

# WELDED STAINLESS STEEL PRESSURE PIPE FROM INDIA

Bristol Metals LLC  
Felker Brothers Corporation  
Marcegaglia USA  
Outokumpu Stainless Pipe, Inc.  
United Steelworkers

September 22, 2016

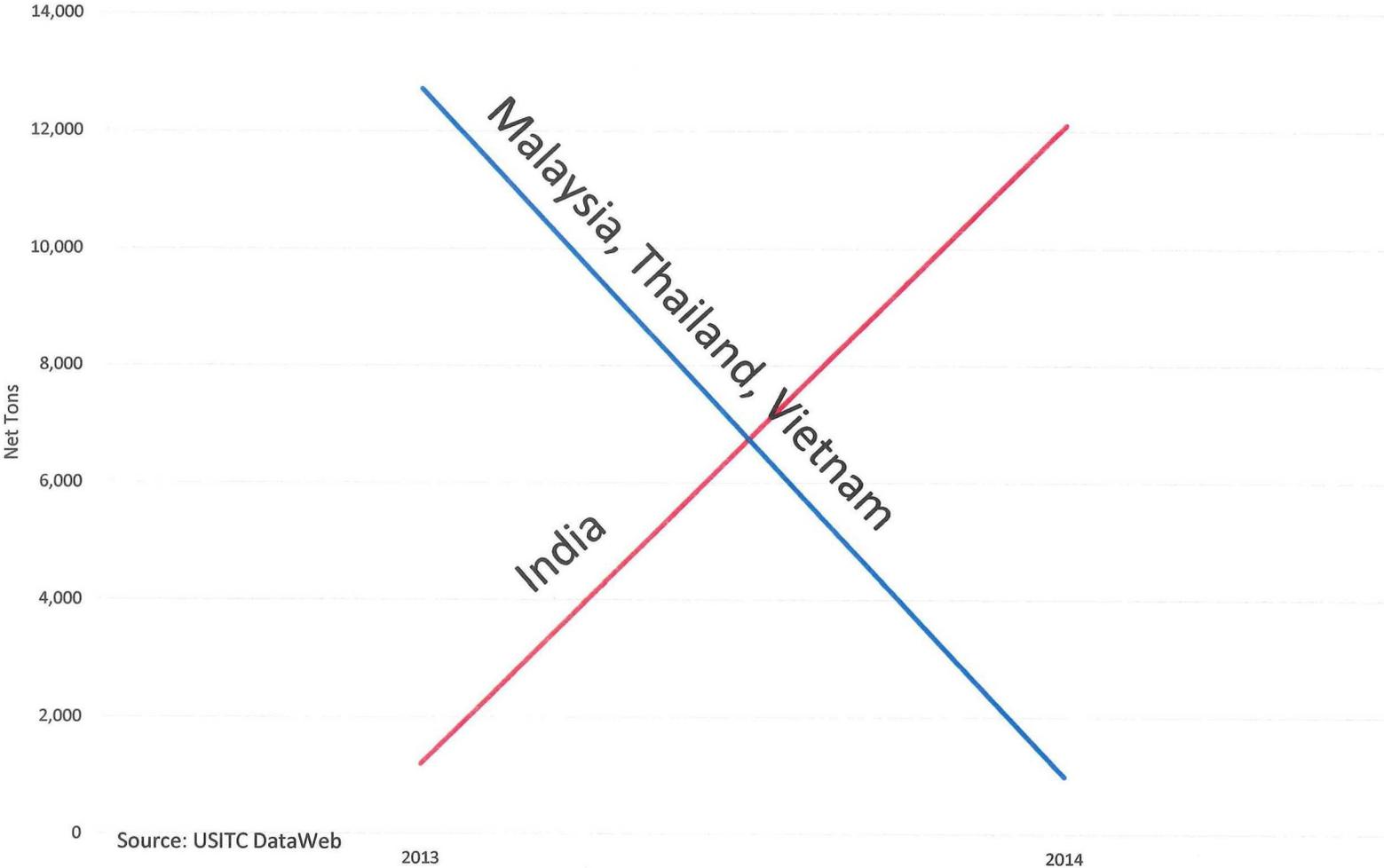
*In Welded Stainless Pressure Pipe  
From Malaysia, Thailand and  
Vietnam, the ITC Determined  
That the Domestic Industry Had  
Been Materially Injured During  
the 2011-2013 POI*

Since then, things have gotten worse

## Difference Between 2013 and 2015

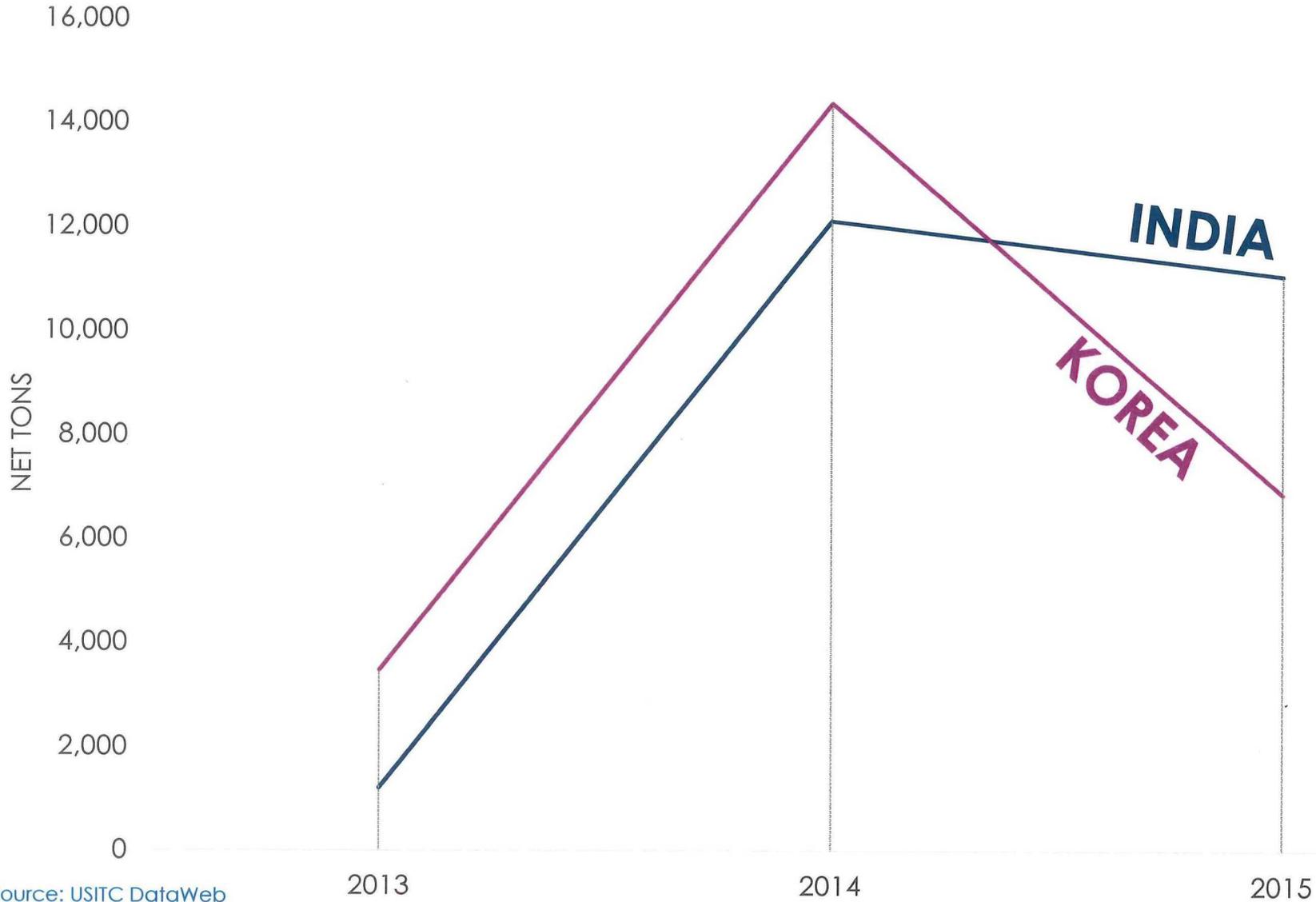
	2013	2015
Apparent Consumption (NT):	64,933	64,742
U.S. Producers' Shipments (NT)	26,073	23,006
Indian WSSPP Shipments (NT)	2,622	15,064
U.S. Producers' Market Share (%)	40.2	35.5
Indian Market Share (%)	4.0	23.3
U.S. Producers' Net Losses (\$000s)	12,953	15,381

# Imports from India versus Imports from Malaysia/Thailand/Vietnam, 2013 - 2014



U.S. WSSPP INDUSTRY IS A VICTIM OF SERIAL DUMPING

# IMPORTS FROM INDIA AND KOREA



Source: USITC DataWeb

**INDIA HAS GREATER IMPACT ON INDUSTRY THAN KOREA**

**Table 3: U.S. Producers' Prices Increased by More and Decreased by Less than Nickel Prices Did**

		<b>Change Q12014-Q42014</b>	<b>Change Q12015-Q42015</b>	
<b>Nickel</b>		7.8%	-34.3%	
<b>Product 1</b>	[			]
<b>Product 2</b>		12.3%	-26.0%	
<b>Product 3</b>	[			]
<b>Product 4</b>		12.0%	-28.7%	

Respondents' Prehearing Brief  
(public), at 35

**ASTM A-312 Specifications, Table 1  
Chemical Requirements (excerpt)**

<b>Grade</b>	<b>Nickel Composition</b>
TP304	8.0-11.0
TP304L	8.0-13.0
TP316	11.0-14.0
TP316L	10.0-14.0

## Per Ton Prices and Raw Material Costs

	2013	2014	2015
Total Net Sales	\$4,005	\$4,114	\$3,733
Change y/y		\$109	-\$381
Raw Materials	\$3,062	\$2,956	\$2,733
Change y/y		-\$106	-\$223
Source: Prehearing Report, Table VI-1			

PRICE AFFECTED BY MORE THAN  
CHANGES IN RAW MATERIAL  
COSTS

## Comparison of U.S. WSSPP Capacity and Commercial Shipments of WSSPP from India

Item	Calendar Year		
	2013	2014	2015
	Quantity (short tons)		
Overall Capacity	86,958	86,958	83,550
WSSPP Production	25,849	30,827	22,682
Total production on same equipment	50,085	50,091	40,469
Unused Capacity	36,873	36,867	43,081
Commercial Shipments from India	2,622	17,318	15,064
Unused Capacity if Domestic Industry Had All Sales From India	34,251	19,549	28,017
Source: Prehearing Report, Tables III-3 and IV-3			

Domestic industry has capacity to supply the domestic market with all shipments from India

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