mattresses from China in 2019.⁹ ***. Table VII-4 presents information on the mattress operations of the responding producer/exporter in China.

Table VII-4
Mattresses: Summary data on firms in China, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Zinus	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

⁶ Petition, Vol. 1, exh. I-10, citing ***.

⁷ These firms were identified through a review of information in the petition, the Commission's recent investigation on mattresses from China, the preliminary phase of these investigations, and ***.

⁸ Petition, Vol. 1, exh. I-10, citing ***.

⁹ The coverage number presented was calculated using importer data submitted in response to Commission questionnaires. In the Commission's recent investigation on mattresses from China, usable questionnaire responses were received from 13 firms producing mattresses in China. These 13 firms' exports to the United States together accounted for 59.7 percent of U.S. imports of mattresses from China in 2018 and *** percent of overall production of mattresses in China in 2018. Zinus was the largest of the 13 responding producers, accounting for *** percent of 2018 mattress production in China as reported in that proceeding. The time period for which foreign producer data were collected in that investigation was 2016-18, January-June 2018, January-June 2019, and projected 2019-20. Investigation No. 731-TA-1424 (Final): Mattresses from China, Confidential Report, INV-RR-116, November 5, 2019, as revised in INV-RR-120, November 12, 2019 ("China final confidential report"), p. VII-3 and tables VII-1 and VII-3.

Changes in operations

As presented in table VII-5, Zinus reported two operational changes since January 1, 2017—***.

Table VII-5

Mattresses: Reported changes in operations by the producer in China, since January 1, 2017

Item / Firm	Reported changed in operations
Plant openings:	
***	***
Other:	
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Producers in the subject countries were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, production, and sales (including exports to the United States) relating to mattresses. Zinus reported ***. Zinus' explanation for this response is presented in appendix E (table E-4).

Operations on mattresses

Table VII-6 presents information on the mattress operations of Chinese producer/exporter Zinus. The firm's annual production capacity in China increased by *** percent from *** mattresses in 2017 to *** mattresses in 2018, but declined by *** percent to *** mattresses in 2019, ending *** percent lower in 2019 than in 2017. Production capacity was *** percent lower in interim 2020 compared with interim 2019. Zinus' production capacity in China is projected to be *** percent lower in 2020 and 2021 than in 2019. Zinus was asked about constraints on its production capacity. It reported that its capacity is limited by ***. Zinus explained that ***.

Table VII-6

Mattresses: Data on Chinese producer Zinus, 2017-19, January to September 2019, and January to September 2020 and projection calendar years 2020 and 2021

Item	Actual experience					Projections	
	Calendar year			January to September		Calendar year	
	2017	2018	2019	2019	2020	2020	2021
	Quantity (units)						
Capacity	***	***	***	***	***	***	***
Production	***	***	***	***	***	***	***
End-of-period inventories	***	***	***	***	***	***	***
Shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***
	Ratios and shares (percent)						
Capacity utilization	***	***	***	***	***	***	***
Inventories/production	***	***	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***	***	***
Share of shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Similar to its reported trends in capacity, mattress production by Zinus in China increased by *** percent from *** mattresses in 2017 to *** mattresses in 2018, but declined by *** percent to *** mattresses in 2019, ending *** percent lower in 2019 than in 2017. Production was *** percent lower in interim 2020 compared with interim 2019. Projections indicated that Zinus' production in China is expected to decline by *** from 2019 levels by 2021. Zinus' capacity utilization declined from *** percent in 2017 to *** percent in 2019 and was *** percent during interim 2020. Zinus reported that capacity utilization is projected to be *** percent during calendar year 2020 and *** during 2021.

The overall trend in Zinus' total shipments mirrored that of the firm's reported production, increasing slightly from 2017 to 2018, but declining in 2019 to a level below that reported in 2017. Zinus' export shipments accounted for *** of its total shipments during 2017-19 and *** of its exports were destined for the United States. Zinus' exports to the United States accounted for *** percent of its total shipments in 2017, *** percent in 2018, and *** percent in 2019. The quantity of exports to the United States declined by *** percent between 2017 and 2019, with the overwhelming majority of the decline occurring from 2018 to 2019. Zinus' total shipments were *** percent lower in interim 2020 compared with interim 2019 and a further decline in its exports to the United States to *** was reported during interim 2020. Projections indicate that Zinus' 2021 total shipments are expected to be *** the level reported in 2019 and that it expects to replace its exports to the United States with exports to other markets. Export shipments to other countries, which increased from 2017 to 2019, were destined for ***.

Inventories represented a relatively minor (i.e., less than *** percent) and fluctuating share of Zinus' production and shipments during 2017-19, although inventories as a share of total shipments was higher at *** percent during interim 2020 compared with *** percent during interim 2019. Zinus' data indicate that the shares are expected to increase to *** during 2020-21 as the firm's production and shipments decline.

Production and capacity by packaging type

Zinus reported that *** of its mattress capacity is dedicated to the production of MiBs and that *** capacity to produce FPMs.

Alternative products

As shown in table VII-7, Zinus reported the production of out-of-scope products on the same equipment and machinery used to produce mattresses. Mattresses accounted for the largest share of Zinus' overall plant production using shared equipment during 2017-19 (** percent in 2017 and 2018 and ** percent in 2019), although the production of these other items increased in 2019 as production of mattresses declined. During January-September 2020, mattresses accounted for a smaller share (** percent) of Zinus' overall plant production. In addition to mattresses, other items produced by Zinus on shared equipment include mattress toppers and pet items. Zinus reported that **. It added that **.

Table VII-7

Mattresses: Overall capacity and production on the same equipment as in-scope production by producers in China, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall capacity	**	**	**	**	**
Production:					
Mattresses	**	**	**	**	**
Out-of-scope production	**	**	**	**	**
Total production on same machinery	**	**	**	**	**
	Ratios and shares (percent)				
Overall capacity utilization	**	**	**	**	**
Share of production:					
Mattresses	**	**	**	**	**
Out-of-scope production	**	**	**	**	**
Total production on same machinery	**	**	**	**	**

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Exports

China is the largest mattress exporter in the world, accounting for 29 percent of global mattress exports in 2018.¹⁰ According to GTA global export data for "articles of bedding," China accounted for the largest share of the value of global exports of bedding products (19.3 percent) in 2019 (see global export data presented later in this part of the report at table VII-45). The leading export markets for articles of bedding from China in 2019, by quantity, were

¹⁰ Petition, Vol. 1, exh. I-10, citing **.

the United States and Japan, accounting for 27.6 percent and 19.3 percent, respectively (table VII-8).

Table VII-8
Articles of bedding: China exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Quantity (units)		
United States	26,852,188	27,874,795	22,232,641
Japan	14,826,945	17,394,938	15,535,311
United Kingdom	5,791,491	6,137,427	6,746,926
Bangladesh	43,948	1,576,630	5,523,787
Canada	2,282,553	2,207,274	3,113,880
Korea	1,907,454	1,756,715	2,502,754
Germany	1,984,202	1,808,945	2,328,059
Australia	1,828,701	1,897,892	2,247,386
Vietnam	926,648	1,310,633	2,023,858
All other destination markets	23,386,638	22,356,027	18,220,808
Total exports	79,830,768	84,321,276	80,475,410
	Value (1,000 dollars)		
United States	667,085	757,060	312,907
Japan	154,156	159,669	162,621
United Kingdom	33,297	34,447	44,703
Bangladesh	432	334	184
Canada	24,340	35,880	50,286
Korea	28,700	33,743	50,404
Germany	13,180	11,327	28,690
Australia	60,743	69,903	68,534
Vietnam	13,376	25,507	32,349
All other destination markets	232,203	263,858	328,794
Total exports	1,227,511	1,391,727	1,079,473

Table continued on next page.

Table VII-8—Continued
Articles of bedding: China exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Unit value (dollars per unit)		
United States	24.84	27.16	14.07
Japan	10.40	9.18	10.47
United Kingdom	5.75	5.61	6.63
Bangladesh	9.83	0.21	0.03
Canada	10.66	16.26	16.15
Korea	15.05	19.21	20.14
Germany	6.64	6.26	12.32
Australia	33.22	36.83	30.49
Vietnam	14.44	19.46	15.98
All other destination markets	9.93	11.80	18.04
Total exports	15.38	16.51	13.41
	Share of quantity (percent)		
United States	33.6	33.1	27.6
Japan	18.6	20.6	19.3
United Kingdom	7.3	7.3	8.4
Bangladesh	0.1	1.9	6.9
Canada	2.9	2.6	3.9
Korea	2.4	2.1	3.1
Germany	2.5	2.1	2.9
Australia	2.3	2.3	2.8
Vietnam	1.2	1.6	2.5
All other destination markets	29.3	26.5	22.6
Total exports	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data.

Source: Official export statistics under HS subheadings 9404.21 and 9404.29 as reported by China Customs in the Global Trade Atlas database, accessed February 18, 2020.

The industry in Indonesia

The Commission issued foreign producers'/exporters' questionnaires to 12 firms for which valid contact information was obtained that were believed to produce and/or export mattresses from Indonesia.¹¹ Usable responses to the Commission's questionnaire in the final phase of these investigations were received from three firms: PT Graha Seribusatu Jaya ("Graha"); PT Romance Bedding and Furniture ("Romance"); and PT Zinus Global Indonesia ("Zinus Global").¹² These firms' exports to the United States accounted for *** percent of reported U.S. imports of mattresses from Indonesia in 2019.¹³

Table VII-9 presents information on the mattress operations of the responding producers and exporters in Indonesia.

Table VII-9
Mattresses: Summary data on firms in Indonesia, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Graha	***	***	***	***	***	***
Romance	***	***	***	***	***	***
Zinus Global	***	***	***	***	***	***
All firms	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

¹¹ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

¹² The following eight firms in Indonesia provided usable information in the preliminary phase of these investigations: PT Celebes Putra Prima; PT Graha Anom Jaya; PT Demak Putra Mandiri; PT Dynasti Indomegah; PT Ecos Jaya Indonesia; Graha; Romance; and Zinus Global. These eight firms together produced *** mattresses in 2019. One additional firm in Indonesia (***) submitted an unusable response to the Commission's questionnaire in the preliminary phase of the investigations. *** produced *** mattresses in 2019. The three firms that responded to the Commission's questionnaire in the final phase of these investigations (Graha, Romance, and Zinus Global) accounted for *** of 2019 Indonesian mattress production reported in the preliminary phase of the investigations.

¹³ The coverage number presented was calculated using importer data submitted in response to Commission questionnaires.

Changes in operations

As presented in table VII-10, two responding producers in Indonesia reported in their final phase questionnaire responses certain changes in operations since January 1, 2017, including plant openings, expansions, and equipment acquisitions.

Table VII-10
Mattresses: Reported changes in operations by producers in Indonesia, since January 1, 2017

Item / Firm	Reported changed in operations
Plant openings:	
***	***
Expansions:	
***	***
Acquisitions:	
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Producers in the subject countries were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, production, and sales (including exports to the United States) relating to mattresses. Romance reported ***; Graha and Zinus Global reported ***. Foreign producers' narrative responses to this question are presented in appendix E (table E-4).

Operations on mattresses

Table VII-11 presents information on the mattress operations of the responding producers and exporters in Indonesia.

Table VII-11

Mattresses: Data on industry in Indonesia, 2017-19, January to September 2019, and January to September 2020 and projection calendar years 2020 and 2021

Item	Actual experience					Projections	
	Calendar year			January to September		Calendar year	
	2017	2018	2019	2019	2020	2020	2021
	Quantity (units)						
Capacity	***	***	***	***	***	***	***
Production	***	***	***	***	***	***	***
End-of-period inventories	***	***	***	***	***	***	***
Shipments:							
Home market shipments:							
Internal consumption/ transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***
	Ratios and shares (percent)						
Capacity utilization	***	***	***	***	***	***	***
Inventories/production	***	***	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***	***	***
Share of shipments:							
Home market shipments:							
Internal consumption/ transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Responding producers' capacity in Indonesia increased by *** percent during 2017-19, while production increased by *** percent during the same period. Capacity and production were *** percent and *** percent higher, respectively, in interim 2020 compared with interim 2019. The majority of the increase in capacity and production in Indonesia was reported from 2018 to 2019 and in interim 2020, and was attributable to the opening of ***.¹⁴ In addition, *** began mattress production in Indonesia in *** and, by 2019, was *** producer of mattresses in Indonesia, accounting for *** of total reported production. Responding producers' capacity in Indonesia is projected to be *** percent higher in 2021 than in 2019 and production is projected to be *** percent higher. Capacity utilization decreased overall from *** percent in 2017 to *** percent in 2019, was higher at *** percent in interim 2020, and is projected to be *** percent in 2021.

The overall trend in Indonesian producers' total shipments mirrored that of reported production, increasing by *** percent from 2017 to 2019, with the majority of the increase occurring from 2018 to 2019. Total shipments were *** percent higher in interim 2020 compared with interim 2019. Commercial home market shipments accounted for *** of total shipments by Indonesian producers during 2017 (*** percent) and 2018 (*** percent). However, by 2019, exports to the United States accounted for *** of total shipments (*** percent) with the opening of ***, which exported *** of their mattress production to the United States. Exports to the United States increased from *** mattresses in 2017 and 2018 to *** mattresses in 2019 and *** mattresses during January-September 2020. Exports to the United States are projected to increase further to *** mattresses annually by 2020 and 2021. Home market shipments increased modestly from *** mattresses in 2017 to *** mattresses in 2019 but were lower in interim 2020 compared with interim 2019. Home market shipments are projected to increase to *** mattresses by 2021. Export shipments to other countries, which accounted for *** percent of total shipments, increased from *** mattresses in 2017 to *** mattresses in 2019 and are projected to increase to *** mattresses by 2021. These mattress exports to countries other than the United States, which were reported by two producers (***), were destined for ***.

¹⁴ ***.

End-of-period inventories, which increased in terms of quantity from 2017 to 2019 and were higher in interim 2020 compared with interim 2019, represented a relatively minor (i.e., ***) but generally increasing share of Indonesian production and shipments.

Production and capacity by packaging type

Table VII-12 presents production, capacity, and capacity utilization in Indonesia by packaging type (i.e., MiB versus FPM). Of the mattress producers in Indonesia that provided usable responses to the Commission’s questionnaire, all three reported production of FPMs at any point since January 1, 2017 and two reported production of MiBs. Production of MiBs increased by *** percent from 2017 to 2019, while production of FPM increased by *** percent in the same period. Production of MiBs and FPMs were higher in interim 2020 compared with interim 2019. The capacity to produce MiBs and FPMs showed similar trends as reported production. Although MiBs held only *** percent of total production of mattresses in Indonesia during 2017, the share of total mattress production held by MiBs increased to *** percent in 2019. The share of total mattress production held by MiBs was also higher at *** percent in interim 2020 than in interim 2019. The increase in MiB production in 2019 was largely attributable to ***.

Table VII-12
Mattresses: Capacity and production by packaging type in Indonesia, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
MiB capacity	***	***	***	***	***
MiB production	***	***	***	***	***
	Ratios and shares (percent)				
MiB capacity utilization	***	***	***	***	***
	Quantity (units)				
FPM capacity	***	***	***	***	***
FPM production	***	***	***	***	***
	Ratios and shares (percent)				
FPM capacity utilization	***	***	***	***	***
	Share of all mattress production (percent)				
MiB production	***	***	***	***	***
FPM production	***	***	***	***	***
All mattress production	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

Data on overall plant capacity for the three responding mattress producers in Indonesia are presented in table VII-13. Mattresses accounted for a generally increasing majority of the aggregate firms' overall plant production using shared equipment, accounting for *** percent in 2017, *** percent in 2019, and *** percent in interim 2020. *** reported the production of other products in addition to mattresses on the same equipment and machinery used to produce mattresses, but did not name those other items in its response. *** reported that ***.

Table VII-13

Mattresses: Overall capacity and production on the same equipment as in-scope production by producers in Indonesia, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall capacity	***	***	***	***	***
Production: Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***
	Ratios and shares (percent)				
Overall capacity utilization	***	***	***	***	***
Share of production: Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Exports

According to GTA, the leading export market for “articles of bedding” from Indonesia is currently the United States (table VII-14). During 2017, Singapore was the largest export market, by value, for articles of bedding from Indonesia, accounting for 30.0 percent, followed by the United States, accounting for 11.4 percent. However, by 2019, the United States became, by far, the largest export market, accounting for 93.3 percent, followed by Singapore as a distant second, accounting for 3.0 percent.

Table VII-14
Articles of bedding: Indonesia exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Value (1,000 dollars)		
United States	2,025	8,979	192,686
Singapore	5,330	7,122	6,103
Germany	1,527	1,297	1,225
Malaysia	871	762	1,078
East Timor	763	557	805
Denmark	447	731	674
Australia	453	633	496
Vietnam	2,656	102	438
Thailand	209	189	316
All other destination markets	3,461	2,237	2,794
All destination markets	17,742	22,608	206,614
	Share of value (percent)		
United States	11.4	39.7	93.3
Singapore	30.0	31.5	3.0
Germany	8.6	5.7	0.6
Malaysia	4.9	3.4	0.5
East Timor	4.3	2.5	0.4
Denmark	2.5	3.2	0.3
Australia	2.6	2.8	0.2
Vietnam	15.0	0.5	0.2
Thailand	1.2	0.8	0.2
All other destination markets	19.5	9.9	1.4
All destination markets	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data. Quantity data are not available.

Source: Official export statistics under HS subheadings 9404.21 and 9404.29 as reported by Statistics Indonesia in the Global Trade Atlas database, accessed January 27, 2021.

The industry in Malaysia

The Commission issued foreign producers'/exporters' questionnaires to 18 firms for which valid contact information was obtained that were believed to produce and/or export mattresses from Malaysia.¹⁵ Usable responses to the Commission's questionnaire were received from five firms: Bedco Sistem (M) Sdn Bhd ("Bedco"); Far East Foam Industries SDN BHD ("FEFI"); LSK Mattressworld Sdn Bhd ("Mattressworld"); Masterfoam Industries Sdn Bhd ("Masterfoam"); and Wansern Foam Ind Sdn Bhd ("Wansern").¹⁶ These firms' exports to the United States accounted for *** percent of U.S. imports of mattresses from Malaysia in 2019.¹⁷

Table VII-15 presents information on the mattress operations of the responding producers and exporters in Malaysia.

Table VII-15
Mattresses: Summary data on firms in Malaysia, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Bedco	***	***	***	***	***	***
FEFI	***	***	***	***	***	***
Mattressworld	***	***	***	***	***	***
Masterfoam	***	***	***	***	***	***
Wansern	***	***	***	***	***	***
All firms	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

¹⁵ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

¹⁶ The following four firms in Malaysia provided usable information in the preliminary phase of these investigations: Bedco; Diglant Malaysia Sdn Bhd ("Diglant"); Masterfoam; and Wansern. Diglant, the only firm that responded in the preliminary phase but did not respond in the final phase of these investigations reported production of *** mattresses in 2019, *** percent of which were exported to the United States in the same year.

¹⁷ The coverage number presented was calculated using official import statistics under primary HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087.

Changes in operations

As presented in table VII-16, *** responding producers in Malaysia reported certain changes in operations since January 1, 2017, including plant openings, expansions, and equipment acquisitions.

Table VII-16

Mattresses: Reported changes in operations by producers in Malaysia, since January 1, 2017

Item / Firm	Reported changed in operations
Plant openings:	
***	***
Expansions:	
***	***
***	***
Revised labor agreements:	
***	***
Other:	
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Producers in the subject countries were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, production, and sales (including exports to the United States) relating to mattresses. Masterfoam and Wansern reported ***; Bedco, FEFI, and Mattressworld reported ***. Foreign producers' narrative responses to this question are presented in appendix E (table E-4).

Operations on mattresses

Table VII-17 presents information on the mattress operations of the responding producers and exporters in Malaysia. Responding producers' capacity in Malaysia increased by *** percent during 2017-19, while production increased by *** percent during the same period. Capacity and production were *** percent and *** percent higher, respectively, during interim 2020 compared with interim 2019. *** firms in Malaysia reported higher capacity and production of mattresses in 2019 than in 2017, whereas *** reported lower amounts. Aggregate reported capacity and production in Malaysia is projected to be *** percent and *** percent higher, respectively, in 2021 than in 2019. Capacity utilization in Malaysia increased from *** percent in 2017 to *** percent in 2019 but was lower at *** percent in interim 2020. Capacity utilization is projected to be *** percent during 2021.

The overall upward trend in the Malaysian producers' total shipments is similar to that of reported production, increasing by *** percent from 2017 to 2019. Total shipments were *** percent higher in interim 2020 compared with interim 2019. Home market shipments accounted for *** of total shipments by Malaysian producers during 2017 (*** percent) and 2018 (*** percent). However, by 2019, exports to the United States led to a decline in the share held by home market shipments, which accounted for *** percent of total shipments in 2019 and *** percent in interim 2020, while the share of exports to the United States increased from *** percent in 2018 to *** percent, and were *** percent in interim 2020. Exports to countries other than the United States, which declined on an absolute and relative basis from 2017 to 2019, accounted for *** percent of total shipments in 2019. Exports to other countries, however, are expected to increase slightly into 2020 and 2021. Principal other export markets reported by the *** mattress producers in Malaysia include ***.

End-of-period inventories, which fluctuated within a relatively narrow range, represented a relatively minor (i.e., ***) and declining share of Malaysian production and shipments. Projections indicate that inventories will decline in 2021 from 2019 and 2020 levels.

Table VII-17

Mattresses: Data on industry in Malaysia, 2017-19, January to September 2019, and January to September 2020 and projection calendar years 2020 and 2021

Item	Actual experience					Projections	
	Calendar year			January to September		Calendar year	
	2017	2018	2019	2019	2020	2020	2021
	Quantity (units)						
Capacity	***	***	***	***	***	***	***
Production	***	***	***	***	***	***	***
End-of-period inventories	***	***	***	***	***	***	***
Shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***
	Ratios and shares (percent)						
Capacity utilization	***	***	***	***	***	***	***
Inventories/production	***	***	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***	***	***
Share of shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Production and capacity by packaging type

Table VII-18 presents production, capacity, and capacity utilization in Malaysia by packaging type (i.e., MiB versus FPM). Of the five mattress producers in Malaysia that provided usable responses to the Commission’s questionnaire, all reported production of FPMs since January 1, 2017 and four began production of MiBs in 2019. Production of MiBs increased from *** mattresses in 2017 and 2018 to *** mattresses in 2019, while production of FPMs decreased overall during 2017-19 by *** percent. Production of MiBs were higher in interim 2020 compared with interim 2019, whereas production of FPMs were lower. The capacity to produce MiBs and FPMs showed similar trends as reported production. Although MiBs held *** percent of total production of mattresses in Malaysia during 2017-18, the share of total mattress production held by MiBs increased to *** percent in 2019 and was higher at *** percent in interim 2020 compared with *** percent in interim 2019.

Table VII-18

Mattresses: Capacity and production by packaging type in Malaysia, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
MiB capacity	***	***	***	***	***
MiB production	***	***	***	***	***
	Ratios and shares (percent)				
MiB capacity utilization	***	***	***	***	***
	Quantity (units)				
FPM capacity	***	***	***	***	***
FPM production	***	***	***	***	***
	Ratios and shares (percent)				
FPM capacity utilization	***	***	***	***	***
	Share of all mattress production (percent)				
MiB production	***	***	***	***	***
FPM production	***	***	***	***	***
All mattress production	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

Data on overall plant capacity for the five responding mattress producers in Malaysia are presented in table VII-19. Mattresses accounted for more than *** of the aggregate firms' overall plant production using shared equipment during 2017-19 and almost *** during interim 2020. Other items, which were reported by *** responding mattress producers in Malaysia, accounted for the majority of aggregate overall plant production. In addition to mattresses, other items produced on the same equipment and machinery used to produce mattresses by these *** firms in Malaysia include pillows, polyurethane and polyester foam, foundations, bedding, mattress protectors, mattress toppers, bolsters, and cushions. All but one responding producer in Malaysia (***) reported that they ***.

Table VII-19

Mattresses: Overall capacity and production on the same equipment as in-scope production by producers in Malaysia, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall capacity	***	***	***	***	***
Production:					
Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***
	Ratios and shares (percent)				
Overall capacity utilization	***	***	***	***	***
Share of production:					
Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Exports

According to GTA, the leading export market for “articles of bedding” from Malaysia, by quantity, is currently the United States (table VII-20). During 2019, the United States was the largest export market for articles of bedding from Malaysia, accounting for 75.9 percent of total exports, followed by Singapore and Indonesia, accounting for 11.4 percent and 4.3 percent, respectively.

Table VII-20
Articles of bedding: Malaysia exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Quantity (units)		
United States	160,495	589,549	5,288,033
Singapore	1,095,679	936,031	792,198
Indonesia	339,760	414,496	300,823
Japan	198,032	174,548	195,917
Hong Kong	74,727	25,126	110,191
Korea	77,876	163,093	62,256
Taiwan	70,283	85,351	42,256
Brunei Darussalam	29,141	26,111	33,204
Germany	25,582	25,727	18,149
All other destination markets	299,011	212,588	120,347
Total exports	2,370,586	2,652,620	6,963,374
	Value (1,000 dollars)		
United States	2,481	5,121	125,475
Singapore	17,013	17,340	14,626
Indonesia	2,637	2,815	1,350
Japan	12,561	15,579	18,102
Hong Kong	4,657	4,869	3,410
Korea	7,353	7,766	6,269
Taiwan	3,395	3,555	2,878
Brunei Darussalam	1,630	1,658	1,336
Germany	458	427	328
All other destination markets	9,516	7,392	8,031
Total exports	61,703	66,522	181,805

Table continued on next page.

Table VII-20—Continued

Articles of bedding: Malaysia exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Unit value (dollars per unit)		
United States	15.46	8.69	23.73
Singapore	15.53	18.53	18.46
Indonesia	7.76	6.79	4.49
Japan	63.43	89.25	92.39
Hong Kong	62.32	193.77	30.95
Korea	94.42	47.61	100.69
Taiwan	48.31	41.65	68.11
Brunei Darussalam	55.94	63.51	40.23
Germany	17.91	16.60	18.09
All other destination markets	31.83	34.77	66.73
Total exports	26.03	25.08	26.11
	Share of quantity (percent)		
United States	6.8	22.2	75.9
Singapore	46.2	35.3	11.4
Indonesia	14.3	15.6	4.3
Japan	8.4	6.6	2.8
Hong Kong	3.2	0.9	1.6
Korea	3.3	6.1	0.9
Taiwan	3.0	3.2	0.6
Brunei Darussalam	1.2	1.0	0.5
Germany	1.1	1.0	0.3
All other destination markets	12.6	8.0	1.7
Total exports	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data.

Source: Official export statistics under HS subheadings 9404.21 and 9404.29 as reported by Department of Statistics Malaysia in the Global Trade Atlas database, accessed February 18, 2021.

The industry in Serbia

The Commission issued foreign producers'/exporters' questionnaires to 11 firms for which valid contact information was obtained that are believed to produce and/or export mattresses from Serbia.¹⁸ No response to the Commission's questionnaire in the final phase of these investigations was submitted by any foreign producer or exporter in Serbia. However, one usable response to the Commission's questionnaire was received during the preliminary phase of these investigations from Healthcare Europe DOO Ruma ("Healthcare Europe").¹⁹ Unless otherwise noted, the information in this section of the report concerning Serbia is based on the preliminary phase questionnaire response of Healthcare Europe. This firm's exports to the United States accounted for *** percent of reported U.S. imports of mattresses from Serbia in 2019.²⁰ Table VII-21 presents information on the mattress operations submitted by Healthcare Europe in Serbia.

¹⁸ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

¹⁹ Healthcare Europe reported in the preliminary phase of these investigations that it is related to producers of mattresses in ***. ***.

²⁰ The coverage number presented was calculated using importer data submitted in response to Commission questionnaires in the final phase of these investigations. Healthcare Europe reported in its questionnaire response in the preliminary phase of these investigations that it accounted for *** percent of mattress production in Serbia and *** percent of exports of mattress from Serbia to the United States. Healthcare Europe indicated that *** are related U.S. importers and listed *** as its top U.S. importers during 2019. Importers *** submitted responses to the Commission's questionnaire in the final phase of these investigations, but related importers *** did not. Two of the three responding U.S. importers of mattresses from Serbia identified Healthcare Europe as the producer of the mattresses they import, whereas one U.S. importer (***) reported that the mattress brand it imports from Serbia is ***.

Table VII-21

Mattresses: Summary data on firms in Serbia, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Healthcare Europe	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires in the preliminary phase of these investigations.

Changes in operations

As presented in table VII-22, Healthcare Europe reported ***.

Table VII-22

Mattresses: Reported changes in operations by producers in Serbia, since January 1, 2017

Item / Firm	Reported changed in operations
Plant openings:	
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Operations on mattresses

Table VII-23 presents information on the mattress operations of Serbian producer/exporter Healthcare Europe. The firm’s capacity in Serbia increased by *** percent during 2017-19, while production increased by *** percent during the same period. Projections indicated that the firm is expecting its capacity to be *** percent higher in 2021 than in 2019 and its production to be *** percent higher, as it anticipates the opening of an additional plant in Serbia during 2020-21 to supply mattresses to the European Union (“EU”) market. Healthcare Europe’s capacity utilization increased from *** percent in 2017 to *** percent in 2019 as it ***. The firm projects its capacity utilization to increase to *** by 2021. Healthcare Europe was asked about shifts in capacity and constraints on its production capacity. It reported that increases in reported capacity were the result of *** and that its capacity is limited by its “***.”

Table VII-23

Mattresses: Data on Serbian producer Healthcare Europe, 2017-19 and projected calendar years 2020 and 2021

Item	Actual experience			Projections	
	Calendar year			Calendar year	
	2017	2018	2019	2020	2021
	Quantity (units)				
Capacity	***	***	***	***	***
Production	***	***	***	***	***
End-of-period inventories	***	***	***	***	***
Shipments:					
Home market shipments:					
Internal consumption/ transfers	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***
Total home market shipments	***	***	***	***	***
Export shipments to:					
United States	***	***	***	***	***
All other markets	***	***	***	***	***
Total exports	***	***	***	***	***
Total shipments	***	***	***	***	***
	Ratios and shares (percent)				
Capacity utilization	***	***	***	***	***
Inventories/production	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***
Share of shipments:					
Home market shipments:					
Internal consumption/ transfers	***	***	***	***	***
Commercial home market Shipments	***	***	***	***	***
Total home market shipments	***	***	***	***	***
Export shipments to:					
United States	***	***	***	***	***
All other markets	***	***	***	***	***
Total exports	***	***	***	***	***
Total shipments	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

The upward trend in Healthcare Europe's total shipments, which mirrored that of reported production, increased by *** percent from 2017 to 2019, and are projected to increase further by *** percent from 2019 to 2021. Exports to markets other than the United States accounted for *** of total shipments by the Serbian producer during 2017 (*** percent) and 2018 (*** percent). However, by 2019, exports to the United States accounted for *** of total shipments (*** percent). Exports to the United States, increased from *** mattresses in 2017 to *** mattresses in 2019 and are projected to increase to *** mattresses by 2021. Healthcare Europe's home market shipments, which declined as a share of total shipments from *** percent in 2017 to *** percent in 2019, also declined in absolute terms from *** mattresses in 2017 to *** mattresses in 2019. Export shipments to other countries, which accounted for *** percent of total shipments in 2019, increased from *** mattresses in 2017 to *** mattresses in 2019 and are projected to increase to *** mattresses by 2021. These mattress exports to countries other than the United States were destined for ***.

End-of-period inventories, which increased in terms of quantity from 2017 to 2019, represented a relatively minor (i.e., ***) and fluctuating share of Serbia production.

Alternative products

Data on overall plant capacity for the responding mattress producer in Serbia are presented in table VII-24. Mattresses accounted for *** percent, *** percent, and *** percent of the firm’s overall plant production using shared equipment during 2017-19. In addition to mattresses, Healthcare Europe in Serbia reported the production of *** and indicated that ***. It explained that “***.”

Table VII-24

Mattresses: Overall capacity and production on the same equipment as in-scope production by the producer in Serbia, 2017-19

Item	Calendar year		
	2017	2018	2019
	Quantity (units)		
Overall capacity	***	***	***
Production: Mattresses	***	***	***
Out-of-scope production	***	***	***
Total production on same machinery	***	***	***
	Ratios and shares (percent)		
Overall capacity utilization	***	***	***
Share of production: Mattresses	***	***	***
Out-of-scope production	***	***	***
Total production on same machinery	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Exports

According to GTA, the leading export market for “articles of bedding” from Serbia, based on value, is currently the United States (table VII-25). During 2017, however, there were no exports from Serbia to the United States. Germany and France were the largest export markets for articles of bedding from Serbia in 2017, together accounting for 30.5 percent of total exports. By 2019, the United States became the largest export market for articles of bedding produced in Serbia, accounting for 67.5 percent of total exports, followed by Poland as the second largest export market, accounting for 13.8 percent.

Table VII-25
Articles of bedding: Serbia exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Value (1,000 dollars)		
United States	---	2,560	53,802
Poland	884	7,156	11,039
Germany	1,859	4,666	2,420
France	1,555	4,762	1,959
Croatia	1,155	1,507	1,450
Montenegro	1,349	1,444	1,310
Bosnia & Herzegovina	1,340	1,496	1,303
Hungary	42	1,826	1,297
Bulgaria	325	905	1,284
All other destination markets	2,688	3,499	3,885
Total exports	11,196	29,822	79,750
	Share of value (percent)		
United States	---	8.6	67.5
Poland	7.9	24.0	13.8
Germany	16.6	15.6	3.0
France	13.9	16.0	2.5
Croatia	10.3	5.1	1.8
Montenegro	12.1	4.8	1.6
Bosnia & Herzegovina	12.0	5.0	1.6
Hungary	0.4	6.1	1.6
Bulgaria	2.9	3.0	1.6
All other destination markets	24.0	11.7	4.9
Total exports	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data. Quantity data are not available.

Source: Official exports statistics under HS subheading 9404.21 and 9404.29 as reported by Statistics Serbia and Montenegro in the Global Trade Atlas database, accessed January 14, 2021.

The industry in Thailand

The Commission issued foreign producers'/exporters' questionnaires to 15 firms for which valid contact information was obtained that are believed to produce and/or export mattresses from Thailand.²¹ No response to the Commission's questionnaire in the final phase of these investigations was submitted by any foreign producer or exporter in Thailand. However, one usable response to the Commission's questionnaire was received during the preliminary phase of these investigations from Saffron Living Co., Ltd. ("Saffron").²² Unless otherwise noted, the information in this section of the report concerning Thailand is based on the preliminary phase questionnaire response of Saffron. This firm's exports to the United States accounted for *** percent of reported U.S. imports of mattresses from Thailand in 2019.²³ Table VII-26 presents information on the mattress operations submitted by Saffron in Thailand.

²¹ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

²² Although Saffron reported in its response to the Commission's questionnaire in the preliminary phase of these investigations that it is not related to any producers of mattresses in any other country, it appears to be related to Saffron Living, a producer of mattresses in China. "Saffron Living Inks Land and Building Lease Deal at WHA Eastern Seaboard Industrial Estate 1," <https://www.wha-industrialestate.com/en/mediaactivities/news/customer-news/3001/saffron-living-inks-land-and-building-lease-deal-at-wha-easternseaboard-industrial-estate-1>, retrieved February 24, 2021; "Saffron Living Inaugurates New Manufacturing Facility at EEC," <https://www.wha-industrialestate.com/en/media-activities/news/customernews/3091/saffron-living-inaugurates-new-manufacturing-facility-at-eeec>, retrieved February 24, 2021.

²³ The coverage number presented was calculated using importer data submitted in response to Commission questionnaires in the final phase of these investigations. Saffron reported in its questionnaire response in the preliminary phase of these investigations that it accounted for *** percent of mattress production in Thailand and *** percent of exports of mattress from Thailand to the United States. Saffron listed in its preliminary phase questionnaire response five top U.S. importers of its mattresses in 2019 (***), three of which (***) responded to the Commission's importer questionnaire in the final phase of these investigations. Responding U.S. importers in the final phase of these investigations reported that producers of their mattress imports from Thailand include ***.

Table VII-26

Mattresses: Summary data on firms in Thailand, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Saffron	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires in the preliminary phase of these investigations.

Changes in operations

As presented in table VII-27, Saffron reported ***.

Table VII-27

Mattresses: Reported changes in operations by producers in Thailand, since January 1, 2017

Item / Firm	Reported changed in operations
Plant openings:	
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Operations on mattresses

Table VII-28 presents information on the mattress operations of Thai producer/exporter Saffron. The firm opened its operation on ***. The firm's reported capacity in Thailand was *** mattresses in 2019, which is expected to *** by 2020-21. Its production of *** mattresses in 2019 is expected to increase by *** percent to *** mattresses in 2020-21. Saffron projects that its capacity utilization will increase from *** percent in 2019 to *** percent in 2020-21 as it ***. The firm reported that *** constraint on capacity.

Saffron's total shipments mirrored that of reported production. The firm's reported total shipments of *** mattresses in 2019 is expected to increase by *** percent to *** mattresses in 2020-21. Exports to the United States, which accounted for *** of Saffron's mattress shipments during 2019, are expected to decline to *** percent of total shipments in 2020-21 as the company expects to shift some sales to the commercial home market and other export markets. Exports to the United States are expected to amount to *** mattresses annually during 2020-21, whereas Saffron's annual commercial home market shipments and other export markets are expected to be *** mattresses each during that time. Saffron expects to develop export markets for its mattresses in *** during 2020-21.

End-of-period inventories represented a relatively minor share (i.e., ***) of Saffron's production and shipments during 2019 and are *** during 2020-21.

Table VII-28

Mattresses: Data on industry in Thailand, 2017-19 and projected calendar years 2020 and 2021

Item	Actual experience			Projections	
	Calendar year			Calendar year	
	2017	2018	2019	2020	2021
	Quantity (units)				
Capacity	***	***	***	***	***
Production	***	***	***	***	***
End-of-period inventories	***	***	***	***	***
Shipments:					
Home market shipments:					
Internal consumption/ transfers	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***
Total home market shipments	***	***	***	***	***
Export shipments to:					
United States	***	***	***	***	***
All other markets	***	***	***	***	***
Total exports	***	***	***	***	***
Total shipments	***	***	***	***	***
	Ratios and shares (percent)				
Capacity utilization	***	***	***	***	***
Inventories/production	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***
Share of shipments:					
Home market shipments:					
Internal consumption/ transfers	***	***	***	***	***
Commercial home market Shipments	***	***	***	***	***
Total home market shipments	***	***	***	***	***
Export shipments to:					
United States	***	***	***	***	***
All other markets	***	***	***	***	***
Total exports	***	***	***	***	***
Total shipments	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

Exports

According to GTA, the leading export market for “articles of bedding” from Thailand, by quantity, is the United States (table VII-29). During 2019, the United States was the largest export market for articles of bedding from Thailand, accounting for 32.4 percent, followed by China (27.1 percent) and South Africa (21.0 percent).

Table VII-29

Articles of bedding: Thailand exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Quantity (units)		
United States	83,564	74,797	830,158
China	233,429	494,549	696,090
South Africa	324,660	205,025	538,087
Cambodia	19,553	22,158	149,531
Laos	97,739	98,056	133,130
Korea	69,022	56,347	45,780
Singapore	38,567	19,566	20,210
Myanmar	14,978	341,313	20,118
United Arab Emirates	19,817	20,265	18,492
All other destination markets	136,772	359,382	112,858
Total exports	1,038,101	1,691,458	2,564,454
	Value (1,000 dollars)		
United States	1,109	1,243	62,942
China	22,028	32,901	39,950
South Africa	812	513	556
Cambodia	797	1,212	1,381
Laos	2,754	2,646	3,385
Korea	5,791	4,737	3,512
Singapore	3,663	4,148	3,515
Myanmar	693	927	569
United Arab Emirates	50	90	55
All other destination markets	10,065	10,713	8,689
Total exports	47,762	59,130	124,554

Table continued on next page.

Table VII-29—Continued**Articles of bedding: Thailand exports by destination market, 2017-19**

Destination market	Calendar year		
	2017	2018	2019
	Unit value (dollars per unit)		
United States	13.27	16.62	75.82
China	94.37	66.53	57.39
South Africa	2.50	2.50	1.03
Cambodia	40.75	54.70	9.24
Laos	28.18	26.99	25.43
Korea	83.90	84.06	76.71
Singapore	94.98	212.02	173.91
Myanmar	46.30	2.72	28.27
United Arab Emirates	2.51	4.43	2.99
All other destination markets	73.59	29.81	76.99
Total exports	46.01	34.96	48.57
	Share of quantity (percent)		
United States	8.0	4.4	32.4
China	22.5	29.2	27.1
South Africa	31.3	12.1	21.0
Cambodia	1.9	1.3	5.8
Laos	9.4	5.8	5.2
Korea	6.6	3.3	1.8
Singapore	3.7	1.2	0.8
Myanmar	1.4	20.2	0.8
United Arab Emirates	1.9	1.2	0.7
All other destination markets	13.2	21.2	4.4
Total exports	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data.

Source: Official export statistics under HS subheadings 9404.21 and 9404.29 as reported by Thai Customs Department in the Global Trade Atlas database, accessed February 18, 2021.

The industry in Turkey

The Commission issued foreign producers'/exporters' questionnaires to 18 firms or which valid contact information was obtained that are believed to produce and/or export mattresses from Turkey.²⁴ Usable responses to the Commission's questionnaire were received from two firms: BRN Yatak Baza Ev Tekstili Insaat Sanayi Ticaret A.S. ("BRN") and Yatsan Yatak Sunger A.S. ("Yatsan"). ***. *** exports to the United States accounted for *** percent of U.S. imports of mattresses from Turkey in 2019.²⁵ Table VII-30 presents information on the mattress operations submitted by BRN and Yatsan in Turkey.

Table VII-30
Mattresses: Summary data on firms in Turkey, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
BRN	***	***	***	***	***	***
Yatsan	***	***	***	***	***	***
All firms	***	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Changes in operations

As presented in table VII-31, both responding producers in Turkey reported certain changes in operations since January 1, 2017, including a plant opening, additional equipment installments, and a revised labor agreement.

²⁴ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

²⁵ The coverage number presented was calculated using official import statistics under primary HTS statistical reporting numbers 9404.21.0010, 9404.21.0013, 9404.29.1005, 9404.29.1013, 9404.29.9085, and 9404.29.9087.

Table VII-31**Mattresses: Reported changes in operations by producers in Turkey, since January 1, 2017**

Item / Firm	Reported changed in operations
Plant openings:	
***	***
Revised labor agreements:	
***	***
Other:	
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Producers in the subject countries were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, production, and sales (including exports to the United States) relating to mattresses. BRN and Yatsan reported ***. Foreign producers' narrative responses to this question are presented in appendix E (table E-4).

Operations on mattresses

Table VII-32 presents information on the mattress operations of responding producers/exporters in Turkey. During 2017-19, aggregate capacity to produce mattresses remained unchanged from 2017 to 2018, but increased by *** percent in 2019 as ***. Aggregate production of mattresses in Turkey declined by *** percent from *** mattresses in 2017 to *** mattresses in 2018, but increased by *** percent from 2018 to *** mattresses in 2019, a level that was *** percent higher than reported in 2017. Aggregated capacity and production were *** percent and *** percent higher, respectively, in interim 2020 compared with interim 2019. Capacity utilization of responding firms in Turkey declined from *** percent in 2017 to *** percent in 2019, and was higher at *** percent in interim 2020 than at *** percent reported in interim 2019. Capacity and production are projected to increase ***, respectively, from 2019 to 2021 and capacity utilization is projected to increase to *** percent in 2020 but decline to *** percent in 2021.

Table VII-32

Mattresses: Data on industry in Turkey, 2017-19, January to September 2019, and January to September 2020 and projection calendar years 2020 and 2021

Item	Actual experience					Projections	
	Calendar year			January to September		Calendar year	
	2017	2018	2019	2019	2020	2020	2021
	Quantity (units)						
Capacity	***	***	***	***	***	***	***
Production	***	***	***	***	***	***	***
End-of-period inventories	***	***	***	***	***	***	***
Shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***
	Ratios and shares (percent)						
Capacity utilization	***	***	***	***	***	***	***
Inventories/production	***	***	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***	***	***
Share of shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

The overall trend in total shipments of responding producers in Turkey is similar to that of reported production, declining by *** percent from 2017 to 2018, but increasing by *** percent from 2018 to 2019, for an overall increase of *** percent from 2017 to 2019. Total shipments were *** percent higher in interim 2020 compared with interim 2019 and projections indicate that total shipments in 2021 are expected to be *** percent higher than reported during 2019. Exports accounted for *** of total shipments by producers in Turkey during 2017 (*** percent), 2018 (*** percent), 2019 (*** percent), January-September 2019 (*** percent), and January-September 2020 (*** percent); and they are projected to remain at comparable levels as interim 2020 during calendar years 2020 (*** percent) and 2021 (*** percent). Exports to the United States increased from *** mattresses in 2017 and 2018 to *** mattresses in 2019 and were *** percent higher in interim 2020 compared with interim 2019. The share of total shipments held by exports to the United States was *** percent in 2019, *** percent in interim 2019, and *** percent in interim 2020. Projections indicate that exports to the United States are expected to be *** percent higher in 2021 than reported in 2019 and are expected to account for *** percent of total shipments in 2021. Exports to countries other than the United States, which declined on an absolute and relative basis from 2017 to 2019 and were similarly lower in interim 2020 compared with interim 2019, accounted for *** percent of total shipments in 2019. Exports to other countries are expected to account for *** percent of total shipments in 2021. Principal other export markets reported by *** include ***, ***.

End-of-period inventories, which fluctuated within a relatively narrow range on an absolute basis, represented a declining share of production and shipments of mattresses in Turkey. During 2017, end-of-period inventories accounted for *** percent of production in 2017, *** percent in 2019, and *** percent in interim 2020. Projections indicate that further declines on an absolute and relative basis are expected into 2021.

Production and capacity by packaging type

Table VII-33 presents production, capacity, and capacity utilization in Turkey by packaging type (i.e., MiB versus FPM). Of the two mattress producers in Turkey that provided usable responses to the Commission’s questionnaire, both reported production of FPMs since January 1, 2017 and one (***) began production of MiBs in 2019. Production of MiBs increased from *** mattresses in 2017 and 2018 to *** mattresses in 2019, while production of FPMs decreased overall during 2017-19 by *** percent. Production of MiBs and FPMs were higher in interim 2020 compared with interim 2019. The capacity to produce both MiBs and FPMs increased during 2017-19 and was higher in interim 2020 for MiBs but lower for FPMs. Although MiBs held *** percent of total production of mattresses in Turkey during 2017-18, the share of total mattress production held by MiBs increased to *** percent in 2019 and was higher at *** percent in interim 2020 compared with *** percent in interim 2019.

Table VII-33

Mattresses: Capacity and production by packaging type in Turkey, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
MiB capacity	***	***	***	***	***
MiB production	***	***	***	***	***
	Ratios and shares (percent)				
MiB capacity utilization	***	***	***	***	***
	Quantity (units)				
FPM capacity	***	***	***	***	***
FPM production	***	***	***	***	***
	Ratios and shares (percent)				
FPM capacity utilization	***	***	***	***	***
	Share of all mattress production (percent)				
MiB production	***	***	***	***	***
FPM production	***	***	***	***	***
All mattress production	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

Data on overall plant capacity for the responding mattress producers in Turkey are presented in table VII-34. Since 2017, mattresses accounted for *** of overall plant production using shared equipment by responding producers in Turkey. In addition to mattresses, Yatsan in Turkey reported *** and BRN reported ***. Both firms reported ***.

Table VII-34

Mattresses: Overall capacity and production on the same equipment as in-scope production by producers in Turkey, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall capacity	***	***	***	***	***
Production:					
Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***
	Ratios and shares (percent)				
Overall capacity utilization	***	***	***	***	***
Share of production:					
Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Exports

According to GTA, the leading export market for “articles of bedding” from Turkey, by value, is currently the United States (table VII-35). During 2017, Iraq and Italy were the largest export markets for bedding articles from Turkey, accounting for 15.0 percent and 11.1 percent of Turkey’s total exports, respectively. The United States accounted for only 1.2 percent of total exports of bedding articles from Turkey during 2017. However, by 2019, the United States grew to be Turkey’s largest export market, accounting for 26.3 percent of total exports, followed by the United Kingdom and Italy as the second and third largest export markets, accounting for 8.8 percent and 8.6 percent of the total.

Table VII-35
Articles of bedding: Turkey exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Value (1,000 dollars)		
United States	1,173	4,917	46,299
United Kingdom	4,945	14,796	15,524
Italy	10,436	11,961	15,131
Germany	7,900	9,040	10,702
Iraq	14,126	8,934	9,948
Netherlands	5,092	8,275	9,631
Ireland	4,311	7,666	8,830
Greece	5,079	6,139	5,912
France	4,474	4,909	4,826
All other destination markets	36,437	43,241	49,477
All destination markets	93,971	119,878	176,280
	Share of value (percent)		
United States	1.2	4.1	26.3
United Kingdom	5.3	12.3	8.8
Italy	11.1	10.0	8.6
Germany	8.4	7.5	6.1
Iraq	15.0	7.5	5.6
Netherlands	5.4	6.9	5.5
Ireland	4.6	6.4	5.0
Greece	5.4	5.1	3.4
France	4.8	4.1	2.7
All other destination markets	38.8	36.1	28.1
All destination markets	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data. Quantity data are not available.

Source: Official exports statistics under HS subheading 9404.21 and 9404.29 as reported by State Institute of Statistics in the Global Trade Atlas database, accessed January 14, 2021.

The industry in Vietnam

The Commission issued foreign producers'/exporters' questionnaires to 12 firms for which valid contact information was obtained that were believed to produce and/or export mattresses from Vietnam.²⁶ Usable responses to the Commission's questionnaire were received from five firms: Comfort Bedding Co., Ltd. ("Comfort"); Hava's Co., Ltd. ("Hava's"); Millennium Furniture Co. Ltd. ("Millennium"); Super Foam Vietnam Ltd. ("Super Foam"); and Wanek Furniture LLC ("Wanek").²⁷ These firms' exports to the United States accounted for *** percent of U.S. imports of mattresses from Vietnam in 2019.²⁸ Table VII-36 presents information on the mattress operations of the responding producers and exporters in Vietnam.

Table VII-36
Mattresses: Summary data on firms in Vietnam, 2019

Firm	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
Comfort	***	***	***	***	***	***
Hava's	***	***	***	***	***	***
Millennium	***	***	***	***	***	***
Super Foam	***	***	***	***	***	***
Wanek	***	***	***	***	***	***
All firms	***	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

²⁶ These firms were identified through a review of information in the petition, the preliminary phase of these investigations, and ***.

²⁷ The following four firms in Vietnam provided usable information in response to the Commission's foreign producer questionnaire in the preliminary phase of these investigations but did not respond in the final phase: Cong Ty Tnhh Nem Thien Kim dba Better Zs Co., Ltd.; Saigon - Kyndan Rubber Stock Co.; Sinomax Macao Commercial Offshore Ltd.; and Tongli Vietnam Industrial Co., Ltd. These four firms together reported production of *** mattresses in 2019, *** percent of which were exported to the United States in the same year. Together, they accounted for *** percent of total 2019 production in Vietnam and *** percent of total 2019 exports from Vietnam to the United States as reported in questionnaires during the preliminary phase of the investigations. Additional mattress producers/exporters in Vietnam identified by U.S. importers responding to the Commission's questionnaire include: ***.

²⁸ The coverage number presented was calculated using importer data submitted in response to Commission questionnaires.

Changes in operations

As presented in table VII-37, all five responding producers in Vietnam reported certain changes in operations since January 1, 2017, including plant openings, expansions, consolidations, closings, shutdowns, curtailments, and new investments. Notably, ***, which ***, was the largest producer of mattresses in Vietnam in 2019, accounting for *** percent of total reported production.

Table VII-37
Mattresses: Reported changes in operations by producers in Vietnam, since January 1, 2017

Item / Firm	Reported changed in operations
Plant openings:	
***	***
***	***
***	***
Plant closings:	
***	***
Relocations:	
***	***
Expansions:	
***	***
Consolidations:	
***	***
Prolonged shutdowns or curtailments:	
***	***
***	***
***	***
Other:	
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Producers in the subject countries were asked to indicate whether or not the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes in relation to their supply chain arrangements, production, and sales (including exports to the United States) relating to mattresses. All five responding producers in Vietnam reported ***. Foreign producers' narrative responses to this question are presented in appendix E (table E-4).

Operations on mattresses

Table VII-38 presents information on the mattress operations of the responding producers and exporters in Vietnam. Responding producers' capacity in Vietnam increased by *** percent during 2017-19, while production increased by *** percent during the same period. Capacity and production were *** percent and *** percent higher, respectively, in interim 2020 compared with interim 2019. The majority of the increase in capacity and production in Vietnam was reported from 2018 to 2019 and such increases were indicated by all five firms as new plants opened and new investments in machinery and existing facilities were made.²⁹ Responding producers' capacity and production in Vietnam is projected to be *** percent and *** percent lower, respectively, in 2021 than in 2019, as the largest producer, ***, ***. Capacity utilization for producers in Vietnam fluctuated between a low of *** percent in 2018 and a high of *** percent during 2017 and is projected to decline to *** percent in 2021.

²⁹ One responding producer in Vietnam (***) reported in its response to the Commission's questionnaire that it is currently not related to any producers of mattresses in any other country. The following four responding producers in Vietnam indicated that they are related to producers of mattresses in other countries: ***.

Table VII-38

Mattresses: Data on industry in Vietnam, 2017-19, January to September 2019, and January to September 2020 and projection calendar years 2020 and 2021

Item	Actual experience					Projections	
	Calendar year			January to September		Calendar year	
	2017	2018	2019	2019	2020	2020	2021
	Quantity (units)						
Capacity	***	***	***	***	***	***	***
Production	***	***	***	***	***	***	***
End-of-period inventories	***	***	***	***	***	***	***
Shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***
	Ratios and shares (percent)						
Capacity utilization	***	***	***	***	***	***	***
Inventories/production	***	***	***	***	***	***	***
Inventories/total shipments	***	***	***	***	***	***	***
Share of shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

The upward trend in the Vietnamese producers' total shipments mirrored that of reported production, increasing by *** percent from 2017 to 2019, with the majority of the increase occurring from 2018 to 2019. Exports to the United States accounted for a large and increasing share of total shipments by producers in Vietnam during 2017-19 (*** percent in 2017, *** percent in 2018, *** percent in 2019, *** percent in January-September 2019, and *** percent in January-September 2020), whereas home market shipments fell relative to total shipments during that time (*** percent in 2017, *** percent in 2018, *** percent in 2019, *** percent in January-September 2019, and *** percent in January-September 2020). Exports to the United States increased by *** percent from *** mattresses in 2017 to *** mattresses in 2019 and were *** percent higher in interim 2020 compared with interim 2019. Exports to the United States, however, are projected to decrease to *** mattresses during 2020. No producers in Vietnam reported projected exports to the United States during 2021. Home market shipments increased, although at a more modest rate, from *** mattresses in 2017 to *** mattresses in 2019, but were lower in interim 2020 compared with interim 2019. Home market shipments are projected to decrease slightly to *** mattresses by 2021. Export shipments to other countries, which accounted for *** percent or less of total shipments, increased from *** mattresses in 2017 to *** mattresses in 2019 and were higher during interim 2020 compared with interim 2019. Such exports are projected to increase to *** mattresses by 2021. Mattress exports to countries other than the United States, which were reported by all five responding producers in Vietnam, were destined for ***.

End-of-period inventories, which increased in terms of quantity from 2017 to 2019 but were lower in interim 2020 compared with interim 2019, fluctuated as a share of total shipments between a low of *** percent in 2017 and a high of *** percent in 2018.

Production and capacity by packaging type

Table VII-39 presents production, capacity, and capacity utilization in Vietnam by packaging type (i.e., MiB versus FPM). Of the five mattress producers in Vietnam that provided usable responses to the Commission’s questionnaire, all reported production of MiBs and three reported production of FPMs. Production of MiBs increased from *** mattresses in 2017 to *** mattresses in 2019, and was higher in interim 2020 compared with interim 2019. Production of FPMs likewise increased by *** percent from 2017 to 2019, and was higher in interim 2020 compared with interim 2019. The capacity to produce both MiBs and FPMs increased during 2017-19 and was higher in interim 2020 compared with interim 2019 for MiBs but lower for FPMs. Although MiBs held *** percent of total production of mattresses in Vietnam during 2017, the share of total mattress production held by MiBs increased to *** percent in 2019 and was higher in interim 2020 compared with interim 2019.

Table VII-39

Mattresses: Capacity and production by packaging type in Vietnam, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
MiB capacity	***	***	***	***	***
MiB Production	***	***	***	***	***
	Ratios and shares (percent)				
MiB capacity utilization	***	***	***	***	***
	Quantity (units)				
FPM Capacity	***	***	***	***	***
FPM Production	***	***	***	***	***
	Ratios and shares (percent)				
FPM capacity utilization	***	***	***	***	***
	Share of all mattress production (percent)				
MiB Production	***	***	***	***	***
FPM Production	***	***	***	***	***
All mattress production	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Alternative products

Data on overall plant capacity for the responding mattress producers in Vietnam are presented in table VII-40. Mattresses accounted for the largest but declining share of overall plant production using shared equipment in Vietnam (***) percent in 2017, (***) percent in 2018, and (***) percent in 2019, (***) percent in January-September 2019, and (***) percent in January-September 2020). Four firms in Vietnam reported the production of other products in addition to mattresses on the same equipment and machinery used to produce mattresses. In addition to mattresses, other items produced by these firms in Vietnam include (***) . Three of the responding producers in Vietnam reported that they (***) .

Table VII-40

Mattresses: Overall capacity and production on the same equipment as in-scope production by producers in Vietnam, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
Overall capacity	***	***	***	***	***
Production:					
Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***
	Ratios and shares (percent)				
Overall capacity utilization	***	***	***	***	***
Share of production:					
Mattresses	***	***	***	***	***
Out-of-scope production	***	***	***	***	***
Total production on same machinery	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Exports

According to GTA, the leading export market for “articles of bedding” from Vietnam, by value, is currently the United States (table VII-41). During 2017, Japan was the largest export market for bedding articles from Vietnam, accounting for 68.2 percent of Vietnam’s total exports. The United States accounted for 9.6 percent of total exports of bedding articles from Vietnam during 2017. However, by 2019, the United States became Vietnam’s largest export market, accounting for 68.3 percent of total exports, followed by Japan as the second largest export market, accounting for 23.9 percent of the total.

Table VII-41
Articles of bedding: Vietnam exports by destination market, 2017-19

Destination market	Calendar year		
	2017	2018	2019
	Value (1,000 dollars)		
United States	7,349	12,839	247,779
Japan	52,367	68,126	86,658
China	3,633	4,979	9,371
Singapore	2,151	2,307	3,847
Canada	321	142	3,707
Korea	2,983	2,860	2,313
Taiwan	1,314	1,489	1,642
Cambodia	692	801	1,034
Hong Kong	236	866	902
All other destination markets	5,758	5,753	5,372
All destination markets	76,804	100,163	362,625
	Share of value (percent)		
United States	9.6	12.8	68.3
Japan	68.2	68.0	23.9
China	4.7	5.0	2.6
Singapore	2.8	2.3	1.1
Canada	0.4	0.1	1.0
Korea	3.9	2.9	0.6
Taiwan	1.7	1.5	0.5
Cambodia	0.9	0.8	0.3
Hong Kong	0.3	0.9	0.2
All other destination markets	7.5	5.7	1.5
All destination markets	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. United States is shown at the top, all remaining top export destinations shown in descending order of 2019 data. Quantity is not available.

Source: Official imports statistics of imports from Vietnam (constructed export statistics for Vietnam) under HS subheadings 9404.21 and 9404.29 as reported by various statistical reporting authorities in the Global Trade Atlas database, accessed January 14, 2021.

Subject countries combined

Table VII-42 presents summary data on mattress operations of the subject countries combined. Of the total reported mattress production by subject foreign producers in 2019, Indonesia accounted for the largest share (***) percent), followed by Vietnam (***) percent), China (***) percent), Malaysia (***) percent), Serbia (***) percent), Turkey (***) percent), Thailand (***) percent), and Cambodia (***) percent).

Aggregate subject producers' capacity increased from 5.0 million mattresses in 2017 to 9.4 million mattresses in 2019, and was higher in interim 2020 compared with interim 2019. Capacity is projected to decline between 2020 and 2021 while remaining higher than in 2019. Likewise, production increased overall from 4.3 million mattresses in 2017 to 7.4 million mattresses in 2019, and was higher at 6.6 million mattresses during interim 2020 compared with 4.3 million mattresses in interim 2019. Production projections for 2021 indicate an increase from 2019 to 2020 but a decline in 2021 slightly above the 2019 level. Capacity utilization declined from 86.2 percent in 2017 to 78.9 percent in 2019, but was higher in interim 2020 (84.7 percent) than in interim 2019 (77.3 percent). Capacity utilization is projected to decline to 78.4 percent in 2021.

Exports to the United States by the subject countries combined accounted for a larger share of their total shipments in 2019 (***) percent) than in 2017 (***) percent) and were higher as a share of total shipments in interim 2020 (***) percent) than in interim 2019 (***) percent). Exports to the United States are projected to increase to (***) percent of total shipments in 2020 but decline to (***) percent of subject producers' total shipments in 2021.

Table VII-42

Mattresses: Data on industry in subject countries, 2017-19, January to September 2019, and January to September 2020 and projection calendar years 2020 and 2021

	Actual experience					Projections	
	Calendar year			January to September		Calendar year	
	2017	2018	2019	2019	2020	2020	2021
	Quantity (units)						
Capacity	4,969,338	5,734,786	9,440,763	5,549,913	7,782,630	11,085,086	10,027,351
Production	4,284,413	4,648,091	7,445,601	4,291,933	6,592,890	9,114,436	7,856,996
End-of-period inventories	101,971	168,888	233,968	150,904	197,772	254,723	292,827
Shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	4,292,160	4,581,464	7,380,245	4,303,734	6,609,108	9,085,535	7,818,892
	Ratios and shares (percent)						
Capacity utilization	86.2	81.1	78.9	77.3	84.7	82.2	78.4
Inventories/production	2.4	3.6	3.1	3.5	3.0	2.8	3.7
Inventories/total shipments	2.4	3.7	3.2	3.5	3.0	2.8	3.7
Share of shipments:							
Home market shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Total home market shipments	***	***	***	***	***	***	***
Export shipments to:							
United States	***	***	***	***	***	***	***
All other markets	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. inventories of imported merchandise

Table VII-43 presents data on U.S. importers' reported inventories of mattresses. U.S. importers' end-of-period inventories of imports from the eight subject countries combined increased by 19.3 percent from 965,212 mattresses in 2017 to 1.1 million mattresses in 2018, but declined by 19.9 percent to 921,922 mattresses in 2019, ending 4.5 percent lower in 2019 than in 2017. Inventories were 31.6 percent higher in interim 2020 compared with interim 2019. This aggregate trend largely tracked the inventories held by imports from China alone, while the end-of-period inventories of imports from each of the other seven subject countries showed consistent increases from 2017 to 2019. A comparison of inventories reported during the interim periods indicate that importers from Cambodia, China, and Serbia held fewer inventories for interim 2020 than interim 2019, but that importers from the other five subject countries held more. Thirty-six importers of mattresses from subject countries held end-of-period inventories of subject merchandise during at least one point since 2017, with *** holding the largest quantities of inventories of subject imports at the end of 2019 and interim 2020. Subject sources accounted for *** percent and *** percent of total import inventories at the end of 2019 and interim 2020, respectively.

The ratio of inventories to U.S. imports during 2019 was *** percent for imports from Cambodia, *** percent for China, *** percent for Indonesia, *** percent for Malaysia, *** percent for Serbia, *** percent for Thailand, *** percent for Turkey, and *** percent for Vietnam.³⁰

³⁰ The petitioners argue that in order to timely fulfill their customers' orders, U.S. importers require significantly larger levels of inventory than U.S. producers. Petitioners' postconference brief, response to staff questions, p. 11; petitioners' prehearing brief, pp. 15-16; petitioners' posthearing brief, exh. I-26. Joint respondents argue that MiBs, unlike FPMs, are more often shipped from a central location and require higher inventories to facilitate quick shipping and on-time delivery; and are much better positioned to accommodate high-volume demand. Joint respondents postconference brief, response to staff questions, p. 13; and posthearing brief, annex III, p. 11.

Table VII-43

Mattresses: U.S. importers' end-of-period inventories of imports by source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Inventories (units); Ratios (percent)				
Imports from Cambodia: Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from China: Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from Indonesia: Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from Malaysia: Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from Serbia: Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from Thailand: Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***

Table continued on next page.

Table VII-43—Continued

Mattresses: U.S. importers' end-of-period inventories of imports by source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Inventories (units); Ratios (percent)				
Imports from Turkey:					
Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from Vietnam:					
Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from subject sources:					
Inventories	965,212	1,151,606	921,992	802,995	1,056,755
Ratio to U.S. imports	17.4	16.5	11.8	11.4	10.7
Ratio to U.S. shipments of imports	18.4	17.1	11.5	10.6	10.8
Ratio to total shipments of imports	***	***	***	***	***
Imports from nonsubject sources:					
Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***
Imports from all import sources:					
Inventories	***	***	***	***	***
Ratio to U.S. imports	***	***	***	***	***
Ratio to U.S. shipments of imports	***	***	***	***	***
Ratio to total shipments of imports	***	***	***	***	***

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

U.S. importers' outstanding orders

The Commission requested importers to indicate whether they imported or arranged for the importation of mattresses after September 30, 2020. Twenty-seven responding importers reported outstanding orders of mattresses from subject sources during October 2020 – September 2021, with four firms (***) collectively accounting for *** of such arranged imports. Table VII-44 presents data for quantities of mattresses arranged for U.S. importation after September 30, 2020.

Table VII-44
Mattresses: Arranged imports, October 2020 through September 2021

Item	Period				
	Oct-Dec 2020	Jan-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Total
	Quantity (units)				
Arranged U.S. imports from.--					
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Antidumping or countervailing duty orders in third-country markets

There are no known trade remedy actions on mattresses from any of the eight subject countries in third-country markets.

Information on nonsubject countries

Table VII-45 reports data on global exports of bedding products. China, by value, accounted for the largest share of global exports of bedding products, 19.3 percent, in 2019. Poland was the second largest exporter of bedding products, accounting for 14.2 percent, in 2019. Vietnam accounted for the third largest share of exports of bedding products, 6.5 percent, in 2019.

Table VII-45
Articles of bedding: Global exports by exporter, 2017-19

Exporter	Calendar year		
	2017	2018	2019
	Value (1,000 dollars)		
United States	175,705	199,325	178,530
Cambodia	2,391	3,137	45,332
China	1,227,511	1,391,727	1,079,473
Indonesia	17,742	22,608	206,614
Malaysia	61,703	66,522	181,805
Serbia	11,196	29,822	79,750
Thailand	47,762	59,130	124,554
Turkey	93,971	119,878	176,280
Vietnam	76,804	100,163	362,625
Subject sources	1,539,080	1,792,986	2,256,433
Poland	744,874	821,280	793,771
Germany	156,897	202,314	223,127
Belgium	205,198	222,969	219,687
Italy	177,590	199,991	191,226
Denmark	218,527	218,031	189,584
All other exporters	1,430,706	1,595,271	1,545,006
All reporting exporters	4,648,577	5,252,167	5,597,362
	Share of value (percent)		
United States	3.8	3.8	3.2
Cambodia	0.1	0.1	0.8
China	26.4	26.5	19.3
Indonesia	0.4	0.4	3.7
Malaysia	1.3	1.3	3.2
Serbia	0.2	0.6	1.4
Thailand	1.0	1.1	2.2
Turkey	2.0	2.3	3.1
Vietnam	1.7	1.9	6.5
Subject sources	33.1	34.1	40.3
Poland	16.0	15.6	14.2
Germany	3.4	3.9	4.0
Belgium	4.4	4.2	3.9
Italy	3.8	3.8	3.4
Denmark	4.7	4.2	3.4
All other exporters	30.8	30.4	27.6
All reporting exporters	100.0	100.0	100.0

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Official exports statistics under HS subheading 9404.21 and 9404.29 reported by various national statistical authorities in the Global Trade Atlas database, accessed February 18, 2021 and official global imports statistics from Cambodia and Vietnam under HS subheading 9404.21 and 9404.29 as reported by UN comtrade in the Global Trade Atlas database, accessed February 18, 2021.

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
85 FR 19503, April 7, 2020	<i>Mattresses From Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam; Institution of Anti-Dumping and Countervailing Duty Investigations and Scheduling of Preliminary Phase Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2020-04-07/pdf/2020-07207.pdf
85 FR 22998, April 24, 2020	<i>Mattresses From the People’s Republic of China: Initiation of Countervailing Duty Investigation</i>	https://www.govinfo.gov/content/pkg/FR-2020-04-24/pdf/2020-08844.pdf
85 FR 23002, April 24, 2020	<i>Mattresses From Cambodia, Indonesia, Malaysia, Serbia, Thailand, the Republic of Turkey, and the Socialist Republic of Vietnam: Initiation of Less-Than-Fair-Value Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2020-04-24/pdf/2020-08758.pdf
85 FR 30984, May 21, 2020	<i>Mattresses From Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam; Determinations</i>	https://www.govinfo.gov/content/pkg/FR-2020-05-21/pdf/2020-10938.pdf
85 FR 35415, June 10, 2020	<i>Mattresses From the People’s Republic of China: Postponement of Preliminary Determination in the Countervailing Duty Investigation</i>	https://www.govinfo.gov/content/pkg/FR-2020-06-10/pdf/2020-12562.pdf
August 11, 2020	<i>Mattresses From Cambodia, Indonesia, Malaysia, Serbia, Thailand, the Republic of Turkey, and the Socialist Republic of Vietnam: Postponement of Preliminary Determinations in the Less-Than-Fair-Value Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2020-08-11/pdf/2020-17531.pdf
85 FR 56216, September 11, 2020	<i>Mattresses From the People’s Republic of China: Preliminary Affirmative Countervailing Duty Determination, and Alignment of Final Determination With Final Antidumping Duty Determination</i>	https://www.govinfo.gov/content/pkg/FR-2020-09-11/pdf/2020-20073.pdf

Citation	Title	Link
85 FR 69594, November 3, 2020	<i>Mattresses From Cambodia: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Affirmative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24301.pdf
85 FR 69597, November 3, 2020	<i>Mattresses From Indonesia: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24297.pdf
85 FR 69574, November 3, 2020	<i>Mattresses From Malaysia: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24298.pdf
85 FR 69589, November 3, 2020	<i>Mattresses From the Serbia: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Negative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24302.pdf
85 FR 69568, November 3, 2020	<i>Mattresses From Thailand: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24296.pdf
85 FR 69571, November 3, 2020	<i>Mattresses From the Republic of Turkey: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Negative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24299.pdf

Citation	Title	Link
85 FR 69591, November 3, 2020	<i>Mattresses From the Socialist Republic of Vietnam: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-03/pdf/2020-24300.pdf
85 FR 76105, November 27, 2020	<i>Mattresses From Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam; Scheduling of the Final Phase of Countervailing Duty and Antidumping Duty Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2020-11-27/pdf/2020-26164.pdf
85 FR 15894, March 25, 2021	<i>Mattresses From Cambodia: Final Affirmative Determination of Sales at Less Than Fair Value and Final Negative Determination of Critical Circumstances</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06188.pdf
85 FR 15910, March 25, 2021	<i>Mattresses From the People's Republic of China: Final Affirmative Countervailing Duty Determination</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06189.pdf
85 FR 15899, March 25, 2021	<i>Mattresses From Indonesia: Final Affirmative Determination of Sales at Less Than Fair Value</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06195.pdf
85 FR 15901, March 25, 2021	<i>Mattresses From Malaysia: Final Affirmative Determination of Sales at Less Than Fair Value</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06187.pdf
85 FR 15892, March 25, 2021	<i>Mattresses From Serbia: Final Affirmative Determination of Sales at Less Than Fair Value, and Final Negative Finding of Critical Circumstances</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06192.pdf
85 FR 15928, March 25, 2021	<i>Mattresses From Thailand: Final Affirmative Determination of Sales at Less Than Fair Value</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06191.pdf
85 FR 15917, March 25, 2021	<i>Mattresses From the Republic of Turkey: Final Affirmative Determination of Sales at Less Than Fair Value and Final Negative Determination of Critical Circumstances</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06193.pdf

Citation	Title	Link
85 FR 15889, March 25, 2021	<i>Mattresses From the Socialist Republic of Vietnam: Final Affirmative Determination of Sales at Less Than Fair Value</i>	https://www.govinfo.gov/content/pkg/FR-2021-03-25/pdf/2021-06194.pdf

APPENDIX B

LIST OF HEARING WITNESSES

CALENDAR OF PUBLIC HEARING

Those listed below appeared in the United States International Trade Commission's hearing via videoconference:

Subject: Mattresses from Cambodia, China, Indonesia, Malaysia, Serbia, Thailand, Turkey, and Vietnam

Inv. Nos.: 701-TA-645 and 731-TA-1495-1501 (Final)

Date and Time: March 18, 2021 - 9:30 a.m.

CONGRESSIONAL APPEARANCE:

The Honorable Frank J. Mrvan, U.S. Representative, 1st District, Indiana

EMBASSY APPEARANCE:

**Embassy of Indonesia
Washington, DC**

Mr. Wijayanto, Commercial Attaché

OPENING REMARKS:

Petitioners (**Mary Jane Alves**, Cassidy Levy Kent (USA) LLP)
Respondents (**Kristin H. Mowry**, Mowry & Grimson PLLC)

In Support of the Imposition of Antidumping and Countervailing Duty Orders:

Cassidy Levy Kent (USA) LLP
Washington, DC
on behalf of

Brooklyn Bedding; Corsicana Mattress Company;
Elite Comfort Solutions; FXI, Inc.; Innocor, Inc.;
Kolcraft Enterprises, Inc.; Leggett & Platt, Incorporated;
The International Brotherhood of Teamsters, and United Steel, Paper
and Forestry, Rubber, Manufacturing, Energy, Allied Industrial
and Service Workers International Union, AFL-CIO ("USW")

Karl Glassman, Chairman of the Board and Chief Executive Officer,
Leggett & Platt, Incorporated

Tyson Hagale, Vice President, Commercial, Leggett & Platt, Incorporated

**In Support of the Imposition of
Antidumping and Countervailing Duty Orders (continued):**

Pete W. Wallace, Chief Commercial Officer, Elite Comfort Solutions, LLC

Thomas Koltun, President, Kolcraft Enterprises, Inc.

Harold Earley, President and Chief Executive Officer, FXI, Inc.

Michael F. Dolan, Trade Policy Specialist, International Brotherhood of
Teamsters

Stuart Fallen, Vice President, Corsicana Bedding LLC

John Merwin, Chief Executive Officer, Brooklyn Bedding

Deirdre Maloney, Senior International Trade Advisor, Cassidy Levy Kent (USA)
LLP

Yohai Baisburd)
) – OF COUNSEL
Mary Jane Alves)

**In Opposition to the Imposition of
Antidumping and Countervailing Duty Orders:**

Steptoe & Johnson LLP
Washington, DC
on behalf of

CVB, Inc. d/b/a Malouf

Scott Carr, Director, Specialty Retail, Malouf

Steven Douglas, Director, E-Commerce, Malouf

Jordan Haws, Director, Supply Chain, Malouf

Kyle Robertson, Director, Product Development, Malouf

Jeffrey Steed, Chief Legal Officer, Malouf

James P. Dougan, Vice President, Economic Consulting Services, LLC

**In Opposition to the Imposition of
Antidumping and Countervailing Duty Orders (continued);**

Cara Groden, Senior Economist, Economic Consulting Services, LLC

Eric C. Emerson)
Thomas J. Trendl) – OF COUNSEL
Zachary Simmons)

Mowry & Grimson PLLC
Washington, DC
on behalf of

Ashley Furniture Industries, LLC

Brian Adams, Vice President of International Sourcing Operations,
Regulatory Affairs, and Procurement, Ashley Furniture Industries, LLC

Tom Wynyard Bellhouse, Senior Trade Economist, Mowry & Grimson PLLC

Kristin H. Mowry)
) – OF COUNSEL
Jeffrey S. Grimson)

Doyle, Barlow & Mazard PLLC
Washington, DC
on behalf of

Night & Day Furniture LLC ("Night & Day")

Mike Gallawa, Owner, Night & Day

Camelia C. Mazard) – OF COUNSEL

Thompson Hine LLP
Washington, DC
on behalf of

Cozy Comfort LLC
Kellex Corporation ("Kellex Seating")

W. Neil Owens, President, Cozy Comfort LLC

R.A. Raymond, Managing Director and Founder, Cozy Comfort LLC

**In Opposition to the Imposition of
Antidumping and Countervailing Duty Orders (continued):**

Bryan Beam, Partner and Chief Operating Officer, Kellex Seating

David M. Schwartz) – OF COUNSEL

Appleton Luff PTE LTD
Washington, DC
on behalf of

BRN Yatak BazaEv Tekstili Insaat Sanayi Ticaret A.S. (“BRN”)

Edmund W. Sim)
) – OF COUNSEL
Kelly A. Slater)

REBUTTAL/CLOSING REMARKS:

Petitioners (**Yohai Baisburd**, Cassidy Levy Kent (USA) LLP)
Respondents (**Eric C. Emerson**, Steptoe & Johnson LLP)

-END-

APPENDIX C
SUMMARY DATA

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***, 2017-19, January to September 2019, and January to September 2020.....C-6

All U.S. producers

Table C-1

Mattresses: Summary data concerning the U.S. market, 2017-19, January to September 2019, and January to September 2020

(Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted)

	Reported data					Period changes			
	Calendar year		2019	January to September		Comparison years			Jan-Sep 2019-20
	2017	2018		2019	2019	2017-19	2017-18	2018-19	
U.S. consumption quantity:									
Amount.....	***	***	***	***	***	***	***	***	***
Producers' share (fn1).....	***	***	***	***	***	***	***	***	***
Importers' share (fn1):									
Cambodia.....	***	***	***	***	***	***	***	***	***
China.....	***	***	***	***	***	***	***	***	***
Indonesia.....	***	***	***	***	***	***	***	***	***
Malaysia.....	***	***	***	***	***	***	***	***	***
Serbia.....	***	***	***	***	***	***	***	***	***
Thailand.....	***	***	***	***	***	***	***	***	***
Turkey.....	***	***	***	***	***	***	***	***	***
Vietnam.....	***	***	***	***	***	***	***	***	***
Subject sources.....	***	***	***	***	***	***	***	***	***
Of which previously investigated.....	***	***	***	***	***	***	***	***	***
Of which newly investigated.....	***	***	***	***	***	***	***	***	***
Nonsubject sources.....	***	***	***	***	***	***	***	***	***
All import sources.....	***	***	***	***	***	***	***	***	***
U.S. consumption value:									
Amount.....	***	***	***	***	***	***	***	***	***
Producers' share (fn1).....	***	***	***	***	***	***	***	***	***
Importers' share (fn1):									
Cambodia.....	***	***	***	***	***	***	***	***	***
China.....	***	***	***	***	***	***	***	***	***
Indonesia.....	***	***	***	***	***	***	***	***	***
Malaysia.....	***	***	***	***	***	***	***	***	***
Serbia.....	***	***	***	***	***	***	***	***	***
Thailand.....	***	***	***	***	***	***	***	***	***
Turkey.....	***	***	***	***	***	***	***	***	***
Vietnam.....	***	***	***	***	***	***	***	***	***
Subject sources.....	***	***	***	***	***	***	***	***	***
Of which previously investigated.....	***	***	***	***	***	***	***	***	***
Of which newly investigated.....	***	***	***	***	***	***	***	***	***
Nonsubject sources.....	***	***	***	***	***	***	***	***	***
All import sources.....	***	***	***	***	***	***	***	***	***
U.S. importers' U.S. shipments of imports from:									
Cambodia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
China:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Indonesia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Malaysia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Serbia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Thailand:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***

Table continued on next page.

Table C-1--Continued

Mattresses: Summary data concerning the U.S. market, 2017-19, January to September 2019, and January to September 2020

(Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted)

	Reported data					Period changes			
	Calendar year		2019	January to September		Comparison years			Jan-Sep 2019-20
	2017	2018		2019	2019	2017-19	2017-18	2018-19	
U.S. importers' U.S. shipments of imports from--Continued:									
Turkey:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Vietnam:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Subject sources:									
Quantity.....	5,246,403	6,754,207	7,984,288	5,665,403	7,306,008	▲52.2	▲28.7	▲18.2	▲29.0
Value.....	677,335	836,988	1,042,647	726,253	928,040	▲53.9	▲23.6	▲24.6	▲27.8
Unit value.....	\$129	\$124	\$131	\$128	\$127	▲1.1	▼(4.0)	▲5.4	▼(0.9)
Ending inventory quantity.....	965,212	1,151,606	921,992	802,995	1,056,755	▼(4.5)	▲19.3	▼(19.9)	▲31.6
Subject sources previously investigated:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Subject sources newly investigated:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Nonsubject sources:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
All import sources:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
U.S. producers':									
Average capacity quantity.....	25,465,851	24,921,072	25,456,891	19,301,122	19,868,198	▼(0.0)	▼(2.1)	▲2.2	▲2.9
Production quantity.....	19,117,584	18,472,178	18,436,244	14,156,364	14,134,447	▼(3.6)	▼(3.4)	▼(0.2)	▼(0.2)
Capacity utilization (fn1).....	75.1	74.1	72.4	73.3	71.1	▼(2.7)	▼(0.9)	▼(1.7)	▼(2.2)
U.S. shipments:									
Quantity.....	19,236,908	18,226,947	18,286,554	13,963,203	14,011,538	▼(4.9)	▼(5.3)	▲0.3	▲0.3
Value.....	5,103,659	5,032,747	5,298,044	3,991,781	4,030,633	▲3.8	▼(1.4)	▲5.3	▲1.0
Unit value.....	\$265	\$276	\$290	\$286	\$288	▲9.2	▲4.1	▲4.9	▲0.6
Export shipments:									
Quantity.....	101,363	100,285	98,139	73,715	60,736	▼(3.2)	▼(1.1)	▼(2.1)	▼(17.6)
Value.....	39,153	38,481	35,938	26,211	26,175	▼(8.2)	▼(1.7)	▼(6.6)	▼(0.1)
Unit value.....	\$386	\$384	\$366	\$356	\$431	▼(5.2)	▼(0.7)	▼(4.6)	▲21.2
Ending inventory quantity.....	374,097	498,910	545,677	611,919	606,614	▲45.9	▲33.4	▲9.4	▼(0.9)
Inventories/total shipments (fn1).....	1.9	2.7	3.0	3.3	3.2	▲1.0	▲0.8	▲0.2	▼(0.0)
Production workers.....	13,091	12,590	12,724	12,224	12,243	▼(2.8)	▼(3.8)	▲1.1	▲0.2
Hours worked (1,000s).....	25,352	23,832	25,700	20,147	19,161	▲1.4	▼(6.0)	▲7.8	▼(4.9)
Wages paid (\$1,000).....	512,388	503,496	539,840	393,310	409,810	▲5.4	▼(1.7)	▲7.2	▲4.2
Hourly wages (dollars per hour).....	\$20.21	\$21.13	\$21.01	\$19.52	\$21.39	▲3.9	▲4.5	▼(0.6)	▲9.6
Productivity (units per 1,000 hours).....	754.1	775.1	717.4	702.7	737.7	▼(4.9)	▲2.8	▼(7.4)	▲5.0
Unit labor costs.....	\$26.80	\$27.26	\$29.28	\$27.78	\$28.99	▲9.3	▲1.7	▲7.4	▲4.4

Table continued on next page.

Table C-1--Continued

Mattresses: Summary data concerning the U.S. market, 2017-19, January to September 2019, and January to September 2020

(Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted)

	Reported data					Period changes			
	Calendar year		January to September			Comparison years			Jan-Sep
	2017	2018	2019	2019	2020	2017-19	2017-18	2018-19	2019-20
U.S. producers'--Continued:									
Net sales:									
Quantity.....	18,758,994	17,732,138	17,733,600	13,555,946	13,573,510	▼(5.5)	▼(5.5)	▲0.0	▲0.1
Value.....	5,050,280	4,979,222	5,220,167	3,930,606	3,961,539	▲3.4	▼(1.4)	▲4.8	▲0.8
Unit value.....	\$269	\$281	\$294	\$290	\$292	▲9.3	▲4.3	▲4.8	▲0.7
Cost of goods sold (COGS).....	3,003,396	3,042,399	3,174,175	2,399,093	2,378,095	▲5.7	▲1.3	▲4.3	▼(0.9)
Gross profit or (loss) (fn2).....	2,046,884	1,936,823	2,045,992	1,531,513	1,583,444	▼(0.0)	▼(5.4)	▲5.6	▲3.4
SG&A expenses.....	1,357,123	1,308,010	1,383,236	1,011,315	1,030,288	▲1.9	▼(3.6)	▲5.8	▲1.9
Operating income or (loss) (fn2).....	689,761	628,813	662,756	520,198	553,156	▼(3.9)	▼(8.8)	▲5.4	▲6.3
Net income or (loss) (fn2).....	399,516	287,499	126,997	251,466	(328,122)	▼(68.2)	▼(28.0)	▼(55.8)	▼(---)
Capital expenditures.....	105,756	83,814	112,224	76,288	116,430	▲6.1	▼(20.7)	▲33.9	▲52.6
Research and development expenses.....	40,366	36,437	34,543	26,215	26,711	▼(14.4)	▼(9.7)	▼(5.2)	▲1.9
Net assets.....	4,903,295	4,870,458	4,881,917	NA	NA	▼(0.4)	▼(0.7)	▲0.2	NA
Unit COGS.....	\$160	\$172	\$179	\$177	\$175	▲11.8	▲7.2	▲4.3	▼(1.0)
Unit SG&A expenses.....	\$72	\$74	\$78	\$75	\$76	▲7.8	▲2.0	▲5.7	▲1.7
Unit operating income or (loss) (fn2).....	\$37	\$35	\$37	\$38	\$41	▲1.6	▼(3.6)	▲5.4	▲6.2
Unit net income or (loss) (fn2).....	\$21	\$16	\$7	\$19	\$(24)	▼(66.4)	▼(23.9)	▼(55.8)	▼(---)
COGS/sales (fn1).....	59.5	61.1	60.8	61.0	60.0	▲1.3	▲1.6	▼(0.3)	▼(1.0)
Operating income or (loss)/sales (fn1).....	13.7	12.6	12.7	13.2	14.0	▼(1.0)	▼(1.0)	▲0.1	▲0.7
Net income or (loss)/sales (fn1).....	7.9	5.8	2.4	6.4	(8.3)	▼(5.5)	▼(2.1)	▼(3.3)	▼(14.7)

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than " (0.05)" percent (if negative). Zeros, null values, and undefined calculations are suppressed and shown as "---". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease. The data presented do not include data from firms that submitted unusable and/or untimely responses to the Commission's questionnaires, such as ***.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

fn3.--Percent change not shown given small base.

Source: Compiled from data submitted in response to Commission questionnaires.

Related party exclusion

Table C-2

Mattresses: Summary data concerning the U.S. market excluding one U.S. producer *, 2017-19, January to September 2019, and January to September 2020**

(Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted)

	Reported data					Period changes			
	Calendar year		January to September			Comparison years			Jan-Sep
	2017	2018	2019	2019	2020	2017-19	2017-18	2018-19	2019-20
U.S. consumption quantity:									
Amount.....	***	***	***	***	***	***	***	***	***
Producers' share (fn1):									
Included producers.....	***	***	***	***	***	***	***	***	***
Excluded producers.....	***	***	***	***	***	***	***	***	***
All producers.....	***	***	***	***	***	***	***	***	***
Importers' share (fn1):									
Cambodia.....	***	***	***	***	***	***	***	***	***
China.....	***	***	***	***	***	***	***	***	***
Indonesia.....	***	***	***	***	***	***	***	***	***
Malaysia.....	***	***	***	***	***	***	***	***	***
Serbia.....	***	***	***	***	***	***	***	***	***
Thailand.....	***	***	***	***	***	***	***	***	***
Turkey.....	***	***	***	***	***	***	***	***	***
Vietnam.....	***	***	***	***	***	***	***	***	***
Subject sources.....	***	***	***	***	***	***	***	***	***
Of which previously investigated.....	***	***	***	***	***	***	***	***	***
Of which newly investigated.....	***	***	***	***	***	***	***	***	***
Nonsubject sources.....	***	***	***	***	***	***	***	***	***
All import sources.....	***	***	***	***	***	***	***	***	***
U.S. consumption value:									
Amount.....	***	***	***	***	***	***	***	***	***
Producers' share (fn1):									
Included producers.....	***	***	***	***	***	***	***	***	***
Excluded producers.....	***	***	***	***	***	***	***	***	***
All producers.....	***	***	***	***	***	***	***	***	***
Importers' share (fn1):									
Cambodia.....	***	***	***	***	***	***	***	***	***
China.....	***	***	***	***	***	***	***	***	***
Indonesia.....	***	***	***	***	***	***	***	***	***
Malaysia.....	***	***	***	***	***	***	***	***	***
Serbia.....	***	***	***	***	***	***	***	***	***
Thailand.....	***	***	***	***	***	***	***	***	***
Turkey.....	***	***	***	***	***	***	***	***	***
Vietnam.....	***	***	***	***	***	***	***	***	***
Subject sources.....	***	***	***	***	***	***	***	***	***
Of which previously investigated.....	***	***	***	***	***	***	***	***	***
Of which newly investigated.....	***	***	***	***	***	***	***	***	***
Nonsubject sources.....	***	***	***	***	***	***	***	***	***
All import sources.....	***	***	***	***	***	***	***	***	***
U.S. importers' U.S. shipments of imports from:									
Cambodia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
China:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Indonesia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Malaysia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Serbia:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***

Table continued on next page.

Table C-2--Continued

Mattresses: Summary data concerning the U.S. market excluding one U.S. producer ***, 2017-19, January to September 2019, and January to September 2020

(Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted)

	Reported data					Period changes			
	Calendar year		2019	January to September		Comparison years			Jan-Sep 2019-20
	2017	2018		2019	2019	2020	2017-19	2017-18	
U.S. importers' U.S. shipments of imports from--Continued:									
Thailand:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Turkey:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Vietnam:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Subject sources:									
Quantity.....	5,246,403	6,754,207	7,984,288	5,665,403	7,306,008	▲52.2	▲28.7	▲18.2	▲29.0
Value.....	677,335	836,988	1,042,647	726,253	928,040	▲53.9	▲23.6	▲24.6	▲27.8
Unit value.....	\$129	\$124	\$131	\$128	\$127	▲1.1	▼(4.0)	▲5.4	▼(0.9)
Ending inventory quantity.....	965,212	1,151,606	921,992	802,995	1,056,755	▼(4.5)	▲19.3	▼(19.9)	▲31.6
Subject sources previously investigated:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Subject sources newly investigated:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Nonsubject sources:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
All import sources:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Included U.S. producers':									
Average capacity quantity.....	***	***	***	***	***	***	***	***	***
Production quantity.....	***	***	***	***	***	***	***	***	***
Capacity utilization (fn1).....	***	***	***	***	***	***	***	***	***
U.S. shipments:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Export shipments:									
Quantity.....	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***
Inventories/total shipments (fn1).....	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	***	***	***	***
Hours worked (1,000s).....	***	***	***	***	***	***	***	***	***
Wages paid (\$1,000).....	***	***	***	***	***	***	***	***	***
Hourly wages (dollars per hour).....	***	***	***	***	***	***	***	***	***
Productivity (units per 1,000 hours).....	***	***	***	***	***	***	***	***	***
Unit labor costs.....	***	***	***	***	***	***	***	***	***

Table continued on next page.

Table C-2--Continued

Mattresses: Summary data concerning the U.S. market excluding one U.S. producer ***, 2017-19, January to September 2019, and January to September 2020

(Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted)

	Reported data					Period changes				
	Calendar year		2019	January to September		Comparison years			Jan-Sep 2019-20	
	2017	2018		2019	2019	2020	2017-19	2017-18		2018-19
Included U.S. producers--Continued:										
Net sales:										
Quantity.....	***	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***	***
Cost of goods sold (COGS).....	***	***	***	***	***	***	***	***	***	***
Gross profit or (loss) (fn2).....	***	***	***	***	***	***	***	***	***	***
SG&A expenses.....	***	***	***	***	***	***	***	***	***	***
Operating income or (loss) (fn2).....	***	***	***	***	***	***	***	***	***	***
Net income or (loss) (fn2).....	***	***	***	***	***	***	***	***	***	***
Capital expenditures.....	***	***	***	***	***	***	***	***	***	***
Research and development expenses.....	***	***	***	***	***	***	***	***	***	***
Net assets.....	***	***	***	***	***	***	***	***	***	***
Unit COGS.....	***	***	***	***	***	***	***	***	***	***
Unit SG&A expenses.....	***	***	***	***	***	***	***	***	***	***
Unit operating income or (loss) (fn2).....	***	***	***	***	***	***	***	***	***	***
Unit net income or (loss) (fn2).....	***	***	***	***	***	***	***	***	***	***
COGS/sales (fn1).....	***	***	***	***	***	***	***	***	***	***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	***	***	***	***	***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than " (0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease. The data presented do not include data from firms that submitted unusable and/or untimely responses to the Commission's questionnaires, such as ***.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

fn3.--Percent change not shown given small base.

Source: Compiled from data submitted in response to Commission questionnaires.

APPENDIX D

CHANNELS OF DISTRIBUTION BY PACKAGING FORMAT

Table D-1

Mattresses: U.S. producers' and U.S. importers' U.S. shipments by packaging format, channel of distribution, and source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of format within specified shipment source and channel (percent)				
U.S. producers: MiB.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. producers: FPM.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: MiB: Cambodia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***

Table continued on next page.

Table D-1—Continued

Mattresses: U.S. producers' and U.S. importers' U.S. shipments by packaging format, channel of distribution, and source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of format within specified shipment source and channel (percent)				
U.S. importers: MiB: China.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: China.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: MiB: Indonesia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***

Table continued on next page.

Table D-1—Continued

Mattresses: U.S. producers' and U.S. importers' U.S. shipments by packaging format, channel of distribution, and source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of format within specified shipment source and channel (percent)				
U.S. importers: MiB: Malaysia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: MiB: Serbia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***

Table continued on next page.

Table D-1—Continued

Mattresses: U.S. producers' and U.S. importers' U.S. shipments by packaging format, channel of distribution, and source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of format within specified shipment source and channel (percent)				
U.S. importers: MiB: Thailand.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: MiB: Turkey.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***

Table continued on next page.

Table D-1—Continued

Mattresses: U.S. producers' and U.S. importers' U.S. shipments by packaging format, channel of distribution, and source, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of format within specified shipment source and channel (percent)				
U.S. importers: MiB: Vietnam.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	***	***	***	***	***
U.S. importers: MiB: All subject sources.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	100.0	100.0	100.0	100.0	100.0
U.S. importers: FPM: All subject sources.-- Retailers:					
Brick and mortar stores	***	***	***	***	***
Internet/online	***	***	***	***	***
Omni-channel	***	***	***	***	***
All retail	***	***	***	***	***
Distributors	***	***	***	***	***
End users	***	***	***	***	***
All channels	100.0	100.0	100.0	100.0	100.0

Note: MiB means mattress-in-a-box. FPM means flat-packed mattress.

Source: Compiled from data submitted in response to Commission questionnaires.

APPENDIX E

COVID-19 PANDEMIC EFFECTS

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Table E-1

Mattresses: COVID-19 pandemic effects on U.S. producers' supply chain arrangements, production, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***

Continued on next page.

Table E-1--Continued

Mattresses: COVID-19 pandemic effects on U.S. producers' supply chain arrangements, production, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***

Table continued on next page.

Table E-1--Continued

Mattresses: COVID-19 pandemic effects on U.S. producers' supply chain arrangements, production, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-1--Continued

Mattresses: COVID-19 pandemic effects on U.S. producers' supply chain arrangements, production, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-1--Continued

Mattresses: COVID-19 pandemic effects on U.S. producers' supply chain arrangements, production, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-1--Continued

Mattresses: COVID-19 pandemic effects on U.S. producers' supply chain arrangements, production, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table E-2

Mattresses: COVID-19 pandemic effects on U.S. producers' financial performance

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-2--Continued
Mattresses: COVID-19 pandemic effects on U.S. producers' financial performance

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-2--Continued

Mattresses: COVID-19 pandemic effects on U.S. producers' financial performance

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table E-3

Mattresses: COVID-19 pandemic effects on U.S. importers' supply chain arrangements, imports, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-3--Continued

Mattresses: COVID-19 pandemic effects on U.S. importers' supply chain arrangements, imports, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Table continued on next page.

Table E-3--Continued

Mattresses: COVID-19 pandemic effects on U.S. importers' supply chain arrangements, imports, employment, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

Table E-4

Mattresses: COVID-19 pandemic effects on foreign producers' supply chain arrangements, production, and sales relating to mattresses

Item / Firm	Narrative
COVID-19 pandemic responses:	
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Source: Compiled from data submitted in response to Commission questionnaires.

APPENDIX F

U.S. SHIPMENTS BY PRODUCT TYPE, PACKAGING, AND SIZE

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Table F-1

Mattresses: U.S. producers' U.S. shipments by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. producers' U.S. shipments of MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers' U.S. shipments of FPMs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers' U.S. shipments of all mattresses.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. producers' U.S. shipments of MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers' U.S. shipments of FPMs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers' U.S. shipments of all mattresses.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-1--Continued

Mattresses: U.S. producers' U.S. shipments by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. producers: MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: FPM.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: All packaging.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. producers: MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: FPM.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: All packaging.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-1--Continued

Mattresses: U.S. producers' U.S. shipments by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of quantity (percent)				
U.S. producers: MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: FPM.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: All packaging.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Ratio to overall apparent consumption quantity (percent)				
U.S. producers: MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: FPM.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: All packaging.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-1--Continued

Mattresses: U.S. producers' U.S. shipments by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. producers: MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: FPM.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: All packaging.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. producers: MiBs.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: FPM.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. producers: All packaging.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Table F-2

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of quantity (percent)				
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Ratio to overall apparent consumption quantity (percent)				
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Cambodia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: China.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of value (percent)				
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Ratio to overall apparent consumption value (percent)				
U.S. importers: MiBs: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Indonesia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Malaysia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Serbia.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of value (percent)				
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Ratio to overall apparent consumption value (percent)				
U.S. importers: MiBs: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Thailand.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.- - Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.- - Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of value (percent)				
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.- - Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Ratio to overall apparent consumption value (percent)				
U.S. importers: MiBs: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Turkey.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Turkey.- - Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Vietnam.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers: MiBs: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers: MiBs: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Subject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Subject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Subject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. importers: MiBs: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Value (1,000 dollars)				
U.S. importers: MiBs: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: Nonsubject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: Nonsubject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of value (percent)					
U.S. importers: MiBs: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption value (percent)					
U.S. importers: MiBs: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: Nonsubject sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. importers: MiBs: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Value (1,000 dollars)				
U.S. importers: MiBs: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Unit value (dollars per unit)					
U.S. importers: MiBs: All import sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Difference from AUV for this source for all products (dollars per unit)					
U.S. importers: MiBs: All import sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.-- Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Table continued on next page.

Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Share of quantity (percent)					
U.S. importers: MiBs: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
Ratio to overall apparent consumption quantity (percent)					
U.S. importers: MiBs: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

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Table F-2--Continued

Mattresses: U.S. importers' U.S. shipments, by product type and packaging, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Share of value (percent)				
U.S. importers: MiBs: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
	Ratio to overall apparent consumption value (percent)				
U.S. importers: MiBs: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: FPM: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***
U.S. importers: All packaging: All import sources.--					
Innerspring	***	***	***	***	***
Non-innerspring	***	***	***	***	***
Hybrid	***	***	***	***	***
All product types	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Table F-3

Mattresses: U.S. producers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

Table F-4

Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from Cambodia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from Cambodia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from Cambodia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from Cambodia.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from Cambodia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

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Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from China.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from China.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from China.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from China.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from China.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from Indonesia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from Indonesia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from Indonesia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from Indonesia.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from Indonesia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued

Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from Malaysia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from Malaysia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from Malaysia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from Malaysia.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from Malaysia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from Serbia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from Serbia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from Serbia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from Serbia.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from Serbia.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued

Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from Thailand.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from Thailand.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from Thailand.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from Thailand.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from Thailand.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from Turkey.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from Turkey.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from Turkey.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from Turkey.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from Turkey.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

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Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. importers' U.S. shipments from Vietnam.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Value (1,000 dollars)				
U.S. importers' U.S. shipments from Vietnam.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Unit value (dollars per unit)				
U.S. importers' U.S. shipments from Vietnam.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Share of quantity (percent)				
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
	Share of value (percent)				
U.S. producers' U.S. shipments.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. importers' U.S. shipments from subject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Value (1,000 dollars)				
U.S. importers' U.S. shipments from subject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Unit value (dollars per unit)				
U.S. importers' U.S. shipments from subject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Share of quantity (percent)				
U.S. importers' U.S. shipments from subject sources.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
	Share of value (percent)				
U.S. importers' U.S. shipments from subject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
Quantity (units)					
U.S. importers' U.S. shipments from nonsubject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Value (1,000 dollars)					
U.S. importers' U.S. shipments from nonsubject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Unit value (dollars per unit)					
U.S. importers' U.S. shipments from nonsubject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
Share of quantity (percent)					
U.S. importers' U.S. shipments from nonsubject sources.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
Share of value (percent)					
U.S. importers' U.S. shipments from nonsubject sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Table continued on next page.

Table F-4--Continued
Mattresses: U.S. importers' U.S. shipments by size, 2017-19, January to September 2019, and January to September 2020

Item	Calendar year			January to September	
	2017	2018	2019	2019	2020
	Quantity (units)				
U.S. importers' U.S. shipments from all import sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Value (1,000 dollars)				
U.S. importers' U.S. shipments from all import sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Unit value (dollars per unit)				
U.S. importers' U.S. shipments from all import sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***
	Share of quantity (percent)				
U.S. importers' U.S. shipments from all import sources.-- Crib	***	***	***	***	***
Non-crib	***	***	***	***	***
All sizes	***	***	***	***	***
	Share of value (percent)				
U.S. importers' U.S. shipments from all import sources.-- Crib	***	***	***	***	***
All other mattresses	***	***	***	***	***
All sizes	***	***	***	***	***

Note.--Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Source: Compiled from data submitted in response to Commission questionnaires.

APPENDIX G

PRICE AND PURCHASE COST DATA EXCLUDING U.S. PRODUCER ***

In the preliminary phase of these investigations, the Commission found that U.S. producers *** were related parties. In this final phase, *** provided a timely response to the questionnaire with U.S. producer pricing data.

In its U.S. producers' questionnaire in this final phase, *** provided data only for product **. Table G-1 and figure G-1 provide price data for product ** excluding these data from ***, corresponding to table V-*** and figure V-***. Table G-2 and figure G-2 provide U.S. price and cost for product ** excluding the data from ***, corresponding to table V-*** and figure V-***. Figure G-3 corresponds to figure V-*** and shows price and cost data for U.S. producers (excluding ***) and importers.

Table V-18 shows price trends for the various pricing products by country. With the removal of *** from the producer pricing data, the price *** for U.S. product ** would be *** percent. The range of U.S. prices for product ** would be from a minimum of \$*** to the *** maximum of \$***.

Tables G-3 and G-4 correspond to tables V-20 and V-21, presenting underselling/ (overselling) margins for prices (table G-3) and price-cost differences instances for U.S. prices and costs (table G-4), with data for U.S. producer *** excluded.

Table G-1
Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product ***
(excluding U.S. producer data from *) and margins of underselling/(overselling), by quarter,**
January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

Table continued on next page.

Table G-1--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product * (excluding U.S. producer data from ***) and margins of underselling/(overselling), by quarter, January 2017-September 2020**

Period	United States		Indonesia			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

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Table G-1--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product * (excluding U.S. producer data from ***) and margins of underselling/(overselling), by quarter, January 2017-September 2020**

Period	United States		Serbia			Thailand		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

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Table G-1--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product * (excluding U.S. producer data from ***) and margins of underselling/(overselling), by quarter, January 2017-September 2020**

Period	United States		Turkey			Vietnam		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

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Table G-1--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic and imported product * (excluding U.S. producer data from ***) and margins of underselling/(overselling), by quarter, January 2017-September 2020**

Period	United States		All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	Price (\$ per mattress)	Quantity (mattresses)	Margin (percent)
2017:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2018:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2019:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***
2020:					
Jan.-Mar.	***	***	***	***	***
Apr.-June	***	***	***	***	***
July-Sept.	***	***	***	***	***

Note: Product ***.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure G-1
Mattresses: Weighted-average prices and quantities of domestic and imported product *, by quarter, January 2017-September 2020**

* * * * *

Product ***.

Source: Compiled from data submitted in response to Commission questionnaires.

Table G-2
Mattresses: Weighted-average f.o.b. prices and quantities of domestic product * excluding ***,**
landed duty-paid costs and quantities of imported product *, and price-cost differentials, by**
quarter, January 2017-September 2020

Period	United States		Cambodia			China		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differ- ential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differ- ential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***

Table continued on next page.

Table G-2--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product * excluding ***, landed duty-paid costs and quantities of imported product ***, and price-cost differentials, by quarter, January 2017-September 2020**

Period	United States		Indonesia			Malaysia		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

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Table G-2--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product * excluding ***, landed duty-paid costs and quantities of imported product ***, and price-cost differentials, by quarter, January 2017-September 2020**

Period	United States		Thailand			Turkey		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

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Table G-2--Continued

Mattresses: Weighted-average f.o.b. prices and quantities of domestic product * excluding ***, landed duty-paid costs and quantities of imported product ***, and price-cost differentials, by quarter, January 2017-September 2020**

Period	United States		Vietnam			All subject countries		
	Price (\$ per mattress)	Quantity (mattresses)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)	LDP cost (\$ per mattress)	Quantity (mattresses)	Price-cost differential (percent)
2017:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2018:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2019:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***
Oct.-Dec.	***	***	***	***	***	***	***	***
2020:								
Jan.-Mar.	***	***	***	***	***	***	***	***
Apr.-June	***	***	***	***	***	***	***	***
July-Sept.	***	***	***	***	***	***	***	***

Note: Product ***.

Source: Compiled from data submitted in response to Commission questionnaires.

Figure G-2
Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product ^{*}, by quarter, January 2017-September 2020**

* * * * *

Product ^{***}

Source: Compiled from data submitted in response to Commission questionnaires.

Figure G-3
Mattresses: Weighted-average prices, landed duty-paid costs, and quantities of domestic and imported product *, excluding data from U.S. producer ***, by quarter, January 2017-September 2020**

* * * * *

Product ***.

Source: Compiled from data submitted in response to Commission questionnaires.

Table G-3

Mattresses: Instances of underselling/(overselling) and the range and average of margins, by country, January 2017-September 2020, excluding data for U.S. producer ***

Source	Underselling				
	Number of quarters	Quantity (mattresses)	Average margin (percent)	Margin range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	***	***	***	***	***
Source	(Overselling)				
	Number of quarters	Quantity ¹ (mattresses)	Average margin (percent)	Margin range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	***	***	***	***	***

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Source: Compiled from data submitted in response to Commission questionnaires.

Table G-4

Mattresses: Comparisons of import purchase costs and U.S.-producer sales prices, by country, January 2017-September 2020, excluding data for U.S. producer ***

Source	Import purchase cost lower than U.S. sales price				
	Number of quarters	Quantity (mattresses)	Average price-cost difference (percent)	Price-cost difference range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	***	***	***	***	***
Source	(Import purchase cost higher than U.S. sales price)				
	Number of quarters	Quantity (mattresses)	Average price-cost difference (percent)	Price-cost difference range (percent)	
				Min	Max
Cambodia	***	***	***	***	***
China	***	***	***	***	***
Indonesia	***	***	***	***	***
Malaysia	***	***	***	***	***
Serbia	***	***	***	***	***
Thailand	***	***	***	***	***
Turkey	***	***	***	***	***
Vietnam	***	***	***	***	***
Total	***	***	***	***	***

Note: These data include only quarters in which there is a comparison between the U.S. and subject product

Source: Compiled from data submitted in response to Commission questionnaires.

