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

Investigations Nos. 701-TA-432 (Final) and 731-TA-1024-1028 (Final)

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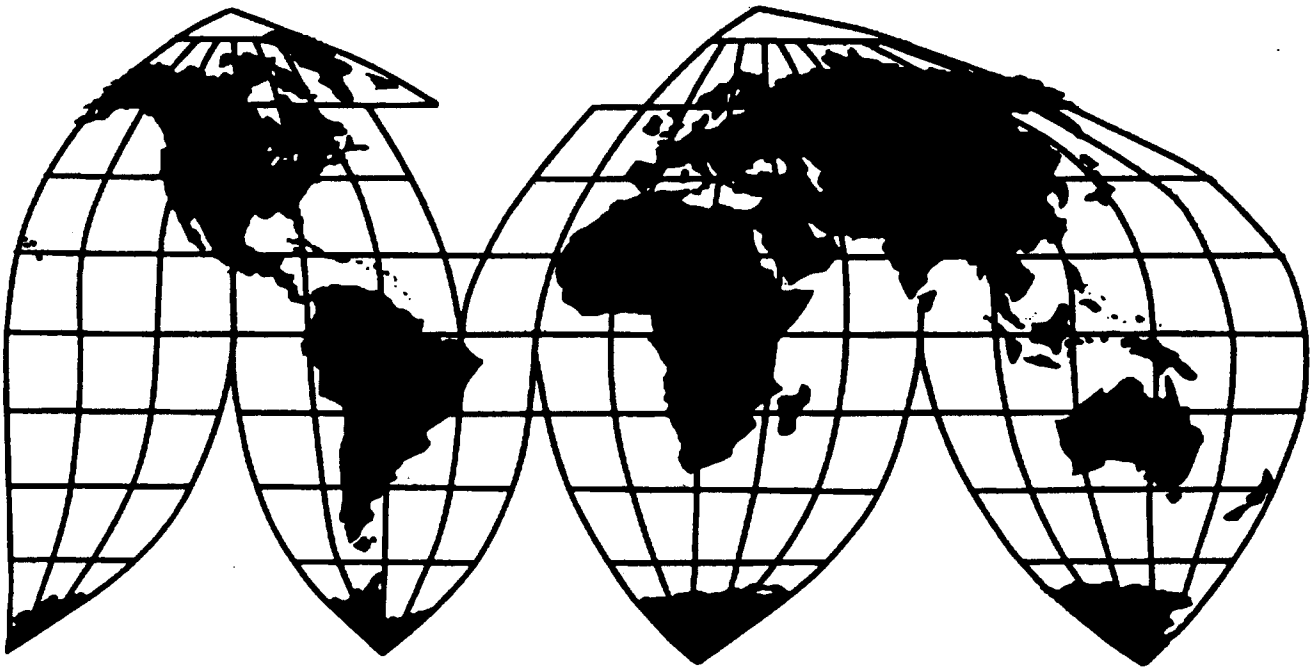
U.S. International Trade Commission



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UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigations Nos. 701-TA-432 and 731-TA-1024-1028 (Final)

PRESTRESSED CONCRETE STEEL WIRE STRAND
FROM BRAZIL, INDIA, KOREA, MEXICO, AND THAILAND

DETERMINATIONS

On the basis of the record[1] developed in the subject investigations, the United States International Trade Commission (Commission) determines, pursuant to section 705(b) of the Tariff Act of 1930 (19 U.S.C. § 1671d(b)) (the Act), that an industry in the United States is materially injured by reason of imports from India of prestressed concrete steel wire strand (PC strand) that have been found by the Department of Commerce (Commerce) to be subsidized by the Government of India and by reason of imports from Brazil, India, Korea, Mexico, and Thailand of PC strand that have been found by Commerce to be sold in the United States at less than fair value (LTFV). The subject merchandise is provided for in subheading 7312.10.30 of the Harmonized Tariff Schedule of the United States.

BACKGROUND

The Commission instituted these investigations effective January 31, 2003, following receipt of petitions filed with the Commission and Commerce by American Spring Wire Corp., Bedford Heights, OH; Insteel Wire Products Co., Mt. Airy, NC; and Sumiden Wire Products Corp., Stockton, CA. The final phase of the investigations was scheduled by the Commission following notification of preliminary determinations by Commerce that imports of PC strand from India were being subsidized within the meaning of section 703(b) of the Act (19 U.S.C. § 1671b(b)) and that imports of PC strand from Brazil, India, Korea, Mexico, and Thailand were being sold at LTFV within the meaning of section 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* of September 4, 2003 (68 F.R. 52614). The hearing was held in Washington, DC, on December 2, 2003, and all persons who requested the opportunity were permitted to appear in person or by counsel.

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

VIEWS OF THE COMMISSION

Based on the record in these investigations, we determine that an industry in the United States is materially injured by reason of imports of prestressed concrete steel wire strand (PC strand) from Brazil, India, Korea, Mexico, and Thailand that are sold in the United States at less than fair value (LTFV) and by reason of imports of PC strand from India that are subsidized.

The petitions in these investigations were filed on January 31, 2003, by domestic producers American Spring Wire Corp. (American), Insteel Wire Products Co. (Insteel), and Sumiden Wire Products Corp. (Sumiden) (collectively, Petitioners). Participating respondent interested parties are Belgo Bekaert Arames S.A. (Belgo Bekaert or Brazilian Respondent), a Brazilian producer/exporter; Camesa, Inc. (Camesa) and Universal Products Group, Inc. (Universal), U.S. importers; and Aceros Camesa, S.A. de C.V. (Aceros) and Cablesa, S.A. de C.V. (Cablesa), Mexican producers/exporters (collectively, Mexican Respondents).[1]

I. BACKGROUND AND SUMMARY

PC strand is steel strand produced from hot-rolled, high-carbon steel wire rod which, after cleaning and descaling, is drawn into wire, fabricated into multi-wire strand, and thermally stress-relieved. PC strand is used to "prestress" concrete structural members to improve their ability to withstand loads. The PC strand is stretched either prior to the pouring of concrete (pre-tensioning) or after the pouring of the concrete (post-tensioning) to impart compressive force to the concrete in which it is placed. Depending on the application, PC strand may be used bare (uncoated) or with a coating of plastic or epoxy. Because plastic-coated and bare PC strand overlap substantially in terms of characteristics and uses, channels of distribution, production processes, equipment and employees, and producer perceptions, and are sometimes interchangeable, we do not treat plastic-coated PC strand as a separate and distinct domestic like product.

Typical applications for prestressed concrete include bridge decks, bridge girders, pilings, precast concrete panels and structural supports, roof trusses, floor supports, and certain concrete foundations.[2] Almost all U.S. shipments of PC strand by U.S. producers have been made directly to end users. The majority of U.S. shipments of subject imports, in the aggregate, also have been made to end users, although the channels of distribution for individual subject countries vary somewhat.[3]

The petition was filed on behalf of three domestic producers of PC strand: American, Bedford Heights, OH; Insteel, Mt. Airy, NC; and Sumiden, Stockton, CA.[4] In addition to the petitioning companies, two other firms reported production of PC strand in 2002: Sivaco Georgia LLC (Sivaco), Newnan, GA, and Strand Tech Martin, Inc. (Strand Tech), Summerville, SC.[5] These five firms are believed to have accounted for 100 percent of U.S. production of uncoated PC strand during the period from January 2000 through June 2003. While a number of purchasers of bare PC strand coat the product before use, we conclude that plastic coating alone is not sufficient production-related activity to qualify

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[1] Participating Brazilian and Mexican Respondents are referred to collectively as Respondents, unless otherwise indicated. The following are parties to these investigations but did not participate in the hearing or file briefs: The Crispin Company, a U.S. importer of subject merchandise from Brazil and Korea; TISCO, an Indian producer/exporter; Tata, Inc., ***; The Siam Industrial Wire Co., Ltd., a producer/exporter; and Cementhai, a U.S. importer of subject merchandise from Thailand.

[2] Confidential Staff Report (CR) at I-9-I-10, Public Staff Report (PR) at I-7.

[3] CR at I-23, PR at I-12.

[4] CR, PR at I-1.

[5] CR at III-3, PR at III-2.

such coaters as members of the domestic industry that produces PC strand, and decline to include such firms in the domestic industry.

Demand for PC strand is derived from demand for prestressed concrete which, in turn, is derived from demand for construction projects. Purchaser characterizations of demand trends were mixed, while apparent U.S. consumption, a proxy for demand, declined modestly between 2000 and 2001 and again between 2001 and 2002, then increased in the first half of 2003 relative to the first half of 2002. Although U.S. producers increased capacity between 2000 and 2002, U.S.-produced PC strand accounted for a declining majority of apparent U.S. consumption. Korea was the largest source of subject imports of PC strand in 2002, followed by Mexico, Brazil, India, and Thailand. PC strand from all sources is largely undifferentiated. Notwithstanding a substantial level of Buy America restrictions and preferences observed by purchasers of PC strand for pre-tension applications, there is a substantial overlap of customers purchasing U.S.-produced and imported PC strand, particularly among large post-tension customers that are engaged in only modest levels of Buy America projects. All purchasers agree that price is an important element in purchasing decisions; indeed, many purchasers engaged in post-tension applications "always" or "usually" purchase the PC strand that is offered at the lowest price. Most such purchasers view subject imports as being lower-priced than the domestic product.

Subject import volume increased throughout 2000-02, and was higher in January-June 2003 than January-June 2002, whether measured in absolute terms, relative to consumption in the United States, or relative to production in the United States. Subject imports entered in increasing quantities through U.S. Pacific ports, mainly in California, as well as through other ports and border crossings, mainly in Texas. Subject imports represented a small, but tangible, portion of sales to purchasers engaged in pre-tension applications (approximately three-fifths of the U.S. market), and a significant and rapidly growing portion of sales to purchasers engaged in post-tension applications (approximately two-fifths of the U.S. market). By 2002, subject imports accounted for a majority of sales to post-tension customers.

Subject imports were, in aggregate, priced lower than comparable domestic product. By all measures, subject imports undersold the domestic like product for sales to pre-tension customers. With respect to sales to pre-tension customers, domestic prices declined irregularly in 2000 and 2001 through the first half of 2002, then rose sporadically, especially in the second quarter of 2003. Subject import prices for modest volumes began to decline in the fourth quarter of 2000 and declined irregularly through the second quarter of 2002, before stabilizing at lower levels and rising in the second quarter of 2003. Although the reported volumes of sales of subject imports to pre-tension customers were relatively small, such volumes resulted in confirmed instances of both lost sales and lost revenue.

With respect to sales to post-tension customers, price data reported by U.S. importers and U.S. producers resulted in a mixture of overselling and underselling. Post-tension purchasers, however, largely reported that subject import prices were lower than domestic producer prices, a view that was generally substantiated by price data reported by such purchasers. We view the underselling data, on the whole, as mixed. Domestic prices declined from the first quarter of 2000 through the second quarter of 2002, then stabilized at these lower levels, and finally rose in the second quarter of 2003. Subject import prices exhibited a generally similar trend. Subject imports gained a significant portion of the sales to post-tension customers and depressed price levels to a significant degree, as demonstrated by a substantial number of confirmed lost sales and lost revenues.

Notwithstanding a degree of protection from Buy America provisions that restrict competition for approximately 30 percent of sales of PC strand in the United States, the domestic industry saw a marked decline in market share and significantly diminished output, sales, and employment between 2000 and 2002, far in excess of relatively minor declines in apparent U.S. consumption. The domestic industry's financial performance worsened noticeably; indeed, operating income declined for all domestic producers in both 2001 and 2002. While the domestic industry's performance improved in interim 2003, this was largely due to a sharp increase in apparent U.S. consumption and to price increases in the second quarter of 2003, i.e., after the filing of the petition.

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 the 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 Act"), defines the relevant domestic industry as the "producers as a [w]hole 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 Act defines "domestic like product" as "a product which is like, or in the absence of like, most similar in characteristics and uses with, the article subject to an investigation . . . ."[8]

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.[9] No single factor is dispositive, and the Commission may consider other factors it deems relevant based on the facts of a particular investigation.[10] The Commission looks for clear dividing lines among possible like products and disregards minor variations.[11] Although the Commission must accept the determination of the Department of Commerce ("Commerce") as to the scope of the imported merchandise that has been found to be subsidized or sold at LTFV, the Commission determines what domestic product is like the imported articles Commerce has identified.[12]

B. Product Description

In its final determinations regarding subject imports from Brazil, India, Korea, Mexico, and Thailand, Commerce defined the imported merchandise within the scope of these investigations as –

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[6] 19 U.S.C. § 1677(4)(A).

[7] 19 U.S.C. § 1677(4)(A).

[8] 19 U.S.C. § 1677(10).

[9] See, e.g., 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: (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).

[10] See, e.g., S. Rep. No. 96-249 at 90-91 (1979).

[11] Nippon Steel, 19 CIT at 455; Torrington, 747 F. Supp. at 748-49. See also S. Rep. No. 96-249 at 90-91 (1979) (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.").

[12] Hosiden Corp. v. Advanced Display Mfrs., 85 F.3d 1561, 1568 (Fed. Cir. 1996) (Commission may find single like product corresponding to several different classes or kinds defined by Commerce); Torrington, 747 F. Supp. at 748-752 (affirming Commission determination of six like products in investigations where Commerce found five classes or kinds).

steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pretensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.[13] [14]

PC strand is made from hot-rolled, high-carbon steel wire rod, which is first cleaned and descaled. The steel wire rod is then drawn into wire, fabricated into multi-wire strand, and thermally stress-relieved. The most common PC strand configuration consists of six wires wound helically around a single wire core.[15]

PC strand is used solely for prestressing concrete.[16] PC strand introduces specified compressive forces into concrete to offset, or neutralize, forces that occur when the prestressed concrete is subject to load. Prestressed concrete, in turn, is used in the construction of, inter alia, bridge decks, bridge girders, pilings, precast concrete panels and structural supports, roof trusses, floor supports, and certain concrete foundations.[17]

Concrete is prestressed in one of two ways, by pre-tensioning (also referred to as "precasting") or by post-tensioning. In pre-tensioned applications, the PC strand is tensioned, literally pulled and elongated, by a calibrated tensioning apparatus. The concrete is then poured around the PC strand. The tension is released after the concrete has cured. The tensile force of the strand induces a compressive force. The PC strand is installed in this application uncoated because it is the bond between the cured concrete and the PC strand that holds the concrete in compression.[18]

In post-tensioned applications, PC strand is not bonded to the cured concrete. The PC strand is tensioned using a calibrated tensioning apparatus after the concrete has cured, and tension is maintained by installing permanent mechanical anchors that remain in place after the tensioning apparatus is removed. There are two methods of post-tensioning, internal and external. For internal post-tensioning, PC strand is either plastic coated, that is, lubricated with grease and encased in plastic, or plastic or metal ducts are cast into the concrete and uncoated PC strand is passed through each duct. If the duct method is used, the ducts are filled with grout after the tensioning apparatus is removed. For external post-

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[13] 68 Fed. Reg. 68348 (Dec. 8, 2003) (antidumping duty investigation (Thailand)); 68 Fed. Reg. 68350 (Dec. 8, 2003) (antidumping duty investigation (Mexico)); 68 Fed. Reg. 68352 (Dec. 8, 2003) (antidumping duty investigation (India)); 68 Fed. Reg. 68353 (Dec. 8, 2003) (antidumping duty investigation (Korea)); 68 Fed. Reg. 68354 (Dec. 8, 2003) (antidumping duty investigation (Brazil)); and 68 Fed. Reg. 68356 (Dec. 8, 2003) (countervailing duty investigation (India)). Commerce also stated in these notices that the merchandise under investigation is currently classifiable under statistical reporting numbers 7312.10.3010 and 7312.10.3012 of the Harmonized Tariff Schedule of the United States (HTS), but that the written description of the merchandise under investigation is dispositive.

[14] Petitioners have stated that the terms "covered" and "uncovered" PC strand, which come from the HTS descriptions of the product, are not generally used in the industry. Petitioners' Prehearing Brief at 11 n.9. Industry terminology appears more precise – "plastic coated" refers to PC strand that has undergone a grease and plastic-coating process and "epoxy coated" refers to PC strand that has undergone an epoxy-coating process. PC strand that is without coating of any sort is variously described as "bare" or "uncoated." We apply industry terminology in these determinations, in contrast to the preliminary determination in which, consistent with the HTS, we generally referred to plastic-coated PC strand as "covered" PC strand and bare PC strand as "uncovered" PC strand.

[15] CR at I-9, PR at I-7.

[16] "Prestressing" concrete is a term of art that refers to a specific type of tensile force applied to concrete.

[17] CR at I-10, PR at I-7.

[18] CR at I-10, PR at I-7. Epoxy-coated PC strand may also be used in bonded applications. CR at I-11 n.34, PR at I-8 n.34.

tensioning, PC strand may be coated with epoxy to protect against corrosion because the PC strand is exposed. External post-tensioning is used primarily for repair and retrofit applications.[19]

C. Analysis

The Commission defined all PC strand as a single like product in the preliminary phase of these investigations. Applying the traditional six-factor test, the Commission found that there was no clear dividing line between "covered" and "uncovered" PC strand to warrant a finding of two domestic like products. The Commission determined that, based on the record in the preliminary phase, the domestic like product was all PC strand co-extensive with Commerce's scope, i.e., steel strand produced from wire of non-stainless, non-galvanized steel that is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.[20]

Petitioners contend that the Commission reached the correct conclusion in the preliminary phase and that the record continues to support the finding of a single domestic like product mirroring the scope, a result consistent with prior Commission investigations involving PC strand.[21] The only parties that dispute the Commission's domestic like product definition from the preliminary phase are the Mexican Respondents, who urge the Commission (as they did in the preliminary phase) to define plastic-coated PC strand as a separate domestic like product.[22]

Five firms are believed to have accounted for 100 percent of U.S. production of uncoated (and epoxy-coated) PC strand during the period examined: the three Petitioners, Strand Tech, and Sivaco, which ceased production in September 2003.[23] No domestic producers of uncoated PC strand currently engage in plastic coating operations.[24] In the U.S. market, domestically produced PC strand is plastic coated by firms that engage in post-tensioning services (post-tensioners).[25] In addition, some post-tensioners coat PC strand and sell it to other post-tensioners that may not have coating facilities, or coat PC strand under toll agreements.[26]

The evidence developed in the final phase supports the findings that there is no clear dividing line separating plastic-coated PC strand from the continuum of PC strand products and that the domestic like product should be defined as all PC strand co-extensive with the scope. The characteristics and uses of PC strand overlap to support a single domestic like product finding. All PC strand is used for imparting compressive forces to concrete – "prestressing" concrete, hence the name prestressed concrete steel wire strand. The purpose for which PC strand is used is thus identical regardless of the particular mode of application employed, pre-tensioned or post-tensioned, and whether or not the product is coated. The ultimate end product, whether it is made by a post-tensioner or a pre-tensioner, is the same, a

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[19] CR at I-10-I-11, PR at I-7-I-8.

[20] Prestressed Concrete Steel Wire Strand from Brazil, India, Korea, Mexico, and Thailand, Invs. Nos. 701-TA-432 (Preliminary) and 731-TA-1024-1028 (Preliminary), USITC Pub. 3589 at 6-7 (March 2003) (Preliminary Determinations).

[21] Petitioners' Prehearing Brief at 6-17 and Posthearing Brief at 2 & Exh. 1 at 60-62.

[22] Mexican Respondents' Prehearing Brief at 5-15 and Posthearing Brief at 1-3; Transcript of Hearing (December 2, 2003) (Tr.) at 221 (Ms. Ellsworth).

[23] CR at III-1-III-9, PR at III-1-III-4. Insteel and Sumiden currently have the capacity to coat PC strand with epoxy. CR, PR at III-1 n.2.

[24] Insteel performed plastic coating from 1993 to 1998, and "***." CR at I-10 n.33, III-4, PR at I-8 n.33, III-3.

[25] Tr. at 19 (Mr. Selhorst), 123 (Mr. Woltz); CR at I-10 n.33, PR at I-8 n.33.

[26] See, e.g., CR at II-1, III-10, PR at II-1, III-5.

prestressed concrete structural member. The two applications have overlapping uses and, indeed, both applications may be specified for certain types of projects.[27] Further, PC strand share the same basic characteristics, since the underlying PC strand used in the post-tension applications is the same strand used in pre-tensioned applications.[28] Uncoated strand, without further processing, may even be used directly in post-tensioned applications.[29]

In terms of interchangeability, PC strand used in the United States conforms to applicable American Society for Testing and Materials (ASTM) specifications based on size, configuration, and grade (minimum ultimate strength). The vast majority of PC strand sold in the U.S. market, whether ultimately used in pre- or post-tensioned applications, is of 0.5-inch diameter, grade 270 (270,000 pounds per square inch (PSI)), low-relaxation product. Within each size, physical configuration, and grade, PC strand is interchangeable, whether it is ultimately used for pre- or post-tensioned applications.[30] PC strand that has been plastic coated, however, may not be used in a pre-tensioned application because of the need for the bond between the concrete and the PC strand. For internal post-tensioning, bare PC strand may only be used for the duct method, which represents a minority of post-tensioned consumption.[31]

With respect to channels of distribution, the U.S. producer questionnaire responses indicate that almost all U.S. shipments of bare PC strand are made directly to end users. *** more than one-half of such shipments was made to pre-tension customers, while a substantial minority was made to post-tension customers.[32] PC strand that is plastic coated in the United States often is internally consumed by the same post-tension customers (because the customers have coating capability and therefore are end users) as opposed to being commercially sold to the end user.[33] Thus the end users of a significant portion of both bare and plastic-coated PC strand (post-tensioners) are the same.

PC strand products overlap in terms of production processes, equipment, and employees. PC strand production involves three distinct steps prior to packaging for shipment: drawing, stranding, and stabilizing. The drawing step begins with cleaning and descaling to remove dirt and mill scale from the hot-rolled, high-carbon steel wire rod before feeding it though the wire drawing dies. Depending upon the finished size required (PC strand is available in nominal diameters ranging from 0.25- to 0.70-inch), the rod may be drawn through up to nine dies.[34]

After drawing, the wire undergoes stranding. The wires are wound into a strand, helically and uniformly, by a stranding machine. PC strand grade designations (grades 250, 270, and 300) correspond to the minimum ultimate strength of the product in PSI based on the tensile strength and cross-sectional surface area of the PC strand.[35]

During the third step, the PC strand is stabilized by removing residual stresses through thermal or, more typically, thermal and mechanical treatment. The extent of stress relief determines the type of

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[27] Tr. at 26, 77 (Mr. Woltz).

[28] Tr. at 18 (Mr. Selhorst).

[29] CR at I-11, PR at I-8.

[30] CR at I-11, PR at I-8.

[31] CR at I-11, PR at I-8; Tr. at 126 (Mr. Wagner) (duct method accounts for about 20 percent of internal post-tension consumption).

[32] CR at I-23, PR at I-12. The share of U.S. producers' shipments to end users that pre-tension was *** percent in 2000, *** percent in 2001, and *** percent in 2002. CR, PR at Table I-2.

[33] E.g., CR I-10 n.33, PR at I-8 n.33.

[34] CR at I-12, PR at I-9. Some PC strand is indented to increase surface area for contact with the concrete in pre-tensioned applications. Indenting takes place after the wire has been drawn to final size reduction. Id.

[35] CR at I-12, PR at 9.

PC strand (low or normal relaxation). After stabilization, if the PC strand is sold as coated, it is either plastic coated or epoxy coated.[36] One post-tensioner described plastic coating as follows: "***."[37] Another stated that the plastic-coating line is "minimal" in cost (***), the process is "relatively simple," and one employee is needed to run the largely automated plastic-coating line.[38] There is no evidence of any recent technological developments in plastic coating operations.[39]

According to Petitioners, producers and purchasers identify different types of PC strand as different forms of the same product, while Mexican Respondents state that customer and producer perceptions of the different applications and processes support finding two separate products. No other responding party has contended that the different types of PC strand are something other than one product, PC strand, finished in certain instances for particular variations in the single end use application.

Plastic coating adds a price premium to PC strand. Aceros Camesa testified that it commanded as much as a 60-percent price premium.[40] Petitioners disputed the amount, claiming that, absent dumping, prices should track the costs and the price premium would thus be between *** and *** percent.[41] A comparison of importers' pricing data provides a market-based indicator of the difference between prices for the plastic-coated and uncoated products. Such a comparison indicates that the uncoated product is priced approximately 32 percent less than the plastic-coated product.[42]

While not alike in every respect, plastic-coated and bare PC strand overlap substantially in terms of characteristics and uses, channels of distribution, production processes, equipment and employees, and producer perceptions. The products are sometimes interchangeable. However, there is limited information on customer perceptions. Price differences between bare and plastic-coated PC strand are arguably significant, but are consistent with a product continuum and do not differentiate plastic-coated PC strand from other PC strand products, such as epoxy-coated PC strand, which no party argues the Commission should define as a separate domestic like product. Based on the above analysis, we reaffirm our finding from the preliminary phase: the domestic like product in these investigations is all PC strand co-extensive with Commerce's scope, that is, steel strand produced from wire of non-stainless, non-galvanized steel that is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.[43]

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[36] CR at I-12, PR at 9. As noted above, Insteel and Sumiden currently have the capacity to epoxy-coat PC strand. CR, PR at III-1 n.2. Insteel stated that ***. Sumiden stated that ***. CR at I-13, PR at I-9. At the hearing, the price premium for epoxy-coated PC strand was estimated to be 300 percent over uncoated PC strand. Tr. at 146 (Mr. Woltz).

[37] CR at I-13, PR at I-9.

[38] CR at I-13-I-14, PR at I-9.

[39] See, e.g., Mexican Respondents' Posthearing Brief Appendix at 1; CR at III-9-III-11, PR at III-5.

[40] Tr. at 222 (Mr. Utz); see also Mexican Respondents' Posthearing Brief Exh. 3.

[41] Petitioners' Posthearing Brief Exh. 1 at 57-59.

[42] CR at V-8, PR at V-6. Four purchasers reported that their sales price of the plastic-coated PC strand was approximately 19-25 percent higher than the cost of the uncoated PC strand that they purchased. *** reported that the sales price of its plastic-coated strand was *** than the cost of the uncoated PC strand that it purchased.

[43] On balance, we are not persuaded that the application of the semi-finished products analysis points to separate domestic like products, as Mexican Respondents also argue. In a semi-finished products analysis, the Commission currently examines: (1) whether the upstream article is dedicated to the production of the downstream article or has independent uses; (2) whether there are perceived to be separate markets for the upstream and downstream articles; (3) differences in the physical characteristics and functions of the upstream and downstream articles; (4) differences in the costs or value of the vertically differentiated articles; and (5) significance and extent of the processes used to

(continued...)

III. DOMESTIC INDUSTRY

The domestic industry is defined as "producers as a [w]hole 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."[44] Mexican Respondents contend, on the premise that plastic-coated PC strand constitutes a separate domestic like product, that the Commission should find that firms engaged in plastic coating operations constitute a separate domestic industry.[45] We have found that plastic coated PC strand does not constitute a separate domestic like product and thus do not find multiple domestic industries.

We turn to the issue raised in the preliminary phase, that is, whether the definition of the domestic industry warrants including firms that engage in plastic coating operations, but not other aspects of PC strand production. In assessing the domestic activity associated with a particular operation and whether it constitutes sufficient activity to bring that operation within the meaning of domestic industry for purposes of the Act, 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

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[43] (...continued)
transform the upstream into the downstream articles. E.g., Certain Frozen Fish Fillets from Vietnam, Inv. No. 731-TA-1012 (Preliminary), USITC Pub. 3533 (August 2002) at 7; Low Enriched Uranium from France, Germany, the Netherlands, and the United Kingdom, Invs. Nos. 701-TA-409-412 (Preliminary) and 731-TA-909-912 (Preliminary), USITC Pub. 3388 (January 2001) at 5-6; Uranium from Kazakhstan, Inv. No. 731-TA-539-A (Final), USITC Pub. 3213 (July 1999) at 6 n.23.

The ultimate end-use of both plastic-coated and bare PC strand is the same: both are used to prestress concrete. However, uncoated PC strand is not dedicated to being coated. Mexican Respondents distinguish pre-tension and post-tension applications for prestressing concrete, the former of which require bare PC strand, but bare PC strand is sold for use in both applications and may even be used in the latter without further finishing. The characteristics and functions of the two PC strand products are marked more by their inherent similarities than any technical differences, thus undercutting the view that there is meaningful vertical distinction between the two for purposes of a semifinished products analysis. CR at I-9-I-11, PR at I-7-I-8. As discussed in the context of defining the domestic industry below, plastic coating adds some value to the product, but the additional processing to transform the product appears minor in comparison to PC strand production and, in many instances, is performed by the end user. CR at I-10, I-13-I-14, PR at I-7, I-9-I-10. Although the evidence is mixed, we do not find that application of a semi-finished products analysis points to a different result than that which we have reached under the traditional six-factor test, defining a single domestic like product.

[44] 19 U.S.C. § 1677(4)(A). In defining the domestic industry, the Commission's general practice has been to include in the industry all domestic production of the domestic like product, whether toll-produced, captively consumed, or sold in the domestic merchant market. See United States Steel Group v. United States, 873 F. Supp. 673, 681-84 (Ct. Int'l Trade 1994), aff'd, 96 F.3d 1352 (Fed. Cir. 1996).

[45] In the preliminary phase, Mexican Respondents argued that there was no domestic production of plastic-coated PC strand or that it may be feasible to define the producers of plastic-coated PC strand as bare PC strand producers plus the firms that perform plastic-coating operations. Preliminary Determinations at 5-6, 7 n.32.

(6) any other costs and activities in the United States directly leading to production of the like product.[46]

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.[47]

Application of these factors to the instant record supports the Commission's finding from the preliminary phase that such firms are not part of the domestic industry.[48] Capital investment requirements appear relatively minimal, particularly when measured against the investment required to support a PC strand operation. As noted above, the cost of a plastic coating line is approximately $***.[49] In contrast, a greenfield stranding facility may require capital expenditures of more than $*** million,[50] and even adding capacity to existing stranding facilities may approach $*** million.[51] The technical expertise involved in plastic coating, as reported by the converters, appears to be relatively simple.[52] The extruder applies a coating of grease and heats plastic around the PC strand that forms a tube. There have been no recent technological developments in plastic coating operations.[53]

The value added by plastic coating was disputed by the parties. The evidence shows that it is significantly less than any claimed price premium. One purchaser indicated that the cost involved in coating bare PC strand accounted for approximately 13 percent of the total cost of the plastic-coated

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[46] See, e.g., Greenhouse Tomatoes from Canada, Inv. No. 731-TA-925 (Final), USITC Pub. 3499 at 10-11 (April 2002); Certain Seamless Carbon and Alloy Steel Standard, Line, and Pressure Pipe from the Czech Republic, Japan, Mexico, Romania, and South Africa, Invs. Nos. 731-TA-846 to 850 (Prelim.), USITC Pub. 3221 at 12 n.49 (August 1999); Fresh Atlantic Salmon from Chile, Inv. No. 731-TA-768 (Final), USITC Pub. 3116 at 9 (July 1998), aff'd as modified on other grounds by remand views, Asociasion de Productores de Salmon y Trucha de Chile A.G. v. United States, 180 F. Supp.2d 1360 (Ct. Int'l Trade 2002); Static Random Access Memory Semiconductors from Korea and Taiwan, Invs. Nos. 731-TA-761 to 762 (Final), USITC Pub. 3098 at 9 n.59 (April 1998); Large Newspaper Printing Presses and Components Thereof from Germany and Japan, Invs. Nos. 731-TA-736 to 737 (Final), USITC Pub. 2988 at 8-9 (August 1996), aff'd, Goss Graphics Sys., Inc. v. United States, 33 F. Supp.2d 1082 (Ct. Int'l Trade 1998), aff'd, 216 F.3d 1357 (Fed. Cir. 2000).

[47] See, e.g., Aramid Fiber Formed of Poly Para-Phenylene Terephthalamide from the Netherlands, Inv. No. 731-TA-652 (Final), USITC Pub. 2783 at I-8-I-9 & n.34 (June 1994) ("no single factor – including value added – is determinative and ... value added information becomes more meaningful when other production activity indicia are taken into account"), aff'd, Aramide Maatschappij V.O.F. v. United States, 19 CIT 884 (1995).

[48] Preliminary Determinations at 7-9. C.f., e.g., Fresh Atlantic Salmon from Chile, USITC Pub. 3116 at 9-11 (finding that domestic industry did not include firms that processed whole salmon into salmon cuts due to insufficient production-related activities); Oil Country Tubular Goods from Argentina, Austria, Italy, Japan, Korea, Mexico, and Spain, Invs. Nos. 701-TA-363 to 364 (Final) and Invs. Nos. 731-TA-711 to 717 (Final), USITC Pub. 2911 (August 1995) (not including threaders in the casing and tubing industry because of "limited levels of capital investment, lower levels of expertise, and lower levels of employment").

[49] Mexican Respondents stated that a new extruding line could cost up to $1 million, but evidence from domestic converters pointed to lower figures. CR at I-13-I-14, PR at I-9-I-10.

[50] CR, PR at Table VI-7 (Sivaco's FY 2001 capital expenditures were $***). See also Tr. at 32-33 (Mr. Burr) (stating that Sumiden invested about $10 million in constructing the Victorville facility, designed specifically to produce the "bread and butter product of the PC strand market, one-half inch, 270K, seven wire PC strand").

[51] CR, PR at Table VI-7 (Strand Tech's FY 2001 capital expenditures were $***).

[52] CR at I-13-I-14, PR at I-9-I-10.

[53] Mexican Respondents' Posthearing Brief Appendix at 1; CR at III-9-III-11, PR at III-5.

strand.[54] Three others reported that the cost involved in coating bare PC strand accounted for between 23 and 26 percent of the total cost of the plastic-coated PC strand.[55] The evidence regarding employment levels to operate a plastic coating line ranges from one employee to two employees.[56]

Significant volumes of bare PC strand coated in the United States are sourced from outside of the United States. For example, *** reported that ***. *** reported that ***. *** reported that ***.[57]

Finally, the firms in the United States that plastic coat PC strand also engage in post-tensioning services, including installation.[58] The firms that produce bare PC strand do not engage in such services. Indeed, the latter firms indicated that they no longer plastic coat or have toll arrangements for plastic coating for domestic sales because they do not wish to create "friction" with post-tensioners that are customers or potential customers.[59] We note also that post-tensioners were served with purchasers' and producers' questionnaires and most completed only the purchasers' questionnaires, notwithstanding their engagement in plastic coating operations.[60]

On balance, we find that plastic coating activity is not sufficient production-related activity to qualify the coaters as members of the domestic industry that produces PC strand. We therefore decline to expand the definition of the domestic industry to include these companies. As noted above, five firms appear to have accounted for 100 percent of domestic production of PC strand: the Petitioners (Insteel, American, and Sumiden), Strand Tech, and Sivaco, which closed its operations after the period examined. Accordingly, and consistent with our finding from the preliminary phase, we define the domestic industry as these five firms.[61]

IV. CUMULATION[62]

A. In General

For purposes of evaluating the volume and price effects for a determination of material injury by reason of the subject imports, section 771(7)(G)(i) of the 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 domestic like products in

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[54] Petitioners also contended that bare strand represented ***-*** percent of the total value of plastic-coated PC strand. CR at I-14, PR at I-10.

[55] CR at I-14-I-15, PR at I-10.

[56] Mexican Respondents' Posthearing Brief Appendix at 2; CR at I-13-I-14 (*** statement), PR at I-9-I-10.

[57] CR at III-9-III-11, PR at III-5.

[58] CR at III-9-III-11, PR at III-5.

[59] CR at III-4, PR at III-3.

[60] Only three post-tensioners that coat PC strand even provided minimal information in response to producers' questionnaires.

[61] No related parties issues are raised under 19 U.S.C. § 1677(4)(B). CR at III-2-III-9, PR at III-2-III-4.

[62] PC strand imports from each of the five subject countries were above the negligibility thresholds during the relevant time period. 19 U.S.C. § 1677(24)(A)-(B). Subject (dumped) imports from Brazil, India, Korea, Mexico, and Thailand exceeded the three-percent threshold for the 12 calendar months preceding the filing of the petitions in January 2003 (January-December 2002). Imports from these countries accounted for *** percent, respectively, of total PC strand imports during this period. CR, PR at Table IV-2. Subject (subsidized) imports from India exceeded the four-percent threshold applicable to subsidized imports from developing countries for the same period. CR, PR at Table IV-2 (*** percent of total PC strand imports).

the U.S. market.[63] In assessing whether subject imports compete with each other and with the domestic like product, the Commission has generally considered four factors, including:

(1) the degree of fungibility between the subject imports from different countries and between 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.[64]

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.[65] Only a "reasonable overlap" of competition is required.[66]

Petitioners argue that additional information gathered in the final phase reinforces the Commission's preliminary determinations to cumulate all subject imports.[67] Mexican Respondents are the only parties disputing cumulation, contending that the criteria for cumulating imports of PC strand from Mexico with other subject countries are not met.[68]

B. Analysis

The conditions for cumulating subject imports from Brazil, India, Korea, Mexico, and Thailand have been satisfied. The petitions were filed with respect to all subject countries on the same day and, based on the record in the final phase of these investigations, we find that there is a reasonable overlap of competition among subject imports and between subject imports from each country and the domestic like product.

First, subject imports from each country are fungible with one another and the domestic like product. PC strand is a largely undifferentiated product in the U.S. market, conforming to ASTM specifications and generally produced in a single form (seven strand), size (0.5 inch), and strength

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[63] 19 U.S.C. § 1677(7)(G)(i). None of the statutory exceptions to cumulation apply in these investigations. 19 U.S.C. § 1677(7)(G)(ii).

[64] See Certain Cast-Iron Pipe Fittings from Brazil, the Republic of Korea, and Taiwan, Invs. 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).

[65] See, e.g., Wieland Werke, AG v. United States, 718 F. Supp. 50 (Ct. Int'l Trade 1989).

[66] The Statement of Administrative Action for the Uruguay Round Agreements Act ("SAA") 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." SAA, H.R. 316, 103d Cong., 2d Sess., vol. I at 848 (1994), citing Fundicao Tupy, S.A. v. United States, 678 F. Supp. 898, 902 (Ct. Int'l Trade 1988), aff'd 859 F.2d 915 (Fed. Cir. 1988). See Goss Graphic System, 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"); Mukand Ltd., 937 F. Supp. at 916; Wieland Werke, AG, 718 F. Supp. at 52 ("Completely overlapping markets are not required.").

[67] Petitioners' Prehearing Brief at 22-41, Posthearing Brief at 3-4.

[68] Mexican Respondents' Prehearing Brief at 20-26.

(270,000 psi).[69] Most purchasers consider domestically produced PC strand to be always interchangeable with PC strand from each subject country.[70] All U.S. producers consider such PC strand to be always interchangeable, while importers' responses were more varied, with most reporting interchangeability either "always" or "sometimes."[71] With respect to the degree of interchangeability between subject imports from subject countries, all responding purchasers reported that PC strand from all subject sources was interchangeable.[72] All U.S. producers were of the same view. Most importers reported that subject imports were always or frequently interchangeable.[73]

Buy America restrictions,[74] discussed below in our injury analysis, play a substantial role in the PC strand market, but do not apply to the majority of the U.S. market. In the aggregate, Buy America restrictions cover approximately 30 percent of the U.S. market purchases.[75]

No member of the domestic industry currently has the capacity to plastic coat PC strand. Most subject imports during the period examined were of bare strand.[76] Mexico was the only country during the period examined to export to the United States substantial amounts of plastic-coated PC strand for use only in post-tensioned applications.[77] However, subject imports from Mexico were not limited to plastic-coated product. During the period examined, imports of bare PC strand from Mexico ranged from *** percent (in 2000) to approximately *** percent (in interim 2003) of total PC strand imports from Mexico, adequate in itself to indicate sufficient overlap of competition in terms of the first factor of our cumulation analysis.[78] [79] Moreover, bare PC strand competes with plastic-coated PC strand from Mexico for customers that perform post-tensioned applications.[80]

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[69] CR at I-9 n.28, PR at I-7 n.28 (98 percent of PC strand is 7-wire); CR at V-8, PR at V-6 (0.5-inch 270,000 psi PC strand accounts for 60 percent of domestic sales and more than 90 percent of subject imports).

[70] CR, PR at Table II-6 (23 of 28 purchasers).

[71] CR at II-18, PR at II-11.

[72] CR, PR at Table II-8.

[73] CR at II-22, PR at II-14.

[74] The Commission's questionnaire in the final phase defined such restrictions as encompassing "Buy America" requirements under the federal-aid highway construction program, "Buy American" requirements for the federal government, and any other programs imposed at the federal, state, local, or private level that limit or favor purchases of U.S.-origin PC strand to material, including any restrictions or preferences for U.S.-origin material that are imposed as a matter of formal or informal policy or practice. CR at II-11 n.13, PR at II-6 n.13.

[75] CR at IV-15, PR at IV-13.

[76] CR at Tables C-1 and C-2.

[77] Thailand also imported some plastic-coated PC strand in 2001 and 2002, but in relatively small amounts. CR at I-10 n.33 ***, PR at I-7 n.33.

[78] CR, PR at Tables C-1 and C-3. Overall, *** percent of the Mexican PC strand imported into the United States was of plastic-coated product and *** percent was bare during the period examined. CR at IV-5, PR at IV-4.

[79] No party argues, and there is no evidence to support, that there is an insufficient overlap of competition for cumulation purposes of domestically produced PC strand and subject imports of bare PC strand.

[80] For example, *** non-distributor customer for *** Mexican PC strand was ***, a company that coats its own strand. Importer's Questionnaire Responses of ***; see also CR at V-9, PR at V-7 (noting that *** purchased ***). *** and sources its product domestically and from *** of the subject countries, including Mexico. E.g., Purchaser's Questionnaire Response of ***; CR, PR at App. D-1 and D-2. We note further that ***, which *** sells only coated product, also listed among its top 10 customers *** and ***, firms that also purchase the uncoated product from U.S. producers and other importers. Importer's Questionnaire Response of ***.

Second, we find overlapping geographic markets for subject imports and domestically produced PC strand. *** reported that they sell PC strand in all, or a large portion, of the United States.[81] Subject imports were spread across the country.[82] For 2002, official import statistics, by customs district, show that imports of PC strand from Brazil, India, Korea, and Mexico each entered the United States through Texas and imports from Brazil, India, Korea, and Thailand each entered through California. During 2000 and 2001, imports of PC strand from all five subject countries entered through Texas, and imports from India, Korea, and Thailand entered into California. During 2000 through 2002, the majority of imports from Brazil, India, and Mexico entered through Texas; for Korea and Thailand, the majority entered through California.[83] Mexican respondents do not dispute that domestic product and other subject imports compete in the large Texas market, and Texas is ***. ***.[84]

Third, with respect to channels of distribution, most PC strand is sold directly to end users; distributors are not common in the domestic market. In 2002, nearly *** percent of U.S. producers' U.S. shipments were to end users, as were *** percent of U.S. shipments of *** PC strand. Likewise, more than *** percent of subject imports from *** were to end users. Although slightly less than *** percent of subject imports from *** were reportedly sold directly to end users, this is sufficient to demonstrate a reasonable overlap of distribution channels.[85]

Finally, imports from all subject countries were present in the domestic market in 2000 through 2002, and in interim 2003. Of the 42 months for which the Commission collected data (January 2000 through June 2003), subject imports from Brazil, Korea, and Mexico entered in every month, while subject imports from India entered in every month but one and subject imports from Thailand in every month but four.[86] These data lead us to conclude that subject imports and the domestic like product are simultaneously present in the U.S. market.

Accordingly, based on the record in these investigations, we find that a reasonable overlap of competition exists among the subject imports and between the subject imports and the domestic like product. Consequently, we cumulate subject imports from Brazil, India, Korea, Mexico, and Thailand for the purpose of analyzing whether the domestic industry is materially injured by reason of subject imports.

V. MATERIAL INJURY BY REASON OF SUBSIDIZED AND LESS THAN FAIR VALUE IMPORTS

In the final phase of antidumping or countervailing duty investigations, the Commission determines whether an industry in the United States is materially injured by reason of the imports under investigation.[87] In making this determination, the Commission must consider the volume of imports, their effect on prices for the domestic like product, and their impact on domestic producers of the domestic

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[81] CR at II-4, PR at II-2. Most U.S. producers are located in the South, although Sumiden, the ***, has one production facility (it formerly had two) in California. CR, PR at Table III-1.

[82] CR, PR at Table IV-4.

[83] CR, PR at Table IV-4.

[84] *** Purchasers' Questionnaire at 16. We note that subject imports from Mexico compete in limited fashion for sales in the United States outside of Texas. See, e.g., Importer's Questionnaire Response of *** (noting that ***).

[85] CR, PR at Table I-2 (total PC strand).

[86] CR, PR at Table IV-5.

[87] 19 U.S.C. § 1673d(b).

like product, but only in the context of U.S. production operations.[88] The statute defines "material injury" as "harm which is not inconsequential, immaterial, or unimportant."[89] 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.[90] 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."[91]

For the reasons discussed below, we determine that the domestic industry producing PC strand is materially injured by reason of subject imports from Brazil, India, Korea, Mexico, and Thailand that are sold in the United States at LTFV and from India that are subsidized.

A. Conditions of Competition

Demand for PC strand is derived from demand for prestressed concrete. Demand for prestressed concrete, in turn, is derived from demand for construction projects, particularly infrastructure projects, commercial and institutional construction, large housing projects and, to a lesser degree, single-family housing.[92] Based on Bureau of Census construction data, the real values of public construction and residential construction increased, while the real value of private nonresidential construction decreased, between 2000 and interim 2003.[93] Residential construction reportedly uses more slabs on grade (particularly in the single family market), a post-tensioned application, than private non-residential construction, which consists in large part of commercial facilities. Thus, based on the Census data, demand for post-tensioned applications may have increased.[94] Purchasers were evenly divided regarding whether demand increased or decreased for prestressed concrete in either pre-tensioned or post-tensioned applications.[95] Overall, apparent U.S. consumption, a proxy for demand, declined 3.1 percent between 2000 and 2001 and an additional 1.7 percent between 2001 and 2002, but showed an 8.9 percent increase in the first half of 2003 relative to the first half of 2002.[96]

The parties disagree as to the existence and significance of market distinctions based on pre-tensioned versus post-tensioned PC strand applications. Petitioners urge the Commission to view the PC strand market as a single unified market, whereas Respondents highlight the distinctions between the pre-tensioned and post-tensioned portions of the market.[97] As noted earlier, PC strand has a single use (to introduce compressive forces into a concrete member), and the same type of PC strand is used in pre- and post-tensioned applications. There is some, but not complete, overlap in the types of concrete members

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[88] 19 U.S.C. § 1677(7)(B)(i). The Commission "may consider such other economic factors as are relevant to the determination" but shall "identify each [such] factor . . . [a]nd explain in full its relevance to the determination." 19 U.S.C. § 1677(7)(B). See also, Angus Chemical Co. v. United States, 140 F.3d 1478 (Fed. Cir. 1998).

[89] 19 U.S.C. § 1677(7)(A).

[90] 19 U.S.C. § 1677(7)(C)(iii).

[91] Id.

[92] CR at II-8, PR at II-5.

[93] CR, PR at Figure II-2.

[94] CR at II-9, PR at II-5.

[95] CR at II-9-II-10, PR at II-5-II-6 (10 of 21 responded in the negative when asked if demand had changed for pre-tensioned applications; 7 of 15 responded in the negative when asked if demand had changed for post-tensioned applications).

[96] CR, PR at Table C-1.

[97] See, e.g., Petitioners' Prehearing Brief at 43-51; Brazilian Respondent's Prehearing Brief at 6-19; Mexican Respondents' Posthearing Brief at 6-10.

that are pre-tensioned and those that are post-tensioned,[98] and a few firms reportedly engage in both pre- and post-tensioning activities.[99] Post-tensioners, which generally plastic-coat PC strand themselves or purchase it plastic-coated, tend to be larger customers, while pre-tensioners tend to purchase in smaller quantities.[100] Buy America provisions are much more prevalent with respect to sales of PC strand to pre-tension customers.[101] Imports, both subject and nonsubject, are concentrated in sales to post-tension customers; import sales to pre-tension customers are much more limited.

Taking into account these market conditions, we cannot conclude that the U.S. market is strictly segmented. We have considered the record with respect to the PC strand market as a whole and, when appropriate and when the data permit, also have examined the data pertaining to pre- and post-tensioned applications separately. In 2002, sales to pre-tension customers accounted for approximately three-fifths of apparent consumption of PC strand, with sales to post-tension customers accounting for the remaining two-fifths.[102]

The U.S. market is supplied by domestic production as well as by subject and nonsubject imports. The domestic industry is the largest source of supply (although it declined over the period to below 70 percent of the market), with capacity levels approximately equal to apparent U.S. consumption.[103] Imports from the cumulated subject countries supply more than 20 percent of the U.S. market, while imports from nonsubject countries supply less than 10 percent.[104] U.S. producers are the predominant suppliers to pre-tension customers, representing 95 percent or more of supply. Post-tension customers, however, are increasingly supplied by subject imports (more than 50 percent in 2002).[105] This increase has been accompanied by 27 confirmed allegations of lost sales or revenue by the domestic industry to subject imports, totaling $***.[106]

PC strand is a largely undifferentiated product, conforming to ASTM specifications and generally produced in a single form (seven strand), size (0.5 inch), and strength (270,000 psi).[107] Responding purchasers considered U.S.-produced PC strand to be "always" or "frequently" interchangeable with PC strand from each of the subject countries.[108] Only 4 of 25 responding

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[98] Tr. at 26, 77 (Mr. Woltz); Petitioners' Posthearing Brief Exh. 12 (Decl. of ***).

[99] CR at II-3, PR at II-2 (*** are active in both applications). In addition, the large majority of responding purchasers (19 of 22) reported that firms active in pre-tensioned and post-tensioned applications compete for the same bare PC strand. CR at II-4, PR at II-2.

[100] CR at II-3, PR at II-2.

[101] CR, PR at Table II-2.

[102] CR, PR at IV-8.

[103] CR, PR at Table C-1 (apparent U.S. consumption was between 748.2 million and 785.8 million pounds annually between 2000 and 2002, while U.S. capacity ranged from 714.7 million pounds to 763.6 million pounds). U.S. producers' capacity increased 6.8 percent between 2000 and 2002 before declining 3.9 percent in interim 2003. CR, PR at Table C-1. Insteel closed its Jacksonville, FL, facilities in December 2001 and ***. Sivaco shut down production in September 2003. Sumiden's Victorville, CA, facility, which opened in March 1999, was closed in January 2002. CR, PR at Table III-1.

[104] CR, PR at Table C-1.

[105] CR, PR at Table IV-8.

[106] CR, PR at Tables V-15 and V-16.

[107] CR at I-9 n.28, PR at I-7 n.28 (98 percent of PC strand is 7-wire); CR at V-8 (0.5-inch 270,000 psi PC strand accounts for 60 percent of domestic sales and more than 90 percent of subject imports).

[108] CR, PR at Table II-6 (regarding domestic-import interchangeability, 23 of 28 responses indicated "always" and 2 more indicated "frequently").

purchasers reported that certain grades, sizes, or types of PC strand were only available from a single source.[109]

Buy America restrictions or preferences cover about 30 percent of the entire U.S. PC strand market.[110] Purchasers report that approximately 50 percent of pre-tensioned applications are subject to Buy America restrictions or preferences, compared to only approximately 5 percent of post-tensioned applications.[111] There is, therefore, a substantial part of the U.S. PC strand market that contains no such restrictions or preferences.

Availability, price, and product quality were identified by purchasers as important purchase factors.[112] Among purchasers using PC strand in pre-tension applications, quality was rated the number one factor in purchasing decisions, followed by price. Among purchasers using PC strand in post-tension applications, price was rated the number one factor in purchasing decisions, followed by availability and quality.[113] Overall, non-price differences between domestic and imported PC strand were reportedly "sometimes" or "never" significant.[114] Indeed, purchasers rated U.S.-produced PC strand as comparable or superior to subject imports in all purchasing considerations save one: PC strand from all five subject countries was "superior" to U.S.-produced PC strand in terms of lower prices.[115] Subject imports and domestically produced PC strand, as we concluded in the preliminary phase, are generally substitutable and price is an important factor in purchasing decisions.

B. Volume

Section 771(7)(C)(i) of the 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."[116]

Cumulated subject import volume increased throughout the period examined, rising from 115.8 million pounds in 2000 to 128.5 million pounds in 2001 and to 166.9 million pounds in 2002; cumulated

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[109] CR at II-18, PR at II-13 (one of the four was referring to galvanized strand, which is not under consideration).

[110] CR, PR at Table IV-8 (based on the table at page IV-25, shipments subject to Buy America restrictions ranged from 28.5 percent to 30.2 percent of the total during 2000-2002, and were 35.0 percent in January-June 2003, but such figures are overstated due to the undercount for nonsubject imports).

[111] CR at II-11-II-12, PR at II-6. Calculated from the suppliers' standpoint, pre-tensioned applications may be slightly less restricted (approximately 41 percent between 2000 and 2002) and post-tensioned applications might be slightly more restricted (10 percent). CR, PR at Table IV-8. We note that our data are based on a definition of Buy America that includes domestic origin preferences in addition to legal requirements to buy domestic product. CR at II-2 n.13, PR at II-6 n.13.

[112] CR, PR at Table II-5 (availability, price, and quality all considered "very important" by 22 purchasers).

[113] CR, PR at Table II-4. With respect to quality, while virtually all purchasers require PC strand to be certified, only 2 of 28 reported having a supplier fail in its certification efforts. CR at II-20, PR at II-13.

[114] CR, PR at Table II-7 (regarding the significance of non-price differences, 8 of 20 responses indicate "never" and 10 of 20 indicate "sometimes").

[115] CR at II-19-II-20, PR at II-12-II-13.

[116] 19 U.S.C. § 1677(7)(C)(i).

subject import volume was 88.5 million pounds in the first half of 2003 compared to 79.3 million pounds in the first half of 2002.[117] [118]

During the period examined, subject imports' U.S. shipment volume relative to consumption in the United States grew from 15.1 percent in 2000 to 17.0 percent in 2001 and to 22.0 percent in 2002, and was 21.5 percent in the first half of 2003 compared to 21.0 percent in the first half of 2002. Domestic market share declined throughout the period examined from 76.8 percent in 2000 to below 70 percent in 2002 and the first half of 2003, while nonsubject import market share fluctuated modestly between 8.1 percent and 9.2 percent.[119] Subject import volume relative to production in the United States increased throughout the period examined, rising from 18.3 percent in 2000 to 22.3 percent in 2001 and to 30.9 percent in 2002, and was 32.1 percent in the first half of 2003 compared to 30.5 percent in the first half of 2002.[120]

Over the period examined, pre-tension sales accounted for approximately three-fifths of reported sales in the U.S. market and post-tension sales accounted for a lower but still substantial portion of approximately two-fifths.[121] Domestic producers accounted for more than 95 percent of reported sales to pre-tension customers throughout the period examined, while subject imports reportedly accounted for less than 2 percent and nonsubject imports accounted for less than 4 percent. Subject imports' reported share of such sales decreased between 2000 and 2002, and increased in interim 2003.[122] In contrast, for sales to post-tension customers, where subject imports were focused during the period examined, U.S. producers' sales steadily declined while subject import volumes substantially increased. Domestic producers accounted for 53.5 percent of sales to post-tension customers in 2000; 51.8 percent in 2001; and 37.1 percent in 2002.[123] Subject imports accounted for 39.2 percent in 2000; 44.4 percent in 2001; and 57.9 percent in 2002. Subject imports accounted for 50.1 percent of sales to post-tension customers in January-June 2003, while domestic producers accounted for 42.8 percent. Nonsubject imports never accounted for more than 7.3 percent.[124] Between 2000 and 2002, shipments of subject imports to post-tension customers grew by approximately 50 million pounds, while shipments of domestically-produced PC strand to this same type of customer fell by a comparable 49 million pounds.[125] Thus subject imports

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[117] CR, PR at Table IV-2.

[118] We note that Mexican Respondents repeatedly emphasized the importance of Texas as a destination for subject imports from Mexico. E.g., Tr. at 246 (Mr. Totaro). According to official import statistics, however, the quantity of cumulated subject imports entering through Pacific ports (primarily Los Angeles, as well as Columbia, Honolulu, San Francisco, and Seattle) increased from 37.2 million pounds in 2000 to 47.5 million pounds in 2001 and to 71.8 million pounds in 2002. As a share of subject imports recorded in the official import statistics, subject imports entering Pacific ports rose from less than one-third in 2000 to nearly one-half by January-June 2003. CR, PR at Table IV-4.

[119] CR, PR at Table IV-7.

[120] CR, PR at Table IV-9.

[121] CR, PR at Table IV-8.

[122] Sales of subject imports to pre-tension customers reported by importers appear understated. For example, ***. CR, PR at Tables IV-8 and D-1. Also, *** purchasers confirmed lost sales and/or revenue allegations concerning imports from India and Thailand, whereas importers of PC strand from those countries reported ***. CR, PR at Tables V-15, V-16.

[123] As a share of U.S. producers' U.S. shipments during the period examined, U.S. shipments to post-tensioners declined approximately 21.1 percent (or 5.4 percentage points from 25.5 percent to 20.1 percent) between 2000 and 2002. Calculated from CR, PR at Table III-4.

[124] CR, PR at Table IV-8.

[125] CR, PR at IV-8.

displaced a significant volume of domestic sales and market share between 2000 and 2002, only a portion of which was regained in the first half of 2003.

The volume of subject imports increased substantially over the period examined and subject imports gained market share at the expense of U.S. producers, particularly in sales to post-tension customers.[126] We thus find the volume of subject imports, both in absolute terms, and relative to production and consumption in the United States, as well as the increase in that volume, to be significant.

C. Price Effects of the Subject Imports

Section 771(7)(C)(ii) of the 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.[127]

Price, as noted above, is an important factor in PC strand purchasing decisions.[128] Nine of 17 pre-tension customers "always" or "usually" purchase the PC strand that is offered at the lowest price, as do 8 of 9 post-tension customers.[129] Most purchasers view subject imports as being lower-priced than the domestic product.[130]

We have considered price data concerning sales of the main type of PC strand sold in the U.S. market (0.5-inch diameter, grade 270, low relaxation, uncoated PC strand), both for sales to pre-tension customers and to post-tension customers.[131] The Commission collected data from U.S. producers, U.S. importers, and U.S. purchasers accounting for a substantial portion of the U.S. market.

The record on underselling by subject imports is mixed. Based on data submitted by U.S. producers and U.S. importers, with respect to combined sales to pre-tension and post-tension customers, subject imports were almost always priced below comparable domestic product. Imports from all subject countries combined undersold the comparable domestic product in all 14 quarters by margins ranging from 4.5 to 13.6 percent.[132] On an individual subject country basis, subject imports undersold the

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[126] We note that sales to post-tension customers subject to Buy America restrictions increased by approximately 3 million pounds between 2000 and 2002 and declined in interim 2003 as compared to interim 2002 by approximately 5 million pounds. CR, PR at Table IV-8.

[127] 19 U.S.C. § 1677(7)(C)(ii).

[128] CR, PR at Table II-5 (availability, price, and quality all considered "very important" by 22 purchasers).

[129] CR at II-15, PR at II-9.

[130] CR at II-19-II-20, PR at II-11-II-13

[131] We have not relied on pricing data respecting product 2 (plastic-coated PC strand). While nearly all data collected for product 2 show underselling, "domestic" prices for product 2 were based on small-volume sales from a single coater (i.e., not a member of the domestic industry).

[132] CR at V-15, PR at V-9; CR, PR at Tables V-4 and V-5.

domestic product in 67 out of 70 comparisons. In the three instances in which subject imports did not undersell the domestic product, the margins were very small: 0.1 to 3.1 percent.[133]

With respect to sales to pre-tension customers only, according to data submitted by U.S. producers and U.S. importers, subject imports undersold comparable domestic products in 15 of 21 possible comparisons (10 of 13 when subject imports are aggregated).[134] As discussed above, however, subject imports account for only a small portion of sales to pre-tension customers (less than 2 percent), reportedly because of the generally-smaller size of those customers and the greater prevalence of Buy America restrictions for projects that utilize pre-tension PC strand.[135]

With respect to sales to post-tension customers only, based on data submitted by U.S. producers and U.S. importers, subject imports from the five subject countries undersold comparable domestic products in 28 of 70 possible comparisons (3 of 14 when subject imports are aggregated).[136]

Data submitted by U.S. purchasers, with respect to sales to pre-tension customers, indicate that subject imports undersold comparable domestic products in all 9 possible comparisons,[137] although, as noted above, subject import volumes to pre-tension customers are relatively low.

Based on data submitted by U.S. purchasers, with respect to sales to post-tension customers, subject imports from the five subject countries undersold comparable domestic product in 8 of 27 possible comparisons (10 of 10 when subject imports are aggregated).[138]

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[133] CR, PR at Table V-4.

[134] CR, PR at Tables V-8 (individual) and V-5 (all subject). The aggregate calculations are based on a weighted-average price for all subject countries from which data were obtained.

[135] Data that exclude domestic Buy America sales also show mainly underselling for sales to pre-tension customers. CR, PR at Table E-4.

[136] CR, PR at Tables V-8 (individual) and V-6 (all subject). Data that exclude domestic Buy America sales show a mixture of over- and underselling for sales to post-tension customers. CR, PR at Table E-4.

We note the following with respect to comparisons of prices to post-tension customers reported by U.S. producers and importers. First, approximately one-half of the subject import price data (weighted by quantity) is drawn from U.S. imports of PC strand from Korea which, reportedly, largely oversold domestic product. Korean pricing data, however, were the only data that consistently resulted in substantially higher average unit values (AUVs) for pricing data than for shipments data, despite the fact that both sets of data appear to account for virtually all imports from Korea (and therefore should show similar values). During 2000-02, Korean AUVs calculated from pricing data were $***; $***; and $*** per 1,000 pounds, respectively. Based on reported shipment data, however, 2000-02 AUVs were $***; $***; and $*** per 1,000 pounds, respectively. CR, PR at Table V-6 (pricing data converted based on 518 pounds per 1,000 lineal feet) and Table IV-8 (shipment data; AUVs calculated from presented quantities and values). No Korean Respondent appeared at the hearing or submitted a prehearing or post-hearing brief to reconcile these differences.

Second, price data for Thai PC strand were reported as ***. Record evidence indicates, however, that *** purchased *** pounds of Thai strand in ***. CR, PR at Tables D-1 (purchase history) and ***.

Finally, as discussed above, purchasers reported that the prices for PC strand from each of the subject countries were lower than the price for PC strand produced in the United States. CR at II-19-II-20, PR at II-11-13. For all of these reasons, we have considered both producer-importer price comparison data and purchaser price comparison data in evaluating whether there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States.

[137] CR, PR at Table V-10.

[138] CR, PR at Tables V-11, V-13. We note that *** could not segregate its purchases of imports by country, but reported purchasing *** imports (apparently at *** given its ***). Because *** could not segregate its import price data by source country, its data may include sales of PC strand imports from nonsubject countries. However, at least *** percent of its reported quantity of purchases of imports were from subject countries; accordingly, we find its data

(continued...)

Overall, domestic and subject import prices for bare PC strand declined during 2000-01, and through the first half of 2002, before stabilizing in the last half of 2002 and first quarter of 2003, then rising sharply in the second quarter of 2003.[139] With respect to sales to pre-tension customers, domestic prices declined most noticeably in the second half of 2001 through the first half of 2002, then rose sporadically, especially in the second quarter of 2003. Subject import prices for modest volumes sold to pre-tension customers began to decline in the fourth quarter of 2000 and declined irregularly through the second quarter of 2002, before stabilizing at lower levels and rising in the second quarter of 2003.[140] With respect to sales to post-tension customers, domestic prices declined from the first quarter of 2000 through the second quarter of 2002, then stabilized at these lower levels, and finally rose in the second quarter of 2003. Subject import prices exhibited a generally similar trend.[141]

Based on the rising volume of subject imports, the high degree of substitutability between the subject imports and domestically-produced PC strand, the importance of price to purchasers, the mixed pattern of over- and underselling revealed by our various pricing data sets, and the similar downward trend in domestic and subject import prices, we conclude that subject imports contributed materially to the significant price depression experienced by the domestic industry.[142] Confirmed allegations of sales and revenues lost to the subject imports provide further support for this finding. The record indicates that domestic producers and subject importers share the same top customers,[143] some of whom confirmed allegations of lost sales and revenues. Specifically, U.S. purchasers confirmed 15 instances in which domestic producers alleged that they had lost sales to lower-priced subject imports. Each of the five subject countries was included in at least two of these confirmed lost sales allegations. Three of the 15 confirmed lost sales allegations involved *** and 12 involved ***.[144]

U.S. purchasers also confirmed 12 instances in which domestic producers alleged that they had been forced to lower prices due to import competition. Each of the five subject countries was included in at least one of these confirmed lost revenue allegations. Two of the 12 confirmed lost revenue allegations involved *** and 10 involved ***.[145] In total, responding purchasers agreed with *** percent

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[138] (...continued)
to be probative of the prices of its subject PC strand imports. Table V-11 includes *** purchases from U.S. producers and includes *** purchases in the all-subject series, but does not include *** purchases in the country-specific data series. With *** excluded from the data, *** of 27 possible comparisons show underselling by subject imports from the five subject countries (*** of 10 when subject imports are aggregated). Calculated from CR, PR at Table V-11 and Purchaser's Questionnaire Response of ***.

[139] CR, PR at Table V-4 (comparing U.S. prices and aggregate subject import prices).

[140] CR, PR at Table V-5 (comparing U.S. prices and aggregate subject import prices).

[141] CR, PR at Table V-6 (comparing U.S. prices and aggregate subject import prices).

[142] We note that the overselling at narrow margins may indicate that U.S. producers were lowering prices to hold on to market share, as they testified. See, e.g., Tr. at 22 (Mr. Selhorst).

[143] See CR at II-2-II-3, PR at II-1-II-2; see also CR, PR at Table D-1 (4 reporting pre-tension companies purchase both domestic and subject imported PC strand; 7 reporting post-tension companies purchase both domestic and subject imported PC strand); CR, PR at Table D-2 (10 of the top customers reported by U.S. producers and importers identified purchases of domestic and subject imported PC strand).

[144] CR, PR at Table V-15. This tabulation does not include ***, which disagreed with the lost sales allegation, but noted that it increased foreign purchases and decreased domestic purchases because of low foreign prices and high domestic prices. This company's imported strand came exclusively from subject countries, namely ***. Compare CR, PR at Tables V-15, D-3, and D-1.

[145] CR, PR at Table V-16.

by value of the $63.6 million in lost sales alleged, and with *** percent by value of the $1.7 million in lost revenues alleged.[146]

We observe that domestic prices for PC strand declined over the period examined in all portions of the market, including pre-tension, post-tension, and Buy America sales. We also observe that, for certain of these sales (pre-tension and Buy America), competition from subject imports was limited. We considered whether this indicates that factors other than subject imports were driving prices in the PC strand market, such as declining domestic consumption and increased domestic competition.

With respect to domestic consumption trends, we note that apparent U.S. consumption of PC strand declined 3.1 percent from 2000 to 2001, and a further 1.7 percent from 2001 to 2002.[147] In general, reduced demand would tend to create downward price pressure. However, the reduced consumption occurred mainly in the pre-tensioned portion of the market, in which consumption declined by 6.9 percent from 2000 to 2002. By contrast, apparent consumption in the post-tensioned portion of the market declined only marginally (by 1.9 percent) from 2000 to 2002.[148] Thus, while reduced consumption appears to explain at least in part the decline in prices to pre-tension customers, it does not account for the significant decline that occurred in prices to post-tension customers. Rather, particularly with respect to sales to post-tension customers, we find that it was the substantial and increasing volume of substitutable subject imports, which were concentrated in the post-tension portion of the market, that led to the price depression shown by our data.

With respect to increased domestic competition for sales of PC strand, we observe that, during the period examined, a new domestic producer, Sivaco, began production, two producers (American and Strand Tech) expanded their production capacity, and two producers (Insteel and Sumiden) closed facilities. Overall, domestic capacity to produce PC strand grew by 6.8 percent between 2000 and 2002, and declined by 3.9 percent between interim periods. As with reduced demand, in general increased capacity would tend to place downward pressure on prices as newly expanded firms seek to grow their sales to utilize the new capacity. However, if aggressive pricing by domestic producers were driving prices, one would expect to see growing domestic sales and market share; at a minimum, one would not anticipate substantial declines in domestic sales and market share. In this case, domestic producers' U.S. shipments declined by 13.7 percent from 2000 to 2002, and the domestic industry lost approximately 7 percentage points of market share to subject imports during that period. Thus, we conclude that while increased domestic capacity might have had some effect on prices, any effect was modest absolutely and in comparison to the effects of subject imports.

We therefore find that declining apparent consumption and increased domestic competition do not sever the causal link between subject imports and the significant price depression experienced by the domestic PC strand industry.

In addition, we have considered the impact of Buy America restrictions on domestic prices. Although there have been price declines for sales with Buy America restrictions, this does not detract from our finding that subject imports had significant price depressing effects. We note that a significant number of Buy America purchases are by customers that make non-Buy America purchases as well. Of the 14 purchasers that reported making Buy America purchases, half reported making both Buy America and non-Buy America purchases.[149] There is some evidence, although not conclusive, that the price on non-Buy America sales may have helped purchasers to obtain lower prices for their Buy America

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[146] CR, PR at Tables V-15-V-16.

[147] CR, PR at Table IV-6.

[148] CR, PR at Table IV-8.

[149] Purchaser's Questionnaire Responses of *** at III-26.

purchases.[150] We also note that Buy America transactions were concentrated in the pre-tensioned part of the market and that only a relatively modest portion of post-tensioned sales (between 9.6 and 12.6 percent between 2000 and 2002) were subject to Buy America provisions. Thus, Buy America provisions provided only limited protection to domestic producers in the post-tensioned portion of the market. As noted above, subject imports' share of this portion of these sales grew by more than 18 percentage points between 2000 and 2002, mainly at the expense of domestic producers. In light of this rapid shift in sales, combined with the large number of confirmed allegations of lost sales and revenues (particularly among post-tension customers), we conclude that Buy America restrictions did not prevent domestic producers from experiencing significant price depression caused by subject imports.

For these reasons, we find that significant volumes of the subject merchandise depressed U.S. prices, resulted in substantial lost sales and lost revenues, and had significant adverse price effects on the U.S industry.

D. Impact

In examining the impact of the subject imports on the domestic industry, we consider all relevant economic factors that bear on the state of the industry in the United States.[151] These factors include output, sales, inventories, capacity utilization, market share, employment, wages, productivity, profits, cash flow, return on investment, ability to raise capital, and research and development. 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."[152] [153]

Most indicators of the domestic industry's condition showed marked declines between 2000 and 2002 at a rate greater than the decline in apparent U.S. consumption. The domestic industry was expanding at the beginning of the period examined and contracting at the end, as Sivaco entered the market in 1999 and ramped up production, only to halt production in 2003. Strand Tech increased capacity in 2002, but Insteel closed a facility in December 2001 and Sumiden closed a facility in January

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[150] See, e.g., Petitioners' Posthearing Brief Exh. 3 (Decl. of Richard Wells), ¶ 8.

[151] 19 U.S.C. § 1677(7)(C)(iii). See also SAA at 851, 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." Id. at 885.).

[152] 19 U.S.C. § 1677(7)(C)(iii). See also SAA at 851, 885; Live Cattle from Canada and Mexico, Invs. Nos. 701-TA-386, 731-TA-812-813 (Preliminary), USITC Pub. 3155 (Feb. 1999) at 25 n.148.

[153] 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 calculated the following antidumping duty margins: Brazil, 118.75 percent for Belgo Bekaert and all others (68 Fed. Reg. at 68355); India, 102.07 percent for Tata Iron and Steel Co. Ltd. and 83.65 percent for all others (68 Fed. Reg. at 68353); Korea, 54.19 percent for Kiswire Ltd. and Dong-Il Steel Manufacturing Co. Ltd. and 35.64 percent for all others (68 Fed. Reg. at 68354); Mexico, 77.20 percent for Cablesa and 62.78 percent for Camesa and all others (68 Fed. Reg. at 68351); and Thailand, 12.99 percent for Siam Industrial Wire Co., Ltd. and all others (68 Fed. Reg. at 68349).

2002.[154] Overall capacity rose by 6.8 percent between 2000 and 2002 (49 million pounds), but was 3.9 percent (15 million pounds) lower in interim 2003 than in interim 2002.[155]

Domestic output decreased from 2000 to 2002 (down 14.8 percent), as did capacity utilization (down 18.0 percentage points to 70.7 percent).[156] Even without the increase in domestic capacity, capacity utilization declines would have exceeded 10 percentage points.[157] Interim 2003 production was 6.3 percent higher than production in interim 2002; and capacity utilization was 7.0 percentage points higher at 73.6 percent, but still well below 2000 levels.[158]

U.S. shipment volumes declined as well, decreasing by 83 million pounds (13.7 percent) between 2000 and 2002. This was accompanied by a decrease in average unit values (down by 7.9 percent from $264 per 1,000 pounds in 2000 to $243 per 1,000 pounds in 2002).[159] Volume losses in 2001 were largely a result of decreased sales to pre-tension customers, while losses in 2002 were largely a result of decreased sales to post-tension customers, where subject imports were concentrated.[160] Shipment average unit values (AUVs) declined across all forms and types of sales (pre-tension and post-tension, coated and uncoated, Buy America and unrestricted) in 2001 and generally continued to decline in most combinations in 2002, consistent with the trends in prices discussed in the pricing section.[161]

Employment trends (workers, hours, wages) followed output trends, declining from 2000 to 2002 (down by about one quarter), then stabilizing between interim 2002 and 2003.[162] As a result of

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[154] The closure of its Victorville, CA, facility resulted in high shutdown costs ($***) in 2002 for Sumiden. CR, PR at Table VI-1 note 2. ***. Petitioners' Postconference Brief Exh. 7; Tr. at 33-36 (Mr. Burr). We find that this information indicates that electricity problems were not a substantial cause of the shutdown of the Victorville facility. Further, we find that the closure was due at least in part to lower prices driven by subject imports. Most of the production from the Victorville facility was destined for post-tensioned customers, the portion of the market in which most subject imports were sold. Domestic prices for post-tensioned sales declined significantly during 2000 and 2001. Most of the increase in subject imports from 2000 to 2001 entered through Pacific ports, primarily through the nearby port of Los Angeles.

[155] CR, PR at Table C-1.

[156] CR, PR at Table C-1.

[157] Had domestic capacity not increased from 2000 to 2002, domestic capacity utilization in 2002 would have been 75.5 percent, a figure substantially below the 88.6 percent utilization rate of 2000. CR, PR at Table III-2.

[158] CR, PR at Table C-1.

[159] CR, PR at Table C-1.

[160] Pre-tension shipments declined by nearly 35 million pounds between 2000 and 2001 (with decreases in both Buy America and non-restricted volumes), while post-tension sales fell by 7 million pounds (mostly due to diminished Buy America volume). Both trends were consistent with consumption within the specified applications and did not result in a meaningful shift in market share by application. Pre-tension shipments increased by 1 million pounds in 2002 due to a modest recovery in Buy America sales which offset diminished unrestricted sales, consistent with an increase of 3 million pounds in pre-tension consumption. Post-tension shipments fell by nearly 42 million pounds in 2002 (entirely as a result of diminished unrestricted sales), while consumption fell by less than 1 million pounds, resulting in a marked shift in share of post-tension consumption away from U.S. producers and toward subject imports. CR, PR at Table IV-8.

[161] CR, PR at Table III-4. We note that AUV data may not be as reliable in investigations involving product mix issues; however, in these investigations, this is not a significant issue because one product dominates sales. Although these trends may not be reflected in the data for epoxy-coated PC strand, this highly specialized PC strand accounts for a very small portion of shipments.

[162] CR, PR at Table C-1. The number of production workers declined from 409 to 308 between 2000 and 2002; hours worked declined from 926,000 to 671,000; and wages paid declined from $13.48 million to $10.17 million. There were 289 production workers in interim 2002 and 290 in interim 2003; hours worked were 330,000 in interim

(continued...)

substantial growth in productivity (up 17.5 percent between 2000 and 2002 and 4.0 percent higher in interim 2003 than in interim 2002), unit labor costs fell throughout the period examined.[163] In addition, the domestic industry held its inventory in check, resulting in a stable ratio of inventories to total shipments between 2000 and 2002 (*** percent-*** percent) and relatively lower inventories in interim 2003 (*** percent) than in interim 2002 (*** percent).[164]

The financial performance of the domestic industry followed the same downward trends as output, sales, and employment. The domestic industry saw its profitability evaporate over the period examined, as operating income of $12.5 million (7.6 percent operating margin) in 2000 fell to $2.1 million (1.4 percent operating margin) in 2001 and then turned into an operating loss of $5.8 million (-4.4 percent margin) in 2002, before recovering in the first half of 2003 to an operating income of approximately $1.8 million (2.5 percent operating margin).[165] Each of the reporting domestic producers experienced worsening operating income levels in 2001 and in 2002, and improving operating income levels in interim 2003 relative to interim 2002.[166] [167] Unit net sales values fell steeply in 2000-02 as a result of subject imports before recovering in 2003. Capital expenditures fluctuated but declined overall, and R&D expenditures were small and falling.[168]

The domestic industry thus experienced significant declines in market share and diminished output and sales between 2000 and 2002 that exceeded relatively minor declines in apparent U.S. consumption. The domestic industry's financial performance worsened noticeably, mainly due to lower unit sales values.[169] We attribute the domestic industry's performance declines over the period examined in significant part to the rapid increases in subject import volume and market share that have had significant price depressing effects. Although we have noted that Buy America restrictions or preferences applied to certain sales in the U.S. market, this does not detract from our finding that subject imports had significant price effects, particularly insofar as Buy America sales accounted for only approximately 30 percent of the domestic market. Moreover, the vast majority of subject imports were for post-tension sales, sales that are largely not for Buy America projects. Subject imports have

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[162] (...continued)
2002 and 341,000 in interim 2003; wages paid were $4.98 million in interim 2002 and $5.32 million in interim 2003. CR, PR at Table III-6.

[163] CR, PR at Table C-1. Unit labor costs dropped from $21.28 to $18.85 between 2000 and 2002; unit labor costs were $20.14 in interim 2002 as compared to $19.99 in interim 2003. CR, PR at Table III-6.

[164] CR, PR at Table C-1. U.S. producers' inventories were 51.9 million pounds in 2000, 53.0 million pounds in 2001, and 47.1 million pounds in 2002. U.S. producers' inventories were 42.5 million pounds in interim 2002 as compared to 33.9 million pounds in interim 2003. CR, PR at Table III-5.

[165] CR, PR at Table C-1.

[166] CR, PR at Table VI-3. We note that the interim financial data did not include information from Sivaco, which ***. The domestic industry's cash flow followed the same pattern as its operating income. Cash flow was a positive $10.4 million in 2000, negative $1.3 million in 2001, negative $7.8 million in 2002, negative $5.5 million in interim 2002, and positive $2.5 million in interim 2003. CR, PR at Table VI-1.

[167] Brazilian Respondent argued in the preliminary phase of these investigations that domestic producers were harmed by limited availability of steel wire rod, which is a major input to PC strand. See, e.g., Conference Tr. at 111-114 (Mr. Stokes); see also Mexican Respondent's Prehearing Brief at 60. In the final phase of these investigations, no domestic producer indicated any difficulties obtaining wire rod. CR at II-5, PR at II-3. Moreover, the industry's unit raw material costs only increased modestly over the period examined and thus do not account for the industry's declining profitability. CR, PR at Tables VI-2, VI-4. Therefore, we find no merit to the claim that wire rod availability had a negative impact on the domestic PC strand industry.

[168] CR, PR at Table VI-6. The surge in capital expenditures in 2001 largely reflects ***.

[169] CR, PR at Table VI-5.

increased their share of such post-tension sales rapidly and at the expense of domestic producers, as reflected by 27 confirmed allegations of lost sales and revenue. While subject imports account for only a small share of pre-tension sales, they have had at least some impact on those sales, persistently underselling the domestic product and resulting in both lost sales and lost revenue. While there has been some improvement in the domestic industry's performance in interim 2003, such improvement is a modest reflection of higher apparent U.S. consumption and price increases in the second quarter of 2003, after the filing of the petition.

Respondents assert that any impact of subject imports is limited to sales to post-tensioned customers and that these sales represent too small a portion of the domestic industry's sales to result in a significant negative impact on the domestic industry. Respondents point out that domestic industry sales to post-tensioned customers not subject to Buy America provisions represented about 13 percent of the domestic industry's sales in 2002.[170] However, Respondents fail to point out that, in 2000, these sales accounted for approximately 20 percent of the domestic industry's sales.[171] The share of domestic industry sales accounted for by post-tensioned, non-Buy America sales was reduced from 20 to 13 percent between 2000 and 2002 because subject imports captured additional market share from the domestic industry.[172] Thus, the fact that the share was low was itself a reflection of the impact of subject imports, rather than an indication that the domestic industry was insulated from import competition.[173] Moreover, as noted previously, we find that subject imports have had some impact, although limited, on domestic sales and prices in the pre-tension portion of the market.[174] We therefore find that subject imports have had a significant adverse impact on the domestic industry.

CONCLUSION

For the reasons stated above, we determine that an industry in the United States is materially injured by reason of imports of prestressed concrete steel wire strand (PC strand) from Brazil, India, Korea, Mexico, and Thailand that are sold in the United States at less than fair value and by reason of imports of PC strand from India that are subsidized.

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[170] See, e.g., Respondents' Hearing Exh. 2.

[171] CR, PR at Table III-4.

[172] Calculated from CR, PR at Table III-4.

[173] We have also considered whether the record contains evidence of disinterest on the part of the domestic industry toward sales to post-tension customers. To the contrary, we conclude that the demonstrated ability of the domestic industry to sell more than *** pounds of PC strand to post-tension customers in 2000, despite operating at a capacity utilization rate of 88.6 percent and receiving higher prices for sales to pre-tension customers, clearly demonstrates an interest in, and willingness and ability to sell to, post-tension customers. See CR, PR at Tables III-4 (sales), III-2 (capacity utilization), and V-5-V-6 (relative prices).

[174] Brazilian Respondent claims that most of the financial deterioration experienced by the domestic industry was the result of lower prices received in pre-tensioned and/or Buy America portions of the market, where competition from subject imports is limited. Brazilian Respondent's Prehearing Brief at 36-38, Exhibit 4. We have examined the data submitted by Respondent and do not find them to be meaningful. Respondent bases its claim on domestic shipment data, not domestic financial data. Domestic producers do not maintain financial data broken out according to the various portions of the market cited by Respondent. Shipment data are not a good proxy for financial data because, for example, the shipment data do not take into account differing costs for sales to different portions of the market.

PART I: INTRODUCTION

BACKGROUND

These investigations result from a petition filed by American Spring Wire Corp. ("American"), Bedford Heights, OH; Insteel Wire Products Co. ("Insteel"), Mt. Airy, NC; and Sumiden Wire Products Corp. ("Sumiden"), Stockton, CA, on January 31, 2003, alleging that an industry in the United States is materially injured and threatened with material injury by reason of subsidized imports of prestressed concrete steel wire strand ("PC strand") from India and by reason of less-than-fair-value ("LTFV") imports of PC strand from Brazil, India, Korea, Mexico, and Thailand. Information relating to the background of the investigations is provided below.[1]

Effective date	*Action*
January 31, 2003 ...	Petitions filed with Commerce and the Commission; institution of Commission investigations
February 20, 2003 ..	Commerce's notice of initiation
March 17, 2003	Commission's preliminary determinations
July 8, 2003	Commerce's preliminary countervailing duty determination concerning India and alignment with final antidumping duty determination
July 16, 2003	Commerce's preliminary antidumping duty determinations concerning Brazil, India, Korea, Mexico, and Thailand and postponement of final antidumping determinations concerning Mexico and Thailand; scheduling of final phase of Commission investigations (68 FR 52614, September 4, 2003)
August 18, 2003	Notice of postponement of final antidumping duty determinations concerning Brazil, India, and Korea
December 2, 2003 ..	Commission's hearing[2]
December 8, 2003 ..	Commerce's final determinations (68 FR 68348)
January 8, 2003	Commission's vote
January 21, 2003 ...	Commission determinations sent to Commerce

PREVIOUS AND RELATED COMMISSION INVESTIGATIONS

The Commission has conducted several antidumping and countervailing duty investigations concerning PC strand. In August 1978, the Commission determined that an industry in the United States was not being injured and was not likely to be injured by reason of LTFV imports from India.[3] In its 1978 antidumping investigation concerning PC strand from Japan, the Commission determined that an industry in the United States was being injured by reason of LTFV imports of PC strand from Japan. Under the then-applicable statutory provisions, the Commission made no domestic like product determination *per se* in its original determinations, but it essentially treated all PC strand as a single domestic like product. The Commission determined that it "considered the relevant domestic industry to consist of facilities in the United States devoted to the production of steel wire strand for prestressed

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[1] *Federal Register* notices cited in the tabulation are presented in app. A.

[2] A list of witnesses that appeared at the hearing is presented in app. B.

[3] *Steel Wire Strand for Prestressed Concrete from India, Investigation No. AA1921-182 (Final)*, USITC Pub. 906, August 1978, p. 3.

concrete."[4] The Commission initiated its first review of the original finding concerning PC strand from Japan on September 1, 1998 (63 FR 46477) and determined on December 4, 1998, that it would conduct an expedited review (63 FR 70158, December 18, 1998). In the Commission's expedited five-year review, the Commission determined that revocation of the antidumping finding on PC strand from Japan would be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time. The Commission found that the appropriate definition of the domestic like product in the expedited five-year review was the same as Commerce's scope: all steel wire strand, other than alloy steel, not galvanized, which has been stress-relieved and is suitable for use in prestressed concrete. It further determined that the appropriate domestic industry was all U.S. producers of PC strand.[5] [6]

In the Commission's 1982-83 investigations involving PC strand from Brazil, France, Spain, and the United Kingdom, the Commission similarly defined the domestic like product as "all wire strand of steel for prestressing concrete."[7] The Commission made negative determinations in those investigations.

PC strand was also included in a section 201 investigation on certain steel products instituted by the Commission following a request from the United States Trade Representative on June 22, 2001. The Commission categorized the various steel products covered in the 201 investigation under 33 different product groupings. PC strand was included under a carbon and alloy steel product grouping identified as "rope." In December 2001, the Commission determined that imports of carbon and alloy steel rope were not injuring the U.S. industry producing carbon and alloy steel rope.[8]

COMMERCE'S FINAL DETERMINATIONS

Nature and Extent of Subsidies

In accordance with section 703(b) of the Act, Commerce calculated a final net subsidy rate of 62.92 percent *ad valorem* for all Indian producers/exporters of the subject merchandise. Commerce calculated the single countervailing duty rate based on facts available, pursuant to section 776(a) of the Act, and adverse inferences, pursuant to section 776(b) of the Act, because the questionnaire responses of the Government of India and Tata Iron and Steel Co., Ltd. (Wire Division) (" TISCO") were incomplete and unusable.

In its final determination, Commerce found that the following programs that were determined to be countervailable in other previous investigations and administrative reviews are countervailable in this investigation:

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[4] *Steel Wire Strand for Prestressed Concrete from Japan, Investigation No. AA1921-188 (Final)*, USITC Pub. 928, November 1978, pp. 1-7.

[5] *Prestressed Concrete Steel Wire Strand from Japan, Investigation No. AA1921-188 (Review)*, USITC Pub. 3156, February 1999, pp. 1-4.

[6] The domestic industry in 1999 was comprised of four producers: American, Florida Wire and Cable Co. ("FWC") (purchased by Insteel in January 2000), Insteel, and Sumiden. *Ibid*, p. I-5.

[7] *Prestressed Concrete Steel Wire Strand from Spain, Investigation No. 701-TA-164 (Final)*, USITC Pub. 1281, August 1982, p. 4; *Prestressed Concrete Steel Wire Strand from France, Investigation No. 701-TA-153 (Final)*, USITC Pub. 1325, December 1982, p. 4; *Prestressed Concrete Steel Wire Strand from the United Kingdom, Investigation No. 731-TA-89 (Final)*, USITC Pub. 1343, February 1983, p. 4; *Prestressed Concrete Steel Wire Strand from Brazil, Investigation No. 701-TA-152 (Final)*, USITC Pub. 1358, March 1983, p. 5.

[8] *Steel*, Inv. No. TA-201-73, USITC Pub. 3479 (December 2001).

A. Government of India Programs
    1. Pre-shipment and Post-shipment Export Financing
    2. Duty Entitlement Passbook Scheme
    3. Export Promotion Capital Goods Scheme
    4. Loans from the Steel Development Fund
    5. Exemption of Export Credit from Interest Taxes
    6. Advance Licenses
    7. Income Tax Exemption Scheme (Section 80 HHC)
    8. Loan Guarantees from the Government of India
B. State of Maharashtra Programs
    1. Sales Tax Incentives
    2. Capital Incentive Scheme
    3. Electricity Duty Exemption Scheme

Commerce's final determination also included several programs that have not been examined in other prior investigations and administrative reviews. Because the Government of India and TISCO did not provide Commerce with the information necessary to conduct its investigation of the alleged programs, Commerce made an adverse inference that each of the following programs was countervailable:

A. Programs in the State of Maharashtra
    1. Octroi Refund Scheme
    2. Exemption of Sales and Purchase Taxes for Certain Investments Related to Automobiles or Automobile Components
B. Sales Tax Incentives Program in the State of Bihar
C. Programs in the State of Jharkhand
    1. Sales Tax Incentives
    2. Captive Electricity Generative Plant Subsidy
    3. Interest Subsidy
    4. Stamp Duty and Registration
    5. Pollution Control Equipment Subsidy
    6. Mega Units
    7. Captive Electricity Tax Exemptions
D. Sales Tax Incentives Program in the State of Gujarat

Sales at LTFV

Commerce's final determinations concerning the antidumping duty investigations are presented in table I-1.

Table I-1
PC strand: Commerce's final LTFV determinations

Country	Exporter/manufacturer	Margin (*percent*)	Critical circumstances determination
Brazil	Belgo Bekaert Arames S.A.[1]	118.75	Not applicable
	All others	118.75	Not applicable
India	Tata Iron and Steel Co., Ltd.[1]	102.07	Not applicable
	All others	83.65	Not applicable
Korea	Kiswire Ltd.[1]	54.19	Not applicable
	Dong-Il Steel Mfg. Co., Ltd.[1]	54.19	Not applicable
	All others	35.64	Not applicable
Mexico	Aceros Camesa S.A. de C.V.	62.78	Negative
	Cablesa S.A. de C.V.[1]	77.20	Negative[2]
	All others	62.78	Negative
Thailand	Siam Industrial Wire Co., Ltd.	12.99	Negative
	All others	12.99	Negative

[1] The final margin assigned is based on adverse facts available.
[2] In its final determination, Commerce reversed its preliminary affirmative critical circumstances finding with respect to Cablesa S.A. de C.V. Since critical circumstances are no longer an issue in these investigations, the section entitled "Critical Circumstances" that appeared in the prehearing version of this report is not presented in this final version.

Source: 68 FR 68348 (December 8, 2003).

U.S. TARIFF TREATMENT

The subject PC strand is classified in subheading 7312.10.30 and imported under statistical reporting numbers 7312.10.3010 ("covered[9] with textile or other non-metallic material") and 7312.10.3012 ("other") of the Harmonized Tariff Schedule of the United States ("HTS").[10] The 2003

[9] Although the HTS refers to "covered" material, according to the petitioners the PC strand industry terminology typically refers to PC strand coated with epoxy as "epoxy-coated" PC strand and refers to greased and plastic-encased PC strand as "plastic-coated" PC strand. Petitioners' prehearing brief, p. 11. Accordingly, the terms "epoxy-coated" and "plastic-coated" are used throughout this report.

[10] During final verification in its investigation concerning PC strand from Thailand, Commerce found that end-fittings were added to all coils of PC strand shipped to the United States from Thailand by Siam Industrial Wire Co., Ltd. The entry documents examined by Commerce reflected that the PC strand exported to the United States from this firm in Thailand was improperly classified under subheading 7312.10.20 of the HTS ("stranded wire, ropes, cables, plaited bands, slings and the like, of iron or steel, not electrically insulated: fitted with fittings or made up

(continued...)

general rate of duty for PC strand is 0.5 percent *ad valorem*; however, imports of PC strand produced in Mexico that are originating goods under HTS general note 12 can receive duty-free entry under the North American Free Trade Agreement. If individual shipments do not so qualify or if the importer fails to make a proper claim, the general or normal trade relations rate applies.

MAJOR FIRMS INVOLVED IN THE U.S. PC STRAND MARKET

There are five U.S. producers of bare PC strand: American, Insteel, Sivaco Georgia LLC ("Sivaco"), Strand Tech Martin, Inc. ("Strand Tech"), and Sumiden. American, Insteel, and Sumiden are the petitioners in these investigations.[11] Although Sivaco and Strand Tech are not parties to the investigations, both are in support of the petitions.

Belgo Bekaert Arames S/A ("Belgo Bekaert") is the sole producer and exporter of PC strand from Brazil. The Crispin Co. ("Crispin") and Trefilarbed Inc. ("Trefilarbed")[12] are *** importers of the subject merchandise from Brazil. Crispin also imports the subject merchandise from Korea and ***. Belgo Bekaert and Crispin are parties to these investigations.[13]

The major producer and exporter of PC strand in India is TISCO. Tata, Inc. ("Tata"), ***, is the *** importer of the subject merchandise from India. TISCO and Tata are parties to these investigations.[14]

The following four producers/exporters of PC strand in Korea responded to the Commission's questionnaire in these investigations: Dong-Il Steel Mfg. Co., Ltd. ("Dong-Il"); Kiswire, Ltd. ("Kiswire"); Manho Rope and Wire, Ltd. ("Manho"); and Young Heung Iron and Steel Co., Ltd. ("Young Heung").[15] *** and Crispin[16] are *** U.S. importers of PC strand from Korea.

Aceros Camesa, S.A. de C.V. ("Aceros Camesa") and Cablesa, S.A. de C.V. ("Cablesa") are believed to be the sole producers of PC strand in Mexico. Camesa, Inc. ("Camesa") and Universal Products Group, Inc. ("Universal") import PC strand manufactured by their affiliated producers, Aceros Camesa and Cablesa, respectively, into the United States.[17] Aceros Camesa, Cablesa, Camesa, and Universal are parties to these investigations.[18]

The primary producers of PC strand in Thailand are Bangkok Steel Wire Co., Ltd. ("Bangkok Steel"); Siam Wire Industry Co., Ltd. ("Siam Wire"); Thai Wire Products Public Co., Ltd. ("Thai Wire"); and The Siam Industrial Wire Co., Ltd. ("Siam Industrial"). Cementhai SCT (USA), Inc. ("Cementhai")

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[10] (...continued)
into articles"). Petitioners' prehearing brief, pp. 71 and 119-121.

[11] The petitioners are represented by the law firm of Collier Shannon Scott PLLC.

[12] ***.

[13] Belgo Bekaert is represented by the law firm of Hogan & Hartson and Crispin is represented by the law firm of Coudert Brothers. Crispin did not appear at the hearing and did not file prehearing and posthearing briefs.

[14] TISCO and Tata are represented by the law firm of Garvey Schubert Barer. TISCO and Tata did not appear at the hearing and did not file prehearing and posthearing briefs.

[15] In the preliminary phase of these investigations and in the beginning of the final phase of these investigations, the four Korean producers were represented as parties by the law firm of Kaye Scholer LLP, but the notice of appearance on behalf of these firms was withdrawn on September 25, 2003.

[16] As previously indicated, Crispin is a party to these investigations.

[17] Mexican respondents' prehearing brief, p. 1. ***.

[18] Aceros Camesa, Cablesa, Camesa, and Universal ("Mexican respondents") are represented by the law firm of Harris Ellsworth & Levin.

is the *** U.S. importer of subject merchandise from Thailand. Siam Industrial and Cementhai are parties to these investigations.[19]

There were 29 firms that responded to the Commission's purchaser questionnaire. The largest responding purchasers, in terms of total quantity purchased from January 2000 to June 2003, were (in alphabetical order) Hansen Spancrete Midwest, Newmark International, Post-Tension of Nevada, Standard Concrete Products, and Suncoast Post-Tension. Firms were asked to describe themselves and could provide more than one answer. Four firms reported being convertors, 11 firms reported being in the construction industry, seven firms reported being distributors, and 16 firms selected the "other" category, which consisted mostly of fabricators of pre-tensioned elements, but included some post-tension installers. Four of the purchasers that responded to the Commission's questionnaire in these investigations are wholly owned by other U.S. firms and four are owned by foreign firms, none of which are located in countries subject to these investigations.[20] Only one purchaser indicated that it is related to a foreign firm engaged in the production of PC strand; however this related firm is located in a nonsubject country.[21]

SUMMARY DATA

A summary of data on PC strand collected in the investigations is presented in appendix C, tables C-1, C-2, and C-3.[22] The U.S. industry data presented in this report are based on questionnaire responses of five firms that accounted for all U.S. production of bare PC strand (and for two of these firms, some epoxy-coated strand) during January 2000-June 2003.[23] U.S. import data for subject merchandise presented in this report are based on questionnaire responses. U.S. import data presented for nonsubject sources are based on official U.S. import statistics.[24]

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[19] Siam Industrial and Cementhai are represented by the law firm of White & Case. Siam Industrial and Cementhai did not appear at the hearing and did not file prehearing and posthearing briefs.

[20] ***.

[21] ***.

[22] The data presented in the body of this report and in table C-1 are for all PC strand and the data presented in tables C-2 and C-3 are for uncoated and coated PC strand, respectively. Disaggregated data are also provided elsewhere throughout this report, as appropriate. Certain aggregated data were not presented in the prehearing report in these investigations because of double-counting issues. Such double-counting issues have been resolved and, consistent with Commission practice, the structure of the data presentation in this final report has been changed from that of the prehearing report to reflect the Commission's earlier determinations concerning domestic like product and domestic industry. See *Prestressed Concrete Steel Wire Strand from Brazil, India, Korea, Mexico, and Thailand, Investigation Nos. 701-TA-432 and 731-TA-1024-1028 (Preliminary)*, USITC Pub. 3589, March 2003, pp. 5-7.

[23] In addition to the five domestic PC strand producers, three domestic post-tensioning firms that plastic-coat PC strand provided responses to the Commission's producers' questionnaire; however, little usable data concerning their coating operations was provided. Information submitted by the post-tensioning firms is presented separately throughout the report, where appropriate.

[24] For information on questionnaire coverage, see the section of this report entitled "U.S. Imports, Apparent U.S. Consumption, and Market Shares." The official import statistics for all countries are presented separately in appendix C (table C-4).

THE PRODUCT

The imported product subject to these investigations is PC strand, which is steel strand[25] produced from wire of non-stainless, non-galvanized steel,[26] and which is suitable for use in both pre-tensioned and post-tensioned prestressed concrete applications. The subject product includes all types, grades, and diameters of both uncoated and coated strand.

Physical Characteristics and Uses

PC strand is made from hot-rolled, high-carbon steel wire rod. After cleaning and descaling, the steel wire rod is drawn into wire, fabricated into multi-wire strand, and thermally stress-relieved.[27] The most common PC strand configuration consists of six wires wound helically around a single wire core.[28] Nominal diameters of PC strand typically range from 0.25 to 0.70 inch.[29] PC strand is used in the construction of prestressed concrete structural members. The PC strand is used to introduce desirable compressive forces into a concrete member to offset, or neutralize, forces which occur when the prestressed concrete member is subject to load.[30] Typical applications for prestressed concrete include bridge decks, bridge girders, pilings, precast concrete panels and structural supports, roof trusses, floor supports, and certain concrete foundations.[31]

PC strand is used to prestress concrete either by pre-tensioning or by post-tensioning. In pre-tensioning, the PC strand is tensioned (pulled tightly and slightly elongated) using a calibrated tensioning apparatus, and concrete is poured around the PC strand. After the concrete has cured, the tension is released and the tensile force of the strand induces a compressive force in the concrete. Pre-tensioned prestressed concrete depends upon the bond between the concrete and the PC strand to hold the concrete in compression. In post-tensioning, there is no bond between the PC strand and the cured concrete. Instead, the PC strand is tensioned using a calibrated tensioning apparatus after the concrete has cured. In post-tensioned prestressed concrete, tension is maintained by installing permanent mechanical anchors which remain in place after the tensioning apparatus is removed. Prestressed concrete structures usually also contain reinforcing wire or wire fabric.[32]

Depending on the application, PC strand may be used uncoated or it may be coated before use. There is a distinction between plastic-coated and epoxy-coated PC strand. Plastic-coated PC strand is

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[25] A strand consists of a plurality of round or shaped wires helically laid about an axis. *Wire Rope Users Manual, 2nd Edition,* Washington, DC: American Iron and Steel Institute ("AISI"), 1981, p. 129.

[26] Conference testimony indicates that the use of stainless steel strand in prestressed concrete is extremely rare and that it is not appropriate to use galvanized steel strand to prestress concrete. Transcript of the Commission's February 21, 2003, conference in the preliminary phase of these investigations ("conference transcript"), p. 54.

[27] The American Society for Testing and Materials ("ASTM") specifies mechanical properties for finished PC strand, but does not specify chemical composition for the wire used to make PC strand. Standard Specification for Steel Strand, ASTM, *Annual Book of ASTM Standards,* West Conshohocken, PA: ASTM, 2002, Section 1, vol. 01.04, p. 223.

[28] Although the seven-wire PC strand is the most prevalent product in the industry, accounting for an estimated 98 percent of the market, PC strand may also be produced with as few as three wires. Conference transcript, pp. 12 and 55.

[29] Petition, p. 6.

[30] Lankford, William T., et al. (eds.), *The Making, Shaping and Treating of Steel, 10th Edition,* Pittsburgh, PA: Association of Iron and Steel Engineers, 1985, pp. 1014-1015.

[31] Petition, p. 7.

[32] Lankford, op. cit., pp. 1014-1015.

lubricated with grease and encased in a plastic tube, whereas epoxy-coated PC strand is coated with epoxy.[33] For pre-tensioning applications, where the bond between the cured concrete and the PC strand holds the concrete in compression, the PC strand is installed uncoated.[34] In contrast, post-tensioning applications may require uncoated or coated PC strand. There are two methods of post-tensioning: internal and external. For internal post-tensioning applications, the PC strand is either coated (which keeps the concrete from bonding to the PC strand during the curing process) or plastic or metal ducts are cast into the concrete and uncoated PC strand is passed through each duct. If the duct method is used, after tensioning and anchoring, the ducts containing the PC strand are filled with grout.[35] For external post-tensioning applications, PC strand may be coated with epoxy or it may be galvanized to protect against corrosion.[36]

Whether PC strand is used uncoated or coated, PC strand of various suppliers is interchangeable within each physical size, physical configuration, and grade.[37] According to conference testimony, "Once the product is produced in accordance with the ASTM specifications and consistent with these technical specifications, it is interchangeable whether produced by a domestic or foreign company."[38]

Manufacturing Processes

The PC strand production process consists of four distinct steps: drawing, stranding, stabilizing, and packaging. The drawing step begins with cleaning and descaling to remove dirt and mill scale from the hot-rolled high-carbon steel wire rod before feeding it through the wire drawing dies. Cleaning and descaling can be accomplished chemically, using a strong acid, or mechanically, using abrasive methods. The cleaned and descaled wire rod is then coated with zinc phosphate and pulled through a series of wire drawing dies to reduce its size. Depending on the finished size required, the rod may be drawn through up to nine dies. If indented wire is specified, the wire is indented, using carbide rollers, after the final size reduction.[39]

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[33] ***, two domestic producers, Insteel and Sumiden, produce epoxy-coated PC strand (as well as uncoated PC strand) but reportedly no domestic producers of uncoated PC strand currently plastic-coat PC strand. Insteel reported that for its production of plastic-coated PC strand "***." Generally, in the U.S. market, domestically produced and imported PC strand is coated in plastic by end users (i.e., post-tension customers). During 2002, *** percent of the PC strand imported from Mexico was plastic-coated. Importers of PC strand from Thailand also reported imports of plastic-coated PC strand during 2001 and 2002. These imports from Thailand of plastic-coated PC strand accounted for *** percent of total plastic-coated subject imports during 2001 and *** percent during 2002. Reported imports of PC strand from Brazil, India, and Korea were of bare product.

[34] According to hearing testimony, the epoxy-coated product is also generally used in a bonded application. The epoxy-coated product is a specialty product that is made for severely corrosive environments. Hearing transcript, pp. 123-124.

[35] Telephone interview with ***, February 26, 2003.

[36] External post-tensioning is used primarily for repair and retrofit applications. Although epoxy-coated or galvanized PC strand is used in certain external post-tensioning applications, it is more common in external post-tensioning to use plastic-coated PC strand, or to install the PC strand in external plastic or metal ducts which are filled with grout after tensioning. Telephone interview with ***, February 26, 2003.

[37] PC strand used in the United States conforms to applicable ASTM specifications based on the physical size, physical configuration, and grade (minimum ultimate strength) of the PC strand.

[38] Conference transcript, p. 17.

[39] PC strand made from indented wire may be specified for certain pre-tensioning applications. The indentations in the wire enhance the bond between the cured concrete and the PC strand.

After drawing, the wire undergoes stranding. During the stranding process, the wires are wound into a strand, helically and uniformly, by a stranding machine. PC strand grade designations (such as grades 250, 270, and 300) correspond to the minimum ultimate strength of the product in thousands of pounds per square inch ("psi") based on the tensile strength and cross-sectional surface area of the PC strand. For example, grade 270 PC strand has a minimum ultimate strength of 270,000 psi.[40]

During the third step, the PC strand is stabilized by removing the residual mechanical stresses through thermal treatment. The extent of the stress relief determines the type of PC strand. Low-relaxation PC strand is subjected to simultaneous thermal and mechanical treatment after stranding, while normal-relaxation PC strand (commonly referred to as stress-relieved PC strand) requires only thermal treatment.[41] [42]

If the PC strand is to be sold as coated PC strand, it is at this point in the production process that it would be either lubricated with grease and encased in a plastic tube, or coated with epoxy.[43] Insteel and Sumiden provided the following responses to a question in the Commission's questionnaire in which the Commission requested a detailed description of the process involved in coating bare PC strand, indicating the specific type(s) of coating, the type and level of technical expertise, and the type and cost of equipment required to coat the bare PC strand:

> Insteel: "***."
>
> Sumiden: "***."

The three post-tensioners that responded to the Commission's questionnaire provided the following responses to the Commission's aforementioned question:

> Houston Post-Tension: "***."
>
> Southwest Post-Tension: "***."
>
> Tech-Con: "***."

The Mexican respondents testified at the Commission's hearing that

> a new extruding line for half-inch diameter PC strand can cost up to $1 million, while even a used line would cost about $300,000. The company must also purchase additional materials and train employees in order to achieve a consistent, high quality product. And also the plant must be certified by the PTI Institute before they can ship to the end user.[44]

In their posthearing brief, petitioners provided a declaration made by ***, a post-tensioner and a coater of PC strand, regarding the type and level of technical expertise and the type and cost of equipment

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[40] Petition, p. 6.

[41] Standard Specification for Steel Strand, ASTM, *Annual Book of ASTM Standards,* West Conshohocken, PA: ASTM, 2002, Section 1, vol. 01.04, p. 223.

[42] According to one manufacturer, there is no market for stress-relieved PC strand in the United States. Instead, all PC strand sold in the U.S. market is low-relaxation, which is heat treated by induction while under tension. Telephone interview with ***, February 11, 2003.

[43] Conference transcript, p. 12.

[44] Hearing transcript, p. 191.

required to coat the bare PC strand. In that declaration, *** states that the cost of a plastic coating line is minimal at *** and the process is relatively simple with only one employee needed to run the largely automated plastic coating line.[45]

In its questionnaire, the Commission also requested that the U.S. producers indicate the percentage of the total value of the coated PC strand that they shipped in 2002 that was accounted for by the uncoated PC strand.[46] In response to that question, Insteel stated "***."[47] Sumiden responded "***."

The Mexican respondents disagree with the petitioners' characterization of the value added to bare PC strand by greasing it and sheathing it with plastic. Aceros Camesa testified at the Commission's hearing that the plastic-coated PC strand that it sold during the period for which the Commission sought data in these investigations commanded a 60-percent premium over the bare PC strand.[48]

The Commission requested in its purchasers' questionnaire that the purchasers that engage in the coating of bare PC strand with plastic provide the difference between their cost of the uncoated PC strand and the price at which they sell the plastic-coated PC strand. Four purchasers *** reported that their sales price of the plastic-coated PC strand was approximately 19-25 percent higher than the cost of the uncoated PC strand that they purchased. *** reported that the sales price of its plastic-coated PC strand was almost 50 percent higher than the cost of the uncoated PC strand that it purchased. The Commission also requested in its purchasers' questionnaire that the purchasers that engage in the coating of bare PC strand with plastic provide the average cost of coating. *** indicated that the cost involved in coating bare PC strand accounted for approximately 13 percent of the total cost of the plastic-coated PC strand. Three purchasers *** reported that the cost involved in coating bare PC strand accounted for between 23 and 26 percent of the total cost of the plastic-coated PC strand.

The final step in the production process is packaging for shipment. The finished PC strand is wound onto a coil form and banded with steel strapping. Then the form is removed, producing a "reel-less" coil which is then coated with protective plastic or burlap fabric before shipment to the customer.[49] The coils, or "packs," of PC strand are typically 48 inches in outside diameter and weigh approximately 6,000 pounds.[50] Depending on the nominal diameter of the PC strand, a pack may contain from 8,600 to 22,000 lineal feet.[51]

Channels of Distribution[52]

The Commission questionnaire asked firms to report the quantity of U.S. shipments broken out into the following four categories: (1) To converters or post-tensioners that commercially ship PC strand; (2) to other distributors; (3) to converters or post-tensioners that internally consume or transfer

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[45] Petitioners' posthearing brief, pp. 2-3 and exh. 2.

[46] Post-tensioners that plastic-coat PC strand were asked the same question; however, it is apparent from the poor answers received that the firms did not understand the question. In particular, Houston PT, Southwest PT, and Tech-Con reported that the uncoated PC strand accounted for *** percent, respectively, of the total value of their plastic-coated PC strand during 2002.

[47] Insteel testified at the Commission's hearing that the plastic coating operation adds approximately 10-15 percent to the total value of the bare PC strand. Hearing transcript, p. 92.

[48] Hearing transcript, p. 222.

[49] PC strand is shipped in reel-less coils to accommodate end users, who use strand dispensers designed to accept reel-less coils of PC strand. Conference transcript, pp. 12-13.

[50] Telephone interview with ***, February 11, 2003.

[51] Petition, exhibit 3.

[52] Also see section entitled "Market Segments" in part II of this report.

PC strand to related firms; and (4) to other end users. In that request, the Commission defined distributors as firms that commercially re-sell PC strand. The Commission defined end users as firms that do not commercially sell or re-sell PC strand. For example, post-tensioners that purchase PC strand and then engage in post-tensioning design engineering to prepare the strand for its end use in a post-tensioned application, but do not re-sell PC strand, are end users. Data compiled in response to Commission questionnaires concerning these channels of distribution, by country, are presented in table I-2.

Table I-2
PC strand: U.S. producers' and importers' shares of reported U.S. shipments, by sources, channels of distribution, and types of PC strand (uncoated and coated), 2000-02, January-June 2002, and January-June 2003

* * * * * * *

Petitioners testified at the Commission's hearing that they are aware of no firm that serves as a distributor of PC strand.[53] Petitioners also indicated that there was some confusion with the nomenclature applied to the reporting of channels of trade in that several importers mistakenly identified converters and post-tensioners that coat PC strand as "distributors."[54] They also argued that an examination of the customer list provided by the importers indicates that most PC strand is sold to end users.[55]

The Brazilian respondent testified at the Commission's hearing that he defines a post-tensioner customer as a distributor that

> sells these cut cables, coated cut cables to a contractor–to the site of the contractor. And, actually, the distributor is providing a service. He's not really manufacturing anything. He decides that he transformed the wire and coated it. He's actually providing a service. He's tensioning that slab, that slab that was poured by another contractor . . . Where post-tension is actually selling a service. They're selling the cables to the contractor. So, the contractor is actually the final end user on a slab on ground application.[56]

The Brazilian respondent also testified that he defines pre-tensioned customers as end users that

> have all this manufacturing equipment. They have concrete at their facilities, how they build these I-beams . . . Pretension people, to me, are end users. They get the product; they use it. It's sealed. It's in the product. It's sold as a beam, not as a cable.[57]

In the Commission's questionnaire, purchasers were asked to characterize themselves as one or more of the following: (1) converter (covers the PC strand); (2) construction firm; (3) distributor; and/or (4) other. Only four of the 30 purchasers that responded to the Commission's questionnaire

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[53] Hearing transcript, p. 25.

[54] Commission staff contacted the importers identified by the petitioners in their prehearing brief as having provided erroneous data and has made corrections to the data, as appropriate.

[55] Petitioners' prehearing brief, pp. 14, and 25-37. Also see app. D for customer lists provided by the producers and importers in their questionnaire responses.

[56] Hearing transcript, pp. 207-208.

[57] Ibid.

characterized themselves as solely distributors of the PC strand they purchased. Two of these firms purchase PC strand for exclusively post-tensioned applications, one purchases PC strand exclusively for pre-tensioned applications, and one purchases PC strand for both pre- and post-tensioned applications. Three additional purchasers characterized themselves as not only distributors of the PC strand they purchased, but also as converters and/or construction firms. The remaining 23 responding purchasers characterized themselves as converters, construction firms, or other.

For consistency in the presentation of the data contained in table I-2, post-tensioners that coat bare PC strand are defined as end users and post-tensioners that commercially ship PC strand without further processing are distributors.[58] The channels of distribution data presented indicate that almost all U.S. shipments of PC strand by U.S. producers are made directly to end users. *** more than one-half of such shipments was made to end users other than converters or post-tensioners (*i.e.*, pre-tensioners) that internally consume the PC strand. Aggregate data reported by subject importers reveal that the majority of their U.S. shipments was made to converters or post-tensioners that internally consume (are end users) of the PC strand; however, individually, the channels of distribution for each subject country varied somewhat. For January 2000-June 2003, U.S. importers of PC strand from *** reported that *** of their U.S. shipments were made to ***, and firms that imported PC strand from *** reported that *** of their U.S. shipments were made to ***. The U.S. importer from Thailand reported that, during 2000, *** percent of its U.S. shipments were made to ***, but during the remainder of the period for which the Commission collected data in these investigations, *** percent of such shipments were made to ***.

DOMESTIC LIKE PRODUCT AND DOMESTIC INDUSTRY

In its preliminary determinations, the Commission found the domestic like product to be all PC strand co-extensive with Commerce's scope, that is, steel strand produced from wire of non-stainless, non-galvanized steel that is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications and that encompasses coated and uncoated strand and all types, grades, and diameters of PC strand.[59] The Commission also found in its preliminary determinations that the domestic industry consists of the U.S. fabricators of uncoated PC strand.[60]

Petitioners agree that the domestic like product definition should mirror the scope of the investigations. They contend that an analysis of the six like product factors, as well as Commission precedent, supports a finding of one domestic like product comprised of all PC strand. The petitioners agree that the domestic industry should exclude companies that simply coat the strand with grease and plastic coating, due to the minor or incidental nature of such companies' operations.

The Mexican respondents contend that the Commission should find that "covered" (plastic-coated) and bare PC strand constitute two separate domestic like products and that there are two separate domestic industries: one producing coated PC strand and the second producing bare PC strand. They contend that bare PC strand is used by the pre-tensioned market and that the plastic-coated PC strand is used by the post-tensioned market. They further contended that whether applying the six-factor "like

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[58] Certain importers that sell the imported uncoated PC strand to domestic post-tensioning firms that coat the bare strand with plastic and then commercially ship the coated PC strand categorized such sales of the uncoated strand as shipments to post-tensioner distributors in their questionnaire responses; however, for the purpose of the presentation of the data in table I-2 such sales have been categorized as sales to end users.

[59] *Prestressed Concrete Steel Wire Strand From Brazil, India, Korea, Mexico, and Thailand, Investigations Nos. 701-TA-432 (Preliminary) and 731-TA-1024-1028 (Preliminary)*, USITC Pub. 3589, March 2003, p. 7.

[60] *Ibid.*, p. 9.

product analysis" or the "semifinished product analysis," the Commission must find that coated and bare PC strand constitute two separate domestic like products and industries.[61]

[61] Mexican respondents' prehearing brief, pp. 3-15, and posthearing brief, pp. 4-5.

PART II: CONDITIONS OF COMPETITION IN THE U.S. MARKET

U.S. MARKET CHARACTERISTICS

Market Structure

***, a U.S. producer, had about a ***-percent share of the uncoated PC strand market in 2002; ***, other U.S. producers, followed with market shares of, respectively, ***, ***, ***, and *** percent. *** were the largest importers of the subject product, with market shares in 2002 of ***, ***, and *** percent, respectively. Other importers of subject and nonsubject uncoated PC strand hold the remaining market shares. Although the market for uncoated PC strand has a number of participants, it is somewhat concentrated.

***, an importer of Mexican product, is the largest known seller of plastic-coated PC strand. *** and *** sell some epoxy-coated PC strand. *** and ***, importers of Mexican and Thai products, respectively, also sell some plastic-coated PC strand. The U.S. firms Houston Post-Tension, Southwest Post-Tension, Tech-Con Systems, and others specialize in post-tension operations. These firms coat and consume coated PC strand internally or coat and install coated PC strand for construction companies, and also sell some coated strand.

Purchasers of PC Strand and Overlap

If purchasers were distributors or resellers of PC strand, they were asked to identify their major types of customers. Concrete contractors, whether for commercial buildings or residential construction, were most frequently mentioned.[1] Fabricators of prestressed concrete elements and the mining industry were mentioned in one instance each.

U.S. producers and importers reported the share of sales to their 10 largest customers during 2002. The five U.S. producers named 38 different suppliers.[2] Nine importers sold both coated and uncoated PC strand to 32 different customers.

The next two paragraphs discuss the overlap of customers of U.S. producers and importers. The approach uses the data on shares shipped by producers and importers to each of their 10 largest customers in 2002. These data were multiplied by producers and importers' U.S. shipments of PC strand to obtain the quantity shipped by producers and importers to each reported customer.[3]

U.S. producers and importers' shipments of uncoated PC strand to their 10 largest customers accounted for approximately 48.5 percent and 99.7 percent, respectively, of their total shipments of uncoated PC strand. These data are consistent with the importers' claim that they primarily sell to a limited number of large accounts while domestic producers have more numerous accounts.[4] These data, which totaled 251.5 million pounds and 127.8 million pounds, respectively, for U.S. producers and importers, show that approximately 67.1 percent of U.S. importers' shipments to named customers overlapped with U.S. producers' shipments to named customers and that approximately 33.0 percent of U.S. producers' shipments to named customers overlapped with U.S. importers' shipments to named customers.

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[1] More details on purchasers are provided in table D-1 of appendix D.

[2] The questionnaire response submitted by *** during the preliminary phase of the investigations was used for its data.

[3] A different method of assessing overlap of customers is presented in table D-2 of appendix D, which presents the overlap of sales from different countries.

[4] Hearing transcript, p. 174.

Only ***, ***, and *** reported shipments of imported coated strand in 2002. U.S. producers *** and *** reported shipments of coated PC strand. *** shipments of coated product were *** larger than those of any other importer or producer. The data (for sales of coated product to the 10 largest customers) accounted for 45.1 percent and virtually 100 percent, respectively, of U.S. producers' and importers' shipments and show that 33.4 percent of U.S. producers' shipments overlapped with those of U.S. importers and that 73.4 percent of importers' shipments overlapped with those of producers.

Respondents averred that the customer share data overstate the degree of competition between importers and producers because some customers make both "Buy America(n)" and unrestricted purchases and that part of the post-tensioned market as well as the pre-tensioned market is protected by "Buy America(n)" restrictions.[5] Further information on "Buy America(n)" restrictions is presented in tables II-2 and III-4.

Market Segments

The petitioners refuted the claim that the market is segmented and state that there is only one U.S. market for all PC strand.[6] Respondents conversely asserted that the pre-tensioned and post-tensioned segments are distinct.[7] U.S. producers and importers were asked to describe any differences between the pre-tensioned and post-tensioned market segments. *** reported that most shipments to both segments are spot-market sales, although customers in each market also use longer-term contracting. It added that shipments to pre-tensioning customers tend to be smaller than those to post-tensioning customers. Other U.S. producers stated that there were no differences between these two market segments. *** reported that sales for pre-tensioned applications are typically smaller spot purchases and that post-tensioned sales are larger and have set sales prices for three months or six months.

Purchasers were asked if they were in the pre-tensioned market, the post-tensioned market, or both. Sixteen purchasers reported being in the pre-tensioned market and nine purchasers reported being in the post-tensioned market. *** reported being in both markets despite identifying themselves, respectively, as a mining industry firm, a distributor, and a precast manufacturer.

Purchasers were asked if firms in the pre-tensioned and post-tensioned markets compete for the same bare PC strand. Nineteen purchasers responded in the affirmative and three in the negative. Respondents claim that there is no competition for PC strand between pre-tensioned and post-tensioned uses.[8]

*** reported that they sell PC strand in all, or a large portion, of the United States. *** stated that it offers shipments anywhere in the United States but primarily serves Texas. *** stated that its market was Nevada and California, and *** stated that its market was the southeastern United States. Importers reported that their primary market areas are Texas and the West Coast.

SUPPLY OF DOMESTIC PC STRAND

Marginal production costs in relation to the market clearing price are the primary determinant of supply. Capacity utilization, production efficiency, and availability of alternative markets affect the supply response.

Domestic capacity to produce uncoated PC strand was *** pounds in 2002 (see appendix table C-2), and reported capacity to produce coated PC strand was *** pounds (see appendix table C-3).

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[5] Hearing transcript, p. 179.

[6] This was a recurring theme of the hearing; see, for example, pp. 11 and 52, hearing transcript.

[7] Hearing transcript, pp. 169-170.

[8] Hearing transcript, p. 171.

Capacity utilization ranged between *** and *** percent for uncoated PC strand and between *** percent and *** percent for coated PC strand between 2000 and interim 2003.

Firms reported in the preliminary phase of the investigations that they often produce for inventory because this enables relatively constant production despite seasonal fluctuations in demand.[9] End-of-period inventories fluctuated between *** and *** percent of U.S. producers' total shipments of uncoated PC strand and between *** and *** percent for coated PC strand.

Exports varied between *** and *** percent of the total shipments of uncoated PC strand (by volume). There were no reported exports of coated PC strand. This indicates that the domestic industry has few options for selling in foreign markets.

Wire rod is a major raw material input into the production of PC strand. U.S. producers were asked if they had difficulty obtaining the wire rod needed to manufacture PC strand, and no U.S. producer reported having difficulty obtaining the necessary wire rod.

Sumiden reported that it was forced to close its new and efficient production facility in Victorville, CA because of the surge in imports.[10] Petitioners also allege that Sivaco closed its new efficient plant in Georgia because of imports.[11]

Efficiency indicators are positive overall, although somewhat mixed. For both uncoated and coated PC strand, unit labor costs decreased between 2000 and 2002; unit labor costs were lower in interim 2003 than in interim 2002 for the uncoated product, with the reverse being the case for the coated product (see tables C-2 and C-3). Productivity per hour increased between 2000 and 2002 for both the uncoated and coated products. The interim 2003 figure for productivity per hour was higher than that for interim 2002 for uncoated PC strand, but productivity fell for coated PC strand.

Based on available information, U.S. producers of both uncoated and coated PC strand are likely to respond to changes in demand with moderate to large changes in the quantity of shipments of U.S.-produced PC strand to the U.S. market. The main contributing factors to this supply response are the availability of unused capacity and the efficiency of the domestic industry.

SUPPLY OF SUBJECT IMPORTS

Brazil

Brazil, reportedly, only produced and shipped uncoated PC strand. Reported capacity to produce PC strand in Brazil was *** million pounds in 2002 (see table VII-1). Capacity utilization ranged between *** and *** percent for the 2000-interim 2003 period. Shipments to the home market ranged between *** and *** percent of total shipments. The United States was Brazil's *** export market and accounted for between *** and *** percent of its total shipments of PC strand. Other foreign markets accounted for between *** and *** percent of total shipments.

The Brazilian producer is likely to respond to changes in demand with small changes in the quantity of shipments of PC strand to the U.S. market. The relatively small capacity, relatively high capacity utilization, and the ability to divert some additional shipments to the U.S. market are the main contributing factors to the small supply response.

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[9] Conference transcript, p. 14.

[10] Hearing transcript, pp. 32-33.

[11] Hearing transcript, p. 35. Petitioners added that the planning for these facilities began before demand began to decline. Hearing transcript, p. 65.

India

India, reportedly, only produced and shipped uncoated PC strand. Reported capacity to produce PC strand in India was *** pounds in 2002 (see table VII-2). Capacity utilization ranged between *** and *** percent during the 2000-interim 2003 period. Shipments to the home market ranged between *** and *** percent of total shipments. Exports to third country markets accounted for between *** and *** percent of total shipments. Exports to the United States accounted for between *** and *** percent of total shipments.

The reporting Indian producer is likely to respond to changes in demand with small changes in the quantity of shipments of PC strand to the U.S. market. The limited availability of Indian capacity, the availability of some unused capacity, and the ability to divert some additional shipments to the U.S. market are the main contributing factors to the small supply response.

Korea

Korea produced both uncoated and coated PC strand. Its capacity to produce uncoated and coated PC strand was, respectively, *** pounds and *** pounds in 2002 (see tables VII-4 and VII-5). Capacity utilization ranged between *** and *** percent for uncoated PC strand during the 2000-interim 2003 period, although capacity utilization was lower for coated strand. Shipments of uncoated PC strand to the home market accounted for between *** and *** percent of total shipments. Exports of uncoated strand to the United States accounted for between *** and *** percent of total shipments. Exports of uncoated strand to third country markets accounted for between *** and *** percent of total shipments. All coated PC strand was shipped either to the home market or to third country markets.

Korean producers are likely to respond to changes in demand with moderate changes in the quantity of shipments of PC strand to the U.S. market. The relatively large size of the Korean industry and the ability to divert some additional shipments to the U.S. market contribute to the moderate supply response.

Mexico

Mexico produced both uncoated and coated PC strand. Reported Mexican capacity to produce uncoated and coated PC strand was, respectively, *** pounds and *** pounds in 2002 (see tables VII-7 and VII-8). For the 2000-interim 2003 period, capacity utilization ranged between *** and *** percent for the uncoated product and between *** and *** percent for the coated product. Shipments to the home market accounted for between *** and *** percent of total uncoated shipments and between *** and *** of total coated shipments. Exports to the United States accounted for between *** and *** percent of uncoated shipments and between *** and *** percent of coated shipments. Exports to third country markets accounted for between *** and *** percent of uncoated shipments and between *** and *** percent of coated shipments.

Mexican producers are likely to respond to changes in demand with moderate changes in the quantity of shipments of PC strand to the U.S. market. The moderate size of the Mexican industry, the availability of unused capacity, the limited ability to access third country markets, and the proximity to the U.S. market contribute to the moderate supply response.

Thailand

Thailand produced both uncoated and coated PC strand. Reported Thai capacity to produce uncoated and coated PC strand was, respectively, *** pounds and *** pounds in 2002 (see tables VII-11 and VII-12). During the 2000-interim 2003 period, capacity utilization ranged between *** and ***

percent for uncoated PC strand and was lower for coated PC strand. Shipments to the home market accounted for between *** and *** percent of uncoated shipments and between *** and *** percent of coated shipments. Exports to third country markets accounted for between *** and *** percent of uncoated shipments and between *** and *** percent of coated shipments. Exports to the United States accounted for between *** and *** percent of uncoated shipments and for between *** and *** percent of coated shipments.

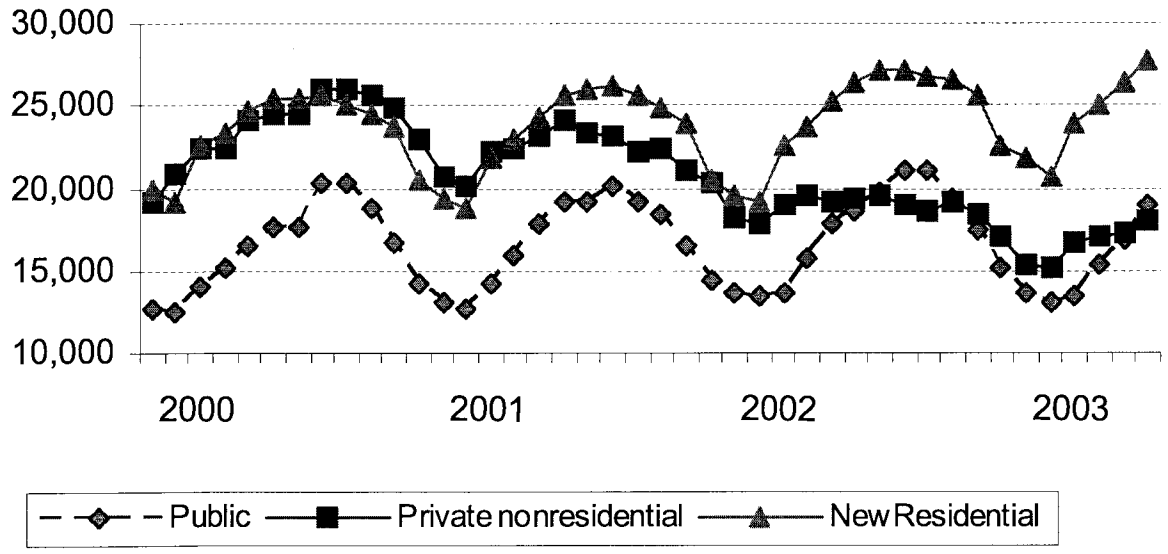
Thai producers are likely to respond to changes in demand with moderate changes in the quantity of shipments of PC strand to the U.S. market. The large size of the Thai industry, availability of unused capacity, and the ability to divert some additional shipments to the U.S. market contribute to the moderate supply response.

U.S. DEMAND

Demand Characteristics

PC strand is used to apply pressure to concrete, thus increasing the strength of the concrete. Pre-stressed concrete elements are used in the construction of buildings, bridges, parking decks and garages, highways, and slabs for residences. The demand for PC strand is thus derived from the demand for construction, particularly infrastructure projects, commercial and institutional construction, large housing projects, and to a lesser degree single-family housing. The values of public, private nonresidential, and residential construction are indicators of this demand (figure II-1). Average monthly rates of change were positive for public and residential construction, but slightly negative for private nonresidential. Private residential construction reportedly uses more slabs on grade, a post-tensioned application, than the nonresidential private sector, which consists of commercial facilities in large part. This implies that the demand for post-tensioning applications may have increased.

Figure II-1
Real value of public, private nonresidential, and new residential construction in millions of dollars, by months, January 2000-June 2003



Source: Compiled from official Bureau of Census statistics and staff calculation.

Purchasers were asked if their demand for pre-tensioned applications had changed since January 2000. Ten purchasers responded in the negative and 11 responded in the affirmative. *** stated that its competition was supplying a less expensive product. *** reported that the lack of funding for highway and bridge construction had decreased its demand. *** stated that market cycles unrelated to PC strand had influenced demand. *** stated that its demand had increased because of major construction at the ports of Long Beach and Los Angeles.

Purchasers were asked if their demand for post-tensioned applications had changed since January 2000. Seven purchasers responded in the negative and eight responded in the affirmative. *** and *** stated that a decrease in total market volume and competition from other post-tensioning companies had decreased demand. *** stated that low interest rates had led to increased residential construction and increased demand for slabs on grade.

Purchasers reported the quantity and value of purchases from 2000 through mid-year 2003 (table II-1). Over this time, quantities purchased from India, Korea, Mexico, Thailand, and nonsubject sources increased substantially, but were lower for product from the United States and Brazil. Unit values were variable; nonsubject sources and Brazil had the lowest unit values in 2002.

U.S. producers and importers were asked to report any changes in demand for PC strand in pre-tensioned and post-tensioned applications since January 1, 2000. *** U.S. producers reported that demand for PC strand in pre-tensioned applications had been relatively stable. *** added that market conditions had remained relatively strong but turned down more during 2003. Similarly, importers did not report any significant changes in demand.

*** reported that no significant changes had occurred in the demand for PC strand in post-tensioning applications. *** added that increased competition from imports had depressed prices despite stable quantities demanded. *** added that the growth of slabs on grade in residential construction had offset the lower demand for commercial construction. By contrast, *** reported that demand grew yearly through 2002 and had been relatively stable in 2003. *** reported that demand in the post-tensioning segment had been steady. *** reported that demand fell sharply after 9/11/01 and that the subsequent oversupply and slow recovery had negatively affected prices. *** reported that low interest rates had led to increased residential construction.

Respondents alleged that "Buy America(n)" restrictions reserve part of the market for U.S. producers.[12] Purchasers were asked to report the quantity of purchases during 2002 to which "Buy America(n)" restrictions apply.[13] Purchasers reported that 51.5 percent of purchases in the pre-tensioned market were unrestricted and 94.9 percent of purchases in the post-tensioned market were unrestricted (table II-2). "Buy America(n)" purchases represented 23.7 percent of total reported purchases in 2002. The data reported by purchasers accounted for 29.5 percent of apparent domestic consumption in 2002.

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[12] Joint respondents' postconference brief, pp. 12-18.

[13] The term "Buy America(n)" in the Commission's questionnaires encompassed "Buy America" requirements under the Federal-aid highway construction program, "Buy American" requirements for the Federal Government, and any other programs imposed at the federal, state, local, or private level that limits or favors purchases of PC strand to material of U.S. origin, including any restrictions or preferences for U.S.-origin material that are imposed as a matter of formal or informal policy or practice. Petitioners contend that the definition of "Buy America(n)" used by the Commission is overly broad because it encompasses not only formal restrictions or limitations under the law, but subjective preferences for domestically produced PC strand. Hearing transcript, pp. 96-97 and petitioners' posthearing brief, exh. 1, p. 13.

Table II-1
PC strand: Quantity and unit values of purchases by reporting purchasers, by country

Country	2000	2001	2002	January-June 2003
	Quantity (*1,000 pounds*)			
United States	176,673	187,606	136,231	80,464
Brazil	***	***	***	***
India	***	***	***	***
Korea	***	***	***	***
Mexico	***	***	***	***
Thailand	-	-	***	***
Nonsubject	6,410	8,536	13,639	4,925
	Unit value (*per pound*)			
United States	$0.25	$0.26	$0.25	$0.26
Brazil	***	***	***	***
India	***	***	***	***
Korea	***	***	***	***
Mexico	***	***	***	***
Thailand	-	-	***	***
Nonsubject	0.21	0.23	0.22	0.23

Note.–***.

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

Table II-2
PC strand: "Buy America(n)" and unrestricted purchases by type of application, 2002, as reported by purchasers

	"Buy America(n)" purchases (*1,000 pounds*)	Unrestricted purchases (*1,000 pounds*)
Pre-tensioned applications	45,880	48,718
Post-tensioned applications	6,417	119,913
Total	52,297	168,631

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

Purchasers were asked to explain any price differences between "Buy America(n)" and unrestricted purchases in the pre-tensioned and post-tensioned market segments. *** stated that it always used foreign steel unless "Buy America(n)" applies and that there is no price difference among domestic suppliers. *** reported that unrestricted purchases are lower in price. *** stated that *** charges more for strand on "Buy America(n)" jobs. *** stated that unrestricted sources cost 35 percent less. *** stated that "Buy America(n)" purchases are usually about 10 percent higher. By contrast, *** reported that it is able to purchase "Buy America(n)" strand at prices close or equal to those of unrestricted strand.

Purchasers were asked the extent to which they maintain separate inventories of domestic and imported PC strand. *** stated that it maintains totally separate inventories. *** stated that it does not maintain separate inventories. *** and *** stated that they maintained separate inventories as needed. *** stated that it did not maintain separate inventories because all of its strand must meet ASTM standards. Other purchasers reported buying all domestic or all imports and therefore having no need to maintain separate inventories. *** reported that all of its material is tagged, but it does not maintain separate inventories.

Substitute Products

Eleven purchasers reported that PC strand had no substitutes in its various end uses. Other firms reported that rebar, structural steel, wire mesh, and reinforcing steel or bars were substitutes. *** stated that PC strand and rebar are different ways to reinforce concrete. *** also stated that rebar could be used in place of PC strand to reinforce concrete depending upon the price. *** stated that rebar and PC strand do not compete with each other because PC strand puts concrete under compression, which is a different type of reinforcement from rebar. *** reported that PC strand dominates rebar for slabs on grade for residential housing in the ***. *** reported that 85 percent of the slabs on grade in the *** area are made with post-tensioned PC strand, with the remainder made with rebar. Relative to the price of PC strand, one purchaser stated that the price of rebar and wire mesh had remained the same since January 2000, and another purchaser reported that the price of reinforcing bars had remained the same. Three purchasers reported that the price of rebar relative to the price of PC strand had increased since January 2000, and one purchaser reported that the cost of reinforcing steel had increased relative to the cost of PC strand. *** reported that it had shifted some purchases since the relative price of rebar had changed, but all other purchasers reported that they had not shifted purchases into or away from substitutes for PC strand. *** reported that PC strand competed well with rebar before the recent price increases and that any further increases would harm its competitiveness.

Cost Share

PC strand is used in the manufacture of a large variety of concrete products. Median cost shares of PC strand in these products ranged from 6 to 34 percent (table II-3). Most of these products are components of larger construction projects such as houses, commercial buildings, roads, bridges, and parking garages. All items except post-tension foundations are pre-tension applications.

Table II-3
PC strand: Median cost share in end-use products and number of purchasers reporting

End use	Median cost share	Number of firms reporting
Hollow core planks	***	***
Piling	11	6
Post-tension foundations	18	3
Precast beams	10	4
Precast columns	***	***
Precast double Ts	***	***
Precast hollow cord	***	***
Precast panels	***	***
Precast slabs	***	***
Prestressed bridge girder	***	***
Spun prestressed concrete poles	***	***
Source: Compiled from data submitted in response to Commission questionnaires.		

SUBSTITUTABILITY ISSUES[14]

The degree of substitution between domestic and imported PC strand depends upon quality, price, and the conditions of sale. There appear to be no significant differences in quality, although conditions of sale vary somewhat. Price is addressed in Part V.

Factors Affecting Purchasing Decisions

Purchasers were asked how often they purchased PC strand that is offered at the lowest price. Among pre-tensioners, two purchasers reported that they always purchase at the lowest price; seven reported that they usually purchase at the lowest price; five reported that they sometimes purchase at the lowest price; and three reported that they never purchase at the lowest price. Among post-tensioners, two purchasers reported that they always purchase at the lowest price; six reported that they usually purchase at the lowest price; and one reported that it usually purchases at the lowest price.

Purchasers were asked to list in order of importance the three major factors considered in deciding from whom to purchase PC strand. Availability, price, and quality were listed most frequently by both pre-tensioners and post-tensioners, although various other factors were listed as well (table II-4).

Purchasers were asked to rate the importance of each of 14 factors in their purchase decisions for PC strand. Most purchasers rated availability, price, product consistency, product quality, and reliability of supply as very important (table II-5).

[14] This section is largely based on the responses of 29 purchasers to the Commission's questionnaire. These purchasers are: ***. Purchasers, which could select more than one category, identified themselves as follows: 4 convertors, 11 construction firms, 7 distributors, and 16 others. The "other" category consisted mostly of fabricators of various prestressed concrete elements.

Table II-4
PC strand: Ranking of factors used in purchasing decisions, as reported by U.S. purchasers

Factor	Number of firms reporting		
	Number one factor	Number two factor	Number three factor
Pre-tensioned market			
Availability	0	1	4
Pre-arranged contract	0	2	0
Price	2	9	3
Quality	8	1	2
U.S. source	2	0	0
Other	5	4	6
Post-tensioned market			
Availability	0	3	4
Price	7	1	1
Quality	2	3	1
Reliability	0	1	1
Other	0	1	2

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

Table II-5
PC strand: Importance of purchase factors, as reported by purchasers

Factor	Number of firms reporting		
	Very important	Somewhat important	Not important
Availability	22	1	0
Delivery terms	10	12	1
Delivery time	15	8	0
Discounts offered	7	10	5
Price	22	1	0
Minimum quantity requirements	2	15	6
Packaging	7	15	1
Product consistency	21	2	0
Product quality	22	0	1
Product range	5	11	6
Reliability of supply	20	3	0
Technical support/service	10	11	2
Transportation network	7	11	5
U.S. transportation costs	4	13	6

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

***, which purchases PC strand through brokers from multiple countries, reported that domestic strand and imported strand are comparable in all respects except that domestic suppliers provide superior technical assistance and service. It added that the technical assistance and service are usually not needed.

U.S. producers and importers were asked to report the average lead time between a customer's order and the date of delivery of their PC strand. U.S. producers reported lead times of a day or two, although *** reported a lead time of a week. Importers reported longer lead times. *** reported lead times ranging from slightly less than two months to three months. *** reported lead times ranging from 15 to 30 days. ***, which imports from nonsubject sources, reported a lead time of 12 weeks.

Most purchasers considered domestically produced PC strand to be always interchangeable with PC strand from all subject countries (table II-6). Individual purchasers reported that U.S.-produced PC strand was frequently interchangeable with PC strand from Korea and Thailand, sometimes interchangeable with PC strand from Brazil and Mexico, and never interchangeable with PC strand from Korea.

Table II-6
PC strand: Degree of interchangeability of U.S.-produced and subject imported product, by subject country, as reported by purchasers

Country	Number of firms reporting			
	Always interchangeable	Frequently Interchangeable	Sometimes Interchangeable	Never Interchangeable
Brazil	4	0	1	0
India	4	0	0	0
Korea	6	1	0	1
Mexico	5	0	1	0
Thailand	4	1	0	0

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

Producers and importers were also asked the degree of interchangeability between domestic and subject imported strand. All U.S. producers consider domestic PC strand to be always interchangeable with imports from each subject country. *** and *** consider domestic strand to be frequently interchangeable with imports from, respectively, Mexico and Thailand. *** considers domestic PC strand to be frequently interchangeable with strand imported from each subject country. *** and *** consider domestic PC strand to be sometimes interchangeable with the similar product imported from each subject country. *** commented that many users dictate that only domestic strand be used. *** added that it only imports coated PC strand, which is not interchangeable with uncoated PC strand.

Purchasers were asked if certain grades, sizes, or types of PC strand were only available from a single source (domestic or foreign). Four purchasers responded affirmatively and 21 responded negatively. *** stated that ½ inch and 0.6 inch galvanized PC strand was only available from foreign sources. *** stated that "Buy America(n)" purchases must be made from domestic sources. *** stated that epoxy-coated PC strand and indented PC strand were only available from ***.

Purchasers were asked to explain any reasons for purchasing from one source when a comparable product was available at a lower price. *** reported that it had purchased higher priced Mexican PC

strand instead of Korean strand for quality reasons. *** reported that "Buy America(n)" requirements were a reason for buying from a higher-priced source. Several purchasers reported buying from U.S. sources because of their short lead times.

Purchasers were asked if differences other than price between domestic and subject imported PC strand were important factors in their firms purchases of PC strand. Purchasers tended to consider differences other than price not to be very significant, although many purchasers did not respond to this question (table II-7).

Table II-7
PC strand: Significance of differences other than price between U.S.-produced and subject imported product, by subject country, as reported by purchasers

Country	Number of firms reporting			
	Always significant	Frequently significant	Sometimes significant	Never significant
Brazil	1	0	3	1
India	0	0	0	2
Korea	1	0	4	2
Mexico	0	0	2	2
Thailand	0	0	1	1

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

U.S. producers and importers were asked if differences other than price between domestic and subject imported PC strand were important factors in their firms sales of PC strand. Producers were unanimous in stating that non-price differences between domestic PC strand and any subject imports were never an important determinant of sales. *** stated that non-price differences, such as "Buy American" restrictions and its proximity to the Texas market, were frequently important factors between sales of domestic and imported Mexican PC strand. *** stated that non-price differences between domestic and imported Thai PC strand were sometimes important. *** reported that differences other than price were sometimes important factors between sales of Korean and domestic PC strand; it added that sometimes quality and availability influence purchasers' choices. *** reported that non-price differences between domestic PC strand and imports from each subject country were sometimes important. *** reported that non-price differences between domestic PC strand and imports from each subject country were frequently important and added that "Buy America(n)" restrictions are frequently important and that its imports of coated strand are different from uncoated strand.

A limited number of purchasers compared domestically produced PC strand to that from the subject countries. Purchasers rated domestic PC strand mostly comparable to Brazilian strand; domestic strand was inferior with respect to lower price and was superior or comparable regarding product consistency and product quality. Domestic strand was generally superior or comparable to Indian strand. Domestic strand was considered superior with respect to delivery terms, delivery time, and reliability of supply and inferior with respect to lower price. Purchasers rated domestic strand superior to Korean strand in terms of delivery time; superior to comparable with respect to availability, delivery terms, and technical support/service; and inferior with respect to lower price. U.S. and Mexican PC strand were rated mostly comparable; the United States was rated superior regarding reliability of supply and inferior

with respect to lower price. U.S. PC strand and Thai PC strand were mostly considered comparable; domestic strand was considered superior regarding availability and delivery time but inferior concerning lower price.

Out of 29 responding purchasers, 27 reported that they require supplies to be certified with respect to the quality, chemistry, strength, or other performance characteristics of PC strand. Twenty-four purchasers reported that all of their total purchases in 2002 required some form of qualification. The most frequently mentioned requirements were meeting ASTM specifications, "Buy America(n)" requirements, specifications of the Post-Tensioning Institute (PTI), or requirements of the Department of Transportation. The primary factor in certification was that the product meet the required specifications, although reliability, shipping time, price, and consistency were also mentioned. Despite the pervasive certification requirements, only two of 28 reporting purchasers stated that domestic or foreign producers had failed in their attempts to qualify PC strand. *** reported disqualifying a concrete reinforcement product, without identifying the supplier, because it was spring-like. *** reported that *** did not qualify because it did not meet PTI specifications.

Comparisons of Domestic Products and Nonsubject Imports

*** reported that Italian PC stand was superior to U.S. PC strand with respect to packaging, product consistency, product quality, reliability of supply, and technical support/service, and was comparable to U.S. PC strand with respect to the other purchase factors. *** reported that U.S. PC strand was superior to Italian PC strand with respect to availability, delivery time, reliability of supply, and technical support/service and was comparable on the other factors. *** reported that U.S.-produced and imported Spanish PC strand were comparable on all factors except that the United States was inferior regarding lower price. *** reported that Spanish PC strand was inferior to domestic PC strand with respect to delivery terms, delivery time, minimum quantity requirements, and transportation network and was comparable on the other factors. *** reported that U.S. and Canadian PC strand were comparable in all categories. *** reported that U.S. PC strand was superior to European PC strand with respect to availability, delivery terms, delivery time, discounts offered, minimum quantity requirements, product range, and technical support/service and was comparable on the other factors.

Seven purchasers reported that U.S.-produced PC strand and nonsubject PC strand is always interchangeable. One purchaser each reported that domestic PC strand is, respectively, frequently, sometimes, and never interchangeable with nonsubject PC strand.

Comparisons of Subject Imports and Nonsubject Imports

*** reported that Mexican and Spanish PC strand were comparable with respect to all factors. *** reported that Korean and European PC strand were comparable on all factors except that transportation costs were less for the Korean product to its West Coast operation.

Two purchasers each reported that PC strand from Brazil, India, Korea, and Thailand is always interchangeable with nonsubject PC strand. Four purchasers reported that Mexican and nonsubject PC strand are always interchangeable.

Comparisons of Subject Products from the Subject Countries

***, which reported purchases from India, Korea, Mexico, and Thailand, reported that all strand appeared comparable. *** reported that PC strand from Korea and PC strand from Thailand were comparable in all categories.

All purchasers that responded to the Commission's question about interchangeability by sources reported that PC strand from all subject sources was interchangeable with each other (table II-8).

Table II-8
PC strand: Interchangeability by subject sources, as reported by purchasers

Country	India	Korea	Mexico	Thailand	Other
	Number of firms reporting "always interchangeable"				
Brazil	2	3	3	2	2
India		4	4	4	2
Korea			4	5	2
Mexico				4	4
Thailand					2

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

All U.S. producers and the *** consider PC strand imported from each subject country to be always interchangeable with all other subject imported PC strand. *** reported that imports tended to compete in similar markets and that its main competition came from Indian and Thai imports. *** reported that all combinations of subject imports were frequently interchangeable with each other. *** reported that all combinations of subject imports, other than those involving Mexico, are frequently interchangeable with each other and that those involving Mexico are sometimes interchangeable with other subject imports. *** importation of the coated product was cited as the reason for this difference.

ELASTICITY ESTIMATES

The U.S. supply elasticity for PC strand indicates how U.S. producers will respond to changes in the U.S. market price of PC strand. Marginal costs, capacity, ability to shift to production of other products, inventories, and the availability of alternate markets affect the supply elasticity for U.S.-produced PC strand. Analysis of these factors earlier indicates that the U.S. industry is likely to be able to modify shipments to the U.S. market significantly; an estimate in the range of 5 to 10 is suggested.

The U.S. demand elasticity for PC strand measures the sensitivity of the overall quantity demanded to a change in the U.S. market price of PC strand. This estimate depends on factors discussed earlier such as the viability of substitutes and the cost share of the PC strand in the production of downstream products. Based on the available information, the aggregate demand for PC strand is likely to be inelastic; a range of -0.5 to -1.0 is suggested.

The elasticity of substitution is a measure of the ease at which the imported product may be substituted for the domestic product. It depends upon such factors as quality, availability, the conditions of sale, etc. Based on available information, the elasticity of substitution between U.S.-produced PC strand and imported PC strand is likely to be in the range of 4 to 6.

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 margins of dumping was presented earlier in this report and information on the volume and pricing of imports of the subject merchandise is presented in Parts IV and V. Information on the other factors specified is presented in this section and/or Part VI.

U.S. PRODUCERS

The Commission sent producer questionnaires to the five firms identified in the petition as domestic producers of PC strand and to other domestic firms identified as possible coaters of PC strand. The Commission also provided producer questionnaires to all U.S. recipients of the importer and purchaser questionnaires. All five firms identified in the petition as producers provided responses to the Commission's producer questionnaire in the final phase of these investigations.[1] These five firms are believed to have accounted for 100 percent of U.S. production of uncoated PC strand during the period from January 2000 through June 2003.[2] [3]

Three domestic post-tensioning firms also provided responses to the Commission's producer questionnaire in the final phase of these investigations, which indicated that they coated PC strand with plastic in the United States during the period January 2000 through June 2003; however, the data reported by these firms were not usable.[4] On the basis of quantity and value, these three post-tensioners' total purchases of PC strand accounted for approximately *** percent of apparent U.S. consumption of bare PC strand during 2002.

Presented in table III-1 is a list of the domestic firms that produce PC strand and a list of domestic post-tensioning firms that responded to the Commission's producers' questionnaire in the final phase of these investigations. Also presented is information concerning each company's position on the petition, production locations, and their share of reported 2002 domestic production of PC strand.

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[1] Sivaco provided limited trade data in response to the Commission's questionnaire in the final phase of these investigations. According to ***, Sivaco ceased production of PC strand in the United States on September 12, 2003, only a week after Commission questionnaires were mailed. See e-mail from Harry Lenchitz to Mary Messer, November 5, 2003.

[2] Insteel and Sumiden currently have the capacity to coat PC strand with epoxy, but none of the five U.S. PC strand producers currently has the capacity to coat PC strand with plastic.

[3] Aceros Camesa is in the process of establishing a new PC strand manufacturing operation in the United States. The company, PCS America, Inc. ("PCS"), located in Rosenberg, TX, will begin production of *** PC strand during the fourth quarter of 2003. This U.S. PC strand facility will reportedly have the capacity to produce approximately *** pounds of *** PC strand annually. Initial sales of PC strand produced by PCS are expected to begin during January 2004. Mexican respondents' prehearing brief, p. 71, and hearing transcript, p. 244.

[4] The producer questionnaire responses provided by these three domestic post-tensioning firms were not usable because much of the data requested were not provided. The limited amount of data provided by these firms was grossly inaccurate and incomplete.

Table III-1
PC strand: U.S. firms, positions on the petition, U.S. production locations, and shares of 2002 U.S. production of PC strand

Firm name	Position on petition	U.S. production locations	Share of U.S. production (*in percent*)
U.S. PC strand producers			
American Spring Wire Corp.	Petitioner	Bedford Heights, OH Houston, TX	***
Insteel Wire Products Co.[1]	Petitioner	Gallatin, TN Sanderson, FL Jacksonville, FL[2]	***
Sivaco Georgia LLC	Support	Newnan, GA[3]	***
Strand Tech Martin, Inc.	Support	Summerville, SC	***
Sumiden Wire Products Corp.[1]	Petitioner	Stockton, CA Dickson, TN Victorville, CA[4]	***
U.S. post-tensioners that coat PC strand			
Houston Post-Tension, Inc.	***	Houston, TX	(5)
Southwest Post-Tension Systems, Inc.	***	North Las Vegas, NV	(5)
Tech-Con Systems, Inc.	***[6]	Slidell, LA	(5)

[1] Insteel and Sumiden *** do not coat (i.e., grease and sheath) PC strand but they do produce epoxy-coated PC strand.
[2] Insteel closed the Jacksonville facility in December 2001 and ***.
[3] Sivaco's Newnan facility closed on September 12, 2003.
[4] Sumiden's Victorville facility, opened in March 1999, was closed on January 1, 2002.
[5] Not available.
[6] Tech-Con explained that "***."

Note.–Because of rounding, shares may not total 100.0 percent.

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

Overview of U.S. Producers of PC Strand

American Spring Wire Corp.

American, a petitioner in these investigations, produces uncoated PC strand at facilities located in Bedford Heights, OH and Houston, TX. These facilities are currently capable of producing a combined *** pounds of uncoated PC strand annually. ***. *** it does not engage in post-tensioning services. In addition to PC strand, American also produces spring wire ***. American reported ***. The firm also reported ***. American reported that it sells its bare PC strand ***.

Insteel Wire Products Co.

Insteel, a petitioner in these investigations, is currently capable of producing *** pounds of uncoated PC strand annually at its production facilities in Gallatin, TN and Sanderson, FL. ***[5] as well as epoxy- coated PC strand ***. Insteel reported an annual capacity to produce *** pounds of epoxy-coated strand for use in highly corrosive environments. This epoxy-coated product accounted for *** percent of the total value of Insteel's sales of PC strand during 2002.[6]

Insteel does not currently have the capability to coat (i.e., grease and sheath) PC strand at its domestic PC strand production facilities nor does it engage in post-tensioning services. The firm explained that from 1993 through 1998 its bare PC strand intended for greased and sheathed applications was coated in-house by Insteel, but that the presence of such capability was viewed negatively as a competitive threat by Insteel's post-tensioning customer base. The firm explained that since it had no plans to compete with this important group of customers, it eventually decommissioned its coating line to "eliminate the friction" with its customers.[7] ***.

*** related firms which are engaged in the production of PC strand or in importing or exporting the subject merchandise to the United States. Insteel reported ***. Insteel reported that it ***.

In January 2000, Insteel acquired the common stock of Florida Wire and Cable ("FWC"). The former FWC PC strand production facility, located in Jacksonville, FL, was closed by Insteel in December 2001. The firm reported ***. Insteel reported ***. At the time it was closed, the Jacksonville plant had the capacity to produce approximately *** per year of PC strand and its capacity utilization was ***. In addition, the closing of the former FWC PC strand facility resulted in the elimination of *** production, administrative, and management positions. Insteel reports that, despite this rationalization of capacity, Insteel operated until recent months at *** percent of capacity and employment fell ***.[8] It reported that ***.

Sivaco Georgia LLC[9]

Sivaco, with a PC strand production facility located in Newnan, GA, reported an annual production capacity of *** pounds for PC strand during 2002. Sivaco is wholly owned by Atlantic Steel Co., which is located in Atlanta, GA. In addition to PC strand, Sivaco reported that it also produced ***. The firm reported ***.

In its questionnaire response, Sivaco explained ***. As a result of the continued deterioration of the market, the firm made the decision to cease the manufacture of all PC strand during September 2003. It is reported that Sivaco consolidated its North American wire-drawing operations by relocating that

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[5] The firm explains that "***."

[6] It explains that the manufacturing technology for epoxy-coated PC strand is ***. The firm reported that it ***.

[7] Hearing transcript, p. 90.

[8] Joint respondents point out that the discontinuation of PC strand production at the Jacksonville facility occurred in the fourth quarter of 2000, and contend that it had no apparent connection to import competition, but rather was the result of the company's union difficulties and the unrelated decision to exit the galvanized strand business that was the primary activity of the Jacksonville facility, which prompted Insteel to consolidate its PC strand production at its other facilities. Joint respondents' postconference brief, pp. 50-54.

[9] In the final phase of these investigations, Sivaco provided limited trade data as an update to the complete questionnaire response it provided in the preliminary phase of these investigations. The firm did not provide any updated data for employment, financial, and pricing indicators.

equipment from the company's Newnan, GA facility to its existing facilities in Canada.[10] Press reports indicated that import competition was cited as one of the primary reasons behind Sivaco's move.[11]

On October 10, 2003, Ivaco, Inc. announced that its wholly-owned subsidiary, Atlantic Steel Co. and all of its subsidiaries, including Sivaco Georgia LLC, filed under Chapter 7 of the U.S. Bankruptcy Code.[12]

Strand Tech Martin, Inc.

Strand Tech is currently capable of producing *** pounds of PC strand annually in its production facility located in Summerville, SC,[13] *** does not engage in post-tensioning services. The firm reported that ***. Strand Tech also reported ***.

*** is Strand Tech's majority stockholder. Strand Tech ***. Strand Tech reported ***.

Sumiden Wire Products Corp.

During the period for which information was collected, Sumiden, a petitioner in these investigations, produced uncoated PC strand at facilities located in Stockton, CA; Dickson, TN; and Victorville, CA. During 2002, Sumiden was capable of producing *** pounds of uncoated PC strand annually for sales ***. The firm also reported that its production facilities have the capacity to produce epoxy-coated PC strand[14] ***.[15] Sumiden reported ***. The firm reported that *** nor does it engage in post-tensioning services. Sumiden explained that ***.

Sumiden is majority owned by ***. Sumiden ***.

Sumiden reported that in August 2001, it eliminated *** percent of its employees at its Stockton, CA facility because ***.[16] On January 1, 2002, it shut down its production facility in Victorville, CA (which produced only PC strand and which it contends was built with the primary intention of serving the post-tensioned market), allegedly due to the low market price of imported strand.[17] This idled approximately *** of PC strand production capacity and eliminated *** employees. In February 2002, it laid off *** of its employees in its PC strand facility in Dickson, TN.

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[10] Conference transcript, p. 15 and *Maverick, Sivaco Consolidate Operations*, American Metal Market, vol. 111, no. 5-3, February 5, 2003, p. 1.

[11] *Ibid.*

[12] *American Subsidiaries of Ivaco File Under Chapter 7 of the U.S. Bankruptcy Code*, Yahoo!Finance, found at Internet address *http://biz.yahoo.com/ccn031010/7e940967ae550c3077bf41dcfb098d16_1.html*, retrieved November 1, 2003.

[13] Strand Tech reported ***.

[14] Sumiden reported ***. The firm reported an investment of $*** in the building and equipment devoted to the epoxy-coating process. Sales of Sumiden's epoxy-coated PC strand during 2002 accounted for *** percent of the firm's total sales of PC strand.

[15] Sumiden explains that "***."

[16] *Steel-Import Woes Hit Stockton*, Stockton Record, August 25, 2001.

[17] Conference transcript, pp. 24 and 25. Joint respondents and Cementhai, an importer of Thai PC strand located in California, argue that Sumiden's financial difficulties were not caused by imports but were caused by production and supply difficulties spawned by intermittent power shortages due to the California electricity prices in 2001. Conference transcript, p. 118 and joint respondents' postconference brief, pp. 45-49. Sumiden disputes this assertion as largely inaccurate and states that it was never confronted with supply difficulties. Petitioners' postconference brief, exh. 7, pp. 1-5.

Overview of Domestic Post-Tensioning Firms

Houston Post-Tension

Houston Post-Tension ("Houston PT") coats (i.e., greases and sheaths) bare PC strand at its facilities in Houston, TX, and provides certain post-tension services, such as installation. This facility is currently capable of coating *** pounds of bare PC strand annually and reported coating *** pounds of bare PC strand during calendar year 2002. Houston PT provided only quantity data concerning its purchases of bare PC strand, and only for calendar year 2002. During that period, Houston PT purchased *** of bare PC strand produced ***. The firm reported that ***. *** approximately *** of its U.S. shipments of plastic-coated PC strand during 2002 were produced ***. Houston PT reported that its equipment costs include the following: ***. Houston PT reported ***; the firm provided the following description of such changes: "***."

Southwest Post-Tension Systems, Inc.

Southwest Post-Tension Systems, Inc. ("Southwest PT") coats bare PC strand with plastic at its facilities in North Las Vegas, NV. The firm also provides certain post-tension services, such as installation. Southwest PT's facility is currently capable of coating *** pounds of bare PC strand annually and reported operating at *** capacity during calendar year 2002. Southwest PT provided data concerning its purchases of bare PC strand for only calendar year 2002. During that period, Southwest PT purchased *** pounds of bare PC strand produced in ***. The firm reported that *** percent of its bare PC strand purchases during 2002 was product produced in the United States, *** percent was product produced in ***, *** percent was product produced in ***, and *** percent was product produced in ***. Southwest PT reported ***.

Tech-Con Systems, Inc.

Tech-Con Systems, Inc. ("Tech-Con") coats bare PC strand with plastic at its facilities in Slidell, LA, and provides certain post-tension services, such as installation. Tech-Con reported operating its PC strand facility at *** capacity during 2000-June 2003. During 2002, Tech-Con purchased *** pounds of bare PC strand produced in ***. The firm reported that *** percent of its bare PC strand purchases during 2002 was product produced in ***, *** percent was product produced in ***, and *** percent was product produced in ***. During 2000-01, Tech-Con also reportedly purchased bare PC strand produced in ***. Tech-Con reported ***.

U.S. CAPACITY, PRODUCTION, AND CAPACITY UTILIZATION

U.S. producers' capacity, production, and capacity utilization data for PC strand are presented in table III-2. These data show an overall 6.8-percent increase in capacity during 2000-02. A 14.8-percent decline in production was reported by U.S. producers during 2000-02 and capacity utilization reported by the U.S. producers of PC strand fell by 18.0 percentage points over the same period. Increases in both production and capacity utilization were reported during the partial-year periods.

Three domestic PC strand producers reported an overall increase in capacity during 2000-02: American, Sivaco, and Strand Tech. Sivaco reported that ***, it added *** pounds of annual domestic PC strand capacity during 2001 and that it added an additional *** pounds of annual domestic capacity in

Table III-2
PC strand: U.S. production capacity, production, and capacity utilization, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
Capacity (*1,000 pounds*)	714,675	732,475	763,577	390,242	375,060
Production (*1,000 pounds*)[1]	633,505	576,210	539,601	259,785	276,093
Capacity utilization (*percent*)[1]	88.6	78.7	70.7	66.6	73.6

[1] ***.

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

2002.[18] Strand Tech reported that, ***, it added *** pounds of annual capacity during 2002. Annual increases in American's reported capacity data from 2000 to 2002 are ***.

Insteel reported that the decline in its annual capacity to produce PC strand during 2001 was due to ***.

Sumiden reported that the increase in its annual capacity to produce PC strand during 2001 was due to ***. During 2002, the company indicated that ***. The company's reduction in *** and the closure of the Victorville facility during 2002 explains the reported decline in capacity for Sumiden in that period.

Two U.S. PC strand fabricators also produce epoxy-coated PC strand; however, this product accounted for only *** percent of the aggregate quantity of U.S. production of PC strand during 2002.

U.S. PRODUCERS' SHIPMENTS

Data on domestic producers' shipments of PC strand are presented in table III-3. The domestic commercial market accounted for *** of the U.S. producers' U.S. shipments of PC strand during January 2001-June 2003. During 2000, U.S. producers reported that *** percent of total U.S. shipments of PC strand were transfers to related firms. Domestic producers' reported U.S. shipments of PC strand fell both in terms of quantity and value in each year from 2000 to 2002, while export shipments increased overall during the same time period. The unit value of U.S. producers' U.S. shipments also fell from a high of $263.94 per 1,000 pounds in 2000 to an annual low of $243.19 per 1,000 pounds in 2002. In comparing the partial-year periods, U.S. producers' U.S. shipments increased in terms of quantity, value, and unit value.

Presented in table III-4 are data provided by domestic PC strand producers on their U.S. shipments, by type of market (i.e., pre- and post-tensioned) and restriction (i.e., "Buy America(n)").[19] These data reveal that, during January 2000-June 2003, just over three-quarters of U.S. producers' total U.S. shipments of PC strand were for the pre-tensioned market, 44.8 percent of which were subject to "Buy America(n)" restrictions. Of the slightly less than one-quarter of U.S. producers' total U.S. shipments that were destined for the post-tensioned market during January 2000-June 2003, only 22.6 percent were subject to "Buy America(n)" restrictions. In the aggregate, 39.5 percent of the U.S.

[18] Sivaco closed its U.S. PC strand facility in September 2003.

[19] The data presented do not include data of the three post-tensioners that responded to the Commission's producers' questionnaire in this final phase of the investigations. ***.

Table III-3
PC strand: U.S. shipments, by types, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
			Quantity (*1,000 pounds*)		
Commercial shipments	***	***	***	***	***
Internal consumption	***	***	***	***	***
Transfers to related firms	***	***	***	***	***
U.S. shipments	603,855	561,824	521,323	259,843	282,064
Export shipments	***	***	***	***	***
Total shipments	***	***	***	***	***
			Value (*1,000 dollars*)		
Commercial shipments	***	***	***	***	***
Internal consumption	***	***	***	***	***
Transfers to related firms	***	***	***	***	***
U.S. shipments	159,384[1]	142,959	126,778	61,961	69,096
Export shipments	***	***	***	***	***
Total shipments	***	***	***	***	***
			Unit value (*per pound*)		
Commercial shipments	$***	$***	$***	$***	$***
Internal consumption	***	***	***	***	***
Transfers to related firms	***	***	***	***	***
U.S. shipments	263.94	254.46	243.19	238.46	244.97
Export shipments	***	***	***	***	***
Total shipments	***	***	***	***	***

[1] The value of U.S. shipments presented for calendar year 2000 inthis table differs from that presented in table III-4 due to a minor internal reporting inconsistency in *** producer questionnaire response.

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

Table III-4
PC strand: U.S. producers' U.S. shipments, by type of market and restriction, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Quantity (*1,000 pounds*)				
U.S. shipments to the pre-tensioned market:					
Subject to "Buy America(n)" restrictions	189,394	176,067	181,171	111,498	121,394
Not subject to "Buy America(n)" restrictions	260,494	239,150	235,344	95,744	89,314
Subtotal	449,888	415,217	416,515	207,242	210,708
U.S. shipments of uncoated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal	***	***	***	***	***
U.S. shipments of epoxy-coated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal	***	***	***	***	***
Total U.S. shipments:					
Subject to "Buy America(n)" restrictions	222,056	203,286	216,810	129,895	134,797
Not subject to "Buy America(n)" restrictions	381,799	358,536	304,513	129,946	147,266
Total	603,855	561,823	521,323	259,841	282,063
	Value (*1,000 dollars*)				
U.S. shipments to the pre-tensioned market:					
Subject to "Buy America(n)" restrictions	53,018	48,589	46,167	27,773	30,047
Not subject to "Buy America(n)" restrictions	68,101	60,284	55,089	21,887	21,439
Subtotal	121,119	108,873	101,256	49,660	51,486
U.S. shipments of uncoated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal	***	***	***	***	***
U.S. shipments of epoxy-coated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal	***	***	***	***	***
Total U.S. shipments:					
Subject to "Buy America(n)" restrictions	62,866	56,109	55,626	32,367	33,358
Not subject to "Buy America(n)" restrictions	96,568	86,850	71,152	29,595	35,739
Total	159,434[1]	142,959	126,778	61,962	69,097

Table continued on following page.

Table III-4--*Continued*
PC strand: U.S. producers' U.S. shipments, by type of market and restriction, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Unit value (*per 1,000 pounds*)				
U.S. shipments to the pre-tensioned market:					
Subject to "Buy America(n)" restrictions	$279.93	$275.97	$254.83	$249.09	$247.52
Not subject to "Buy America(n)" restrictions	261.43	252.08	234.08	228.60	240.04
Subtotal	269.22	262.21	243.10	239.62	244.35
U.S. shipments of uncoated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal	***	***	***	***	***
U.S. shipments of epoxy-coated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal	***	***	***	***	***
Total U.S. shipments:					
Subject to "Buy America(n)" restrictions	283.11	276.01	256.57	249.18	247.47
Not subject to "Buy America(n)" restrictions	252.93	242.23	233.66	227.75	242.68
Total	264.03	254.46	243.19	238.46	244.97

[1] The value of U.S. shipments presented for calendar year 2000 in this table differs from that presented in table III-3 due to a minor internal reporting inconsistency in *** producer questionnaire response.

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

producers' total U.S. shipments were subject to "Buy America(n)" restrictions during January 2000-June 2003. The trend in the shares of U.S. shipments held by the two market segments and subject to "Buy America(n)" restrictions, as presented in table III-4, remained unchanged from 2000 to 2001; however, beginning in 2002 the shares held by U.S. shipments to the restricted pre-tensioned market and to the unrestricted post-tensioned market increased while the shares held by the unrestricted pre-tensioned market fell somewhat.

U.S. PRODUCERS' INVENTORIES

According to hearing testimony, the vast majority of domestic PC strand is manufactured by U.S. producers to particular specifications for stocking in inventory rather than being manufactured in response to a particular customer's order. The petitioners add that their PC strand inventory is not distinguished between that destined for post-tensioned or pre-tensioned applications.[20] Data collected in these investigations on domestic producers' end-of-period inventories of PC strand are presented in table III-5. U.S. producers' inventories, which accounted for between *** and *** percent of U.S.

[20] Hearing transcript, p. 17.

Table III-5
PC strand: U.S. producers' end-of-period inventories, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
Inventories (*1,000 pounds*)	51,918	53,043	47,117	42,542	33,940
Ratio of inventories to production (*percent*)	8.2	9.2	8.7	8.2	6.1
Ratio of inventories to U.S. shipments (*percent*)	8.6	9.4	9.0	8.2	6.0
Ratio of inventories to total shipments (*percent*)	***	***	***	***	***

Note.--Partial-year ratios are calculated using annualized production, U.S. shipments, and total shipments data.

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

producers' total shipments during 2000-02, increased by 2.2 percent in 2001, but fell by 11.2 percent in 2002 to a level below that which was reported in 2000. U.S. producers' inventories also fell by 20.2 percent in the first half of 2003.

U.S. EMPLOYMENT, WAGES, AND PRODUCTIVITY

U.S. producers' employment data for PC strand are presented in table III-6. In the aggregate, U.S. PC strand producers reported a decline of 24.8 percent in the number of production and related workers employed in the manufacture of PC strand during 2000-02. Likewise, the number of hours worked by these employees, as well as the total wages paid and unit labor costs, fell during the same time period. In contrast, hourly wages paid increased overall by $0.59 and productivity rose by 17.5 percent from 2000 to 2002. A comparison of the first half of 2002 and 2003 reveal that increases were reported in all indicators with the exception of unit labor costs which fell by $0.15.

Table III-6
PC strand: U.S. producers' employment-related indicators, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
Production and related workers (PRWs)	409	353	308	289	290
Hours worked by PRWs (*1,000 hours*)	926	788	671	330	341
Wages paid to PRWs (*1,000 dollars*)	13,481	12,109	10,171	4,984	5,325
Hourly wages	$14.56	$15.36	$15.15	$15.12	$15.61
Productivity (*pounds produced per hour*)	684.3	730.9	803.9	750.6	780.8
Unit labor costs (*per 1,000 pounds*)	$21.28	$21.01	$18.85	$20.14	$19.99

Note.--Interim period data do not include data of ***.

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

PART IV: U.S. IMPORTS, APPARENT U.S. CONSUMPTION, AND MARKET SHARES

In response to Commission questionnaires sent to importers in the final phase of these investigations, 12 firms supplied usable data. Presented in table IV-1 are the responding 12 U.S. importers and estimates of 2002 coverage, by country, based on a comparison with official import statistics of Commerce.

Table IV-1
PC strand: U.S. importers, locations, and shares of 2002 subject U.S. imports, by subject country

* * * * * * *

U.S. IMPORTS

U.S. import data for the five subject countries presented in the body of this report are based on responses to Commission questionnaires.[1] U.S. import data for the nonsubject countries presented in this report are based on official import statistics (table IV-2).[2] The cumulated U.S. import data for all subject countries show an increase both in volume and value in each year between 2000 and 2002; however, cumulated unit values declined over the same period. With the exception of U.S. imports from Brazil, the quantity of imports from each subject country also individually increased during 2000-02. Imports from Brazil of PC strand, on the other hand, fell overall by *** percent from 2000 to 2002. Official import statistics and questionnaire data for calendar year 2002 (the most recent 12-month period prior to the filing of the petition for which import data are available) show that imports from each of the subject countries exceeded the three percent negligibility threshold and that imports from India exceeded the four percent negligibility threshold applicable to subsidized imports from developing countries.

Unit values for imports from all five subject countries fell overall from 2000 to 2002 and, with the exception of U.S. imports from Mexico, ranged from between $*** and $*** per 1,000 pounds. The unit value of subject imports increased during the partial-year periods. The unit values of U.S. imports from Mexico are noticeably higher than the imports from the other four subject countries, falling overall from $*** per 1,000 pounds in 2000 to $*** per 1,000 pounds in 2002. The unit value increased to $***

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[1] The Mexican respondents indicated that the official import statistics are "unusable" for the purpose of these investigations due to misclassification of merchandise into classifications other than PC strand. Hearing transcript, pp. 276-277. Counsel for the Brazilian respondent indicated that the two data sets are reasonably close. In view of this similarity, they have no objections to the Commission's use of the data compiled from the questionnaire responses for Brazil. Telephone conversation with *** of Hogan & Hartson, December 5, 2003. The petitioners testified that "either source of data shows increasing trends, whether it's been volume or market share. We just thought that the Commerce statistics were another good source to be able to corroborate those trends because they do cover 100 percent." Hearing transcript, p. 152. Because reasonably complete import coverage was obtained through questionnaire responses in these investigations and because possible misclassification issues with respect to the official import statistics have been raised, the data provided in response to the Commission's importers' questionnaire are presented for subject imports, apparent consumption, and market shares, unless otherwise indicated. Official import statistics for all countries are presented separately in app. C (table C-4) and in tables IV-4 and IV-5. PC strand is provided for in statistical reporting numbers 7312.10.3010 and 7312.10.3012, and subheading 7312.10.20 (Thailand only) of the HTS.

[2] The official import statistics rather than Commission questionnaire import data are presented for nonsubject imports because of insufficient coverage of imports from nonsubject sources in the questionnaire responses.

Table IV-2
PC strand: U.S. imports, by sources, 2000-02, January-June 2002, and January-June 2003

Source	Calendar year			January-June	
	2000	2001	2002	2002	2003
			Quantity (*1,000 pounds*)		
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
Subtotal	115,798	128,526	166,888	79,310	88,497
Other sources	63,340	70,167	61,981	33,340	35,250
Total	179,138	198,693	228,869	112,650	123,747
			Value (*1,000 dollars*)[1]		
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
Subtotal	29,444	29,383	38,315	17,950	21,511
Other sources	16,837	18,955	15,108	8,294	8,998
Total	46,281	48,338	53,423	26,244	30,509
			Unit value (*per 1,000 pounds*)[1]		
Brazil	$***	$***	$***	$***	$***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
Average	254.27	228.61	229.58	226.33	243.07
Other sources	265.82	270.13	243.75	248.78	255.27
Average	258.36	243.28	233.42	232.97	246.55

Table continued on next page.

Table IV-2--*Continued*
PC strand: U.S. imports, by sources, 2000-02, January-June 2002, and January-June 2003

Source	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Share of quantity (*percent*)				
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
Subtotal	64.6	64.7	72.9	70.4	71.5
Other sources	35.4	35.3	27.1	29.6	28.5
Total	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
Subtotal	63.6	60.8	71.7	68.4	70.5
Other sources	36.4	39.2	28.3	31.6	29.5
Total	100.0	100.0	100.0	100.0	100.0

[1] Landed, duty-paid.

Note.–Because of rounding, figures may not add to the totals shown.

Source: Compiled from data submitted in response to Commission questionnaires (subject countries) and from official Commerce statistics (all other sources).

per 1,000 pounds during the first half of 2003. The importer questionnaire response of Cablesa indicated that the unit values of its U.S. imports from Mexico, of which *** percent were plastic-coated strand destined for ***, ranged from $*** to $*** per 1,000 pounds during 2000-01.[3] The importer questionnaire response of Camesa indicated that the unit values of its U.S. imports from Mexico, of which *** percent were plastic-coated PC strand destined for ***, ranged from $*** to $*** per 1,000 pounds during January 2000-June 2003. The importer questionnaire response of Universal Products indicated that the unit values of its U.S. imports from Mexico, *** of which were plastic-coated PC strand destined for ***, ranged from $*** to $*** per 1,000 pounds during January 2000-June 2003.

[3] ***.

According to questionnaire responses, *** percent of the Mexican PC strand imported into the United States during January 2000-June 2003 was of the higher value-added plastic-coated product.

U.S. importers provided data concerning their U.S. shipments of PC strand that were destined for the pre- and post-tensioned markets and the shares subject to "Buy America(n)" restrictions. These data, presented in table IV-3, reveal that, during January 2000-June 2003, 96.8 percent of the quantity of subject importers' total U.S. shipments of PC strand were destined for the post-tensioned market and 3.2 percent were for the pre-tensioned market.[4]

Official import statistics, by customs district, reflect somewhat overlapping ports of entry for imports of PC strand from the subject countries (table IV-4). These data for 2002 indicate that imports of PC strand from Brazil, India, Korea, and Mexico each entered the United States into Texas and imports from Brazil, India, Korea, and Thailand each entered into California. During 2000 and 2001, these statistics reflect imports of PC strand from all five subject countries into Texas and imports from India, Korea, and Thailand into California. For Brazil and India, the majority of imports entered through Houston-Galveston, TX during 2000-02, for Korea and Thailand the majority of imports entered through Los Angeles, CA, and for Mexico nearly all the imports entered through Laredo, TX.

A review of monthly import data for January 2000 through June 2003 indicates that imports of PC strand from each of the subject countries entered the United States in each month of 2001, 2002, and the first half of 2003 (table IV-5). During 2000, imports of PC strand from each of the subject countries entered the United States in each month, except there were no imports from India during July and no imports from Thailand during April, June, August, and October.

APPARENT U.S. CONSUMPTION

The demand for PC strand is derived from the use of PC strand in the construction industry. According to conference testimony, there have been two primary drivers of market demand in the past few years: (1) the funding by the Department of Transportation for infrastructure and transportation projects and (2) private construction.[5]

Data collected in these investigations concerning apparent U.S. consumption of PC strand, as shown in table IV-6, are based on U.S. producers' U.S. shipments of PC strand and subject importers' U.S. shipments of PC strand from responses to Commission questionnaires. Nonsubject importers' U.S. imports of PC strand presented are from official Commerce import statistics. In terms of quantity, U.S. consumption fell by 4.8 percent from 2000 to 2002 and, in terms of value, consumption fell by 12.4 percent during the same period. U.S. consumption increased during the partial-year periods by 8.9 percent in terms of quantity and by 12.8 percent in terms of value.

U.S. MARKET SHARES

U.S. market share data are presented in table IV-7. The cumulated share of the subject imports of PC strand from the five subject countries increased from 15.1 percent in 2000 to 17.0 percent in 2001, and then to 22.0 percent in 2002. The market share held by the subject imports was 21.5 percent during the first half of 2003 compared with 21.0 percent in the corresponding period of 2002. Converse to the increasing volume and market share of the subject imports, U.S. producers' share of the domestic market

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[4] Although not presented in table IV-3, the data provided by nonsubject importers reveal that, during January 2000-June 2003, 56.9 percent of nonsubject importers' total U.S. shipments of PC strand, on a volume basis, were destined for the post-tensioned market and 43.1 percent were for the pre-tensioned market.

[5] Conference transcript, pp. 65 and 66.

Table IV-3
PC strand: Subject importers' U.S. shipments, by type of market and restriction, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Quantity (*1,000 pounds*)				
U.S. shipments to the pre-tensioned market:					
Subject to "Buy America(n)" restrictions	0	0	0	0	0
Not subject to "Buy America(n)" restrictions	5,851	3,666	3,221	1,889	3,216
Subtotal, pre-tensioned market	5,851	3,666	3,221	1,889	3,216
U.S. shipments of uncoated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal, uncoated PC strand to the post-tensioned market	***	***	***	***	***
U.S. shipments of plastic-coated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal, plastic-coated PC strand to the post-tensioned market	***	***	***	***	***
Total U.S. shipments:					
Subject to "Buy America(n)" restrictions	0	0	0	0	0
Not subject to "Buy America(n)" restrictions	118,623	129,210	166,559	77,959	86,739
Total U.S. shipments	118,623	129,210	166,559	77,959	86,739
	Value (*1,000 dollars*)				
U.S. shipments to the pre-tensioned market:					
Subject to "Buy America(n)" restrictions	0	0	0	0	0
Not subject to "Buy America(n)" restrictions	1,783	877	736	445	835
Subtotal, pre-tensioned market	1,783	877	736	445	835
U.S. shipments of uncoated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal, uncoated PC strand to the post-tensioned market	***	***	***	***	***
U.S. shipments of plastic-coated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal, plastic-coated PC strand to the post-tensioned market	***	***	***	***	***
Total U.S. shipments:					
Subject to "Buy America(n)" restrictions	0	0	0	0	0
Not subject to "Buy America(n)" restrictions	30,160	31,655	39,189	18,856	22,416
Total U.S. shipments	30,160	31,655	39,189	18,856	22,416

Table continued on following page.

Table IV-3--*Continued*
PC strand: Subject importers' U.S. shipments, by type of market and restriction, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Unit value (*per 1,000 pounds*)				
U.S. shipments to the pre-tensioned market:					
Subject to "Buy America(n)" restrictions	(1)	(1)	(1)	(1)	(1)
Not subject to "Buy America(n)" restrictions	$304.64	$239.26	$228.64	$235.52	$259.72
Subtotal, pre-tensioned market	304.64	239.26	228.64	235.52	259.72
U.S. shipments of uncoated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal, uncoated PC strand to the post-tensioned market	***	***	***	***	***
U.S. shipments of plastic-coated PC strand to the post-tensioned market:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Subtotal, plastic-coated PC strand to the post-tensioned market	***	***	***	***	***
Total U.S. shipments:					
Subject to "Buy America(n)" restrictions	(1)	(1)	(1)	(1)	(1)
Not subject to "Buy America(n)" restrictions	254.25	244.98	235.28	241.88	258.43
Total U.S. shipments	254.25	244.98	235.28	241.88	258.43

[1] Not applicable.

Note.–Because of data inconsistencies reported in importer questionnaire responses, total quantities and values of U.S. shipments of imports from the subject countries may not agree with such data presented in table IV-6.

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

Table IV-4
PC strand: U.S. imports, by source and customs district, 2000-02, January-June 2002, and January-June 2003

Source	District	Calendar year			January-June	
		2000	2001	2002	2002	2003
		Quantity (*1,000 pounds*)				
Brazil	Baltimore, MD	0	0	789	176	529
	Houston-Galveston, TX	24,058	18,484	19,391	6,931	13,201
	Los Angeles, CA	0	0	1,243	0	2,409
	Miami, FL	2,579	1,119	1,247	979	2,127
	New Orleans, LA	1,054	962	776	228	684
	New York, NY	0	184	776	182	403
	Norfolk, VA	409	0	0	0	0
	Philadelphia, PA	496	181	0	0	0
	San Juan, PR	1,921	958	822	0	911
	Tampa FL	2,884	1,096	0	0	0
	Total, Brazil	33,401	22,985	25,046	8,496	20,264
India	Charleston, SC	799	0	0	0	0
	Houston-Galveston, TX	5,047	10,131	7,418	6,565	0
	Los Angeles, CA	1,534	4,531	11,128	6,267	2,722
	Miami, FL	1,078	182	0	0	0
	Norfolk, VA	43	0	0	0	0
	Savannah, GA	899	0	0	0	0
	Total, India	9,401	14,845	18,546	12,832	2,722
Korea	Buffalo, NY	1	0	0	0	0
	Columbia-Snake, OR	0	679	0	0	0
	Honolulu, HI	0	0	582	187	437
	Houston-Galveston, TX	5,510	6,697	2,057	1,993	0
	Los Angeles, CA	30,007	27,284	47,278	20,452	33,760
	New Orleans, LA	255	0	0	0	0
	Philadelphia, PA	0	39	0	0	0
	Port Arthur, TX	398	0	0	0	0
	San Francisco, CA	237	394	796	528	0
	Savannah, GA	2,115	7,958	11,349	8,102	0
	Seattle, WA	0	192	46	0	0
	Tampa, FL	3,135	0	0	0	0
	Total, Korea	41,658	43,244	62,109	31,262	34,197

Table continued on following page.

Table IV-4--*Continued*
PC strand: U.S. imports, by source and customs district, 2000-02, January-June 2002, and January-June 2003

Source	District	Calendar year			January-June	
		2000	2001	2002	2002	2003
		Quantity (*1,000 pounds*)				
Mexico	Cleveland, OH	0	0	(1)	0	0
	Laredo, TX	36,796	45,236	53,999	27,120	31,256
	Seattle, WA	0	45	0	0	0
	Tampa, FL	118	0	0	0	0
	Total, Mexico	36,913	45,281	54,000	27,120	31,256
Thailand	Houston-Galveston, TX	2,039	42	0	0	0
	Los Angeles, CA	5,455	13,813	9,764	5,445	5,353
	San Francisco, CA	0	0	312	312	0
	Savannah, GA	0	133	0	0	0
	Seattle, WA	0	584	611	441	0
	St. Louis, MO	0	2	0	0	0
	Total, Thailand	7,494	14,574	10,688	6,198	5,353

[1] Less than 500 pounds.

Note.–Because of rounding, figures may not add to the totals shown.

Source: Compiled from official Commerce statistics (HTS subheading 7312.10.20 (Thailand only) and statistical reporting numbers 7312.10.3010 and 7312.10.3012).

Table IV-5
PC strand: U.S. imports, by source and by month, January 2000-June 2003

Period	Brazil	India	Korea	Mexico	Thailand	Subtotal, subject countries	All other countries	Total, all countries
				Quantity (*1,000 pounds*)				
2000:								
January	4,280	1,298	5,224	679	905	12,387	5,293	17,681
February	2,703	897	9,124	2,187	1,026	15,937	4,194	20,131
March	5,419	1,120	4,211	1,836	1,210	13,796	4,311	18,107
April	2,633	1,471	1,930	2,679	0	8,713	3,549	12,262
May	3,941	843	2,211	3,821	266	11,083	9,127	20,209
June	1,926	380	2,663	4,184	0	9,153	4,205	13,359
July	2,554	0	4,407	3,959	1,759	12,679	7,539	20,218
August	1,908	131	2,239	3,775	0	8,053	4,632	12,686
September	1,126	836	2,759	3,193	708	8,622	7,206	15,828
October	2,606	178	3,659	4,268	0	10,710	3,719	14,428
November	1,970	620	1,320	3,001	1,191	8,102	4,022	12,124
December	2,335	1,627	1,910	3,331	429	9,631	5,542	15,173
2001:								
January	2,415	87	3,620	3,415	1,184	10,722	8,057	18,779
February	138	662	2,356	2,971	1	6,128	4,215	10,343
March	2,057	884	3,175	3,661	1,412	11,189	6,291	17,479
April	1,973	355	3,565	3,180	1,139	10,212	5,319	15,531
May	1,974	583	2,983	4,264	2,127	11,931	4,929	16,860
June	2,190	2,180	2,660	4,732	1,308	13,071	6,371	19,442
July	3,113	1,838	5,303	4,083	1,206	15,542	6,797	22,239
August	720	1,505	5,391	4,465	1,510	13,590	7,490	21,081
September	3,419	267	2,992	3,952	2,015	12,644	3,007	15,651
October	2,418	2,422	6,579	4,989	710	17,118	7,429	24,547
November	183	1,547	3,642	4,091	806	10,269	4,266	14,535
December	2,386	2,515	978	1,479	1,155	8,512	5,996	14,508

Table continued on following page.

Table IV-5--*Continued*
PC strand: U.S. imports, by source and by month, January 2000-June 2003

Period	Brazil	India	Korea	Mexico	Thailand	Subtotal, subject countries	All other countries	Total, all countries
				Quantity (*1,000 pounds*)				
2002:								
January	2,186	3,234	3,592	3,733	575	13,320	6,320	19,640
February	2,281	1,938	2,923	3,179	1,761	12,083	6,265	18,348
March	1,215	1,617	4,821	4,897	1,639	14,188	4,746	18,934
April	1,134	2,168	7,707	5,442	801	17,251	5,950	23,202
May	1,150	1,982	3,060	5,237	933	12,361	6,336	18,698
June	532	1,893	9,159	4,633	488	16,704	3,722	20,426
July	1,140	518	6,347	5,056	1,062	14,124	8,483	22,607
August	1,457	1,084	4,654	5,191	928	13,313	3,911	17,224
September	2,854	1,030	4,653	5,342	1,332	15,211	1,936	17,147
October	4,572	1,037	4,857	5,834	136	16,436	5,038	21,474
November	3,190	648	5,595	2,875	494	12,802	5,218	18,020
December	3,336	1,397	4,740	2,582	539	12,594	4,056	16,650
2003:								
January	3,731	527	6,527	4,368	1,310	16,463	4,709	21,171
February	4,123	802	4,866	5,159	677	15,627	3,327	18,954
March	3,730	211	6,277	5,812	356	16,386	5,055	21,440
April	3,293	763	6,857	3,841	2,070	16,825	6,023	22,848
May	2,075	279	4,265	6,533	673	13,825	6,205	20,030
June	3,312	140	5,405	5,543	268	14,667	9,932	24,599

Source: Compiled from official import statistics (HTS subheading 7312.10.20 (Thailand only) and statistical reporting numbers 7312.10.3010 and 7312.10.3012).

Table IV-6
PC strand: U.S. shipments of domestic product, U.S. import shipments, by sources, and apparent U.S. consumption, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
			Quantity (*1,000 pounds*)		
U.S. producers' shipments	603,855	561,824	521,323	259,843	282,064
U.S. shipments of imports from--					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	118,623	129,210	164,878	77,959	86,739
Nonsubject countries[1]	63,340	70,167	61,981	33,340	35,250
All countries	181,963	199,377	226,859	111,299	121,989
Apparent U.S. consumption	785,818	761,201	748,182	371,142	404,053
			Value (*1,000 dollars*)		
U.S. producers' shipments	159,384	142,959	126,778	61,961	69,096
U.S. shipments of imports from--					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	30,845	32,134	39,509	18,878	22,416
Nonsubject countries[1]	16,837	18,955	15,108	8,294	8,998
All countries	47,682	51,089	54,617	27,172	31,414
Apparent U.S. consumption	207,066	194,048	181,395	89,133	100,510

[1] U.S. imports, not U.S. shipments of imports, from official Commerce statistics.

Note.–Because of data inconsistencies reported in importer questionnaire responses, total quantities and values of U.S. shipments of imports from the subject countries may not agree with such data presented in table IV-3.

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

Table IV-7
PC strand: Apparent U.S. consumption and market shares, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
			Quantity (*1,000 pounds*)		
Apparent U.S. consumption	785,818	761,201	748,182	371,142	404,053
			Value (*1,000 dollars*)		
Apparent U.S. consumption	207,066	194,048	181,395	89,133	100,510
			Share of quantity (*percent*)		
U.S. producers' shipments	76.8	73.8	69.7	70.0	69.8
U.S. shipments of imports from--					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	15.1	17.0	22.0	21.0	21.5
Nonsubject countries[1]	8.1	9.2	8.3	9.0	8.7
All countries	23.2	26.2	30.3	30.0	30.2
			Share of value (*percent*)		
U.S. producers' shipments	77.0	73.7	69.9	69.5	68.7
U.S. shipments of imports from--					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	14.9	16.6	21.8	21.2	22.3
Nonsubject countries[1]	8.1	9.8	8.3	9.3	9.0
All countries	23.0	26.3	30.1	30.5	31.3

[1] U.S. imports, not U.S. shipments of imports, from official Commerce statistics.

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

dropped during each year, falling from 76.8 percent in 2000 to 73.8 percent in 2001, and further to 69.7 percent in 2002. The U.S. producers' share of the U.S. market during the first half of 2003 was 69.8 percent compared with 70.0 percent in the corresponding period of 2002.

U.S. importers and producers provided data concerning their U.S. shipments of PC strand destined for the pre- and post-tensioned markets and U.S. shipments subject to "Buy America(n)" restrictions. These data, shown in table IV-8, indicate that the share of U.S. consumption held by the pre-tensioned market fell slightly from 61.9 percent in 2000 to 60.6 percent in 2002. The share fell to 56.7 percent in the first half of 2003 from 62.1 percent in the first half of 2002. The share of the pre-tensioned market subject to "Buy America(n)" restrictions ranged from 40.5 to 41.7 percent during 2000-02, but increased from 51.2 percent to 55.6 percent during the partial-year periods. The share of U.S. consumption held by the post-tensioned market rose slightly from 38.1 percent in 2000 to 39.4 percent in 2002. The share increased to 43.3 percent in the first half of 2003 from 37.9 percent during the first half of 2002. The share of the post-tensioned market subject to "Buy America(n)" restrictions fell from 11.4 percent to 9.6 percent from 2000 to 2001, but increased to 12.6 percent in 2002. A decline was reported during the partial-year periods. The share of the total U.S. PC strand market held by product subject to "Buy America(n)" restrictions hovered around 30 percent during 2000-02.

The subject imports of PC strand accounted for less than two percent and the domestic producers accounted for greater than 95 percent of U.S. consumption of PC strand destined for the pre-tensioned market during January 2000-June 2003. The share of U.S. consumption of PC strand destined for the post-tensioned market held by the U.S. producers fell from a high of 53.5 percent during 2000 to a low of 37.1 percent during 2002. U.S. producers held 39.7 percent of that market during the first half of 2002 and 42.8 percent during the first half of 2003. The share held by the subject importers increased from 39.2 percent during 2000 to 57.9 percent in 2002. The subject importers' share fell during the partial-year periods. The share of U.S. consumption of the total PC strand market held by the U.S. producers fell from a high of 80.0 percent during 2000 to a low of 72.7 percent during 2002. U.S. producers held 74.2 percent of that market during the first half of 2002 and 73.3 percent during the first half of 2003. The share held by the subject importers increased from 15.7 percent during 2000 to 23.2 percent in 2002. The subject importers' share remained relatively unchanged during the partial-year periods.

RATIO OF SUBJECT IMPORTS TO U.S. PRODUCTION

Information concerning the ratio of subject imports to U.S. production of PC strand is presented in table IV-9. Aggregate subject imports were equivalent to 18.3 percent of U.S. production during 2000. This level increased to 30.9 percent during 2002 and further to 32.1 percent during the first half of 2003. U.S. imports from Korea and Mexico accounted for the bulk of the increase in the aggregate ratio from 2000 to 2002.

Table IV-8
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Pre-tensioned market				
	Quantity (*1,000 pounds*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	189,394	176,067	181,171	111,498	121,394
Not subject to "Buy America(n)" restrictions	260,494	239,150	235,344	95,744	89,314
Total, U.S. producers' U.S. shipments	449,888	415,217	416,515	207,242	210,708
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	5,851	3,666	3,221	1,889	3,216
Nonsubject countries	11,498	12,475	15,206	8,489	4,350
All countries	17,349	16,142	18,426	10,378	7,567
Total, apparent U.S. consumption	467,237	431,359	434,941	217,620	218,275
	Value (*1,000 dollars*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	53,018	48,589	46,167	27,773	30,047
Not subject to "Buy America(n)" restrictions	68,101	60,284	55,089	21,887	21,439
Total, U.S. producers' U.S. shipments	121,119	108,873	101,256	49,660	51,486
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	1,783	877	736	445	835
Nonsubject countries	3,512	3,669	4,805	2,505	1,269
All countries	5,294	4,546	5,541	2,950	2,104
Total, apparent U.S. consumption	126,413	113,419	106,797	52,610	53,590

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Pre-tensioned market				
	Share of quantity (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	40.5	40.8	41.7	51.2	55.6
Not subject to "Buy America(n)" restrictions	55.8	55.4	54.1	44.0	40.9
Total, U.S. producers' U.S. shipments	96.3	96.3	95.8	95.2	96.5
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	1.3	0.9	0.7	0.9	1.5
Nonsubject countries	2.5	2.9	3.5	3.9	2.0
All countries	3.7	3.7	4.2	4.8	3.5
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	41.9	42.8	43.2	52.8	56.1
Not subject to "Buy America(n)" restrictions	53.9	53.2	51.6	41.6	40.0
Total, U.S. producers' U.S. shipments	95.8	96.0	94.8	94.4	96.1
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	1.4	0.8	0.7	0.8	1.6
Nonsubject countries	2.8	3.2	4.5	4.8	2.4
All countries	4.2	4.0	5.2	5.6	3.9
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Post-tensioned market (uncoated PC strand)				
	Quantity (*1,000 pounds*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	***	***	***	***	***
	Value (*1,000 dollars*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	***	***	***	***	***

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Post-tensioned market (uncoated PC strand)				
	Share of quantity (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Post-tensioned market (coated PC strand)				
	Quantity (*1,000 pounds*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	***	***	***	***	***
	Value (*1,000 dollars*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	***	***	***	***	***

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Post-tensioned market (coated PC strand)				
	Share of quantity (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	***	***	***	***	***
Not subject to "Buy America(n)" restrictions	***	***	***	***	***
Total, U.S. producers' U.S. shipments	***	***	***	***	***
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	***	***	***	***	***
Nonsubject countries	***	***	***	***	***
All countries	***	***	***	***	***
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Total post-tensioned market (uncoated plus coated)				
	Quantity (*1,000 pounds*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	32,662	27,219	35,639	18,397	13,403
Not subject to "Buy America(n)"	121,305	119,386	69,169	34,202	57,952
Total, U.S. producers' U.S. shipments	153,967	146,606	104,808	52,599	71,355
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	112,772	125,544	163,339	76,069	83,522
Nonsubject countries	20,863	10,856	14,065	3,918	11,778
All countries	133,634	136,400	177,404	79,987	95,301
Total, apparent U.S. consumption	287,601	283,006	282,212	132,586	166,656
	Value (*1,000 dollars*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	9,848	7,521	9,459	4,594	3,311
Not subject to "Buy America(n)"	28,467	26,566	16,063	7,708	14,300
Total, U.S. producers' U.S. shipments	38,315	34,086	25,522	12,302	17,611
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	28,377	30,777	38,452	18,411	21,580
Nonsubject countries	5,054	2,480	2,733	948	2,857
All countries	33,431	33,257	41,185	19,359	24,438
Total, apparent U.S. consumption	71,746	67,344	66,707	31,661	42,049

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Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Total post-tensioned market (uncoated plus coated)				
	Share of quantity (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	11.4	9.6	12.6	13.9	8.0
Not subject to "Buy America(n)"	42.2	42.2	24.5	25.8	34.8
Total, U.S. producers' U.S. shipments	53.5	51.8	37.1	39.7	42.8
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	39.2	44.4	57.9	57.4	50.1
Nonsubject countries	7.3	3.8	5.0	3.0	7.1
All countries	46.5	48.2	62.9	60.3	57.2
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	13.7	11.2	14.2	14.5	7.9
Not subject to "Buy America(n)"	39.7	39.4	24.1	24.3	34.0
Total, U.S. producers' U.S. shipments	53.4	50.6	38.3	38.9	41.9
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	39.6	45.7	57.6	58.2	51.3
Nonsubject countries	7.0	3.7	4.1	3.0	6.8
All countries	46.6	49.4	61.7	61.1	58.1
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Total PC strand market (pre-tensioned plus post-tensioned)				
	Quantity (*1,000 pounds*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	222,056	203,286	216,810	129,895	134,797
Not subject to "Buy America(n)" restrictions	381,799	358,536	304,513	129,946	147,266
Total, U.S. producers' U.S. shipments	603,855	561,823	521,323	259,841	282,063
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	118,623	129,210	166,559	77,959	86,739
Nonsubject countries	32,361	23,331	29,271	12,407	16,128
All countries	150,984	152,541	195,830	90,366	102,867
Total, apparent U.S. consumption	754,839	714,363	717,154	350,206	384,929
	Value (*1,000 dollars*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	62,866	56,109	55,626	32,367	33,358
Not subject to "Buy America(n)" restrictions	96,568	86,850	71,152	29,595	35,739
Total, U.S. producers' U.S. shipments	159,434	142,959	126,778	61,962	69,097
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	30,160	31,655	39,189	18,856	22,416
Nonsubject countries	8,566	6,149	7,538	3,453	4,126
All countries	38,726	37,804	46,727	22,309	26,542
Total, apparent U.S. consumption	198,160	180,763	173,504	84,271	95,638

Table continued on following page.

Table IV-8--*Continued*
PC strand: U.S. shipments of domestic product, U.S. shipments of imported product, apparent U.S. consumption, and market shares, by sources, by market, and by types of strand (uncoated or coated), 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Total PC strand market (pre-tensioned plus post-tension)				
	Share of quantity (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	29.4	28.5	30.2	37.1	35.0
Not subject to "Buy America(n)"	50.6	50.2	42.5	37.1	38.3
Total, U.S. producers' U.S. shipments	80.0	78.6	72.7	74.2	73.3
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	15.7	18.1	23.2	22.3	22.5
Nonsubject countries	4.3	3.3	4.1	3.5	4.2
All countries	20.0	21.4	27.3	25.8	26.7
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
U.S. producers' U.S. shipments:					
Subject to "Buy America(n)" restrictions	31.7	31.0	32.1	38.4	34.9
Not subject to "Buy America(n)"	48.7	48.0	41.0	35.1	37.4
Total, U.S. producers' U.S. shipments	80.5	79.1	73.1	73.5	72.2
U.S. importers' U.S. shipments:					
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	15.2	17.5	22.6	22.4	23.4
Nonsubject countries	4.3	3.4	4.3	4.1	4.3
All countries	19.5	20.9	26.9	26.5	27.8
Total, apparent U.S. consumption	100.0	100.0	100.0	100.0	100.0

Note.--Total apparent U.S. consumption data presented in this table do not equal total apparent U.S. consumption data presented elsewhere in this report. In addition to inconsistencies reported by firms within individual questionnaires, the consumption data presented in this table for nonsubject countries are calculated using U.S. importers' U.S. shipments from questionnaire responses and the data presented elsewhere in this report for nonsubject countries are calculated using U.S. imports from official import statistics. Because of insufficient questionnaire response coverage of imports from nonsubject sources, the nonsubject country data and total apparent U.S. consumption data presented in this table are understated.

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

Table IV-9
PC strand: Ratio of U.S. imports to U.S. production, by sources, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Ratio of U.S. imports to production (*percent*)				
Brazil	***	***	***	***	***
India	***	***	***	***	***
Korea	***	***	***	***	***
Mexico	***	***	***	***	***
Thailand	***	***	***	***	***
All subject countries	18.3	22.3	30.9	30.5	32.1
Nonsubject countries	10.0	12.2	11.5	12.8	12.8
All countries	28.3	34.5	42.4	43.4	44.8

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

PART V: PRICING AND RELATED INFORMATION

FACTORS AFFECTING PRICES

Transportation Costs

All subject countries except Mexico incur sizable costs for ocean freight to access the U.S. market. Estimates of these charges were derived from official import data and represent the cost of the PC strand plus insurance and freight compared with its customs value (table V-1). Transportation costs of PC strand shipped from Brazil and India were usually highest.

Table V-1
PC strand: Transportation costs to the U.S. market, by countries, 2002 and January-August 2003

Country	Transportation costs (ratio (*in percent*) to customs value)	
	2002	January-August 2003
Brazil	14.9	16.1
India	17.1	15.2
Korea	14.8	10.8
Mexico	7.1	4.6
Thailand	14.3	13.3

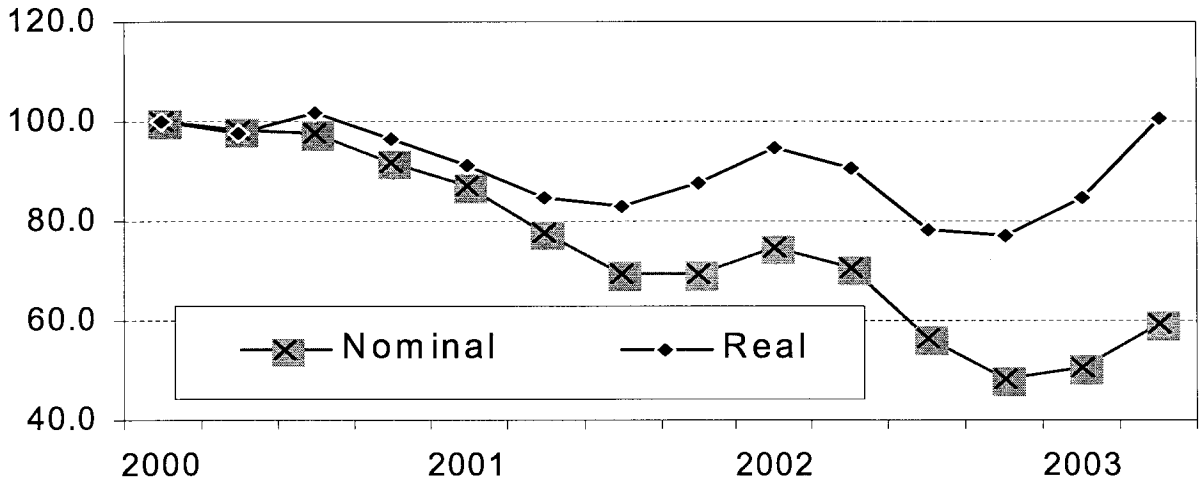
Source: Compiled from official Commerce statistics.

U.S. producers reported that they generally made the arrangements to ship PC strand to their customers. Most importers reported that they made the transportation arrangements themselves, although *** and *** reported that purchasers usually made the transportation arrangements. U.S. producers' average transport cost as a share of the total delivered costs of PC strand was 5.7 percent. Similarly, importers reported an average U.S. inland transport cost of 7.7 percent of the total delivered cost of PC strand. U.S. producers reported that 34.4 percent, 60.0 percent, and 5.6 percent of their sales were, respectively, within 100 miles, between 101 and 1,000 miles, and over 1,000 miles of their production facilities. Importers reported that 62.9 percent of their sales were within 100 miles of their storage facilities or ports of entry, 36.4 percent were between 101 and 1,000 miles, and 0.7 percent were over 1,000 miles.

Exchange Rates

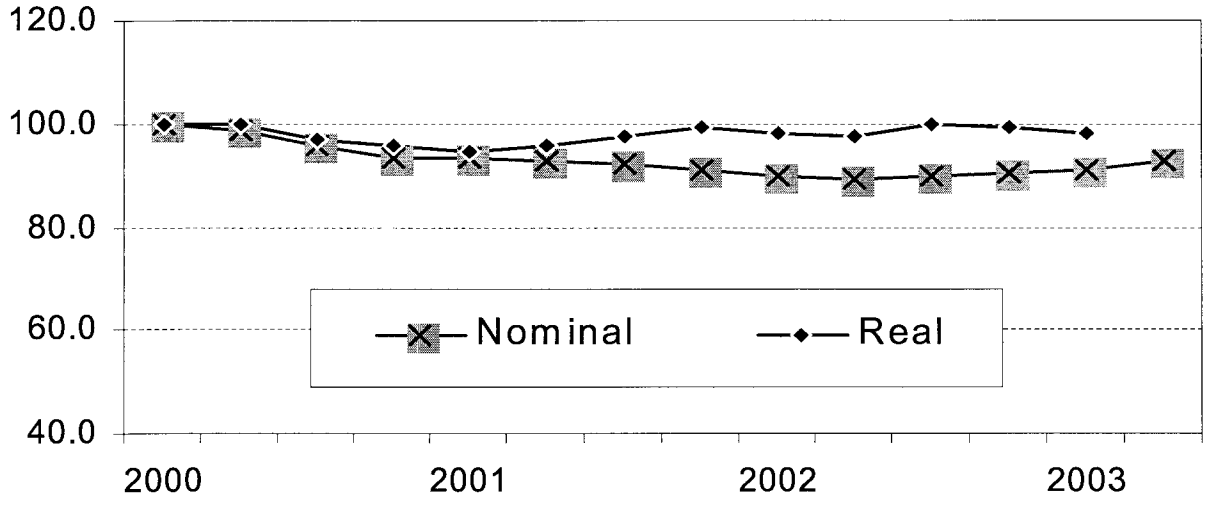
Quarterly data reported by the International Monetary Fund indicate that the nominal U.S. dollar price of the Brazilian real fell by 40.6 percent between the first quarter of 2000 and the second quarter of 2003, although the real was more stable in real terms during this period (figure V-1). The nominal U.S. dollar price of the Indian rupee fell by 7.4 percent between the first quarter of 2000 and the second quarter of 2003, although the rupee only depreciated by 1.7 percent in real terms between the first quarter of 2000 and the first quarter of 2003, the last period for which data were available (figure V-2). The nominal U.S. dollar price of the Korean won fell by 6.9 percent between the first quarter of 2000 and the second quarter of 2003, although the won only depreciated by 5.4 percent in real terms during this time (figure V-3). Between the first quarter of 2000 and the second quarter of 2003, the nominal value of the

Figure V-1
Exchange rates: Indexes (first quarter 2000=100) of the nominal and real U.S. dollar price of the Brazilian real, by quarters, first quarter 2000-second quarter 2003



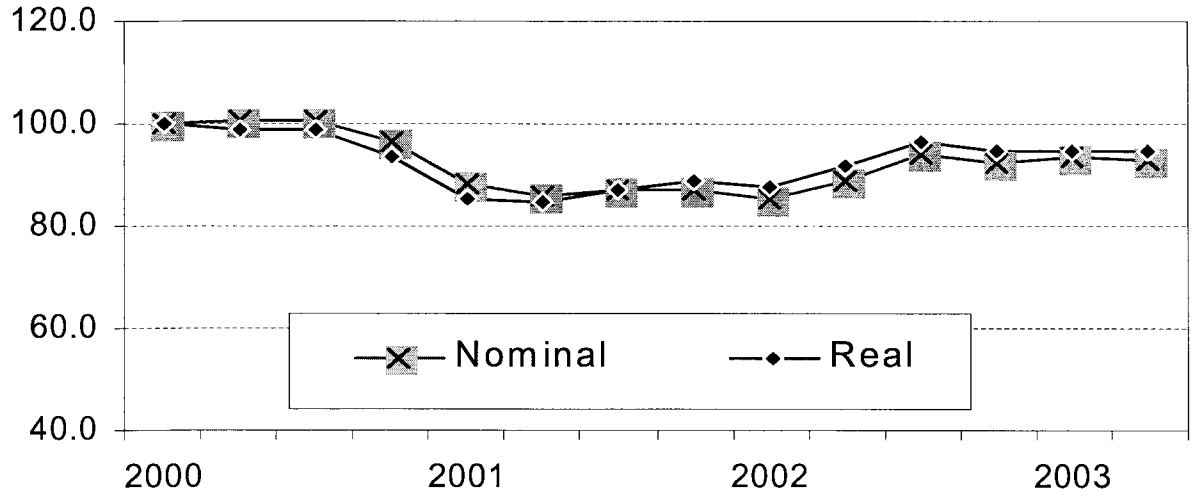
Source: International Monetary Fund, *International Financial Statistics*, August 2003.

Figure V-2
Exchange rates: Indexes (first quarter 2000=100) of the nominal and real U.S. dollar price of the Indian rupee, by quarters, first quarter 2000-second quarter 2003



Source: International Monetary Fund, *International Financial Statistics*, August 2003.

Figure V-3
Exchange rates: Indexes (first quarter 2000=100) of the nominal and real U.S. dollar price of the Korean won, by quarters, first quarter 2000 - second quarter 2003



Source: International Monetary Fund, *International Financial Statistics*, August 2003.

Mexican peso fell by 10.1 percent relative to the U.S. dollar, and the real value increased by 0.8 percent (figure V-4). The U.S. dollar value of the Thai baht decreased by 10.9 percent and 7.2 percent, respectively, in nominal and real terms, between the first quarter of 2000 and the second quarter of 2003 (figure V-5).

Price Leadership

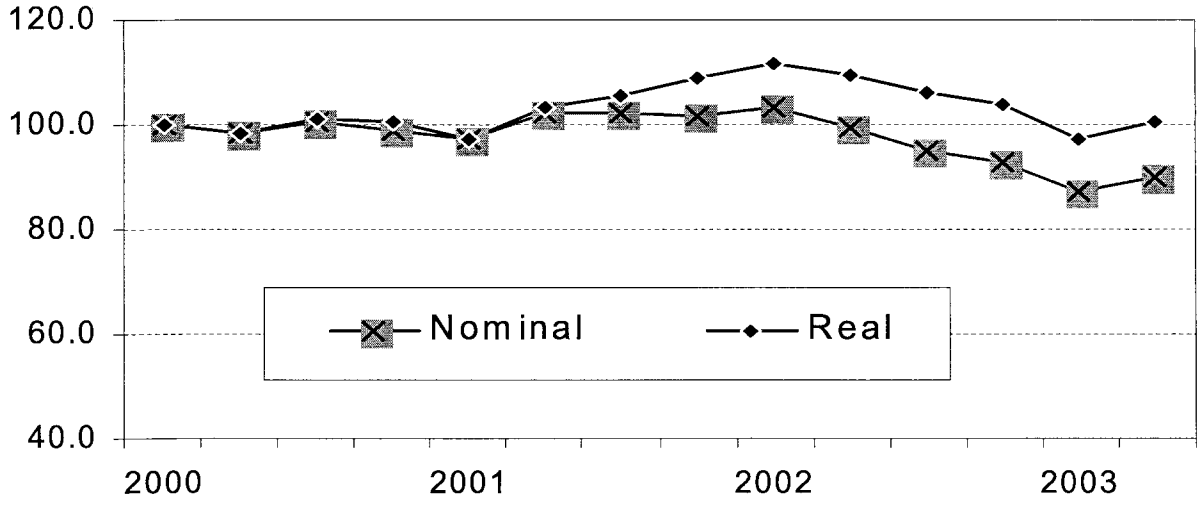
Eight purchasers reported that there were no price leaders. *** reported that all firms appear to have similar price schedules. *** reported that major suppliers had similar prices and that prices tended to move together. *** reported that everyone was forced to lower prices in an oversupplied market. Many purchasers identified particular firms as price leaders, although there was no consensus on the identity of the price leaders. For example, American Spring Wire, Crispin, FWC, Insteel, Strand Tech, Sumiden, Tata, and Trefilarbed were reported to be price leaders in particular markets at particular times.

PRICING PRACTICES

*** reported that prices have no defined duration and adjust as market conditions change. *** reported attempting to negotiate quarterly prices since January 2000 but reported that customers have little incentive to make quarterly commitments in view of declining prices. *** reported that specific sales are based on market conditions, trends, and customer relationships. *** reported determining price on a cost-plus basis.

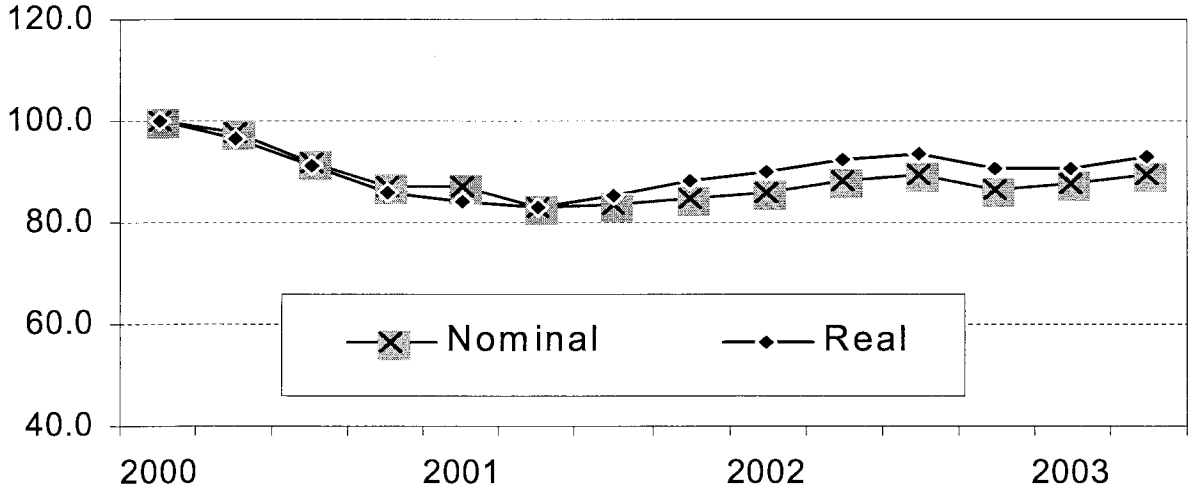
Ten purchasers reported that the supplier generally sets the terms of a purchase; ten purchasers reported that the terms were set jointly or negotiated between buyer and seller, and three purchasers reported setting the terms themselves. *** reported that prices are usually locked in for three to six months but volatile scrap market price increases are resulting in more frequent changes.

Figure V-4
Exchange rates: Indexes (first quarter 2000=100) of the nominal and real U.S. dollar price of the Mexican peso, by quarters, first quarter 2000-second quarter 2003



Source: International Monetary Fund, *International Financial Statistics*, August 2003.

Figure V-5
Exchange rates: Indexes (first quarter 2000=100) of the nominal and real U.S. dollar price of the Thai baht, by quarters, first quarter 2000-second quarter 2003



Source: International Monetary Fund, *International Financial Statistics*, August 2003.

Most U.S. producers and importers reported that they have no set policy for discounts, although some are negotiated on a case-by-case basis. *** reported that it has customer-specific volume incentives. *** reported that it sometimes extends payment terms when the buyer has approved credit. *** reported that it built quarterly total volume discounts into the sale price.

U.S. producers reported requiring full payment within 30 days of delivery. Some importers reported longer periods before requiring full payment.

Most producers reported quoting prices on a delivered basis, although *** reported quoting on an f.o.b. warehouse basis. Similarly, most importers reported that they usually quote on a delivered basis, although *** reported quoting on a delivered and port basis.

U.S. producers reported that they made about 83.5 percent of their sales in the spot market and 16.5 percent of sales by contract. By contrast, U.S. importers reported that 72.5 percent of their sales of the subject product were by contract and 27.5 percent in the spot market. Producers reported contract durations of three months to one year. Most importers reported contract lengths of three months, although *** reported having six-month contracts as well. *** and *** reported that contracts fixed both quantity and price, and *** reported that its contracts only fixed price, although it ***. Importers *** reported that their contracts fixed both quantity and price. U.S. producers did not report any standard quantity requirements. *** reported a minimum requirement of one truckload. *** reported a minimum order size of 60 metric tons for post-tensioned applications and 20 metric tons for pre-tensioned applications. Neither meet-or-release provisions nor price premiums for sub-minimum shipments appeared to be important.

PRICE DATA

The Commission requested that U.S. producers and importers of PC strand provide data on the quantity and f.o.b. value of PC strand shipped to unrelated customers in the U.S. market. Quarterly data were requested from the first quarter of 2000 to the second quarter of 2003. The Commission requested data on the following two products:

Product 1–Low relaxation, uncovered (uncoated) PC strand, grade 270, ½-inch diameter

Product 2–Low relaxation PC strand, grade 270, ½-inch diameter that is greased and covered (coated) in a polyethylene wrap

U.S. producers and importers were requested to identify whether the sales were to the pre-tensioned or post-tensioned market segments. U.S. producers also fabricate a higher value epoxy-coated strand; no data were gathered on this product.

At the hearing, respondents alleged that product 1 may divided into "heavy" and regular strand,[1] [2] with "heavy" strand having a higher price. Petitioners reported that they did not include any of this product in their pricing data.[3] *** were asked if their data included any "heavy" product. None of these firms reported including any "heavy" product in their pricing data.

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[1] Hearing transcript, p. 219.

[2] Regular ½ inch diameter strand has a cross sectional area of 0.153 square inches and weighs from about 512 pounds per 1,000 lineal feet to about 520 pounds per 1,000 lineal feet. "Heavy ½" inch strand has a cross sectional area of 0.162 square inches and weighs 550 pounds per 1,000 lineal feet. Some people may also refer to 0.6 inch diameter strand, which weighs 740 pounds per 1,000 lineal feet, as "heavy ½" inch strand.

[3] Petitioners' posthearing brief, exh. 1, p. 69.

Data were reported for product 1 in both the pre-tensioned and post-tensioned market segments, but only data in the post-tensioned market segment were reported for product 2. *** provided usable pricing data for sales of the U.S. product. *** provided usable pricing data for sales of the subject imports. Pricing data coverage is shown in the following tabulation, based on data submitted in response to Commission questionnaires.[4]

Country	Coverage (*percent*)
Brazil	86.7
India	99.5
Korea	95.8
Mexico	100.0
Thailand	91.8
United States	62.4

Petitioners alleged that *** may have included transportation costs in their pricing data. ***[5] submitted revised data for imports from, respectively, ***, although the reported changes were small.

Importers *** provided price data for product 1 (uncoated) and product 2 (coated); a comparison of these firms' price data provides a market-based indicator of the difference between prices of the coated and uncoated products. Such a comparison indicates that the uncoated product is priced approximately 32 percent less than the coated product. Information from purchasers on their cost of coating bare PC strand with plastic is presented in Part I.

Because post-tension firms typically buy uncoated strand, coat it, and use the coated strand in post-tensioned applications, petitioners alleged that these firms only purchased imported coated strand because it was priced below these firms' production costs for coated strand. Respondents alleged that the coated product is purchased because some post-tension firms lack the capability to coat and because some larger firms may have temporary capacity constraints. *** was the *** of coated strand, and *** was its ***. *** stated that, if it had not purchased the coated strand, *** would have sold it to small firms that lack coating lines. Therefore, *** had purchased the coated product to reduce competition with the small firms. It added that its coated purchases were priced higher than its internal production cost but that the difference was small.

*** alleged in its questionnaire response that sales for pre-tensioned applications are typically small because pre-tensioning customers may lack storage facilities and that "Buy America(n)" provisions are more prevalent in this market. In contrast, it alleged that sales for post-tensioned applications are typically larger and that delivery time is less important in this market because these customers likely have storage facilities. It alleged that these factors result in sales for post-tensioned applications being priced less. Price data for firms that reported sales for product 1 in both the pre-tensioned and post-tensioned

[4] A conversion factor of 518 pounds per 1,000 lineal feet of PC strand was used in each case to compute coverage.

[5] *** reported that it stands by the numbers it has already submitted.

markets show that sales in the post-tensioned market were about 11 percent lower in price than those in the pre-tensioned market.[6]

Besides the difference in price between the pre-tensioned and post-tensioned segments that result from size of sale, the Brazilian respondent alleged that prices in the two segments respond to different demand factors and have no relationship with each other.[7] U.S. producers presented price data for both the pre-tensioned and post-tensioned segments for all 14 quarters, and there was significant positive correlation between the prices in these two segments. The correlation coefficient was 0.734, and the probability that it occurred at this level by chance (p-value) was 0.0014. Purchasers submitted a full 10 quarters of data for purchases from U.S. sources in both the pre-tensioned and post-tensioned markets, but the correlation coefficient between these two series was 0.411, and it was not statistically significant (p-value: 0.1187). The only data on imports in the pre-tensioned segment from both importers and purchasers were for product sourced in Korea. There were gaps in this quarterly data, and it did not lend itself to correlation analysis. Besides the U.S. producer data, a correlation between prices in the two segments was not found; however, complete data were not available for this type of analysis.

Petitioners allege that importers may have incorrectly reported price data as sales to the post-tensioned segment when they were actually sales to the pre-tensioned segment.[8] If sales to pre-tensioners were reported as sales to post-tensioners, it would tend to raise the reported prices to the post-tension segment.[9] Mexican respondents alleged that its reported sales to the post-tension segment are low because they were, in fact, sales to a distributor, not a post-tensioner.[10]

The Brazilian respondent has alleged that "Buy America(n)" data included in the petitioners pricing data overstates the effective competitive price of the domestic product by approximately *** percent.[11] Information on prices for "Buy America(n)" sales are presented in appendix E.

Price Trends

Prices of product 1 in the pre-tensioned and post-tensioned markets combined generally declined for most of the period (figure V-6). Prices for all countries reached their highs during the first three quarters of 2000. U.S. producers' prices reached a low in the second quarter of 2002 and have since increased, especially in the second quarter of 2003. Prices of imports from Brazil, Mexico, and Thailand after reaching lows in, respectively, the fourth quarter of 2002, the fourth quarter of 2001, and the second quarter of 2002, have since increased, *** (for Brazil and Mexico) in the second quarter of 2003. Prices of imports from India and Korea continued to decline and reached lows in the second quarter of 2003.

Importer price data for product 1 in pre-tensioned applications were very limited. Korea was the only subject country with enough data to plot a price series, and the data are based on very limited quantities. There were several quarters of sizable data from Mexico and a limited amount from Brazil. U.S. prices for product 1 were much steadier than similar Korean prices (figure V-7).

For product 1 in post-tensioned applications, prices of each country's product were at their peak during the first three quarters of 2000 (figure V-8). U.S. producers' prices reached their low in the

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[6] These firms are ***.

[7] Brazilian respondent's posthearing brief, pp. 6-7.

[8] Petitioners' posthearing brief, pp. 50-54.

[9] *** reported that most of its sales are to the post-tension market and that petitioners' allegations based on price differences are wrong. Most of its sales are to *** that picks up the strand in its warehouse in ***. It has *** direct sales to pre-tensioners. Sales that go through the distributor to a pre-tensioner tend to be 0.6 inch instead of ½ inch.

[10] Mexican respondents' posthearing brief, p. 13. ***.

[11] Brazilian respondent's posthearing brief, p. 13.

Figure V-6
PC strand: Pricing trends for domestic and subject imported product 1 in U.S. dollars per 1,000 lineal feet in the pre-tensioned and post-tensioned markets combined, first quarter 2000-second quarter 2003

* * * * * * *

Figure V-7
PC strand: Pricing trends for U.S. and imported Korean product 1 in U.S. dollars per 1,000 lineal feet in the pre-tensioned market, first quarter 2000-second quarter 2003

* * * * * * *

Figure V-8
PC strand: Pricing trends for U.S. and subject imported product 1 in U.S. dollars per 1,000 lineal feet in the post-tensioned market, first quarter 2000-second quarter 2003

* * * * * * *

second quarter of 2002 and have since recovered somewhat. Brazilian prices reached a low in the fourth quarter of 2002; Mexican prices reached a low in the fourth quarter of 2001; Thai prices reached a low in the second quarter of 2002; and prices of product from all three countries have since increased. Indian and Korean prices reached lows in the second quarter of 2003.

Importers of product 2 from Mexico and Thailand were the only ones to present data for significant quantities of product 2 (figure V-9), which is only sold for post-tensioned applications, although there were some U.S. producers' data as well. The U.S. producers' data were nearly constant at a much higher level than those of the Mexican and Thai products.

Figure V-9
PC strand: Pricing trends for U.S. and imported Mexican product 2 in U.S. dollars per 1,000 lineal feet in the post-tensioned market, first quarter 2000-second quarter 2003

* * * * * * *

Changes in U.S. producer and importer pricing between the first and last period reported are summarized in table V-2. Similar data for U.S. purchaser pricing are summarized in table V-3.

Table V-2
PC strand: Change (*in percent*) in U.S. importer and producer prices between the first quarter of 2000 and the second quarter of 2003, by country, product, and market

* * * * * * *

Table V-3
PC strand: Change (*in percent*) in U.S. purchaser prices between the first quarter of 2001 and the second quarter of 2003, by country, product, and market

* * * * * * *

Price Comparisons

U.S. Producers and Importers

All sales of product 1 to the pre-tensioned and post-tensioned markets combined were compared. Imports of product 1 from Brazil, India, and Korea undersold the similar domestic product in each of the 14 quarters for which comparisons were available (table V-4). Underselling margins ranged from 1.4 to 16.4 percent for Brazil, from 7.3 to 18.2 percent for India, and from 4.2 to 16.4 percent for Korea. Imports from Mexico undersold the similar domestic product in 13 quarters by margins ranging from 0.2 percent to 18.2 percent and oversold the domestic product in one quarter by 0.1 percent. Imports from Thailand undersold the domestic product in 12 quarters by margins ranging from 1.8 to 9.3 percent and oversold the domestic product in two quarters by margins of 2.0 and 3.1 percent. All subject countries combined undersold the similar domestic product in all 14 quarters by margins ranging from 4.5 to 13.6 percent.

Sales of product 1 in the pre-tensioned market only were compared (table V-5). Imports from Brazil undersold the domestic product in three quarters by margins ranging from 2.0 to 6.3 percent. Imports from Korea undersold the domestic product in 12 quarters by margins ranging from 7.2 to 47.7 percent and oversold the domestic product in one quarter by 9.4 percent. Imports from Mexico oversold the domestic product in five quarters by margins ranging from 2.4 to 12.7 percent. All subject product combined undersold the similar domestic product in 10 quarters by margins ranging from 3.9 to 43.2 percent and oversold the domestic product in three quarters by margins ranging from 0.6 to 9.4 percent.

Table V-4
PC strand: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 in the pre-tensioned and post-tensioned markets combined, and margins of underselling/ (overselling), by quarters, first quarter 2000-second quarter 2003

* * * * * * *

Table V-5
PC strand: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 in the pre-tensioned market and margins of underselling/(overselling), by quarters, first quarter 2000-second quarter 2003

* * * * * * *

Sales of product 1 in the post-tensioned market were compared (table V-6). Imports from Brazil undersold the domestic product in seven quarters by margins ranging from less than 0.05 percent to 7.7 percent and oversold the domestic product in seven quarters by margins ranging from 0.4 to 8.1 percent. Imports from India undersold the domestic product in 11 quarters by margins ranging from 0.3 to 14.8 percent and oversold the domestic product in three quarters by margins ranging 0.1 to 2.2 percent. Imports from Korea undersold the domestic product in three quarters by margins ranging from 0.2 to 13.4 percent and oversold the domestic product in 11 quarters by margins ranging from 0.9 to 6.7 percent. Imports from Mexico undersold the domestic product in six quarters by margins ranging from 0.4 to 9.7 percent and oversold the similar domestic product in eight quarters by margins ranging from 0.2 to 9.9 percent. Imports from Thailand undersold the domestic product in one quarter by 0.4 percent and oversold the similar domestic product in 13 quarters by margins ranging from 1.3 to 13.1 percent. All subject countries combined undersold the domestic quarter in three quarters by margins ranging from 0.3

Table V-6
PC strand: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 in the post-tensioned market and margins of underselling/(overselling), by quarters, first quarter 2000-second quarter 2003

* * * * * * *

to 10.3 percent and oversold the domestic product in 11 quarters by margins ranging from 0.5 to 5.0 percent.

Price data were limited for sales of product 2 in the post-tensioned market. *** provided data on imports from Mexico; *** provided data on imports from Thailand; and *** provided data on the domestic product. Data on domestic sales are limited because some domestic firms purchase uncoated strand, coat it, and consume it in their own operations. Imports from Mexico undersold the domestic product in 10 quarters by margins ranging from *** to *** percent (table V-7). Imports from Thailand undersold the domestic product in eight quarters by margins ranging from *** to *** percent. All subject countries combined undersold the domestic product in all 10 quarters for which comparisons were available by margins ranging from 27.1 to 36.6 percent.

Data on underselling and overselling by U.S. producers and importers are summarized in tables V-8 and V-9.

Table V-7
PC strand: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 in the post-tensioned market and margins of underselling/(overselling), by quarters, first quarter 2000-second quarter 2003

* * * * * * *

Table V-8
PC strand: Number of quarters of underselling and overselling, by subject country, product, and market, as reported by U.S. producers and importers, first quarter 2000-second quarter 2003

* * * * * * *

Table V-9
PC strand: Minimum and maximum margins of underselling and overselling, by subject country, product, and market, as reported by U.S. producers and importers, first quarter 2000-second quarter 2003

* * * * * * *

Purchaser Prices

*** provided usable data. Purchaser data for the pre-tensioned market were only available for product sourced from Korea and the United States (table V-10). Korean product 1 in the pre-tensioned market undersold the similar domestic product in nine quarters by margins ranging from 4.9 to 12.0 percent. Data on purchases of product 1 for post-tensioned applications were available for product from Brazil, India, Korea, Mexico, Thailand, and the United States (table V-11). The Brazilian product undersold the similar domestic product in one quarter by 5.6 percent and oversold the domestic product in two quarters by 48.2 and 76.8 percent. Indian product 1 undersold the domestic product in six quarters

Table V-10
PC strand: Weighted-average purchaser prices and quantities of domestic and imported product 1 in the pre-tensioned market and margins of underselling/(overselling), by quarters, first quarter 2001-second quarter 2003

* * * * * * *

Table V-11
PC strand: Weighted-average purchaser prices and quantities of domestic and imported product 1 in the post-tensioned market and margins of underselling/(overselling), by quarters, first quarter 2001-second quarter 2003

* * * * * * *

by margins ranging from 0.7 percent to 4.8 percent and oversold the domestic product in one quarter by 0.8 percent. The Korean product undersold the domestic product in one quarter by 9.9 percent and oversold the domestic product in seven quarters by margins ranging from 0.5 to 18.4 percent. The Mexican product oversold the domestic product in three quarters by margins ranging from 5.7 to 6.6 percent. The Thai product oversold the domestic product in 6 quarters by margins ranging from 1.7 to 8.3 percent.

For purchases from all subject countries combined, subject imports were purchased for less than the domestic product in all 10 quarters by margins ranging from 0.4 to 8.6 percent. *** reported that it purchased subject imports from a variety of U.S. importers but did not keep track of the country of origin. Its purchases are included in the all-subject data series, but not in the country-specific data series. Its data are also included in the U.S. purchases series. Because *** is generally able to purchase at low prices, inclusion of its data in the all-subject series increased the amount of underselling.

Data on purchases of product 2 for post-tensioned applications were available from India, Korea, Mexico, Thailand, and the United States (table V-12). The Indian product undersold the domestic product in two quarters by margins of 33.0 and 34.3 percent. The Korean product undersold the domestic product in five quarters by margins ranging from 14.9 to 37.9 percent. The Mexican product undersold the domestic product in eight quarters by margins ranging from 21.7 to 46.9 percent. ***, which only purchased the plastic-coated product from Mexico, reported data on purchases of imports from Mexico; it did not report any purchases of the plastic-coated product from domestic sources. The Thai product undersold the domestic product in four quarters by margins ranging from 32.1 to 38.1 percent. The data for all subject countries combined showed underselling in all eight quarters for which comparisons were possible, by margins ranging from 21.4 to 46.8 percent.

Underselling and overselling in U.S. purchaser data are summarized in tables V-13 and V-14.

Table V-12
PC strand: Weighted-average purchaser prices and quantities of domestic and imported product 2 in the post-tensioned market and margins of underselling/(overselling), by quarters, first quarter 2001-second quarter 2003

* * * * * * *

Table V-13
PC strand: Number of quarters of underselling and overselling, by subject country, product, and market, as reported by U.S. purchasers, first quarter 2001-second quarter 2003

Country	Product 1				Product 2	
	Pre-tensioned market		Post-tensioned market		Post-tensioned market	
	Under-selling	Over-selling	Under-selling	Overselling	Under-selling	Over-selling
Brazil	-	-	1	2	-	-
India	-	-	6	1	2	0
Korea	9	0	1	7	5	0
Mexico	-	-	0	3	8	0
Thailand	-	-	0	6	4	0
Sum	9	0	8	19	19	0
All subject[1]	9	0	10	0	8	0

[1] The all-subject data include imports purchased by ***, which was unable to break out imports by individual country; *** domestic purchases are included in the U.S. producers' data which were used in the preparation of this table.

Note.–If a country had no reported prices for either the first quarter 2000 or the second quarter 2003, the nearest quarter with reported prices was used.

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

Table V-14
PC strand: Minimum and maximum margins of underselling and overselling, by subject country, product, and market, as reported by U.S. purchasers, first quarter 2001-second quarter 2003

* * * * * * *

LOST SALES AND LOST REVENUES

In the preliminary phase of the investigations, petitioners made allegations of lost sales totaling $58.7 million. Of the purchasers that responded, 57.9 percent (or 76.3 percent by value of the allegations) agreed with the allegations, and the remainder disagreed (table V-15).

In the final phase of the investigations, petitioners made additional allegations of lost sales totaling approximately $2.1 million (these are shown at the end of table V-15). Four of the six purchasers involved in the allegations responded to inquiries, and *** agreed with the allegations. *** stated that it used to purchase from the domestic producer ***, then from importer *** as a secondary supplier. Then it purchased from importer *** because of lower prices and from several other suppliers and now purchases *** from ***.

Table V-15
PC strand: U.S. producers' allegations of lost sales

* * * * * * *

Allegations of lost revenues totaling $1.3 million were made in the preliminary phase of the investigations. Responding purchasers agreed with 66.7 percent of the allegations (or 62.1 percent by value of the allegations), and the remainder disagreed (table V-16). In the final phase of the investigations, U.S. producers made additional allegations of lost revenues totaling approximately $120,000. Although many purchasers did not respond to Commission inquiries, *** responding purchasers agreed with the allegations. ***, which agreed with the allegation that concerned a purchase in ***, stated that it now buys almost 100 percent from domestic sources because the price of imports has risen.

Table V-16
PC strand: U.S. producers' allegations of lost revenues

* * * * * * *

PART VI: FINANCIAL CONDITION OF THE U.S. PRODUCERS

BACKGROUND

Five U.S. producers[1] provided financial data on their operations on PC strand during the period examined. These data accounted for all known U.S. production of uncoated PC strand in 2000-02 and for all but Sivaco's sales in interim (January-June) 2002 and interim 2003. ***. Insteel and Sumiden also reported financial data on their operations on epoxy-coated PC strand separately, which accounted for approximately *** percent of their 2002 combined sales value.[2]

OPERATIONS ON PC STRAND

Results of operations of the U.S. producers on their PC strand operations are presented in table VI-1; data on a per-thousand-pound basis are shown in table VI-2 and table VI-4.[3]

The quantity sold and the net sales value per thousand pounds decreased in each year, causing an annual decline in the net sales value. Operating income decreased substantially in 2001 compared to 2000 and became an operating loss in 2002. The net sales value per thousand pounds decreased by $9 in 2001 compared to 2000 while the cost of goods sold increased by $10 per thousand pounds and selling, general, and administrative ("SG&A") expenses decreased by $3, resulting in a $16 decrease in the operating income per thousand pounds. The net sales value per thousand pounds decreased by $11 in 2002 compared to 2001 while the cost of goods sold decreased by $2 and SG&A expenses increased by $6 per thousand pounds, resulting in an operating loss of $11 per thousand pounds in 2002.

Both net sales volume and value as well as net sales value per thousand pounds increased from interim 2002 to interim 2003. Therefore, the operating loss in interim 2002 turned to an operating income in interim 2003. The per-thousand-pound net sales value increased from interim 2002 to interim 2003 by $11, whereas the total cost per thousand pounds decreased by $15, resulting in an operating income of $6 per thousand pounds in interim 2003 compared to an operating loss of $19 per thousand pounds in interim 2002.

Without including Sivaco's financial data for 2001 and 2002 which were submitted in the preliminary phase of the investigations, the operating income for the combined companies would have been *** in 2001 (the ratio of the operating income to net sales would be *** percent) and the operating loss for the combined companies would have been *** in 2002 (the ratio of the operating loss to net sales would be *** percent).

---

[1] ***. Sivaco did not provide financial data for the final phase of these investigations, even though it submitted a response in the preliminary phase of the investigations. In this report, Sivaco's preliminary financial data for 2001 and 2002 were utilized (no sales in 2000). Even though three additional producers of coated PC strand, ***, submitted their responses, their responses were not used because they either contained no financial data or were grossly incomplete.

[2] ***.

[3] The financial data of *** were reviewed with their company records at Commission offices. No adjustment was necessary to the financial data submitted by these two firms.

Table VI-1
Results of operations of U.S. producers in the production of PC strand, calendar years 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Quantity (*1,000 pounds*)				
Net sales	624,730	573,985	545,527	260,014	278,623
	Value (*$1,000*)				
Net sales	164,347	145,849	132,712	61,690	69,015
COGS	139,500	133,909	125,756	58,177	63,341
Gross profit	24,847	11,940	6,956	3,513	5,674
SG&A expenses	12,339	9,874	12,805	8,488	3,917
Operating income (loss)	12,508	2,066	(5,849)	(4,975)	1,757
Interest expense	8,475	8,883	6,534	3,152	2,367
Other expense	540	1,229	2,082	710	122
Other income	684	803	403	162	290
Net income (loss)	4,177	(7,243)	(14,062)	(8,675)	(442)
Depreciation/amortization	6,214	5,920	6,289	3,219	2,919
Cash flow	10,391	(1,323)	(7,773)	(5,456)	2,477
	Ratio to net sales (*percent*)				
COGS	84.9	91.8	94.8	94.3	91.8
Gross profit	15.1	8.2	5.2	5.7	8.2
SG&A expenses	7.5	6.8	9.6	13.8	5.7
Operating income (loss)	7.6	1.4	(4.4)	(8.1)	2.5
	Number of firms reporting				
Operating losses	***	***	***	***	***
Data	4	5	5	4	4

[1] Company transfers are less than *** percent of the combined companies' net sales quantity and value in all periods and are not shown separately.
[2] ***.

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

Table VI-2
Results of operations (*per 1,000 pounds*) of U.S. producers in the production of PC strand, calendar years 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Unit value (*per 1,000 pounds*)				
Net sales	$263	$254	$243	$237	$248
COGS	223	233	231	224	227
Gross profit	40	21	13	14	20
SG&A expenses	20	17	23	33	14
Operating income (loss)	20	4	(11)	(19)	6

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

Selected financial data, by firm, are presented in table VI-3. Three of the five producers experienced decreased net sales values in 2001 compared to 2000 and in 2002 compared to 2001. All five producers incurred decreasing operating income or increasing operating losses in 2001 compared to 2000 and in 2002 compared to 2001. However, all four reporting producers indicated improved profitability from interim 2002 to interim 2003.

Selected aggregate per-thousand-pound cost data of the producers on their operations, i.e., COGS and SG&A expenses, are presented in table VI-4. Total cost per thousand pounds increased continuously between 2000 and 2002 and decreased from interim 2002 to interim 2003. Raw material costs per thousand pounds were constant in 2000 and 2001 and rose by $4 in 2002 compared to those of the two prior years. Raw material costs per thousand pounds increased for all producers from interim 2002 to interim 2003. Direct labor costs per thousand pounds decreased by $2 in 2001 compared to 2000 and decreased further from 2001 to 2002. Other factory costs increased by $12 in 2001 compared to 2000, as explained in note 2 in table VI-4, and decreased in 2002 from 2001.

Table VI-3
Results of operations of U.S. producers in the production of PC strand, by firm, calendar years 2000-02, January-June 2002, and January-June 2003

* * * * * * *

Table VI-4
Per-1,000 pound costs of U.S. producers in the production of PC strand, calendar years 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Value (*per 1,000 pounds*)				
COGS:					
Raw materials	$162	$162	$166	$160	$168
Direct labor[1]	18	16	14	16	16
Factory overhead[2]	44	56	50	48	43
Total COGS	223	233	231	224	227
SG&A expenses:					
Selling expenses	8	6	5	5	5
G&A expenses[3]	12	11	18	28	9
Total SG&A expenses	20	17	23	33	14
Total cost	243	250	254	256	241

[1] The higher per-thousand-pound direct labor costs in 2000 were due mainly to ***.
[2] The increases in the per-thousand-pound value of other factory costs in 2001 and 2002 compared to 2000 were due, in part, to lower production volumes absorbing fixed costs. ***.
[3] G&A expenses per thousand pounds were higher in 2002 and interim 2002 mainly due to ***.

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

A variance analysis showing the effects of prices and volume on the producers' sales of PC strand, and of costs and volume on their total cost, is shown in table VI-5. The analysis is summarized at the bottom of the table. The analysis indicates that the decrease in operating income ($18.4 million) between 2000 and 2002 was attributable mainly to the negative effects of decreased price ($10.8 million), and also to increased costs/expenses ($6.0 million) and lower sales volume ($1.6 million). An increase in operating income between the interim periods was attributable mainly to a favorable price variance (an increase in the unit sales value) combined with a favorable net cost/expense variance (decreased unit costs and expenses).

Table VI-5
Variance analysis of operations of U.S. producers in the production of PC strand, calendar years 2000-02, January-June 2002, and January-June 2003

Item	Between calendar years			January-June
	2000-02	2000-01	2001-02	2002-03
	Value (*$1,000*)			
Net sales:				
Price variance	(10,799)	(5,149)	(5,906)	2,910
Volume variance	(20,836)	(13,349)	(7,231)	4,415
Total net sales variance	(31,635)	(18,498)	(13,137)	7,325
Cost of sales:				
Cost variance	(3,942)	(5,740)	1,514	(1,000)
Volume variance	17,686	11,331	6,639	(4,164)
Total cost variance	13,744	5,591	8,153	(5,164)
Gross profit variance	(17,891)	(12,907)	(4,984)	2,161
SG&A expenses:				
Expense variance	(2,030)	1,463	(3,421)	5,178
Volume variance	1,564	1,002	490	(607)
Total SG&A variance	(466)	2,465	(2,931)	4,571
Operating income variance	(18,357)	(10,442)	(7,915)	6,732
Summarized as:				
Price variance	(10,799)	(5,149)	(5,906)	2,910
Net cost/expense variance	(5,972)	(4,277)	(1,907)	4,178
Net volume variance	(1,586)	(1,016)	(102)	(356)

Note.--Unfavorable variances are shown in parentheses; all others are favorable. The data are comparable to changes in operating income as presented in table VI-1.

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

INVESTMENT IN PRODUCTIVE FACILITIES, CAPITAL EXPENDITURES, AND RESEARCH AND DEVELOPMENT EXPENSES

The responding firms' aggregate data on capital expenditures, research and development (R&D) expenses, and the value of their property, plant, and equipment are shown in table VI-6, and capital expenditures, by firm, are presented in table VI-7. Capital expenditures increased substantially in 2001 compared to 2000 due to capital projects by *** and then decreased measurably in 2002 to the lowest level in the three-year period. Research and development expenses decreased in each comparative period, as did the original cost and book value of fixed assets.

Table VI-6
Capital expenditures, R&D expenses, and assets utilized by U.S. producers in their production of PC strand, calendar years 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Value (*$1,000*)				
Capital expenditures[1]	4,500	12,462	2,430	1,373	419
R&D expenses[2]	***	***	***	***	***
Productive facilities:[3]					
Original cost	114,861	111,047	108,128	100,350	99,877
Book value	81,757	73,696	66,217	61,288	56,696

[1] All companies reported capital expenditures.
[2] *** was the only company reporting R&D expenses.
[3] All companies provided usable data for fixed assets. ***.

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

Table VI-7
Capital expenditures by U.S. producers, by firms, in their production of PC strand, calendar years 2000-02, January-June 2002, and January-June 2003

* * * * * * *

CAPITAL AND INVESTMENT

The Commission requested U.S. producers to describe any actual or potential negative effects of imports of PC strand from Brazil, India, Korea, Mexico, and/or Thailand on their firms' growth, investment, and ability to raise capital or development and production efforts (including efforts to develop a derivative or more advanced version of the product). Their responses are shown in appendix F.

PART VII: THREAT CONSIDERATIONS

The Commission analyzes a number of factors in making threat determinations (see 19 U.S.C. § 1677(7)(F)(i)). 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.

The Commission sent questionnaires to all firms identified in the petition as possible producers/exporters of PC strand in the subject countries. Information submitted in response to the questionnaires is presented in the sections that follow.

THE INDUSTRY IN BRAZIL

Belgo Bekaert *** is the only producer of PC strand in Brazil.[1] The firm reported that *** in Brazil. Based on official Commerce import statistics, PC strand exported to the United States by Belgo Bekaert accounted for *** percent of all imports of the subject merchandise into the United States from Brazil during 2000-02.[2] The data presented in table VII-1 are from Belgo Bekaert's questionnaire response. Belgo Bekaert reported the utilization of its capacity to produce PC strand in Brazil to be between *** and *** percent during 2000-02. Capacity utilization increased to *** percent during the first half of 2003. The firm reported that it ***; however, it reported that PC strand accounted for *** percent of its total sales in its most recent fiscal year.

Table VII-1
PC strand: Brazilian production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

During 2000-02, ***. During the first half of 2003, Belgo Bekaert's shipments of bare PC strand to the United States grew to *** percent of total shipments, while such shipments to the home market fell. The firm projects ***. Belgo Bekaert is related to U.S. importer Arcelor International, Inc., New York, NY (known as Trefilarbed prior to January 2003). *** were identified as the only U.S. importers of PC strand exported to the United States by Belgo Bekaert during 2002. *** U.S. importers provided questionnaire responses. Brazilian PC strand exports are not subject to antidumping or countervailing duty findings or remedies in any WTO-member country.

[1] In addition to Belgo Bekaert, the petition lists two other firms as producers of PC strand in Brazil: Gerdau SA ("Gerdau") and Companhia Siderurgica Belgo Mineira ("Belgo Mineira"). ***, Belgo Mineira *** is not a producer of the subject merchandise. The petition indicated that Belgo Bekaert is a subsidiary of Belgo Mineira. Gerdau did not respond to the Commission's questionnaire.

[2] The coverage figure for the period January-June 2003 is *** lower at only *** percent.

THE INDUSTRY IN INDIA

One PC strand producer in India (TISCO) provided a response to the Commission's request for information in the final phase of these investigations.[3] TISCO reported that it maintains the capacity to produce only bare PC strand in India. Data provided by TISCO are presented in table VII-2. TISCO indicated in its questionnaire response that it accounted for an estimated *** percent of the total production of PC strand in India during 2002. Two other major PC strand producers in India *** are Indore Wire Co., Ltd. ("Indore Wire") and Usha Martin Industries ("Usha Martin"). *** Usha Martin commenced production of PC strand in India during the last quarter of 2002. Reportedly, neither Indore Wire nor Usha Martin have exported PC strand produced in India to the United States. Based on official Commerce import statistics, PC strand exported to the United States by TISCO accounted for *** percent of all imports of the subject merchandise into the United States from India during January 2000-June 2003.

Table VII-2
PC strand: Indian production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

TISCO reported that it ***; however, it reported that PC strand accounted for an estimated *** percent of its total sales in its most recent fiscal year. TISCO reported that it ***. TISCO reported an increase in its capacity utilization in India from *** percent in 2000 to *** percent in 2002. A further increase to *** percent was reported in the first half of 2003. The firm's projected capacity utilization data indicate that it plans to operate at *** percent capacity utilization during 2003 and 2004.

During 2000, *** of TISCO's shipments of PC strand was to the Indian market and *** was exported to countries other than the United States. *** became the largest market for TISCO's PC strand, *** market by ***, at *** percent, during 2001. However, by 2002, *** once again became the largest market for TISCO's PC strand, with *** accounting for slightly more than *** of TISCO's total PC strand shipments. During the first half of 2003, TISCO reported that *** fell to *** percent of its total shipments, while shipments to the home market *** to *** of the firm's total shipments. The remaining shipments of TISCO's PC strand were made to ***. During 2003-04, the firm projects that exports to the United States will *** from the previous calendar-year periods. TISCO exports its PC strand product to the United States through ***. Indian PC strand exports are not subject to antidumping or countervailing duty findings or remedies in any WTO-member country.

THE INDUSTRY IN KOREA

Four Korean producers of PC strand provided responses to the Commission's request for information in the final phase of these investigations.[4] All four producers reported the capacity to produce bare PC strand in Korea; however, only *** reported the capacity to produce plastic-coated PC strand in Korea. During 2002, Korean production of plastic-coated PC strand accounted for *** percent

[3] TISCO responded in the preliminary phase of these investigations under the name Tata SSL, Ltd. For the purposes of this report, the Indian producer/exporter will be referred to as "TISCO." In addition to TISCO, the petition lists three other firms as producers of PC strand in India: Indore Wire Co., Ltd.; Patil Group of Industries; and Usha Martin Industries. These three firms did not respond to the Commission's questionnaire.

[4] All four firms identified in the petition as producers of PC strand in Korea provided responses to the Commission's questionnaire.

of total Korean production of PC strand. No Korean producer of plastic-coated PC strand reported exports of that product to the United States during the period for which information was requested in these investigations.

Based on official Commerce import statistics, PC strand exported to the United States by the four Korean PC strand producers accounted for *** percent of all imports of the subject merchandise into the United States from Korea during January 2000-June 2003. The responding Korean producers and their relative sizes are presented in table VII-3.

Table VII-3
PC strand: Korean producers, shares of reported 2002 Korean production of PC strand, and shares of reported 2002 Korean PC strand exports to the United States

Firm name	Shares of reported 2002 Korean production (*in percent*)	Shares of reported 2002 Korean exports to the United States (*in percent*)
Dong-Il Steel Mfg. Co., Ltd.	***	***
Kiswire, Ltd.	***	***
Manho Rope and Wire, Ltd.	***	***[1]
Young Heung Iron and Steel Co., Ltd.	***	***[2]

[1] Manho reported PC strand exports to ***.
[2] Young Heung ***.

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

Dong-Il reported that PC strand accounted for *** percent of its total sales in its most recent fiscal year, while the other three Korean producers reported that PC strand accounted for between *** percent and *** percent of their total sales. Dong-Il produces ***. The other three Korean producers reported ***.

Dong-Il, the *** exporter of Korean PC strand to the United States during 2002, reported that its exports of PC strand to the United States are ***. Kiswire ***. The firm indicates that it exports its PC strand to the United States through ***; however, *** importer questionnaire response reveals that *** percent of *** exports of PC strand to the United States during the period January 2000-June 2003 were through its related U.S. importer. Korean PC strand exports are not subject to antidumping or countervailing duty findings or remedies in any WTO-member country.

Aggregate Korean production capacity, production, shipments, and inventory data supplied by the four Korean producers of uncoated and plastic-coated PC strand are presented in tables VII-4 and VII-5, respectively. Such data for total PC strand are presented in table VII-6. These data show that the reported utilization of the Korean capacity to produce PC strand was between 71.1 and 86.2 percent during January 2000-June 2003. ***.

Table VII-4
Uncoated PC strand: Korean production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

Table VII-5
Plastic-coated PC strand: Korean production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

Table VII-6
Total PC strand: Korean production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

Item	Actual experience					Projections	
				January-June			
	2000	2001	2002	2002	2003	2003	2004
	Quantity (*1,000 pounds*)						
Capacity	237,445	237,445	237,445	118,812	118,962	237,445	237,445
Production	204,707	176,853	192,024	94,322	84,594	186,167	182,894
End of period inventories	10,761	10,796	14,380	12,633	7,852	11,980	8,632
Shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Home market	136,429	105,247	97,134	48,531	45,116	114,245	122,448
Exports to--							
United States	***	***	***	***	***	***	***
All other markets[1]	***	***	***	***	***	***	***
Total exports	***	***	***	***	***	***	***
Total shipments	***	***	***	***	***	***	***
	Ratios and shares (*percent*)						
Capacity utilization	86.2	74.5	80.9	79.4	71.1	78.4	77.0
Inventories to production	5.3	6.1	7.5	6.7	4.6	6.4	4.7
Inventories to total shipments	***	***	***	***	***	***	***
Share of total quantity of shipments:							
Internal consumption/transfers	***	***	***	***	***	***	***
Home market	***	***	***	***	***	***	***
Exports to--							
United States	***	***	***	***	***	***	***
All other markets[1]	***	***	***	***	***	***	***
All export markets	***	***	***	***	***	***	***

[1] Other export markets include ***.

Note.–Because of rounding, figures may not add to the totals shown.

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

Projections indicate that the Korean capacity utilization for PC strand is expected to fall from the 2002 level of 80.9 percent to 77.0 percent in 2004.

The share of shipments of Korean PC strand to the home market, the *** market for Korean PC strand, fell from *** percent of the total quantity of shipments in 2000 to *** percent in the first half of 2003. The share held by exports to the United States increased during the same period from *** percent of total shipments to *** percent. Other export markets, which accounted for between *** and *** percent of the total shipments of Korean PC strand, include ***.

THE INDUSTRY IN MEXICO

Two Mexican producers of PC strand (Aceros Camesa and Cablesa) provided responses to the Commission's request for information in the final phase of these investigations.[5] These two firms, with PC strand production facilities located in the Mexico City area, are believed to be the sole producers of PC strand in Mexico.[6] Based on official Commerce import statistics, PC strand exported to the United States by the two Mexican PC strand producers accounted for *** percent of all imports of the subject merchandise into the United States from Mexico during January 2000-June 2003.

Both Aceros Camesa and Cablesa produce the bare PC strand as well as the plastic-coated PC strand in Mexico. During 2002, *** percent of total Mexican production of PC strand was of the plastic-coated PC strand, while almost *** of the Mexican PC strand exports to the United States were of the plastic-coated product during the same period. Aceros Camesa reported that PC strand accounted for approximately *** percent of its total sales in its most recent fiscal year and Cablesa reported that PC strand accounted for an estimated *** percent of its total sales. ***. Cablesa reported that galvanized PC strand accounted for *** percent of its total net sales in its most recent fiscal year. ***.

The Commission asked the Mexican producers to indicate whether they or any related firm produces, has the capability to produce, or has any plans to produce PC strand and/or coat PC strand in the United States or other countries. ***. Aceros Camesa is in the process of establishing a new PC strand manufacturing operation in the United States. The related firm, PCS America, Inc., located in Rosenberg, TX, will begin production of *** PC strand in the fourth quarter of 2003. This U.S. PC strand facility will reportedly have the capacity to produce approximately *** pounds of *** PC strand annually. Sales of PC strand produced by PCS are expected to begin in January 2004.[7]

The data presented in tables VII-7, VII-8, and VII-9 are from the questionnaire responses of Mexican producers Aceros Camesa and Cablesa. These data show that, in 2002, Aceros Camesa *** percent of Mexican production of uncoated PC strand; however, during the same period, Cablesa *** percent of exports of Mexican PC strand to the United States.

The capacity to produce bare PC strand in Mexico remained unchanged throughout the period January 2000-June 2003 and the firms ***. During January 2000-June 2003, the Mexican producers ran their uncoated PC strand operations at between *** and *** percent of capacity. These producers project their aggregate capacity utilization for uncoated PC strand to ***.

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[5] In addition to Aceros Camesa and Cablesa, the petition lists four other firms as producers of PC strand in Mexico: Deacero S.A. de S.V. ("Deacero"); Aceros Nacionales S.A. de C.V.; Sicartsa–Siderurgica Lazaro Cardenas Las Truchas S.A. de C.V.; and Siderurgica de Yucatan S.A. de C.V. ***, Deacero *** is not a producer of the subject merchandise. The other three firms did not respond to the Commission's questionnaire.

[6] Mexican respondents' postconference brief, p. 41.

[7] Mexican respondents' prehearing brief, p. 71, and hearing transcript, p. 244.

Table VII-7
Uncoated PC strand: Mexican production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

Table VII-8
Plastic-coated PC strand: Mexican production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

Table VII-9
Total PC strand: Mexican production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

The capacity to coat PC strand with plastic in Mexico remained unchanged during 2000 and 2001. During 2002, however, Cablesa reported ***, which resulted in an aggregate ***-percent increase in the Mexican capacity to coat PC strand with plastic. During January 2000-June 2003, Aceros Camesa and Cablesa ran their PC strand coating operations at between *** and *** percent of capacity. Projected aggregate capacity utilization for their coating operations is expected to be ***.

Cablesa reported that its exports of PC strand to the United States are shipped through its affiliated U.S. importer Universal Products. ***. Aceros Camesa reported that although it exports PC strand to the United States through ***, a *** portion (*** percent during 2002) of its exports to the United States is through ***. Aceros Camesa reported that *** percent of its exports of PC strand to the United States during 2002 was of the plastic-coated product.

The Mexican producers' largest commercial market for uncoated and plastic-coated PC strand combined was the United States, accounting for *** percent and *** percent of total shipments during 2002, respectively. Cablesa *** and Aceros Camesa reported that its export markets other than the United States include ***. There were no exports of plastic-coated PC strand to markets other than the United States during 2002 and exports of uncoated PC strand to markets other than the United States accounted for *** percent of the firms' total shipments of uncoated PC strand during 2002. Mexican PC strand exports are not subject to antidumping or countervailing duty findings or remedies in any WTO-member country.

THE INDUSTRY IN THAILAND

Four producers of PC strand in Thailand (Bangkok Steel, Siam Wire, Thai Wire, and Siam Industrial) provided responses to the Commission's request for information in these investigations.[8] ***

[8] In response to the Commission's questionnaire in the preliminary phase of these investigations, Thai Wire provided a complete response; however, in the final phase of these investigations, Thai Wire stated that ***. Commission staff has contacted the company in an attempt to clear up the discrepancy in the firm's response but the firm has not responded. For the purpose of this report, the questionnaire response submitted by Thai Wire during the preliminary phase of these investigations was used in the aggregation of the data presented in this report. Siam Wire provided a response to the Commission's questionnaire in the preliminary phase of these investigations too late to be incorporated in that phase of the investigations. The firm did not respond to the Commission's questionnaire in the final phase of these investigations. For the purpose of this report, the preliminary questionnaire response submitted

(continued...)

exported PC strand to the United States during 2002. Based on ***, Siam Industrial accounted for *** exports of the subject merchandise from Thailand to the United States during 2002. Based on company estimates provided in response to the Commission's questionnaire, these four producers together accounted for *** of the total production of PC strand in Thailand during 2002. The responding Thai producers and their relative sizes are presented in table VII-10.

Table VII-10
PC strand: Thai producers, shares of reported 2002 Thai production of PC strand, and shares of reported 2002 Thai PC strand exports to the United States

Firm name	Shares of reported 2002 Thai production of uncoated PC strand (*in percent*)	Shares of reported 2002 Thai production of plastic-coated PC strand (*in percent*)	Shares of reported 2002 Thai exports to the United States (*in percent*)
Bangkok Steel Wire Co., Ltd.	***	***	***[1]
Siam Wire Industry Co., Ltd.	***	***	***[2]
Thai Wire Products Public Co., Ltd.	***	***	***[3]
The Siam Industrial Wire Co., Ltd.	***	***	***

[1] Bangkok Steel reported uncoated PC strand exports to the United States ***.
[2] Siam Wire ***.
[3] Thai Wire *** during 2000-02.

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

The four Thai PC strand producers reported that PC strand accounted for between *** percent and *** percent of their total sales in their most recent fiscal year. ***. The other two Thai producers reported that ***. ***. PC strand exports from Thailand are not subject to antidumping or countervailing duty findings or remedies in any WTO-member country.

Aggregate Thai production capacity, production, shipments, and inventory data supplied by the four producers of PC strand in Thailand are presented in tables VII-11, VII-12, and VII-13. These data show that the annual capacity to produce uncoated PC strand in Thailand increased *** during the period for which data were requested in these investigations and that the level of production increased at *** throughout the period for which data were collected in these investigations.

Table VII-11
Uncoated PC strand: Thai production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

[8] (...continued)
by Siam Wire was used in the aggregation of the data presented in this report. In addition to Bangkok Steel, Thai Wire, Siam Wire, and Siam Industrial, the petition lists two other firms as producers of PC strand in Thailand: Thai Special Wire Co., Ltd. and Eastern Wire PCL. ***, Eastern Wire *** is not a producer of the subject merchandise. Thai Special Wire Co., Ltd. did not respond to the Commission's questionnaire.

Table VII-12
Plastic-coated PC strand: Thai production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

Table VII-13
Total PC strand: Thai production capacity, production, shipments, and inventories, 2000-02, January-June 2002, January-June 2003, and projected 2003-04

* * * * * * *

Projections indicate that a further increase in production is expected during 2003-04. Capacity utilization for PC strand increased steadily from *** percent in 2000 to *** percent in 2002. Thai PC strand producers reported producing *** during the first half of 2003. Projections indicate that capacity utilization is expected to climb from *** percent in 2003 to *** percent in 2004.

The home market accounts for a large share of the Thai production of PC strand. Projections indicate that the home market will continue to be a substantial market for the Thai PC strand producers. According to conference testimony, this is explained by the expansion of Asian construction and infrastructure projects, which has increased the demand for PC strand in all of Asia. Continued growth in the Asian market for PC strand is projected.[9]

Export markets other than the United States also account for a substantial, increasing portion of total shipments of Thai PC strand. These other export markets reportedly include ***.

The United States market accounts for a much smaller share of shipments of total Thai PC strand, although it accounted for *** share of shipments of plastic-coated PC strand during 2001-02. Siam Industrial, ***, reported that its exports of PC strand to the United States are ***. Bangkok Steel, ***, reported that its PC strand exports to the United States were made through ***.

AGGREGATE FOREIGN INDUSTRY DATA FOR THE SUBJECT COUNTRIES

Aggregate data provided by foreign producers in the five subject countries are presented in tables VII-14, VII-15, and VII-16. These aggregate data indicate that production and capacity utilization increased overall during the period for which information was collected in these investigations. Further increases are projected for PC strand in 2004 over the 2002 level reported. During 2000-02, exports of both uncoated and plastic-coated PC strand to the United States increased on an absolute basis and as a share of total shipments. Exports of PC strand to the United States fell on an absolute basis and as a share of total shipments in comparing the first half of 2002 to the first half of 2003. Projections indicate that a decline in exports to the United States is expected for PC strand during calendar year 2003. During calendar year 2004, a modest increase is projected over 2003 levels on an absolute basis, but such exports' share of total quantity of shipments is fall slightly during 2004.

U.S. IMPORTS SUBSEQUENT TO JUNE 30, 2003

U.S. importers responding to the Commission's questionnaire provided information concerning their imports of PC strand from the subject countries scheduled for delivery after June 30, 2003. This information is presented in table VII-17.

[9] Conference transcript, p. 119.

Table VII-14
Uncoated PC strand: Aggregate data for producers in the subject countries,[1] 2000-02, January-June 2002, January-June 2003, and projected 2003-04

Item	Actual experience					Projections	
				January-June			
	2000	2001	2002	2002	2003	2003	2004
	Quantity (*1,000 pounds*)						
Capacity	694,726	696,209	697,021	308,600	309,010	697,541	703,493
Production	488,988	482,359	532,679	242,795	265,489	526,692	568,154
End of period inventories	25,161	27,577	28,311	26,110	20,641	22,804	15,073
Shipments:							
Internal consumption/transfers	20,501	25,786	40,537	18,519	21,465	24,613	40,426
Home market	282,066	241,181	237,971	101,585	115,038	266,466	295,788
Exports to--							
United States	99,571	114,870	134,728	71,734	67,120	93,277	77,578
All other markets	86,410	97,600	118,239	50,890	68,014	147,851	161,375
Total exports	185,980	212,469	252,967	122,624	135,134	241,128	238,953
Total shipments	488,547	479,436	531,474	242,728	271,637	532,207	575,167
	Ratios and shares (*percent*)						
Capacity utilization	70.4	69.3	76.4	78.7	85.9	75.5	80.8
Inventories to production	5.1	5.7	5.3	5.4	3.9	4.3	2.7
Inventories to total shipments	5.2	5.8	5.3	5.4	3.8	4.3	2.6
Share of total quantity of shipments:							
Internal consumption/transfers	4.2	5.4	7.6	7.6	7.9	4.6	7.0
Home market	57.7	50.3	44.8	41.9	42.3	50.1	51.4
Exports to--							
United States	20.4	24.0	25.4	29.6	24.7	17.5	13.5
All other markets	17.7	20.4	22.2	21.0	25.0	27.8	28.1
All export markets	38.1	44.3	47.6	50.5	49.7	45.3	41.5

[1] Brazil, India, Korea, Mexico, and Thailand.

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

Table VII-15
Plastic-coated PC strand: Aggregate data for producers in the subject countries,[1] 2000-02, January-June 2002, January-June 2003, and projected 2003-04

Item	Actual experience					Projections	
				January-June			
	2000	2001	2002	2002	2003	2003	2004
	Quantity (*1,000 pounds*)						
Capacity	82,590	82,590	101,104	50,552	50,552	101,104	101,104
Production	30,586	41,220	54,257	24,785	27,160	36,395	51,805
End of period inventories	1,138	1,417	1,054	2,656	511	206	607
Shipments:							
Internal consumption/transfers	0	0	21	0	0	0	0
Home market	4,753	3,939	4,968	2,508	2,207	3,405	3,560
Exports to--							
United States	16,985	25,993	37,696	17,245	18,849	20,554	36,536
All other markets	8,745	11,008	11,935	3,791	6,647	13,284	11,308
Total exports	25,730	37,001	49,631	21,036	25,496	33,838	47,844
Total shipments	30,482	40,941	54,620	23,544	27,703	37,243	51,404
	Ratios and shares (*percent*)						
Capacity utilization	37.0	49.9	53.7	49.0	53.7	36.0	51.2
Inventories to production	3.7	3.4	1.9	5.4	0.9	0.6	1.2
Inventories to total shipments	3.7	3.5	1.9	5.6	0.9	0.6	1.2
Share of total quantity of shipments:							
Internal consumption/transfers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Home market	15.6	9.6	9.1	10.7	8.0	9.1	6.9
Exports to--							
United States	55.7	63.5	69.0	73.2	68.0	55.2	71.1
All other markets	28.7	26.9	21.9	16.1	24.0	35.7	22.0
All export markets	84.4	90.4	90.9	89.3	92.0	90.9	93.1

[1] Korea, Mexico, and Thailand.

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

Table VII-16
Total PC strand: Aggregate data for producers in the subject countries,[1] 2000-02, January-June 2002, January-June 2003, and projected 2003-04

Item	Actual experience					Projections	
				January-June			
	2000	2001	2002	2002	2003	2003	2004
	Quantity (*1,000 pounds*)						
Capacity	711,226	712,709	713,521	316,850	317,260	714,041	719,993
Production	499,074	497,793	546,554	249,061	271,191	538,481	579,532
End of period inventories	26,299	28,994	29,520	28,766	21,308	23,165	15,680
Shipments:							
Internal consumption/transfers	1	0	21	0	7	7	0
Home market	286,819	245,120	242,939	104,084	117,245	269,871	299,348
Exports to--							
United States	116,556	140,863	172,423	88,979	85,969	113,831	114,114
All other markets	95,154	108,608	130,174	54,681	74,661	161,135	172,683
Total exports	211,710	249,471	302,598	143,660	160,630	274,967	286,797
Total shipments	498,530	494,591	545,558	247,744	277,882	544,845	586,145
	Ratios and shares (*percent*)						
Capacity utilization	70.2	69.8	76.6	78.6	85.5	75.4	80.5
Inventories to production	5.3	5.8	5.4	5.8	3.9	4.3	2.7
Inventories to total shipments	5.3	5.9	5.4	5.8	3.8	4.3	2.7
Share of total quantity of shipments:							
Internal consumption/transfers	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Home market	57.5	49.6	44.5	42.0	42.2	49.5	51.1
Exports to--							
United States	23.4	28.5	31.6	35.9	30.9	20.9	19.5
All other markets	19.1	22.0	23.9	22.1	26.9	29.6	29.5
All export markets	42.5	50.4	55.5	58.0	57.8	50.5	48.9

[1] The data presented are the sum of the five subject countries' (i.e., Brazil, India, Korea, Mexico, and Thailand) "total" PC strand tables presented in this section of the report (tables VII-1, VII-2, VII-6, VII-9, and VII-13).

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

Table VII-17
PC strand: U.S. importers and their reported subject U.S. imports scheduled for delivery after June 30, 2003, by subject country

* * * * * * *

U.S. IMPORTERS' INVENTORIES

Data collected in these investigations on U.S. importers' end-of-period inventories of PC strand are presented table VII-18. The U.S. importer of PC strand from India did not report any U.S. inventories of the subject merchandise during the period for which information was requested in the final phase of these investigations. U.S. importers' inventories of Brazilian, Mexican, and Thai PC strand increased overall from 2000 to 2002, while U.S. importers' inventories of Korean PC strand declined overall during the same time period. During the first half of 2003, an increase in end-of-period inventories was reported only by U.S. importers of the Brazilian product. Cumulated U.S. importers' inventories of subject merchandise fell by 14.8 percent from 2000 to 2001, but increased by 17.8 percent in 2002 to a level almost exactly that reported for 2000. The level of aggregate end-of-period inventories of subject merchandise held during January-June 2003 was 16.1 percent lower than the level held during January-June 2002.

Table VII-18
PC strand: U.S. importers' end-of-period inventories of imports, by source, 2000-02, January-June 2002, and January-June 2003

Item	Calendar year			January-June	
	2000	2001	2002	2002	2003
Brazil:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***
India:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***
Korea:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***
Mexico:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***
Thailand:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***
Subject sources:					
Inventories (*1,000 pounds*)	5,441	4,634	5,460	5,985	5,021
Ratio of inventories to imports (*percent*)	4.7	3.6	3.3	3.8	2.8
Ratio to U.S. shipments of imports (*percent*)	4.6	3.6	3.3	3.8	2.9
Other sources:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***
All sources:					
Inventories (*1,000 pounds*)	***	***	***	***	***
Ratio of inventories to imports (*percent*)	***	***	***	***	***
Ratio to U.S. shipments of imports (*percent*)	***	***	***	***	***

Note: Partial-year ratios are calculated using annualized data for imports and shipments of imports.

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

APPENDIX A

FEDERAL REGISTER NOTICES

amended May 11, 2001, which defines the methods and principles of this title transfer process.

Two alternatives are evaluated in the DEIS: (1) the No Action Alternative, under which facilities of the Wellton-Mohawk Division of the Gila Project and lands within or adjacent to the Gila Project would remain in Federal ownership, and (2) the Proposed Action/Preferred Alternative under which Reclamation would transfer title to the facilities of the Wellton-Mohawk Division of the Gila Project and lands within or adjacent to the Gila Project to the District.

Review and Inspection of the DEIS

Copies of the DEIS are available for public review at the following locations:

- Wellton-Mohawk Irrigation and Drainage District, 30570 Wellton-Mohawk Drive, Wellton, AZ, telephone: (928) 785–3351
- Dateland School Branch Library, Avenue 64 East, Dateland, AZ, telephone: (928) 454–2243
- Foothills Branch Library, 11279 South Glenwood Avenue, Yuma, AZ, telephone: (928) 342–1640
- Roll Branch Library, 5151 South Avenue 39 East, Roll, AZ, telephone: (928) 785–3701
- Wellton Branch Library, 10425 Williams Street, Wellton, AZ, telephone: (928) 785–9575
- Yuma County Main Library, 350 South 3rd Avenue, Yuma, AZ, telephone: (928) 782–1871

Internet

The DEIS is also available on the Internet at *http://www.usbr.gov/lc/yuma/* and *http://www.bookmanedmonston.com.*

Dated: August 12, 2003.

Lorri Gray,

Assistant Regional Director, Lower Colorado Region.

[FR Doc. 03–22510 Filed 9–3–03; 8:45 am]

BILLING CODE 4310–MN–P

INTERNATIONAL TRADE COMMISSION

[Investigations Nos. 731–TA–753–756 (Review)]

Cut-to-Length Carbon Steel Plate From China, Russia, South Africa, and Ukraine

Determinations

On the basis of the record[1] developed in the subject five-year reviews, the United States International Trade Commission (Commission) determines, pursuant to section 751(c) of the Tariff Act of 1930 (19 U.S.C. 1675(c)) (the Act), that termination of the suspended investigations on cut-to-length carbon steel plate from China, Russia, and Ukraine would be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time. The Commission further determines that termination of the suspended investigation on the subject product from South Africa would not be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.[2]

Background

The Commission instituted these reviews on September 3, 2002 (67 FR 56311) and determined on December 9, 2002 that it would conduct full reviews (67 FR 77803, December 19, 2002). Notice of the scheduling of the Commission's reviews 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 March 21, 2003 (68 FR 13950). The hearing was held in Washington, DC, on July 8, 2003, and all persons who requested the opportunity were permitted to appear in person or by counsel.

The Commission will transmit its determinations in these reviews to the Secretary of Commerce on August 29, 2003. The views of the Commission are contained in USITC Publication 3626 (September 2003), entitled Cut-to-length Carbon Steel Plate from China, Russia, South Africa, and Ukraine: Investigations Nos. 731–TA–753–756 (Review).

Issued: August 29, 2003.

By order of the Commission.

Marilyn R. Abbott,

Secretary.

[FR Doc. 03–22538 Filed 9–3–03; 8:45 am]

BILLING CODE 7020–02–P

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

[2] Commissioner Stephen Koplan dissenting. Commissioner Charlotte Lane did not participate in these reviews.

INTERNATIONAL TRADE COMMISSION

[Investigations Nos. 701–TA–432 (Final) and 731–TA–1024–1028 (Final)]

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

AGENCY: United States International Trade Commission.

ACTION: Scheduling of the final phase of countervailing duty and antidumping investigations.

SUMMARY: The Commission hereby gives notice of the scheduling of the final phase of countervailing duty investigation No. 701–TA–432 (Final) under section 705(b) of the Tariff Act of 1930 (19 U.S.C. 1671d(b)) (the Act) and the final phase of antidumping investigations Nos. 731–TA–1024–1028 (Final) under section 735(b) of the Act (19 U.S.C. 1673d(b)) to determine whether an industry in the United States is materially injured or threatened with material injury, or the establishment of an industry in the United States is materially retarded, by reason of subsidized imports from India of prestressed concrete steel wire strand (PC strand) and less-than-fair-value imports from Brazil, India, Korea, Mexico, and Thailand of PC strand, provided for in subheading 7312.10.30 of the Harmonized Tariff Schedule of the United States.[1]

For further information concerning the conduct of this phase of the investigations, hearing procedures, and rules of general application, consult the Commission's Rules of Practice and Procedure, part 201, subparts A through E (19 CFR part 201), and part 207, subparts A and C (19 CFR part 207).

EFFECTIVE DATE: July 16, 2003.

FOR FURTHER INFORMATION CONTACT: Mary Messer (202–205–3193), Office of Investigations, U.S. International Trade Commission, 500 E Street, SW., Washington, DC 20436. Hearing-impaired persons can obtain information on this matter by contacting

[1] For purposes of these investigations, the Department of Commerce has defined the subject merchandise as follows: "PC strand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pretensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand. The merchandise under investigation is currently classifiable under subheadings 7312.10.3010 and 7312.10.3012 of the Harmonized Tariff Schedule of the United States (HTSUS). Although the HTSUS subheadings are provided for convenience and customs purposes, the written description of the merchandise under investigation is dispositive."

the Commission's TDD terminal on 202–205–1810. Persons with mobility impairments who will need special assistance in gaining access to the Commission should contact the Office of the Secretary at 202–205–2000. General information concerning the Commission may also be obtained by accessing its Internet server (*http://www.usitc.gov*). The public record for these investigations may be viewed on the Commission's electronic docket (EDIS) at *http://edis.usitc.gov*.

SUPPLEMENTARY INFORMATION:

Background—The final phase of these investigations is being scheduled as a result of affirmative preliminary determinations by the Department of Commerce that certain benefits which constitute subsidies within the meaning of section 703 of the Act (19 U.S.C. 1671b) are being provided to manufacturers, producers, or exporters in India of PC strand, and that imports of PC strand from Brazil, India, Korea, Mexico, and Thailand are being sold in the United States at less than fair value within the meaning of section 733 of the Act (19 U.S.C. 1673b). The investigations were requested in a petition filed on January 31, 2003, by American Spring Wire Corp., Bedford Heights, OH; Insteel Wire Products Co., Mt. Airy, NC; and Sumiden Wire Products Corp., Stockton, CA.

Participation in the investigations and public service list—Persons, including industrial users of the subject merchandise and, if the merchandise is sold at the retail level, representative consumer organizations, wishing to participate in the final phase of these investigations as parties must file an entry of appearance with the Secretary to the Commission, as provided in section 201.11 of the Commission's rules, no later than 21 days prior to the hearing date specified in this notice. A party that filed a notice of appearance during the preliminary phase of the investigations need not file an additional notice of appearance during this final phase. The Secretary will maintain a public service list containing the names and addresses of all persons, or their representatives, who are parties to the investigations.

Limited disclosure of business proprietary information (BPI) under an administrative protective order (APO) and BPI service list—Pursuant to section 207.7(a) of the Commission's rules, the Secretary will make BPI gathered in the final phase of these investigations available to authorized applicants under the APO issued in the investigations, provided that the application is made no later than 21 days prior to the hearing date specified in this notice. Authorized applicants must represent interested parties, as defined by 19 U.S.C. 1677(9), who are parties to the investigations. A party granted access to BPI in the preliminary phase of the investigations need not reapply for such access. A separate service list will be maintained by the Secretary for those parties authorized to receive BPI under the APO.

Staff report—The prehearing staff report in the final phase of these investigations will be placed in the nonpublic record on November 17, 2003, and a public version will be issued thereafter, pursuant to section 207.22 of the Commission's rules.

Hearing—The Commission will hold a hearing in connection with the final phase of these investigations beginning at 9:30 a.m. on December 2, 2003, at the U.S. International Trade Commission Building. Requests to appear at the hearing should be filed in writing with the Secretary to the Commission on or before November 24, 2003. A nonparty who has testimony that may aid the Commission's deliberations may request permission to present a short statement at the hearing. All parties and nonparties desiring to appear at the hearing and make oral presentations should attend a prehearing conference to be held at 9:30 a.m. on November 26, 2003, at the U.S. International Trade Commission Building. Oral testimony and written materials to be submitted at the public hearing are governed by sections 201.6(b)(2), 201.13(f), and 207.24 of the Commission's rules. Parties must submit any request to present a portion of their hearing testimony *in camera* no later than 7 days prior to the date of the hearing.

Written submissions—Each party who is an interested party shall submit a prehearing brief to the Commission. Prehearing briefs must conform with the provisions of section 207.23 of the Commission's rules; the deadline for filing is November 24, 2003. Parties may also file written testimony in connection with their presentation at the hearing, as provided in section 207.24 of the Commission's rules, and posthearing briefs, which must conform with the provisions of section 207.25 of the Commission's rules. The deadline for filing posthearing briefs is December 9, 2003; witness testimony must be filed no later than three days before the hearing. In addition, any person who has not entered an appearance as a party to the investigations may submit a written statement of information pertinent to the subject of the investigations on or before December 9, 2003. On December 26, 2003, the Commission will make available to parties all information on which they have not had an opportunity to comment. Parties may submit final comments on this information on or before December 30, 2003, but such final comments must not contain new factual information and must otherwise comply with section 207.30 of the Commission's rules. All written submissions must conform with the provisions of section 201.8 of the Commission's rules; any submissions that contain BPI must also conform with the requirements of sections 201.6, 207.3, and 207.7 of the Commission's rules. The Commission's rules do not authorize filing of submissions with the Secretary by facsimile or electronic means, except to the extent permitted by section 201.8 of the Commission's rules, as amended, 67 FR 68036 (November 8, 2002).

In accordance with sections 201.16(c) and 207.3 of the Commission's rules, each document filed by a party to the investigations must be served on all other parties to the investigations (as identified by either the public or BPI service list), and a certificate of service must be timely filed. The Secretary will not accept a document for filing without a certificate of service.

Authority: These investigations are being conducted under authority of title VII of the Tariff Act of 1930; this notice is published pursuant to section 207.21 of the Commission's rules.

By order of the Commission.

Issued: August 28, 2003.

Marilyn R. Abbott,

Secretary to the Commission.

[FR Doc. 03–22504 Filed 9–3–03; 8:45 am]

BILLING CODE 7020–02–P

DEPARTMENT OF JUSTICE

Notice of Lodging of Consent Decree Under the Clean Water Act

Under 28 CFR 50.7 notice is hereby given that on August 11, 2003, a proposed consent decree in *United States* v. *Groendyke Transport, Inc.*, Civil Action No. 01–M–1821 (CBS) was lodged with the United States District Court for the District of Colorado.

In this action the United States sought civil penalties for alleged violations of Section 311(b)(3) of the Federal Water Pollution Control Act, also known as the Clean Water Act (the Act), 33 U.S.C. 1321(b)(3), as amended by the Oil Pollution Act of 1990 ("OPA"), resulting from discharges of gasoline and asphalt into waters of the United States. The first spill occurred on December 5, 1998,

publication, or the first business day thereafter, unless the Department alters the date per 19 CFR 351.310(d). The Department will issue the final results of these preliminary results, including the results of our analysis of the issues raised in any such written comments or at a hearing, within 120 days of publication of these preliminary results.

Assessment Rates

Upon completion of this administrative review, the Department will determine, and Customs shall assess, antidumping duties on all appropriate entries. As a result of the Court of International Trade's decision in *Corus Staal BV et al* v. *United States*, Consol. Court No. 02–00003, Slip Op. 03–127 (CIT September 29, 2003), we will not assess duties on merchandise that entered between October 30, 2001 and November 28, 2001, inclusive. For more information, *see Certain Hot-Rolled Carbon Steel Flat Products From The Netherlands: Notice of Final Court Decision and Suspension of Liquidation*, 68 FR 60912 (October 24, 2003). Thus, in accordance with 19 CFR 351.212(b)(1), we will calculate an importer-specific *ad valorem* assessment rate for merchandise based on the ratio of the total amount of antidumping duties calculated for the examined sales made during the POR to the total customs value of the sales used to calculate those duties less the total customs value of the sales of merchandise that entered between October 30, 2001, and November 28, 2001, inclusive. This rate will be assessed uniformly on all entries of that particular importer made during the periods May 3, 2001, through October 29, 2001, and November 29, 2001, through October 31, 2002. The Department will issue appropriate assessment instructions directly to Customs within 15 days of publication of the final results of review.

Furthermore, the following deposit requirements will be effective upon completion of the final results of this administrative review for all shipments of the subject merchandise entered, or withdrawn from warehouse, for consumption on or after the publication date of the final results of this administrative review, as provided by section 751(a)(1) of the Tariff Act: (1) The cash deposit rate for the reviewed company will be the rate established in the final results of the administrative review (except that no deposit will be required if the rate is zero or *de minimis*, *i.e.*, less than 0.5 percent); (2) if the exporter is not a firm covered in this review, or the original investigation, but the manufacturer is, the cash deposit rate will be that established for the most recent period for the manufacturer of the merchandise; and (3) if neither the exporter nor the manufacturer is a firm covered in this review, any previous reviews, or the LTFV investigation, the cash deposit rate will be 2.59 percent, the "all others" rate established in the LTFV investigation. *See Antidumping Duty Order: Certain Hot-Rolled Carbon Steel Flat Products from the Netherlands*, 67 FR 59565 (November 29, 2001).

This notice also serves as a preliminary reminder to importers of their responsibility under 19 CFR 351.402(f) to file a certificate regarding the reimbursement of antidumping duties prior to liquidation of the relevant entries during this review period. Failure to comply with this requirement could result in the Secretary's presumption that reimbursement of antidumping duties occurred and the subsequent assessment of double antidumping duties.

We are issuing and publishing this notice in accordance with sections 751(a)(1) and 777(i)(1) of the Tariff Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

[FR Doc. 03–30391 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–P

DEPARTMENT OF COMMERCE

International Trade Administration

[A-549–820]

Notice of Final Determination of Sales at Less Than Fair Value and Negative Final Determination of Critical Circumstances: Prestressed Concrete Steel Wire Strand from Thailand

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

ACTION: Notice of final determination of sales at less than fair value and negative final determination of critical circumstances.

EFFECTIVE DATE: December 8, 2003.

FOR FURTHER INFORMATION CONTACT: Carol Henninger or Constance Handley, at (202) 482–3003 or (202) 482–0631, respectively; Import Administration, International Trade Administration, U.S. Department of Commerce, 14th Street and Constitution Avenue NW, Washington, DC 20230.

SUPPLEMENTARY INFORMATION:

Final Determination

We determine that prestressed concrete steel wire strand (PC strand) from Thailand is being sold, or is likely to be sold, in the United States at less than fair value (LTFV), as provided in section 735 of the Tariff Act of 1930, as amended (the Act). The estimated margins of sales at LTFV are shown in the *Suspension of Liquidation* section of this notice. In addition, we determine that critical circumstances do not exist with respect to PC strand produced and exported by the respondent in this investigation as well as all other producers/exporters.

Case History

The preliminary determination in this investigation was published on July 17, 2003. *See Notice of Preliminary Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Negative Preliminary Determination of Critical Circumstances: Prestressed Concrete Steel Wire Strand from Thailand*, 68 FR 42373 (July 17, 2003) (Preliminary Determination). Since the publication of the preliminary determination, the following events have occurred:

On July 25, 2003, the Department of Commerce (the Department) received a request from the respondent in this investigation, Siam Industrial Wire Co., Ltd. and Cementhai SCT USA (collectively, SIW), proposing a suspension agreement in accordance with the Department's regulations at 19 CFR 351.208. On several occasions, the Department discussed the proposed suspension agreement with counsel to SIW, who subsequently concluded that a suspension agreement would not be pursued. *See Memorandum from Gary Taverman, Director, Office 5, to the File, Re: PC Strand from Thailand - Proposed Suspension Agreement* (November 24, 2003).

In September 2003, the Department verified the questionnaire responses submitted by SIW. The sales and cost verification reports were issued in October 2003. On October 23, 2003, we received case briefs from the petitioners[1] and SIW. On October 28, 2003, we received a rebuttal brief from SIW. A public hearing was held on November 3, 2003.

Scope of Investigation

For purposes of this investigation, PC strand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in

[1] The petitioners in this investigation are American Spring Wire Corp., Insteel Wire Products Company, and Sumiden Wire Products Corp.

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

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

Period of Investigation

The period of investigation (POI) is January 1, 2002, through December 31, 2002. This period corresponds to the four most recent fiscal quarters prior to the month of the filing of the petition (*i.e.*, January 2003) involving imports from a market economy, and is in accordance with the Department's regulations. *See* 19 CFR 351.204(b)(1).

Critical Circumstances

Section 735(a)(3) of the Act provides that the Department will determine that critical circumstances exist if there is a reasonable basis to believe or suspect that: (A)(i) 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 (ii) 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 less than fair value and that there was likely to be material injury by reason of such sales, and (B) there have been massive imports of the subject merchandise over a relatively short period.

In the preliminary determination of this investigation, the Department found that critical circumstances did not exist because there was no reasonable basis to impute knowledge of dumping with respect to imports of PC strand from Thailand, nor was there a history of dumping of PC strand from Thailand. *See Preliminary Determination* at 42377; *see also, Antidumping Duty Investigation of Prestressed Concrete Steel Wire Strand from Thailand Preliminary Negative Determination of Critical Circumstances Memorandum from Salim Bhabhrawala and Carol Henninger to Gary Taverman*, July 10, 2003, on file in the CRU. The Department normally considers margins of 25 percent or more for export price (EP) sales and 15 percent or more for constructed export price (CEP) sales sufficient to impute knowledge of dumping. *See e.g., Preliminary Determination of Sales at Less Than Fair Value: Certain Cut-to-Length Carbon Steel Plate From the People's Republic of China*, 62 FR 31972, 31978 (June 11, 1997). Because the final dumping margin for the respondent is less than 15 percent, we continue to find there is no reasonable basis to impute knowledge of dumping with respect to these imports from Thailand. As noted in the preliminary determination, it is the Department's practice to conduct its critical circumstances analysis of companies in the "All Others" category based on the experience of the investigated company. Because there is no history of dumping of PC strand from Thailand and the final dumping margin for SIW is less than 15 percent, we are determining that critical circumstances do not exist for SIW, as well as all other producers/exporters covered by the "All Others" rate. Accordingly, we find that critical circumstances do not exist for imports of PC strand from Thailand.

Verification

As provided in section 782(i) of the Act, we conducted verification of the cost and sales information submitted by SIW. We used standard verification procedures including examination of relevant accounting and production records, and original source documents provided by the respondent.

Analysis of Comments Received

All issues raised in the case and rebuttal briefs submitted by parties to this proceeding are listed in the appendix to this notice and addressed in the Memorandum from Holly A. Kuga, Acting Deputy Assistant Secretary, to James J. Jochum, Assistant Secretary for Import Administration, RE: Issues and Decision Memorandum for the Final Determination of the Investigation of Prestressed Concrete Steel Wire Strand from Thailand (Decision Memorandum), dated December 1, 2003, and are hereby adopted by this notice. The Decision Memorandum is on file in room B-099 of the main Department building. In addition, a complete version of the Decision Memorandum can be accessed directly on the World Wide Web at www.ita.doc.gov/import_admin/records/frn. The paper and electronic versions of the Decision Memorandum are identical in content.

Changes Since The Preliminary Determination

Based on our findings at verification, and analysis of comments received, we have made adjustments to the preliminary determination calculation methodologies in calculating the final dumping margins in this proceeding. These adjustments are discussed in the Decision Memorandum for this investigation.

Continuation of Suspension of Liquidation

In accordance with section 735(c)(1)(B) of the Act, we are directing U.S. Customs and Border Patrol (CBP) to continue to suspend liquidation of all entries of PC strand exported from Thailand, that are entered, or withdrawn from warehouse, for consumption on or after the date of publication of the preliminary determination. CBP shall continue to require a cash deposit or the posting of a bond based on the estimated weighted-average dumping margins shown below. The suspension of liquidation instructions will remain in effect until further notice.

We determine that the following weighted-average dumping margins exist for Thailand:

Manufacturer/exporter	Margin (percent)
Siam Industrial Wire Co., Ltd.	12.99
All Others	12.99

International Trade Commission Notification

In accordance with section 735(d) of the Act, we have notified the International Trade Commission (ITC) of our determination. The ITC will determine, within 45 days, whether imports of subject merchandise from Canada are causing material injury, or threaten material injury, to an industry in the United States. If the ITC determines that material injury or threat of material injury does not exist, this proceeding will be terminated and all securities posted will be refunded or canceled. If the ITC determines that such injury does exist, the Department will issue an antidumping order directing CBP officials to assess antidumping duties on all imports of the subject merchandise entered, or withdrawn from warehouse for consumption on or after the effective date of the suspension of liquidation.

This notice also serves as a reminder to parties subject to administrative protective order (APO) of their responsibility concerning the disposition of proprietary information disclosed under APO in accordance with 19 CFR 351.305. Timely notification of return/destruction of APO materials or conversion to judicial protective order is hereby requested.

Failure to comply with the regulations and the terms of an APO is a sanctionable violation.

This determination is issued and published in accordance with sections 735(d) and 777(i)(1) of the Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

APPENDIX

Issues Covered in Decision Memorandum

Comment 1: Allocation of Conversion Costs
Comment 2: Treatment of SIW's Home Market Back-to-Back Sales
Comment 3: Whether to Allow a Constructed Export Price Offset
Comment 4: Corrections to SIW's U.S. sales
Comment 5: Corrections to SIW's Home Market Sales
Comment 6: Corrections to Errors Contained in the Preliminary Margin Calculation Program

[FR Doc. 03–30383 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–S

DEPARTMENT OF COMMERCE

International Trade Administration

[A-201–831]

Notice of Final Determination of Sales at Less Than Fair Value and Negative Final Determination of Critical Circumstances: Prestressed Concrete Steel Wire Strand from Mexico

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

ACTION: Notice of final determination of sales at less than fair value and negative final determination of critical circumstances.

EFFECTIVE DATE: December 8, 2003.

FOR FURTHER INFORMATION CONTACT: James Kemp or Daniel O'Brien at (202) 482–5346 or (202) 482–1376, respectively; AD/CVD Enforcement Group II Office 5, Import Administration, Room 1870, International Trade Administration, U.S. Department of Commerce, 14th Street and Constitution Avenue, NW, Washington, DC 20230.

SUPPLEMENTARY INFORMATION:

Final Determination

We determine that prestressed concrete steel wire strand (PC strand) from Mexico is being sold, or is likely to be sold, in the United States at less than fair value (LTFV), as provided in section 735 of the Tariff Act of 1930, as amended (the Act). The estimated margins of sales at LTFV are shown in the *Suspension of Liquidation* section of this notice. In addition, we determine that critical circumstances do not exist with respect to PC strand produced and exported by either Cablesa S.A. de C.V. (Cablesa) or Aceros Camesa S.A. de C.V. (Camesa) as well as all other producers/exporters.

Case History

The preliminary determination in this investigation was published on July 17, 2003. *See Notice of Preliminary Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Affirmative Preliminary Determination of Critical Circumstances in Part: Prestressed Concrete Steel Wire Strand from Mexico*, 68 FR 42373, 42378 (July 17, 2003) (*Preliminary Determination*). Since the publication of the preliminary determination, the following events have occurred:

In August and September 2003, the Department of Commerce (the Department) verified the questionnaire responses submitted by Camesa and Cablesa. The sales and cost verification reports were issued in October 2003. On October 22, 2003, we received case briefs from the petitioners[1] and Cablesa. On October 28, 2003, we received rebuttal briefs from the petitioners, Camesa, and Cablesa. As the only request for a public hearing was made by the petitioners, and that request was subsequently withdrawn, a public hearing was not held.

Scope of Investigation

For purposes of this investigation, PC strand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pretensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.

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

[1] The petitioners in this investigation are American Spring Wire Corp., Insteel Wire Products Company, and Sumiden Wire Products Corp.

Period of Investigation

The period of investigation (POI) is January 1, 2002, through December 31, 2002. This period corresponds to the four most recent fiscal quarters prior to the month of the filing of the petition (*i.e.*, January 2003) and is in accordance with our regulations. *See* 19 CFR 351.204(b)(1).

Class or Kind

In the preliminary determination, we found that uncovered and covered PC strand constituted the same class or kind of merchandise. Since the preliminary determination, no parties commented on this finding. Therefore, for the final determination, we continue to find that uncovered and covered PC strand constitute the same class or kind of merchandise for the reasons outlined in the *Memorandum from James Kemp and Salim Bhabhrawala, to Holly Kuga, Acting Deputy Assistant Secretary, Regarding Consideration of Scope Exclusion Request and Class or Kind* (July 10, 2003) and the *Preliminary Determination*.

Facts Available

In the preliminary determination, we based the dumping margin for Cablesa on adverse facts available pursuant to sections 776(a) and 776(b) of the Act. The use of adverse facts available was warranted for Cablesa because the Department found that the cost information on the record for Cablesa was so incomplete that it could not serve as a reliable basis for reaching a determination. *See Preliminary Determination*.

Since the preliminary determination, Cablesa has responded to two supplemental questionnaires regarding its cost response. However, Cablesa's cost response could not be verified. Therefore, we have determined that the cost information on the record for Cablesa is unreliable and that Cablesa has failed to cooperate by not acting to the best of its ability. As a result, the use of adverse facts available is warranted with respect to Cablesa. *See Memorandum from Holly A. Kuga, Acting Deputy Assistant Secretary, to James J. Jochum, Assistant Secretary for Import Administration, RE: Issues and Decision Memorandum for the Final Determination of the Investigation of Prestressed Concrete Steel Wire Strand from Mexico (Decision Memorandum)*, dated December 1, 2003, at Comment 6 for a discussion of the deficiencies of Cablesa's cost response and the Department's use of adverse facts available.

Our rejection of Cablesa's cost information renders impossible any

price-to-price or price-to-constructed value comparisons. This is consistent with Department practice. *See, e.g., Notice of Final Determination of Sales at Less than Fair Value: Grain-Oriented Electrical Steel from Italy*, 59 FR 33952 (July 1, 1994), *Notice of Final Determination of Sales at Less than Fair Value: Certain Cold-Rolled Carbon Steel Flat Products from Venezuela*, 67 FR 62119 (October 3, 2002), and *Notice of Final Results of Antidumping Duty Administrative Review: Certain Cut-to-Length Carbon Steel Plate from Mexico*, 64 FR 76, 77–78 (January 4, 1999).

Accordingly, we have assigned to Cablesa the highest margin stated in the notice of initiation for Mexico. *See Notice of Initiation of Antidumping Duty Investigations: Prestressed Concrete Steel Wire Strand From Brazil, India, the Republic of Korea, Mexico, and Thailand*, 68 FR 9050 (February 27, 2003). We corroborated this margin in the preliminary determination and we continue to find this margin corroborated, pursuant to section 776(c) of the Act. *See* Memoranda regarding corroboration of data contained in the petition for assigning facts available rates, dated July 10, 2003.

Critical Circumstances

For the final determination, based on company-specific shipment data submitted to the Department, we have found that critical circumstances do not exist for either Camesa or Cablesa because there were no massive imports with respect to either respondent. We have also found that critical circumstances do not exist for any companies in the "All Others" category. *See Memorandum from Daniel O'Brien, International Trade Compliance Analyst, to Gary Taverman, Director, Office 5, Re: Final Negative Determination of Critical Circumstances and Decision Memorandum* at Comment 8. *See, also, Memorandum from Daniel O'Brien and Jim Kemp, International Trade Compliance Analysts, to Gary Taverman, Director, Office 5, Re: Verification of the Sales Response of Cablesa S.A. de C.V. in the Investigation of Prestressed Concrete Steel Wire Strand from Mexico* dated October 7, 2003, at 22–23.

Verification

As provided in section 782(i) of the Act, we conducted verification of the cost and sales information submitted by Camesa and Cablesa. We used standard verification procedures including examination of relevant accounting and production records, and original source documents provided by the respondent.

Analysis of Comments Received

All issues raised in the case and rebuttal briefs submitted by parties to this proceeding are listed in the appendix to this notice and addressed in the Decision Memorandum hereby adopted by this notice. The *Decision Memorandum* is on file in room B-099 of the main Department building. In addition, a complete version of the *Decision Memorandum* can be accessed directly on the World Wide Web at www.ita.doc.gov/import_admin/records/frn. The paper and electronic versions of the *Decision Memorandum* are identical in content.

Changes Since The Preliminary Determination

Based on our findings at verification and our analysis of comments received, we have made adjustments to the preliminary determination calculation methodologies in calculating the final dumping margin for Camesa. These adjustments are discussed in the *Decision Memorandum* for this investigation.

Continuation of Suspension of Liquidation

In accordance with section 735(c)(1)(B) of the Act, we are directing Customs and Border Patrol (CBP) to continue to suspend liquidation of all entries of PC strand exported from Mexico, that are entered, or withdrawn from warehouse, for consumption on or after the date of the preliminary determination. CBP shall continue to require a cash deposit or the posting of a bond based on the estimated weighted-average dumping margins shown below. The suspension of liquidation instructions will remain in effect until further notice. Because the Department now determines that critical circumstances do not exist for either respondent, the retroactive suspension of liquidation ordered at the preliminary determination is terminated. CBP shall return all bonds and/or cash deposits posted for entries of PC strand produced and exported by Cablesa during the critical circumstances period (*i.e.* April 18, 2003, to July 17, 2003).

We determine that the following weighted-average dumping margins exist for Mexico:

Manufacturer/exporter	Margin (percent)
Camesa	62.78
Cablesa	77.20
All Others	62.78

International Trade Commission Notification

In accordance with section 735(d) of the Act, we have notified the International Trade Commission (ITC) of our determination. The ITC will determine, within 45 days, whether imports of subject merchandise from Mexico are causing material injury, or threaten material injury, to an industry in the United States. If the ITC determines that material injury or threat of material injury does not exist, this proceeding will be terminated and all securities posted will be refunded or canceled. If the ITC determines that such injury does exist, the Department will issue an antidumping order directing CBP officials to assess antidumping duties on all imports of the subject merchandise entered, or withdrawn from warehouse for consumption on or after the effective date of the suspension of liquidation.

This notice also serves as a reminder to parties subject to administrative protective order (APO) of their responsibility concerning the disposition of proprietary information disclosed under APO in accordance with 19 CFR 351.305. Timely notification of return/destruction of APO materials or conversion to judicial protective order is hereby requested. Failure to comply with the regulations and the terms of an APO is a sanctionable violation.

This determination is issued and published in accordance with sections 735(d) and 777(i)(1) of the Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

APPENDIX

Issues Covered in Decision Memorandum

I. ISSUES SPECIFIC TO ACEROS CAMESA

Comment 1: Unverified Movement Expenses
Comment 2: Indirect Selling Expenses
Comment 3: Understatement of Cost of Manufacturing
Comment 4: General and Administrative Expense
Comment 5: Finance Expense

II. ISSUES SPECIFIC TO CABLESA

Comment 6: Reliability of Cost Information
Comment 7: Adjustments to Cost Information
Comment 8: Critical Circumstances new file

[FR Doc. 03–30384 Filed 12–5–03; 8:45 am]
BILLING CODE 3510–DS–S

DEPARTMENT OF COMMERCE

International Trade Administration

[A-533–828]

Notice of Final Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from India

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

EFFECTIVE DATE: December 8, 2003.

SUMMARY: We determine that prestressed concrete steel wire strand (PC strand) from India is being sold, or is likely to be sold, in the United States at less than fair value (LTFV), as provided in section 735 of the Tariff Act of 1930, as amended (the Act). The estimated margins of sales at LTFV are shown in the *Continuation of Suspension of Investigation* section of this notice.

FOR FURTHER INFORMATION CONTACT: Tisha Loeper-Viti or Martin Claessens at (202) 482–7425 and (202) 482–5451, respectively; Import Administration, International Trade Administration, U.S. Department of Commerce, 14th Street and Constitution Avenue, NW, Washington, DC 20230.

SUPPLEMENTARY INFORMATION:

Case History

The preliminary determination in this investigation was published on July 17, 2003. *See Notice of Preliminary Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from India*, 68 FR 42389 (July 17, 2003) (*Preliminary Determination*). Since the publication of the *Preliminary Determination*, the following events have occurred:

On July 31, 2003, Tata Iron and Steel Co. Ltd. (TISCO), the sole respondent in this investigation, requested that the Department of Commerce (the Department) postpone its final determination and fully extend the provisional measures by 60 days. On August 18, 2003, the Department published in the **Federal Register** the postponement of the final determination for PC strand from India. *See Notice of Postponement of Final Antidumping Duty Determinations and Extension of Provisional Measures: Prestressed Concrete Steel Wire Strand From Brazil, India, and the Republic of Korea*, 68 FR 49436 (August 18, 2003).

Scope of Investigation

For purposes of this investigation, PC strand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pretensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand. The merchandise under investigation is currently classifiable under subheadings 7312.10.3010 and 7312.10.3012 of the Harmonized Tariff Schedule of the United States (HTSUS). Although the HTSUS subheadings are provided for convenience and customs purposes, the written description of the merchandise under investigation is dispositive.

Period of Investigation

The period of investigation is January 1, 2002, through December 31, 2002.

Facts Available

In the preliminary determination, we based the dumping margin for the mandatory respondent, TISCO, on adverse facts available pursuant to sections 776(a) and 776(b) of the Act. The use of adverse facts available was warranted in this investigation because TISCO failed to provide the detailed cost information requested by the Department. *See Preliminary Determination*, 68 FR at 42390. The failure of the respondent to supply the requested information significantly impedes this proceeding because the Department cannot accurately determine a margin for this party. Furthermore, the respondent did not give an explanation for its failure to supply such information, nor propose alternatives. Therefore, we found that TISCO failed to cooperate by not acting to the best of its ability. We assigned TISCO the highest margin stated in the notice of initiation. *See Notice of Initiation of Antidumping Duty Investigations: Prestressed Concrete Steel Wire Strand From Brazil, India, the Republic of Korea, Mexico, and Thailand*, 68 FR 9050 (February 27, 2003). We corroborated this margin in the preliminary determination and we continue to find this margin corroborated, pursuant to section 776(c) of the Act. *See* Memorandum regarding Corroboration of Data Contained in the Petition for Assigning Facts Available Rates, dated July 10, 2003. A complete explanation of both the selection and application of facts available can be found in the *Preliminary Determination*. *See Preliminary Determination*, 68 FR at 42390–91. Nothing has changed since the preliminary determination was issued that would affect the Department's selection and application of facts available.

No interested parties have commented since the publication of the preliminary determination on the use of adverse facts available in this investigation, or on the choice of the facts available margin. Accordingly, for the final determination, we are continuing to use the highest margin stated in the notice of initiation for TISCO. The "All Others" rate remains unchanged as well.

Analysis of Comments Received

We received no comments from interested parties in response to our preliminary determination in this investigation. We did not hold a hearing because none was requested.

Continuation of Suspension of Liquidation

In accordance with section 735(c)(1)(B) of the Act, we are directing the U.S. Customs and Border Protection (CBP) to continue to suspend liquidation of all entries of PC strand exported from India that are entered, or withdrawn from warehouse, for consumption on or after the date of the *Preliminary Determination*. The CBP shall continue to require a cash deposit or the posting of a bond based on the estimated dumping margins shown below.

It is generally the Department's practice to decrease the required antidumping duty cash deposit rate by any export subsidies found in a companion countervailing duty investigation based on the presumption that if a respondent benefitted from an export subsidy program, such a subsidy contributed to the lower-priced sales of subject merchandise. This is done to avoid double-application of duties to counteract the same situation. However, in this investigation, TISCO has not cooperated with the Department and has not acted to the best of its ability in providing the Department with necessary information. This has prevented the Department from making its normal determination of whether the subsidies in question may have affected the calculation of the dumping margin. As indicated above, TISCO's margin is based on total adverse facts available, taken from the petition. Insofar as the dumping margin for TISCO is not a calculated margin, there is no way to determine the portion of the dumping margin which is attributable to export subsidies. For that reason, unlike in the preliminary determination, we have not subtracted the amount of any export subsidy from that margin. The suspension of liquidation instructions will remain in effect until further notice.

We determine that the following dumping margins exist:

Manufacturer/exporter	Margin (percent)
Tata Iron and Steel Co. Ltd. (TISCO)	102.07
All Others	83.65

International Trade Commission Notification

In accordance with section 735(d) of the Act, we have notified the International Trade Commission (ITC) of our determination. The ITC will determine, within 45 days, whether imports of subject merchandise from India are causing material injury, or threaten material injury, to an industry in the United States. If the ITC determines that material injury or threat of injury does not exist, this proceeding will be terminated and all securities posted will be refunded or canceled. If the ITC determines that such injury does exist, the Department will issue an antidumping duty order directing CBP officials to assess antidumping duties on all imports of the subject merchandise entered, or withdrawn from warehouse for consumption on or after the effective date of the suspension of liquidation.

This notice also serves as a reminder to parties subject to APO of their responsibility concerning the disposition of proprietary information disclosed under APO in accordance with 19 CFR 351.305. Timely notification of return/destruction of APO materials or conversion to judicial protective order is hereby requested. Failure to comply with the regulations and the terms of an APO is a sanctionable violation.

This determination is issued and published in accordance with sections 735(d) and 777(i)(1) of the Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

[FR Doc. 03–30385 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–S

DEPARTMENT OF COMMERCE

International Trade Administration

[A-580–852]

Notice of Final Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from the Republic of Korea

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

EFFECTIVE DATE: December 8, 2003.

SUMMARY: We determine that prestressed concrete steel wire strand (PC strand) from the Republic of Korea (Korea) is being sold, or is likely to be sold, in the United States at less than fair value (LTFV), as provided in section 735 of the Tariff Act of 1930, as amended (the Act). The estimated margins of sales at LTFV are shown in the *Continuation of Suspension of Investigation* section of this notice.

FOR FURTHER INFORMATION CONTACT: Marin Weaver or Christopher Welty at (202) 482–2336 and (202) 482–0186, respectively; Import Administration, International Trade Administration, U.S. Department of Commerce, 14th Street and Constitution Avenue, NW, Washington, DC 20230.

SUPPLEMENTARY INFORMATION:

Case History

The preliminary determination in this investigation was published on July 17, 2003. *See Notice of Preliminary Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from the Republic of Korea*, 68 FR 42393 (July 17, 2003) (*Preliminary Determination*). Since the publication of the *Preliminary Determination*, the following events have occurred:

On August 4, 2003, Kiswire Ltd. (Kiswire) and Dong-Il Steel Manufacturing Co., Ltd. (Dong-Il), two Korean producers/exporters selected as mandatory respondents, requested that the Department of Commerce (the Department) postpone its final determination and fully extend the provisional measures by 60 days. On August 18, 2003, the Department published in the **Federal Register** the postponement of the final determination for PC strand from Korea. *See Notice of Postponement of Final Antidumping Duty Determinations and Extension of Provisional Measures: Prestressed Concrete Steel Wire Strand From Brazil, India, and the Republic of Korea*, 68 FR 49436 (August 18, 2003).

Scope of Investigation

For purposes of this investigation, PC strand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pretensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.

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

Period of Investigation

The period of investigation is January 1, 2002, through December 31, 2002.

Facts Available

In the preliminary determination, we based the dumping margin for the mandatory respondents, Kiswire and Dong-Il, on adverse facts available pursuant to sections 776(a) and 776(b) of the Act. The use of adverse facts available was warranted in this investigation because both of the respondents failed to respond to any part of the antidumping duty questionnaires issued to them by the Department. *See Preliminary Determination*, 68 FR at 42393. The failure of these respondents to supply the requested information significantly impedes this proceeding because the Department cannot accurately determine a margin for these parties. Furthermore, these respondents did not give an explanation for their failure to supply such information, nor propose alternatives. Therefore, we found that Kiswire and Dong-Il failed to cooperate by not acting to the best of their ability. We assigned Kiswire and Dong-Il the highest margin stated in the notice of initiation. *See Notice of Initiation of Antidumping Duty Investigations: Prestressed Concrete Steel Wire Strand From Brazil, India, the Republic of Korea, Mexico, and Thailand*, 68 FR 9050 (February 27, 2003). We corroborated this margin in the preliminary determination and we continue to find this margin corroborated, pursuant to section 776(c) of the Act. *See* Memorandum regarding Corroboration of Data Contained in the Petition for Assigning Facts Available Rates, dated July 10, 2003. A complete explanation of both the selection and application of facts available can be found in the *Preliminary Determination*. *See Preliminary Determination*, 68 FR at 42394–95. Nothing has changed since the preliminary determination was issued that would affect the Department's selection and application of facts available.

No interested parties have commented since the publication of the preliminary determination on the use of adverse facts available in this investigation, or on the choice of the facts available margin. Accordingly, for the final determination, we are continuing to use the highest margin stated in the notice of initiation for Kiswire, and Dong-Il. The "All Others" rate remains unchanged as well.

Analysis of Comments Received

We received no comments from interested parties in response to our preliminary determination in this investigation. We did not hold a hearing because none was requested.

Continuation of Suspension of Liquidation

In accordance with section 735(c)(1)(B) of the Act, we are directing the U.S. Customs and Border Protection (CBP) to continue to suspend liquidation of all entries of PC strand exported from Korea that are entered, or withdrawn from warehouse, for consumption on or after the date of the *Preliminary Determination*. The CBP shall continue to require a cash deposit or the posting of a bond based on the estimated dumping margins shown below. The suspension of liquidation instructions will remain in effect until further notice.

We determine that the following dumping margins exist:

Manufacturer/exporter	Margin (percent)
Kiswire Ltd.	54.19
Dong-Il Steel Manufacturing Co. Ltd.	54.19
All Others	35.64

International Trade Commission Notification

In accordance with section 735(d) of the Act, we have notified the International Trade Commission (ITC) of our determination. The ITC will determine, within 45 days, whether imports of subject merchandise from Korea are causing material injury, or threaten material injury, to an industry in the United States. If the ITC determines that material injury or threat of injury does not exist, this proceeding will be terminated and all securities posted will be refunded or canceled. If the ITC determines that such injury does exist, the Department will issue an antidumping duty order directing CBP officials to assess antidumping duties on all imports of the subject merchandise entered, or withdrawn from warehouse for consumption on or after the effective date of the suspension of liquidation.

This notice also serves as a reminder to parties subject to APO of their responsibility concerning the disposition of proprietary information disclosed under APO in accordance with 19 CFR 351.305. Timely notification of return/destruction of APO materials or conversion to judicial protective order is hereby requested. Failure to comply with the regulations and the terms of an APO is a sanctionable violation.

This determination is issued and published in accordance with sections 735(d) and 777(i)(1) of the Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

[FR Doc. 03–30386 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–S

DEPARTMENT OF COMMERCE

International Trade Administration

[A-351–837]

Notice of Final Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from Brazil

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

EFFECTIVE DATE: December 8, 2003.

SUMMARY: We determine that prestressed concrete steel wire strand (PC strand) from Brazil is being sold, or is likely to be sold, in the United States at less than fair value (LTFV), as provided in section 735 of the Tariff Act of 1930, as amended (the Act). The estimated margins of sales at LTFV are shown in the Continuation of Suspension of Investigation section of this notice.

FOR FURTHER INFORMATION CONTACT: David Layton or Monica Gallardo at (202) 482–0371 and (202) 482–3147, respectively; Import Administration, International Trade Administration, U.S. Department of Commerce, 14th Street and Constitution Avenue, NW, Washington, DC 20230.

SUPPLEMENTARY INFORMATION:

Case History

The preliminary determination in this investigation was published on July 17, 2003. *See Notice of Preliminary Determination of Sales at Less Than Fair Value: Prestressed Concrete Steel Wire Strand from Brazil*, 68 FR 42386 (July 17, 2003) (*Preliminary Determination*). Since the publication of the *Preliminary Determination*, the following events have occurred:

On August 6, 2003, Belgo Bekaert Arames S.A. (BBA), the sole Brazilian producer and mandatory respondent, requested that the Department of Commerce (the Department) postpone its final determination and fully extend the provisional measures by 60 days. On August 18, 2003, the Department published in the **Federal Register** the postponement of the final determination for PC strand from Brazil. *See Notice of Postponement of Final Antidumping Duty Determinations and Extension of Provisional Measures: Prestressed Concrete Steel Wire Strand From Brazil, India, and the Republic of Korea*, 68 FR 49436 (August 18, 2003).

Scope of Investigation

For purposes of this investigation, PC strand is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pretensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.

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

Period of Investigation

The period of investigation is January 1, 2002, through December 31, 2002.

Facts Available

In the preliminary determination, we based the dumping margin for the mandatory respondent, BBA, on adverse facts available pursuant to sections 776(a) and 776(b) of the Act. The use of adverse facts available was warranted in this investigation because BBA failed to respond to any part of the antidumping duty questionnaire issued to it by the Department. *See Preliminary Determination*, 68 FR at 42386. The failure of the respondent to supply the requested information significantly impedes this proceeding because the Department cannot accurately determine a margin for this party. Furthermore, the respondent did not give an explanation for its failure to supply such information, nor propose alternatives. Therefore, we found that BBA, failed to cooperate by not acting to the best of its ability. We assigned BBA the highest margin stated in the notice of initiation. *See Notice of Initiation of Antidumping Duty Investigations: Prestressed Concrete Steel Wire Strand From Brazil, India, the Republic of Korea, Mexico, and Thailand*, 68 FR 9050 (February 27, 2003). We corroborated this margin in the preliminary determination and we continue to find this margin corroborated, pursuant to section 776(c) of the Act. *See* Memorandum regarding Corroboration of Data Contained in the Petition for Assigning Facts Available

Rates, dated July 10, 2003. A complete explanation of both the selection and application of facts available can be found in the *Preliminary Determination*. *See Preliminary Determination*, 68 FR at 42387–88. Nothing has changed since the preliminary determination was issued that would affect the Department's selection and application of facts available.

No interested parties have commented since the publication of the preliminary determination on the use of adverse facts available in this investigation, or on the choice of the facts available margin. Accordingly, for the final determination, we are continuing to use the highest margin stated in the notice of initiation for BBA. The "All Others" rate remains unchanged as well.

Analysis of Comments Received

We received no comments from interested parties in response to our preliminary determination in this investigation. We did not hold a hearing because none was requested.

Continuation of Suspension of Liquidation

In accordance with section 735(c)(1)(B) of the Act, we are directing the U.S. Customs and Border Protection (CBP) to continue to suspend liquidation of all entries of PC strand exported from Brazil that are entered, or withdrawn from warehouse, for consumption on or after the date of the *Preliminary Determination*. The CBP shall continue to require a cash deposit or the posting of a bond based on the estimated dumping margins shown below. The suspension of liquidation instructions will remain in effect until further notice.

We determine that the following dumping margins exist:

Manufacturer/exporter	Margin (percent)
Belgo Bekaert Arames S.A.	118.75
All Others.	118.75

International Trade Commission Notification

In accordance with section 735(d) of the Act, we have notified the International Trade Commission (ITC) of our determination. The ITC will determine, within 45 days, whether imports of subject merchandise from Brazil are causing material injury, or threaten material injury, to an industry in the United States. If the ITC determines that material injury or threat of injury does not exist, this proceeding will be terminated and all securities posted will be refunded or canceled. If the ITC determines that such injury does exist, the Department will issue an antidumping duty order directing CBP officials to assess antidumping duties on all imports of the subject merchandise entered, or withdrawn from warehouse for consumption on or after the effective date of the suspension of liquidation.

This notice also serves as a reminder to parties subject to APO of their responsibility concerning the disposition of proprietary information disclosed under APO in accordance with 19 CFR 351.305. Timely notification of return/destruction of APO materials or conversion to judicial protective order is hereby requested. Failure to comply with the regulations and the terms of an APO is a sanctionable violation.

This determination is issued and published in accordance with sections 735(d) and 777(i)(1) of the Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

[FR Doc. 03–30387 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–S

DEPARTMENT OF COMMERCE

International Trade Administration

[A–583–831]

Certain Stainless Steel Sheet and Strip in Coils From Taiwan: Extension of Final Results of Antidumping Duty Administrative Review

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

ACTION: Notice of extension of time limit for final results of antidumping duty administrative review.

SUMMARY: The Department of Commerce ("the Department") is extending the time limit for the final results of the review of stainless steel sheet and strip in coils ("SSSS") from Taiwan. This review covers the period July 1, 2001 through June 30, 2002.

EFFECTIVE DATE: December 8, 2003.

FOR FURTHER INFORMATION CONTACT: Laurel LaCivita, Enforcement Group III—Office 9, Import Administration, International Trade Administration, U.S. Department of Commerce, 14th Street and Constitution Avenue NW., Washington, DC 20230; telephone (202) 482–4243.

Background

On August 27, 2002, the Department published a notice of initiation of a review of SSSS from Taiwan covering the period July 1, 2001 through June 30, 2002. *See Initiation of Antidumping and Countervailing Duty Administrative Reviews and Requests for Revocation in Part*, 67 FR 55000 (August 27, 2002). On August 6, 2003, the Department published the preliminary results of the review. *See Stainless Steel Sheet and Strip in Coils From Taiwan: Preliminary Results and Partial Rescission of Antidumping Duty Administrative Review*, 68 FR 46582 (August 6, 2003), ("*Preliminary Results*"). In the *Preliminary Results*, the Department stated that it would make its final determination for the antidumping duty administrative review no later than 120 days after the date of publication of the *Preliminary Results*, or not later than December 4, 2003.

Extension of Time Limit for Preliminary Results

Section 751(a)(3)(A) of the Act states that if it is not practicable to complete the review within the time specified, the administering authority may extend the 120-day period, following the date of publication of the preliminary results, to issue its final results by an additional 60 days. Completion of the final results within the 120-day period is not practicable for the following reasons: (1) This review requires the Department to analyze YUSCO's complex affiliation and corporate relationships; (2) This review involves certain complex issues which were raised by petitioners after the verification and after the preliminary results of review; and (3) The review involves a large number of transactions and complex adjustments.

Therefore, in accordance with section 751(a)(3)(A) of the Act, the Department is extending the time period for issuing the final results of review by 43 days until January 16, 2004.

This notice is published in accordance with section 751(a)(3)(A) and 777(i) of the Act.

Dated: December 2, 2003.

Barbara E. Tillman,

Acting Deputy Assistant Secretary for Import Administration, Group III.

[FR Doc. 03–30390 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–P

DEPARTMENT OF COMMERCE

International Trade Administration

[C–533–829]

Final Affirmative Countervailing Duty Determination: Prestressed Concrete Steel Wire Strand From India

AGENCY: Import Administration, International Trade Administration, Department of Commerce.

ACTION: Notice of final affirmative countervailing duty investigation.

SUMMARY: On July 8, 2003, the Department of Commerce (the Department) published in the **Federal Register** its preliminary affirmative determination in the countervailing duty investigation of prestressed concrete steel wire strand (PC strand or subject merchandise) from India for the period April 1, 2001, through March 31, 2002.

The program rates determined in this final determination do not differ from those determined in the preliminary determination. The final net rate for all Indian producers/exporters of subject merchandise is listed below in the "Suspension of Liquidation" section of this notice.

EFFECTIVE DATE: December 8, 2003.

FOR FURTHER INFORMATION CONTACT: Robert Copyak at (202) 482–2209 or Alicia Kinsey at (202) 482–4793, Office of AD/CVD Enforcement VI, Group II, Import Administration, International Trade Administration, U.S. Department of Commerce, Room 4012, 14th Street and Constitution Avenue, NW., Washington, DC 20230.

SUPPLEMENTARY INFORMATION:

Background

The petition in this investigation was filed by American Spring Wire Corp., Insteel Wire Products Company, and Sumiden Wire Products Corp. (collectively, the petitioners). On July 8, 2003, the Department published the preliminary determination. *See Notice of Preliminary Affirmative Countervailing Duty Determination: Prestressed Concrete Steel Wire Strand from India*, 68 FR 40629 (July 8, 2003) (*Preliminary Determination*), which is on file in room B–099 in the Central Records Unit of the main Commerce building (CRU).

In accordance with section 705(a)(1) of the Tariff Act of 1930, as amended (the Act), we aligned this final determination with the final determination in the antidumping duty investigation of PC strand from India. *See Preliminary Determination*, 68 FR 40629, 40631. We invited interested parties to comment on the Department's findings in the *Preliminary Determination*. On August 27, 2003, we received comments from petitioners supporting the Department's preliminary analysis. We received no other comments. This investigation covers all producers/exporters of subject merchandise in India for the period April 1, 2001, through March 31, 2002.

Scope of the Investigation

The merchandise subject to this investigation is prestressed concrete steel wire (PC strand), which is steel strand produced from wire of non-stainless, non-galvanized steel, which is suitable for use in prestressed concrete (both pre-tensioned and post-tensioned) applications. The product definition encompasses covered and uncovered strand and all types, grades, and diameters of PC strand.

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

Analysis of Comments Received

The Department's positions on the subsidy programs addressed in this case are discussed the "Issues and Decision Memorandum" (Decision Memorandum) from Holly A. Kuga, Acting Deputy Assistant Secretary, AD/CVD Enforcement II, to James J. Jochum, Assistant Secretary for Import Administration, dated December 1, 2003, which is hereby adopted by this notice. This public memorandum, which is on file in the CRU, also contains the recommended adverse facts available program rates and the adverse facts available total net subsidy rate. A complete version of the Decision Memorandum can be accessed on the World Wide Web at *http://www.ia.ita.doc.gov*, under the heading "**Federal Register** Notices." The paper copy on file in the CRU and the electronic version of the Decision Memorandum are identical in content.

Suspension of Liquidation

In accordance with section 703(b) of the Act, we have calculated the following countervailing duty rate for all Indian producers/exporters of subject merchandise:

Producer/exporter	Net subsidy rate
All producers/exporters.	62.92% *ad valorem*

In accordance with our preliminary affirmative determination, we instructed U.S. Customs and Border Protection (CBP) to suspend liquidation of all entries of prestressed concrete steel wire strand from India, which were entered or withdrawn from warehouse, for consumption on or after July 8, 2003, the date of the publication of our preliminary determination in the **Federal Register**. In accordance with section 703(d) of the Act, we instructed the CBP to discontinue the suspension of liquidation for merchandise entered on or after November 5, 2003, but to continue the suspension of liquidation of entries made between July 8, 2003, and November 4, 2003.

If the International Trade Commission (ITC) issues a final affirmative injury determination, we will issue a countervailing duty order, reinstate suspension of liquidation under section 706(a) of the Act for all entries, and require a cash deposit of estimated countervailing duties for such entries of merchandise in the amount indicated above. If the ITC determines that material injury, or threat of material injury, does not exist, this proceeding will be terminated and all estimated duties deposited or securities posted as a result of the suspension of liquidation will be refunded or canceled.

ITC Notification

In accordance with section 705(d) of the Act, we will notify the ITC of our determination. In addition, we are making available to the ITC all non-privileged and non-proprietary information related to this investigation. We will allow the ITC access to all privileged and business proprietary information in our files, provided that the ITC confirms that it will not disclose such information, either publicly or under an administrative protective order (APO), without the written consent of the Assistant Secretary for Import Administration.

Return or Destruction of Proprietary Information

In the event that the ITC issues a final negative injury determination, this notice will serve as the only reminder to parties subject to APO of their responsibility concerning the destruction of proprietary information disclosed under APO in accordance with 19 CFR 351.305(a)(3). Failure to comply is a violation of the APO.

This determination is published pursuant to sections 705(d) and 777(i) of the Act.

Dated: December 1, 2003.

James J. Jochum,

Assistant Secretary for Import Administration.

Appendix I—Issues and Decision Memorandum

Summary

Methodology and Background Information

I. Use of Facts Available
II. Programs Determined to Confer Subsidies
A. Government of India Programs
1. Pre-shipment and Post-shipment Export Financing
2. Duty Entitlement Passbook Scheme (DEPS)
3. Export Promotion Capital Goods Scheme (EPCGS)
4. Loans From the Steel Development Fund (SDF)
5. Exemption of Export Credit From Interest Taxes
6. Advance Licenses
7. Income Tax Exemption Scheme (Section 80 HHC)
8. Loan Guarantees From the GOI
B. State of Maharashtra (SOM) Programs
1. Sales Tax Incentives
2. Capital Incentive Scheme
3. Electricity Duty Exemption Scheme
4. Octroi Refund Scheme
5. Exemption of Sales and Purchase Taxes for Certain Investments Related to Automobiles or Automobile Components
C. Program in the State of Bihar
1. Sales Tax Incentives
D. Programs in the State of Jharkhand
1. Sales Tax Incentives
2. Captive Electricity Generative Plant Subsidy
3. Interest Subsidy
4. Stamp Duty and Registration
5. Pollution Control Equipment Subsidy
6. Mega Units
7. Captive Electricity Tax Exemptions
E. Program in the State of Gujarat
1. Sales Tax Incentives
III. Total Ad Valorem Rate
IV. Recommendation

[FR Doc. 03–30389 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–DS–P

DEPARTMENT OF COMMERCE

International Trade Administration

North American Free-Trade Agreement, Article 1904, NAFTA Panel Reviews; Request for Panel Review

AGENCY: NAFTA Secretariat, United States Section, International Trade Administration, Department of Commerce.

ACTION: Notice of first request for panel review.

SUMMARY: On November 24, 2003, the Canadian Wheat Board filed a First Request for Panel Review with the United States Section of the NAFTA Secretariat pursuant to Article 1904 of the North American Free Trade Agreement. Panel review was requested of the final results of the Injury determination made by the United States International Trade Commission, respecting Hard Red Spring Wheat from Canada. This determination was published in the **Federal Register**, (68 FR 60707) on October 23, 2003. The NAFTA Secretariat has assigned Case Number USA–CDA–2003–1904–06 to this request.

FOR FURTHER INFORMATION CONTACT: Caratina L. Alston, United States Secretary, NAFTA Secretariat, Suite 2061, 14th and Constitution Avenue, Washington, DC 20230, (202) 482–5438.

SUPPLEMENTARY INFORMATION: Chapter 19 of the North American Free-Trade Agreement ("Agreement") establishes a mechanism to replace domestic judicial review of final determinations in antidumping and countervailing duty cases involving imports from a NAFTA country with review by independent binational panels. When a Request for Panel Review is filed, a panel is established to act in place of national courts to review expeditiously the final determination to determine whether it conforms with the antidumping or countervailing duty law of the country that made the determination.

Under Article 1904 of the Agreement, which came into force on January 1, 1994, the Government of the United States, the Government of Canada and the Government of Mexico established *Rules of Procedure for Article 1904 Binational Panel Reviews* ("Rules"). These Rules were published in the **Federal Register** on February 23, 1994 (59 FR 8686).

A first Request for Panel Review was filed with the United States Section of the NAFTA Secretariat, pursuant to Article 1904 of the Agreement, on November 24, 2003, requesting panel review of the final determination described above.

The Rules provide that:

(a) A Party or interested person may challenge the final determination in whole or in part by filing a Complaint in accordance with Rule 39 within 30 days after the filing of the first Request for Panel Review (the deadline for filing a Complaint is December 24, 2003);

(b) a Party, investigating authority or interested person that does not file a Complaint but that intends to appear in support of any reviewable portion of the final determination may participate in the panel review by filing a Notice of Appearance in accordance with Rule 40 within 45 days after the filing of the first Request for Panel Review (the deadline for filing a Notice of Appearance is January 8, 2004); and

(c) the panel review shall be limited to the allegations of error of fact or law, including the jurisdiction of the investigating authority, that are set out in the Complaints filed in the panel review and the procedural and substantive defenses raised in the panel review.

Dated: December 1, 2003.

Caratina L. Alston,

United States Secretary, NAFTA Secretariat.

[FR Doc. 03–30362 Filed 12–5–03; 8:45 am]

BILLING CODE 3510–GT–P

DEPARTMENT OF COMMERCE

National Oceanic and Atmospheric Administration

[I.D. 112503B]

Draft Strategic Plan for Fisheries Research (2004)

AGENCY: National Marine Fisheries Service (NMFS), National Oceanic and Atmospheric Administration (NOAA), Commerce.

ACTION: Notice of availability; request for comments.

SUMMARY: NMFS announces the availability of and seeks public comment on the draft NMFS Strategic Plan for Fisheries Research (2004). The Magnuson-Stevens Fishery Conservation and Management Act (MSFCMA) requires the Secretary of Commerce to develop, triennially, a strategic plan for fisheries research for the subsequent years. Any written comments on the draft plan will be considered by NMFS in the development of the final NMFS Strategic Plan for Fisheries Research (2004).

DATES: Comments on the draft NMFS Strategic Plan for Fisheries Research (2004) will be accepted on or before January 7, 2004.

ADDRESSES: Comments on and requests for copies of the draft NMFS Strategic Plan for Fisheries Research (2004) should be directed to Mark Chandler, Research, Analysis, and Coordination Division, Office of Science and Technology, NMFS, NOAA, 1315 East-West Highway, Silver Spring, MD 20910. PHONE: (301) 713–2363. FAX: (301) 713–1875.

Electronic Access: The draft NMFS Strategic Plan for Fisheries Research (2004) may be reviewed in its entirety

APPENDIX B

LIST OF WITNESSES APPEARING AT THE HEARING

CALENDAR OF PUBLIC HEARING

Those listed below appeared as witnesses at the United States International Trade Commission's hearing:

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

Inv. Nos.: 701-TA-432 and 731-TA-1024-1028 (Final)

Date and Time: December 2, 2003 - 9:30 a.m.

Sessions were held in connection with these investigations in the Main Hearing Room (room 101), 500 E Street, S.W., Washington, D.C.

OPENING REMARKS:

Petitioners (**Paul C. Rosenthal**, Collier Shannon Scott, PLLC)
Respondents (**Cheryl Ellsworth**, Harris Ellsworth & Levin *and*
Christopher S. Stokes, Hogan & Hartson L.L.P.)

In Support of the Imposition of Countervailing and Antidumping Duties:

Collier Shannon Scott, PLLC
Washington, D.C.
on behalf of

American Spring Wire Corp.
Insteel Wire Products Co.
Sumiden Wire Products Corp.

H.O. Woltz, III, President and Chief Executive Officer, Insteel Wire Products Co.
Timothy Selhorst, President and Chief Executive Officer, American Spring Wire Corp.
Brian Burr, Plant Manager, Sumiden Wire Products Corp.
Richard Wagner, Vice President and General Manager, Insteel Wire Products Co.
Jeffrey Feitler, Sales Representative, Sumiden Wire Products Corp.
Gina E. Beck, Economic Consultant, Georgetown Economic Services, LLC
Michael T. Kerwin, Economic Consultant, Georgetown Economic Services, LLC

Paul C. Rosenthal - OF COUNSEL
Kathleen W. Cannon
R. Alan Luberda
John M. Herrmann

In Opposition to the Imposition of Countervailing and Antidumping Duties:

Harris Ellsworth & Levin
Washington, D.C.
on behalf of

Aceros Camesa, S.A. de C.V.
Cablesa, S.A. de C.V.
Camesa, Inc.
Universal Products Group, Inc.

Thomas W. Utz, President, Camesa, Inc.

Herbert E. Harris II - OF COUNSEL
Cheryl Ellsworth
Jeffrey S. Levin
John B. Totaro, Jr.

Hogan & Hartson L.L.P.
Washington, D.C.
on behalf of

Belgo Bekaert Arames S.A. ("Belgo Bekaert")

Peter Barlage, Products Manager, Arcelor International America, Inc.

Christopher S. Stokes - OF COUNSEL
Craig A. Lewis
Jonathan T. Stoel

REBUTTAL/CLOSING REMARKS:

Petitioners (**Paul C. Rosenthal**, Collier Shannon Scott, PLLC)
Respondents (**Cheryl Ellsworth** and **Jeffrey S. Levin**, Harris Ellsworth & Levin *and*
Christopher S. Stokes, Hogan & Hartson L.L.P.)

APPENDIX C

SUMMARY DATA AND COMMERCE IMPORT STATISTICS

Table C-1
PC strand: Summary data concerning the U.S. market, 2000-02, January-June 2002, and January-June 2003

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

Item	Reported data					Period changes			
	Calendar year			January-June		Calendar year			Jan.-June
	2000	2001	2002	2002	2003	2000-2002	2000-2001	2001-2002	2002-2003
U.S. consumption quantity: Amount	785,818	761,201	748,182	371,142	404,053	-4.8	-3.1	-1.7	8.9
Producers' share[1]	76.8	73.8	69.7	70.0	69.8	-7.2	-3.0	-4.1	-0.2
Importers' share:[1]									
Brazil	***	***	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***	***	***
Korea	***	***	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***	***	***
Thailand	***	***	***	***	***	***	***	***	***
Subtotal	15.1	17.0	22.0	21.0	21.5	6.9	1.9	5.1	0.5
Other sources	8.1	9.2	8.3	9.0	8.7	0.2	1.2	-0.9	-0.3
Total	23.2	26.2	30.3	30.0	30.2	7.2	3.0	4.1	0.2
U.S. consumption value: Amount	207,066	194,048	181,395	89,134	100,510	-12.4	-6.3	-6.5	12.8
Producers' share[1]	77.0	73.7	69.9	69.5	68.7	-7.1	-3.3	-3.8	-0.8
Importers' share:[1]									
Brazil	***	***	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***	***	***
Korea	***	***	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***	***	***
Thailand	***	***	***	***	***	***	***	***	***
Subtotal	14.9	16.6	21.8	21.2	22.3	6.9	1.7	5.2	1.1
Other sources	8.1	9.8	8.3	9.3	9.0	0.2	1.6	-1.4	-0.4
Total	23.0	26.3	30.1	30.5	31.3	7.1	3.3	3.8	0.8
U.S. shipments of imports from--									
Brazil:									
Quantity	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***
Ending inventory	***	***	***	***	***	***	***	***	***
India:									
Quantity	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***
Ending inventory	***	***	***	***	***	***	***	***	***
Korea:									
Quantity	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***
Ending inventory	***	***	***	***	***	***	***	***	***

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Table C-1--*Continued*
PC strand: Summary data concerning the U.S. market, 2000-02, January-June 2002, and January-June 2003

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

Item	Reported data					Period changes			
	Calendar year			January-June		Calendar year			Jan.-June
	2000	2001	2002	2002	2003	2000-2002	2000-2001	2001-2002	2002-2003
U.S. shipments of imports from--									
Mexico:									
Quantity	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***
Ending inventory	***	***	***	***	***	***	***	***	***
Thailand:									
Quantity	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***
Ending inventory	***	***	***	***	***	***	***	***	***
Subtotal:									
Quantity	118,623	129,210	164,878	77,959	86,739	39.0	8.9	27.6	11.3
Value	30,845	32,134	39,509	18,878	22,416	28.1	4.2	23.0	18.7
Unit value	$260.03	$248.69	$239.62	$242.16	$258.43	-7.8	-4.4	-3.6	6.7
Ending inventory	5,441	4,634	5,460	5,985	5,021	0.3	-14.8	17.8	-16.1
Other sources:[3]									
Quantity	63,340	70,167	61,981	33,340	35,250	-2.1	10.8	-11.7	5.7
Value	16,837	18,955	15,108	8,294	8,998	-10.3	12.6	-20.3	8.5
Unit value	$265.82	$270.13	$243.75	$248.78	$255.27	-8.3	1.6	-9.8	2.6
Ending inventory	***	***	***	***	***	***	***	***	***
All sources:									
Quantity	181,963	199,377	226,859	111,299	121,989	24.7	9.6	13.8	9.6
Value	47,682	51,089	54,617	27,172	31,414	14.5	7.1	6.9	15.6
Unit value	$262.04	256.2428	240.7531	244.1362	$257.51	-8.1	-2.2	-6.0	5.5
Ending inventory	***	***	***	***	***	***	***	***	***
U.S. producers'[4]--									
Capacity quantity	714,675	732,475	763,577	390,242	375,060	6.8	2.5	4.2	-3.9
Production quantity	633,505	576,210	539,601	259,785	276,093	-14.8	-9.0	-6.4	6.3
Capacity utilization[1]	88.6	78.7	70.7	66.6	73.6	-18.0	-10.0	-8.0	7.0
U.S. shipments:									
Quantity	603,855	561,824	521,323	259,843	282,064	-13.7	-7.0	-7.2	8.6
Value	159,384	142,959	126,778	61,961	69,096	-20.5	-10.3	-11.3	11.5
Unit value	$263.94	$254.46	$243.19	$238.46	$244.97	-7.9	-3.6	-4.4	2.7
Export shipments:									
Quantity	***	***	***	***	***	***	***	***	***
Value	***	***	***	***	***	***	***	***	***
Unit value	***	***	***	***	***	***	***	***	***
Ending inventory quantity	51,918	53,043	47,117	42,542	33,940	-9.2	2.2	-11.2	-20.2
Inventories/total shipments[1]	***	***	***	***	***	***	***	***	***

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Table C-1–*Continued*
PC strand: Summary data concerning the U.S. market, 2000-02, January-June 2002, and January-June 2003

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

Item	Reported data					Period changes			
	Calendar year			January-June		Calendar year			Jan.-June
	2000	2001	2002	2002	2003	2000-2002	2000-2001	2001-2002	2002-2003
Production workers	409	353	308	289	290	-24.8	-13.7	-12.9	0.3
Hours worked (*1,000 hours*)	926	788	671	330	341	-27.5	-14.8	-14.9	3.5
Wages paid (*1,000 dollars*)	13,481	12,109	10,171	4,984	5,324	-24.6	-10.2	-16.0	6.8
Hourly wages	$14.56	$15.36	$15.15	$15.12	$15.61	4.1	5.5	-1.3	3.2
Productivity (*pounds per hour*)	684.3	730.9	803.9	750.6	780.8	17.5	6.8	10.0	4.0
Unit labor costs	$21.28	$21.01	$18.85	$20.14	$19.99	-11.4	-1.2	-10.3	-0.8
Net sales:									
Quantity	624,730	573,985	545,527	260,014	278,623	-12.7	-8.1	-5.0	7.2
Value	164,347	145,849	132,712	61,690	69,015	-19.2	-11.3	-9.0	11.9
Unit value	$263.07	$254.10	$243.27	$237.26	$247.70	-7.5	-3.4	-4.3	4.4
COGS	139,500	133,909	125,756	58,177	63,341	-9.9	-4.0	-6.1	8.9
Gross profit or (loss)	24,847	11,940	6,956	3,513	5,674	-72.0	-51.9	-41.7	61.5
SG&A expenses	12,339	9,874	12,805	8,488	3,917	3.8	-20.0	29.7	-53.9
Operating income or (loss)	12,508	2,066	(5,849)	(4,975)	1,757	(5)	-83.5	(5)	(5)
Capital expenditures	4,500	12,462	2,430	1,373	419	-46.0	176.9	-80.5	-69.5
Unit COGS	$223.30	$233.30	$230.52	$223.75	$227.34	3.2	4.5	-1.2	1.6
Unit SG&A expenses	$19.75	$17.20	$23.47	$32.64	$14.06	18.8	-12.9	36.4	-56.9
Unit operating income or (loss)	$20.02	$3.60	$(10.72)	$(19.13)	$6.31	(5)	-82.0	(5)	(5)
COGS/sales[1]	84.9	91.8	94.8	94.3	91.8	9.9	6.9	2.9	-2.5
Operating income or (loss)/ sales[1]	7.6	1.4	(4.4)	(8.1)	2.5	-12.0	-6.2	-5.8	10.6

[1] "Reported data" are in percent and "period changes" are in percentage points.
[2] Not applicable.
[3] U.S. imports from all other sources.
[4] U.S. producer data are for uncoated plus coated PC strand; to avoid double-counting, combined data have been adjusted to remove internal consumption of uncoated product.
[5] Undefined.

Note.–Because of rounding, figures may not add to the totals shown. Unit values and shares are calculated from the unrounded figures.

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

Table C-2
Uncoated PC strand: Summary data concerning the U.S. market, 2000-02, January-June 2002, and January-June 2003

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Table C-3
Coated PC strand: Summary data concerning the U.S. market, 2000-02, January-June 2002, and January-June 2003

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Table C-4
PC strand: U.S. imports, by sources, 2000-02, January-June 2002, and January-June 2003

Source	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Quantity (*1,000 pounds*)				
Brazil	33,401	22,985	25,046	8,496	20,264
India	9,401	14,845	18,546	12,832	2,722
Korea	41,658	43,244	62,109	31,262	34,197
Mexico	36,913	45,281	54,000	27,120	31,256
Thailand	7,494	14,574	10,688	6,198	5,353
Subtotal	128,868	140,928	170,388	85,908	93,792
Other sources	63,340	70,167	61,981	33,340	35,250
Total	192,207	211,096	232,369	119,248	129,043
	Value (*1,000 dollars*)[1]				
Brazil	7,875	4,823	5,081	1,761	4,333
India	2,269	3,303	3,941	2,725	579
Korea	9,649	9,545	13,005	6,534	7,355
Mexico	10,962	13,457	15,675	7,851	9,338
Thailand	1,712	3,371	2,376	1,384	1,206
Subtotal	32,466	34,499	40,077	20,256	22,811
Other sources	16,837	18,955	15,108	8,294	8,998
Total	49,303	53,453	55,185	28,550	31,809
	Unit value (*per 1,000 pounds*)[1]				
Brazil	$235.76	$209.85	$202.88	$207.31	$213.84
India	241.35	222.47	212.47	212.40	212.64
Korea	231.62	220.72	209.39	209.01	215.08
Mexico	296.96	297.19	290.28	289.47	298.75
Thailand	228.39	231.28	222.29	223.37	225.33
Average	251.93	244.80	235.21	235.78	243.21
Other sources	265.82	270.13	243.75	248.78	255.27
Average	256.51	253.22	237.49	239.42	246.50

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Table C-4--*Continued*
PC strand: U.S. imports, by sources, 2000-02, January-June 2002, and January-June 2003

Source	Calendar year			January-June	
	2000	2001	2002	2002	2003
	Share of quantity (*percent*)				
Brazil	17.4	10.9	10.8	7.1	15.7
India	4.9	7.0	8.0	10.8	2.1
Korea	21.7	20.5	26.7	26.2	26.5
Mexico	19.2	21.5	23.2	22.7	24.2
Thailand	3.9	6.9	4.6	5.2	4.1
Subtotal	67.0	66.8	73.3	72.0	72.7
Other sources	33.0	33.2	26.7	28.0	27.3
Total	100.0	100.0	100.0	100.0	100.0
	Share of value (*percent*)				
Brazil	16.0	9.0	9.2	6.2	13.6
India	4.6	6.2	7.1	9.5	1.8
Korea	19.6	17.9	23.6	22.9	23.1
Mexico	22.2	25.2	28.4	27.5	29.4
Thailand	3.5	6.3	4.3	4.8	3.8
Subtotal	65.9	64.5	72.6	70.9	71.7
Other sources	34.2	35.5	27.4	29.1	28.3
Total	100.0	100.0	100.0	100.0	100.0

[1] Landed, duty-paid.

Note.–Because of rounding, figures may not add to the totals shown.

Source: Compiled from official Commerce statistics (HTS subheading 7312.10.20 (Thailand only) and statistical reporting numbers 7312.10.3010 and 7312.10.3012).

APPENDIX D

PURCHASER INFORMATION

Table D-1
PC strand: Purchases by purchasers, by type of firm, market (pre-tensioned or post-tensioned), and by country source, 2000-2002 and the first half of 2003

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Table D-2
PC strand: Top 10 customers reported by U.S. producers and importers (and import source) and overlap of firms and sources

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Table D-3
PC strand: Reasons that relative shares of purchases may have changed in the last three years, as reported by purchasers

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APPENDIX E

"BUY AMERICA(N)" PRICE DATA

Table E-1
PC strand: Weighted-average f.o.b. prices and quantities of domestic "Buy America(n)" sales and imported product 1 in the pre-tensioned and post-tensioned markets combined, and margins of underselling/(overselling), by quarters, January 2000-June 2003

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Table E-2
PC strand: Weighted-average f.o.b. prices and quantities of domestic Non-"Buy-America(n) sales and imported product 1 in the pre-tensioned and post-tensioned markets combined, and margins of underselling/(overselling), by quarters, January 2000-June 2003

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Table E-3
PC strand: Weighted-average f.o.b. prices and quantities of domestic "Buy America(n)" sales and imported product 1 in the pre-tensioned market, and margins of underselling/(overselling), by quarters, January 2000-June 2003

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Table E-4
PC strand: Weighted-average f.o.b. prices and quantities of domestic Non-"Buy-America(n)" sales and imported product 1 in the pre-tensioned market, and margins of underselling/(overselling), by quarters, January 2000-June 2003

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Table E-5
PC strand: Weighted-average f.o.b. prices and quantities of domestic "Buy America(n)" sales and imported product 1 in the post-tensioned market, and margins of underselling/(overselling), by quarters, January 2000-June 2003

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Table E-6
PC strand: Weighted-average f.o.b. prices and quantities of domestic Non-"Buy America(n)" sales and imported product 1 in the post-tensioned market, and margins of underselling/(overselling), by quarters, January 2000-June 2003

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APPENDIX F

ALLEGED EFFECTS OF SUBJECT IMPORTS ON U.S. PRODUCERS' EXISTING DEVELOPMENT AND PRODUCTION EFFORTS, GROWTH, INVESTMENT, AND ABILITY TO RAISE CAPITAL

Responses of U.S. producers to the following questions:

1. Since January 1, 2000, has your firm experienced any actual negative effects on its return on investment or its growth, investment, ability to raise capital, existing development and production efforts (including efforts to develop a derivative or more advanced version of the product), or the scale of capital investments as a result of imports of PC strand from Brazil, India, Korea, Mexico and/or Thailand?

Responses of the producers are:

American ***

Insteel ***

Sivaco ***

Strand Tech ***

Sumiden ***

2. Does your firm anticipate any negative impact of imports of PC strand from Brazil, India, Korea, Mexico and/or Thailand?

Responses of the producers are:

American ***

Insteel ***

Sivaco ***

Strand Tech ***

Sumiden ***