Exhibits to Testimony on Behalf of Joint Respondents

Hot-Rolled Steel Products from China, India, Indonesia, Taiwan, Thailand, and Ukraine
Inv. Nos. 701-TA-405, 406, and 408 &
731-TA-899-901 and 906-908
(Second Review)

U.S. International Trade Commission
Commission Hearing
October 31, 2013

U.S. GDP and Industrial Production are Growing

Growth in:	2011	2012	Projection 2013	Projection 2014
U.S. Real GDP	+1.8%	+2.8%	+1.5%	+2.6%
U.S. Industrial Production	+3.4%	+3.6%	+2.5%	+3.1%

Source: Bureau of Economic Analysis; Federal Reserve; National Association for Business Economics.

Domestic Hot-Rolled Steel Industry Improvements Since 2009

- From 2009 to 2012, total market apparent consumption increased by 57.0 percent and open-market consumption increased by 70.4 percent
- From 2009 to 2012, U.S. production increased by 51.9 percent
- From 2009 to 2012, U.S. capacity increased by 4.0 percent, and increased further in first-half 2013
- Capacity utilization increased from 52.1 percent in 2009 to 76.1 percent in 2012, and remained steady at 76.0 percent in first-half 2013
- The number of PRWs increased from 18,232 in 2009 to 20,571 in the first half of 2013

Source: Public Prehearing Report at I-51, I-52, III-11, III-16, and III-20.

Domestic Hot-Rolled Steel Industry Improvements Since 2009 (continued)

- From 2009 to 2012, U.S. commercial shipments increased by 70.6 percent and total U.S. shipments increased by 56.2 percent

- From 2009 to the first half of 2013, U.S. producers' market share increased

  - Total market share increased from 93.8 percent to 94.1 percent

  - Open-market share increased from 84.6 percent to 86.5 percent

Source: Public Prehearing Report at I-51, I-52, III-11, III-16, and III-20.

Ford Motor Company Statements Regarding Sourcing of Hot-Rolled Steel

"Ford's reference and practice of purchasing hot-rolled steel produced in North America is grounded in the North American producers' fundamental advantages in local proximity to Ford's operations and reliability of supply."

"Purchasing domestic product is very important to Ford: domestic producers offer shorter lead times, local technical support, and the ability to meet Ford's just-in-time delivery requirements."

Source: Public Prehearing Brief of Ford Motor Company at 2.

See Confidential Exhibits

Confidential Exhibit A:	Auto Sector Sourcing Preferences
Confidential Exhibit B:	U.S. Steel Producers' Shipments for Auto-Sector Applications
Confidential Exhibit C:	Purchaser Requirements/Preferences for Sourcing

U.S. Shipments By U.S. Producers and Imports from Canada and Korea (in short tons)

	2007	2008	2009	2010	2011	2012	January-June 2012	January-June 2013
Total U.S. Shipments								
U.S. Producers	58,388,727	52,325,588	34,300,292	48,358,776	51,026,062	53,576,088	27,574,307	26,888,718
Imports from								
Canada	1,360,068	1,453,945	915,378	1,136,378	1,305,102	1,241,558	677,671	621,547
Korea	601,910	708,491	457,915	503,680	727,265	889,349	435,798	280,684
Subtotal	1,961,978	2,162,436	1,373,293	1,640,058	2,032,367	2,130,907	1,113,469	902,231
Total U.S. Producers' Shipments and Imports from Canada and Korea	60,350,705	54,488,024	35,673,585	49,998,834	53,058,429	55,706,995	28,687,776	27,790,949
Other imports	1,386,698	1,462,512	900,815	1,456,088	1,527,551	1,723,958	858,030	789,634
Total Apparent U.S. Consumption	61,737,403	55,950,536	36,574,400	51,454,922	54,585,980	57,430,953	29,545,806	28,580,583
Open-Market Shipments Only								
U.S. Producers	22,793,143	20,338,473	12,480,435	18,860,508	20,623,781	21,285,799	11,090,044	10,871,652
Imports from								
Canada	1,360,068	1,453,945	915,378	1,136,378	1,305,102	1,241,558	677,671	621,547
Korea	601,910	708,491	457,915	503,680	727,265	889,349	435,798	280,684
Subtotal	1,961,978	2,162,436	1,373,293	1,640,058	2,032,367	2,130,907	1,113,469	902,231
Total U.S. Producers' Shipments and Imports from Canada and Korea	24,755,121	22,500,909	13,853,728	20,500,566	22,656,148	23,416,706	12,203,513	11,773,883
Other imports	1,386,698	1,462,512	900,815	1,456,088	1,527,551	1,723,958	858,030	789,634
Open Market U.S. Consumption	26,141,819	23,963,421	14,754,543	21,956,654	24,183,699	25,140,664	13,061,543	12,563,517

Source: Public Prehearing Report at III-16 and IV-7.

U.S. Shipments By U.S. Producers and Imports from Canada and Korea (market shares)

	2007	2008	2009	2010	2011	2012	January-June 2012	January-June 2013
Total U.S. Shipments								
U.S. Producers	94.6%	93.5%	93.8%	94.0%	93.5%	93.3%	93.3%	94.1%
Imports from								
Canada	2.2%	2.6%	2.5%	2.2%	2.4%	2.2%	2.3%	2.2%
Korea	1.0%	1.3%	1.3%	1.0%	1.3%	1.5%	1.5%	1.0%
Subtotal	3.2%	3.9%	3.8%	3.2%	3.7%	3.7%	3.8%	3.2%
Total U.S. Producers and Imports from Canada and Korea	97.8%	97.4%	97.5%	97.2%	97.2%	**97.0%**	97.1%	**97.2%**
Other imports	2.2%	2.6%	2.5%	2.8%	2.8%	3.0%	2.9%	2.8%
Total Apparent U.S. Consumption	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Open Market Shipments Only								
U.S. Producers	87.2%	84.9%	84.6%	85.9%	85.3%	84.7%	84.9%	86.5%
Imports from								
Canada	5.2%	6.1%	6.2%	5.2%	5.4%	4.9%	5.2%	4.9%
Korea	2.3%	3.0%	3.1%	2.3%	3.0%	3.5%	3.3%	2.2%
Subtotal	7.5%	9.0%	9.3%	7.5%	8.4%	8.5%	8.5%	7.2%
Total U.S. Producers and Imports from Canada and Korea	94.7%	93.9%	93.9%	93.4%	93.7%	**93.1%**	93.4%	**93.7%**
Other imports	5.3%	6.1%	6.1%	6.6%	6.3%	6.9%	6.6%	6.3%
Open Market U.S. Consumption	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Public Prehearing Report at III-16 and IV-7.