

Large Power Transformers from Korea

Hearing Before the U.S. International Trade Commission

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## Transformer Bid Information Requested

### Purchaser Questionnaire (Q. V-1)

“**Bid data.**— Please submit in chronological order the information requested below for your 10 largest purchases by value since January 1, 2009 for LPTs. List all bids for each of you 10 largest purchases.”

### Producer (Q. IV-7) and Importer (Q. III-7) Questionnaires

“**Bid data.**— Please report in chronological order the information requested below for *all* large power transformer bids you submitted *with expected delivery between January 1, 2009 and March 31, 2012* or bids made between January 1, 2009 and March 31, 2012 for later delivery.” *{emphasis added}*

#### Data to be reported:

Purchaser	Bid End Date	Project Location	Number of Units	Top MVA	High line kV	Bid (\$1,000)	Production plant country	Win? (yes/no/split)	Deliv. Year (if won)
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Source: Purchaser questionnaires.

# Summary of Bid Analysis Methodology

## Purchaser Questionnaires

Review competitive bids for 70 purchasers submitting usable data:

- Bid wins by Korea where US also competed.
- Bid wins by Korea where US did not compete.
- Bid losses by US where no Korea competition.



## Producer and Importer Questionnaires

Exclude from producer and importer bids those made to 70 purchasers submitting usable bid information.

From smaller bid database include only those customers where both U.S. and subject imports competed in the same year.

Review remaining competitive bid wins by

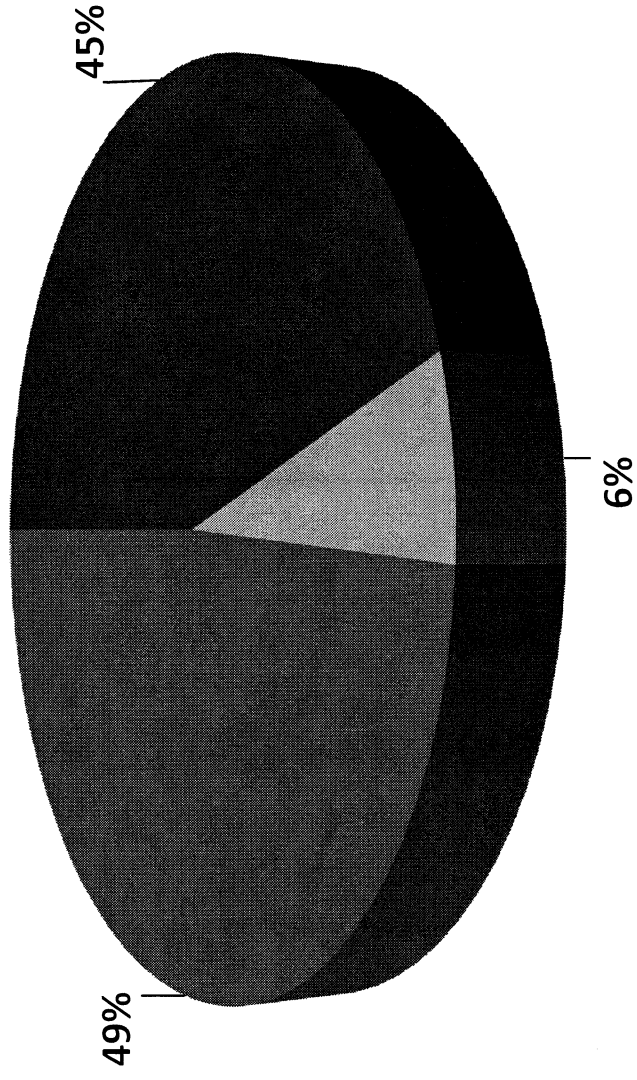
Korea:

- Bid wins by Korea where US also competed.
- Bid wins by Korea where US did not compete.



Consolidate evaluation of bids from purchaser, producer, and importer questionnaires to quantify bid wins by Korea not against U.S. producers.

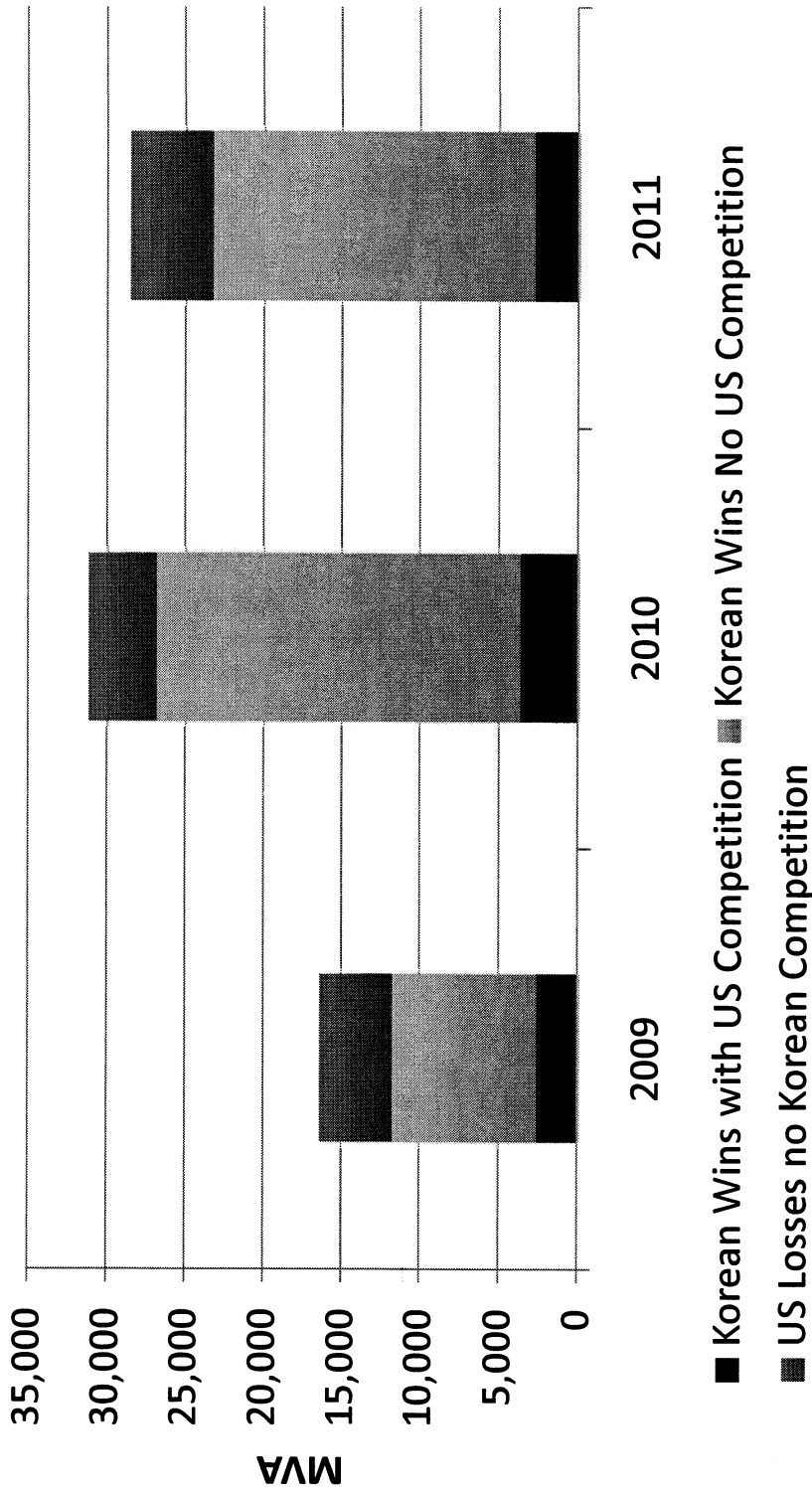
# Only Six Percent of Korean Bids Have Resulted in Wins Against U.S. Producers



- Korean Wins with no US Competition
- Korean Losses
- Korean wins with US Competition

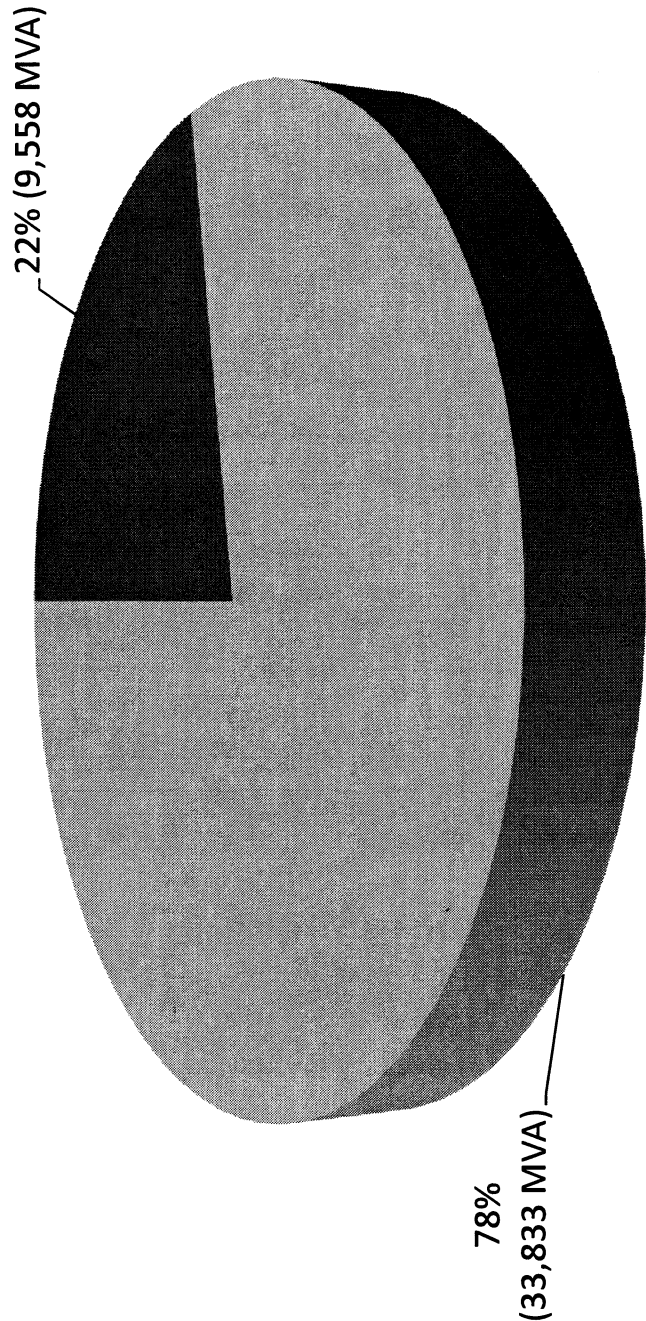
Source: Purchaser questionnaires.

# The Purchaser Bid Data Shows that Korea's Bid Wins Were Only Infrequently Against U.S. Producers



Source: Purchaser questionnaires.

# For the Vast Majority of Korean Wins There Was No U.S. Competition (Producer & Importer Questionnaires)

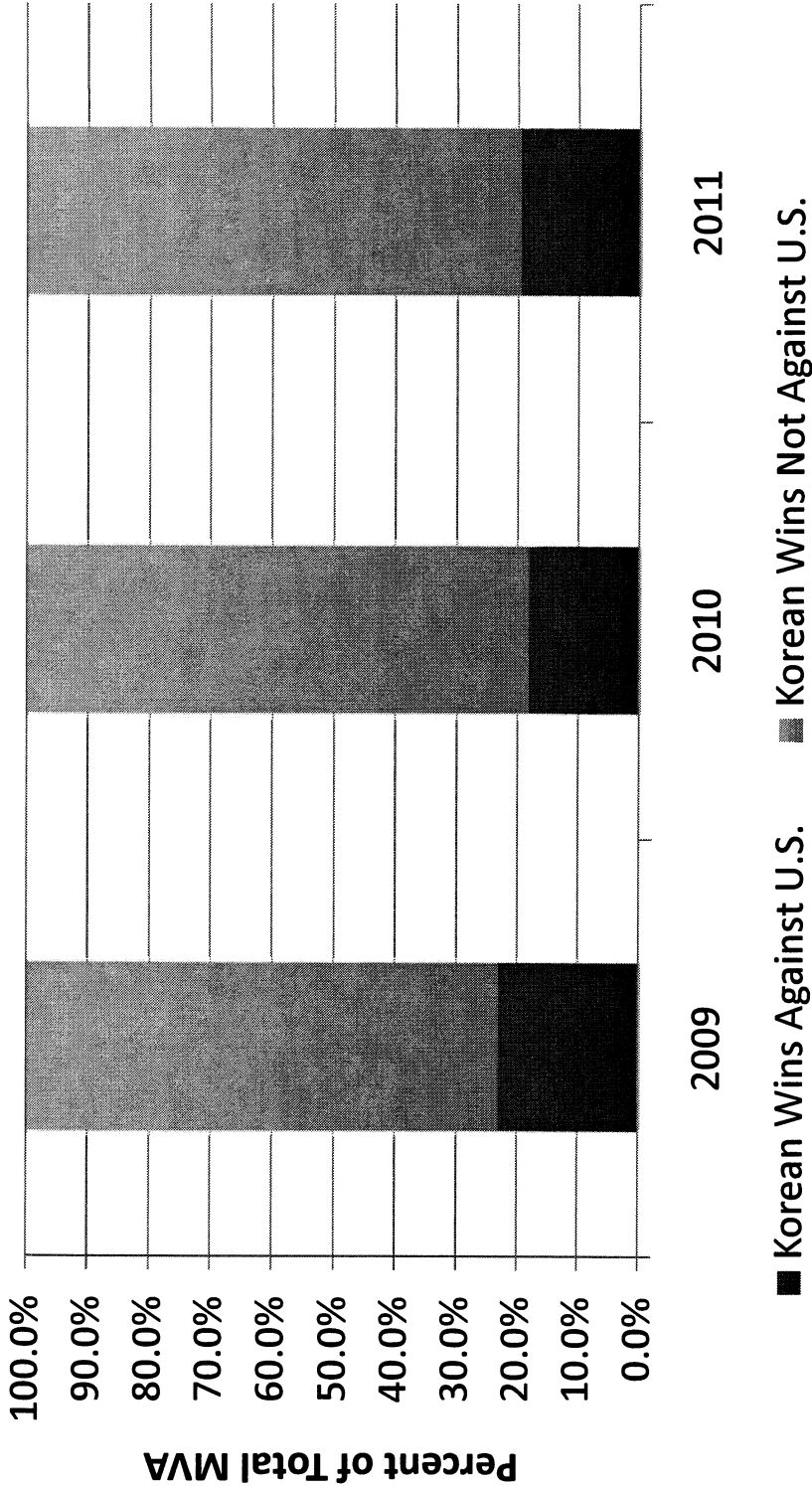


■ Korean Wins Against the US    ■ Korean Wins not Against the US

Source: U.S. producer and importer questionnaires—bids to purchasers not submitting bid data.

Prepared by Capital Trade, Inc.

# For the Vast Majority of Korean Wins There Was No U.S. Competition (Purchaser, Producer, and Importer Questionnaires)



Source: Purchaser, U.S. producer, and importer questionnaires.