

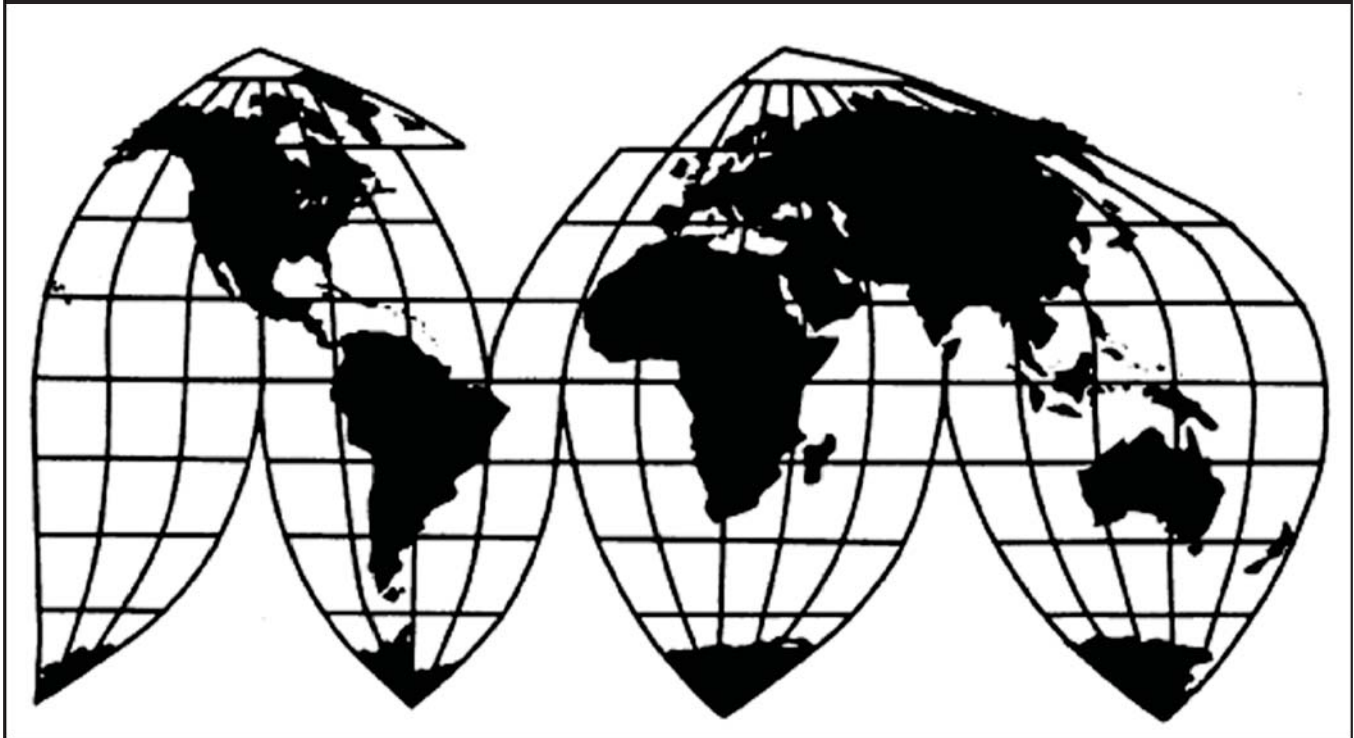
Circular Welded Carbon-Quality Steel Pipe from Oman, Pakistan, the United Arab Emirates, and Vietnam

Investigation Nos. 701-TA-549 and 731-TA-1299, 1300, 1302, and 1303 (Final)

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THE INDUSTRY IN PAKISTAN

Overview

The Commission issued foreign producers' or exporters' questionnaires to 17 firms believed to produce and/or export CWP from Pakistan.¹⁰ The Commission received one useable response from International Industries Limited ("IIL"). This firm's reported exports to the United States accounted for *** percent of U.S. imports of CWP from Pakistan during 2015. According to estimates requested of IIL, its production accounts for approximately *** percent of overall production in Pakistan and *** percent of Pakistani exports to the United States.¹¹ Table VII-5 presents information on the CWP operations of the responding producer and exporter in Pakistan.

Table VII-5
CWP: Summary data on firms in Pakistan, 2015

Firm	Production (short tons)	Share of reported production (percent)	Exports to the United States (short tons)	Share of reported exports to the United States (percent)	Total shipments (short tons)	Share of firm's total shipments exported to the United States (percent)
International Industries Limited (IIL)	***	***	***	***	***	***
Total	***	***	***	***	***	***

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

Changes in operations

As presented in table VII-6, the producer in Pakistan reported a number of changes in operations.

¹⁰ These firms were identified through a review of information submitted in the petition, contained in proprietary Customs records, and identified in postconference briefs from the preliminary phase.

¹¹ According to IIL, it is the only Pakistani producer capable of exporting to the United States. Other Pakistani producers of CWP are focused on the domestic market due to the nature of their facilities and since their distance from ports makes importing raw material unviable. Hearing transcript, p. 133 (Chinoy).

Table VII-6

CWP: Pakistani Producer reported changes in operations, since January 1, 2013

* * * * *

Operations of CWP producer in Pakistan

Table VII-7 presents information on the CWP operations of the responding producer in Pakistan for 2013-15, January to June 2015 and 2016, as well as projections for 2016 and 2017.

Pakistani capacity *** from 2013 to 2015. Production, capacity utilization, inventories and shipments *** over 2013 to 2015. Production, capacity utilization, and shipments were *** in the interim period of 2015 than in the same period of 2016, although inventories were *** in that time period.

The home market accounted for between *** and *** percent of total shipments by IIL from 2013 through 2015 and accounted for *** percent in the interim period of 2016. Exports to the United States accounted for between *** percent of total shipments in 2013 and *** percent during 2015. Export markets other than the United States accounted for *** percent of the Pakistani producer's total shipments in 2013 and *** percent in 2015. Other export markets identified include ***.

Table VII-7

CWP: Data on the industry in Pakistan, 2013-15, January to June 2015, January to June 2016, and calendar year projections for 2016 and 2017

* * * * *

Alternative products

As shown in table VII-8, from 2013-2015 subject merchandise accounted for between *** percent of all Pakistani production on the same equipment. ***.

Table VII-8

CWP: Pakistani producer's overall capacity and production on the same equipment as subject production, 2013-15, January to June 2015, January to June 2016

* * * * *

Exports

According to GTA, the top export markets for CWP produced in Pakistan during 2015 were the United States and Sri Lanka (table VII-9). During 2015, the United States and Sri Lanka accounted for 47.6 and 30.6 percent of total exports from Pakistan, respectively

Table VII-9
CWP: Pakistani exports by destination market, 2013-15

Item	Calendar year		
	2013	2014	2015
	Quantity (short tons)		
Pakistan's exports to the United States	12,719	23,817	29,593
Pakistan's exports to other major destination markets.-- Sri Lanka	18,116	17,174	19,007
Canada	841	6,117	6,327
Australia	0	1,150	3,012
Belgium	57	417	1,619
United Kingdom	237	6,660	885
Germany	0	0	837
Netherlands	0	0	598
Bahrain	421	399	139
All other destination markets	327	224	137
Total Pakistan exports	32,719	55,957	62,154
Item	Value (1,000 dollars)		
	2013	2014	2015
	Value (1,000 dollars)		
Pakistan's exports to the United States	9,789	17,046	19,222
Pakistan's exports to other major destination markets.-- Sri Lanka	15,359	13,945	14,264
Canada	622	5,005	4,964
Australia	---	924	1,874
Belgium	39	293	972
United Kingdom	168	5,134	552
Germany	---	0	449
Netherlands	---	---	361
Ireland	393	305	93
All other destination markets	262	186	85
Total Pakistan exports	26,632	42,838	42,836

Table continued on next page.

Table VII-9—Continued
CWP: Pakistani exports by destination market, 2013-15

Item	Calendar year		
	2013	2014	2015
	Unit value (dollars per short ton)		
Pakistan's exports to the United States	770	716	650
Pakistan's exports to other major destination markets.-- Sri Lanka	848	812	750
Canada	740	818	785
Australia	---	803	622
Belgium	683	702	600
United Kingdom	708	771	623
Germany	---	10,368	536
Netherlands	---	---	604
Ireland	935	765	669
All other destination markets	801	832	622
Total Pakistan exports	814	766	689
	Share of quantity (percent)		
Pakistan's exports to the United States	38.9	42.6	47.6
Pakistan's exports to other major destination markets.-- Sri Lanka	55.4	30.7	30.6
Canada	2.6	10.9	10.2
Australia	---	2.1	4.8
Belgium	0.2	0.7	2.6
United Kingdom	0.7	11.9	1.4
Germany	---	0.0	1.3
Netherlands	---	---	1.0
Ireland	1.3	0.7	0.2
All other destination markets	1.0	0.4	0.2
Total Pakistan exports	100.0	100.0	100.0

Source: Official import statistics from Pakistan reported under HTS subheading 7306.30 by various national statistical authorities in the IHS/GTA database, accessed September 6, 2016.

THE INDUSTRY IN VIETNAM

Overview

The Commission issued foreign producers' or exporters' questionnaires to six firms believed to produce and/or export CWP from Vietnam.¹⁶ Useable responses to the Commission's questionnaire were received from four firms: SeAH Steel Vina Corporation ("SeAH"), Vietnam Haiphong Hongyuan Machinery Manufactory Co., Ltd. ("Vietnam Haiphong"), Maruichi Sunsteel Joint Stock Company ("Maruichi Sunsteel"), and Hoa Phat Steel Pipe Co., Ltd ("Hoa Phat"). These firms' exports to the United States accounted for *** percent of U.S. imports of CWP from Vietnam during 2015. Subject Vietnamese firms' exports to the United States accounted for *** percent of U.S. imports of CWP from Vietnam during 2015. According to estimates requested of the responding Vietnamese producers, SeAH accounted for approximately *** percent of total Vietnamese production and approximately *** percent of Vietnamese exports of CWP to the United States in 2015. Maruichi Sunsteel's estimated production accounted for approximately *** percent of total Vietnamese production and approximately *** percent of Vietnamese exports of CWP to the United States in 2015. Table VII-15 presents information on the CWP operations in Vietnam.

Table VII-15
CWP: Summary data on firms in Vietnam, 2015

Firm	Production (short tons)	Share of reported production (percent)	Exports to the United States (short tons)	Share of reported exports to the United States (percent)	Total shipments (short tons)	Share of firm's total shipments exported to the United States (percent)
Hoa Phat Steel Pipe Co., Ltd	***	***	***	***	***	***
Maruichi Sunsteel Joint Stock Company	***	***	***	***	***	***
SeAH Steel Vina Corporation	***	***	***	***	***	***
Vietnam Haiphong Hongyuan Machinery Manufactory Co., Ltd.	***	***	***	***	***	***
Total	***	***	***	***	***	***

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

¹⁶ These firms were identified through a review of information submitted in the petition, contained in proprietary Customs records, and other public sources.

Commerce assigned a zero weighted-average dumping margin to SeAH in its final determination and its imports were counted as nonsubject. The other responding firms were counted as subject imports.

Changes in operations

As presented in table VII-16, producers in Vietnam reported the following changes to operations since January 2013.

Table VII-16

CWP: Reported changes in operations by firms in Vietnam, since January 1, 2013

* * * * *

Operations of the subject CWP producers in Vietnam

Table VII-17 presents information on the CWP operations of subject producers¹⁷ in Vietnam for 2013-15, January to June 2015, and January to June 2016, as well as projections for 2016 and 2017. Vietnam's subject producer capacity, production, and total shipments increased from 2013 to 2015, while capacity utilization and inventories decreased from 2013 to 2015. These trends are driven in part by ***. Capacity utilization, production, and shipments were higher during the interim period of 2016 than in the same period of 2015; capacity and inventories were largely unchanged.

The home market accounted for between *** percent and *** percent of Vietnam's total shipments from 2013 in 2015. Exports to the United States comprised *** percent of Vietnam's total shipments in 2013; the share fell to *** percent in 2015. Export markets other than the United States accounted for *** percent of Vietnam's total shipments in 2013 and rose slightly to *** percent in 2015. Other export markets identified include Australia, Cambodia, Canada, Kuwait, Myanmar, Oman, Thailand, and the UAE.

Table VII-17

CWP: Data on industry in Vietnam subject producers, 2013-15, January to June 2015, January to June 2016, and calendar year projections for 2016 and 2017

* * * * *

Alternative products

As shown in table VII-18, CWP accounted for *** percent of production on the same equipment in 2015. Other products include ***.

¹⁷ Subject producers includes Vietnam Haiphong, Maruichi Sunsteel, and Hoa Phat.

Table VII-18

CWP: Vietnam subject producers' overall capacity and production on the same equipment as subject production, 2013-15, January to June 2015, and January to June 2016

* * * * *

Operations of the nonsubject CWP producer in Vietnam

Table VII-19 presents information on the CWP operations of the nonsubject producer in Vietnam (SeAH) for 2013-15, January to June 2015, and January to June 2016, as well as projections for 2016 and 2017. SeAH's capacity *** from 2013 to 2014 ***, while production, capacity utilization, inventories, and total shipments *** from 2013 to 2015. Capacity utilization, production, and shipments were *** during the interim period of 2015 than in the same period of 2016; capacity *** and inventories *** in the interim period of 2016 compared to the same period in 2015.

The home market accounted for *** percent of SeAH's total shipments in 2013 and fell to *** percent in 2015. Exports to the United States comprised *** percent of SeAH's total shipments in 2013 and *** percent in 2015. Export markets other than the United States accounted for *** percent of SeAH's total shipments in 2013 and fell to *** percent in 2015. Other export markets identified include ***.

Table VII-19

CWP: Data on industry from Vietnam nonsubject producer (SeAH), 2013-15, January to June 2015, January to June 2016, and calendar year projections for 2016 and 2017

* * * * *

Alternative products for the nonsubject producer

As shown in table VII-20, SeAH's production of CWP accounted for *** percent of its overall production in 2015. ***.

Table VII-20

CWP: Vietnam nonsubject producers' overall capacity and production on the same equipment as subject production, 2013-15, January to June 2015, and January to June 2016

* * * * *

Exports

According to GTA, the top export markets for CWP produced in Vietnam during 2015 were the United States and Canada (table VII-21). During 2015, the United States and Canada accounted for 66.0 and 11.6 percent of total Vietnamese exports, respectively.

Table VII-21
CWP: Vietnam exports by destination market, 2013-15

Item	Calendar year		
	2013	2014	2015
	Quantity (short tons)		
Vietnam's exports to the United States	68,568	64,299	85,868
Vietnam's exports to other major destination markets.-- Canada	9,880	16,994	15,118
Hong Kong	1,221	3,647	6,148
Taiwan	3,338	2,576	5,585
Malaysia	2,409	2,740	3,614
Thailand	3,428	7,251	3,383
Japan	2,915	4,279	3,281
Singapore	58	---	2,353
Indonesia	385	832	1,306
All other destination markets	1,411	1,686	3,488
Total Vietnam exports	93,615	104,305	130,144
Item	Value (1,000 dollars)		
	2013	2014	2015
	Value (1,000 dollars)		
Vietnam's exports to the United States	52,763	47,868	57,103
Vietnam's exports to other major destination markets.-- Canada	9,622	14,992	11,851
Hong Kong	977	2,937	4,170
Taiwan	3,922	3,160	5,723
Malaysia	2,134	2,320	2,111
Thailand	3,597	6,202	2,929
Japan	3,912	4,474	3,436
Singapore	40	---	2,707
Indonesia	579	1,168	1,470
All other destination markets	1,937	2,772	4,313
Total Vietnam exports	79,482	85,893	95,813

Table continued on next page.

Table VII-21—Continued
CWP: Vietnam exports by destination market, 2013-15

Item	Calendar year		
	2013	2014	2015
	Unit value (dollars per short ton)		
Vietnam's exports to the United States	770	744	665
Vietnam's exports to other major destination markets.-- Canada	974	882	784
Hong Kong	801	805	678
Taiwan	1,175	1,227	1,025
Malaysia	886	847	584
Thailand	1,049	855	866
Japan	1,342	1,045	1,047
Singapore	679	---	1,151
Indonesia	1,501	1,404	1,126
All other destination markets	1,372	1,644	1,236
Total Vietnam exports	849	823	736
	Share of quantity (percent)		
Vietnam's exports to the United States	73.2	61.6	66.0
Vietnam's exports to other major destination markets.-- Canada	10.6	16.3	11.6
Hong Kong	1.3	3.5	4.7
Taiwan	3.6	2.5	4.3
Malaysia	2.6	2.6	2.8
Thailand	3.7	7.0	2.6
Japan	3.1	4.1	2.5
Singapore	0.1	---	1.8
Indonesia	0.4	0.8	1.0
All other destination markets	1.5	1.6	2.7
Total Vietnam exports	100.0	100.0	100.0

Source: Official import statistics from Vietnam reported under HTS subheading 7306.30 by various national statistical authorities in the IHS/GTA database, accessed September 6, 2016.

Table VII-26

CWP: Global exports by exporter, 2013-15

Item	Calendar year		
	2013	2014	2015
	Quantity (short tons)		
United States	403,894	381,935	334,832
Subject exporters.--			
Oman	35,347	49,179	40,161
Pakistan	32,719	55,957	62,016
UAE	70,222	98,322	143,461
Vietnam	93,615	104,305	129,047
Subject exporters	231,903	307,764	374,685
All other major exporting countries.--			
China	934,018	1,146,965	1,407,543
Italy	1,006,303	1,100,893	1,099,934
Turkey	540,666	643,241	600,851
Korea	450,849	431,344	354,873
Germany	381,464	361,451	341,933
Russia	247,636	248,951	308,014
Canada	235,027	247,414	259,827
India	225,548	245,914	230,611
Spain	234,133	247,914	192,309
Switzerland	160,573	144,212	148,495
All other exporting countries	1,483,570	1,363,735	1,296,882
Total	6,535,583	6,871,732	6,952,933
	Value (1,000 dollars)		
United States	621,181	611,165	532,340
Subject exporters.--			
Oman	24,902	34,791	27,162
Pakistan	26,632	42,838	42,836
UAE	59,277	77,952	103,332
Vietnam	79,482	85,893	95,813
Subject exporters	190,293	241,474	269,143
All other major exporting countries.--			
China	734,967	872,421	945,876
Italy	1,061,882	1,122,144	915,147
Turkey	432,401	496,280	385,261
Korea	425,236	415,379	309,321
Germany	617,368	570,297	448,872
Russia	188,747	163,673	157,120
Canada	284,178	298,368	288,128
India	164,890	183,926	152,443
Spain	280,087	256,779	189,177
Switzerland	265,952	256,035	226,574
All other exporting countries.	1,877,498	1,724,798	1,345,111
Total global exports	7,144,680	7,212,740	6,164,512

Table continued on following page.