

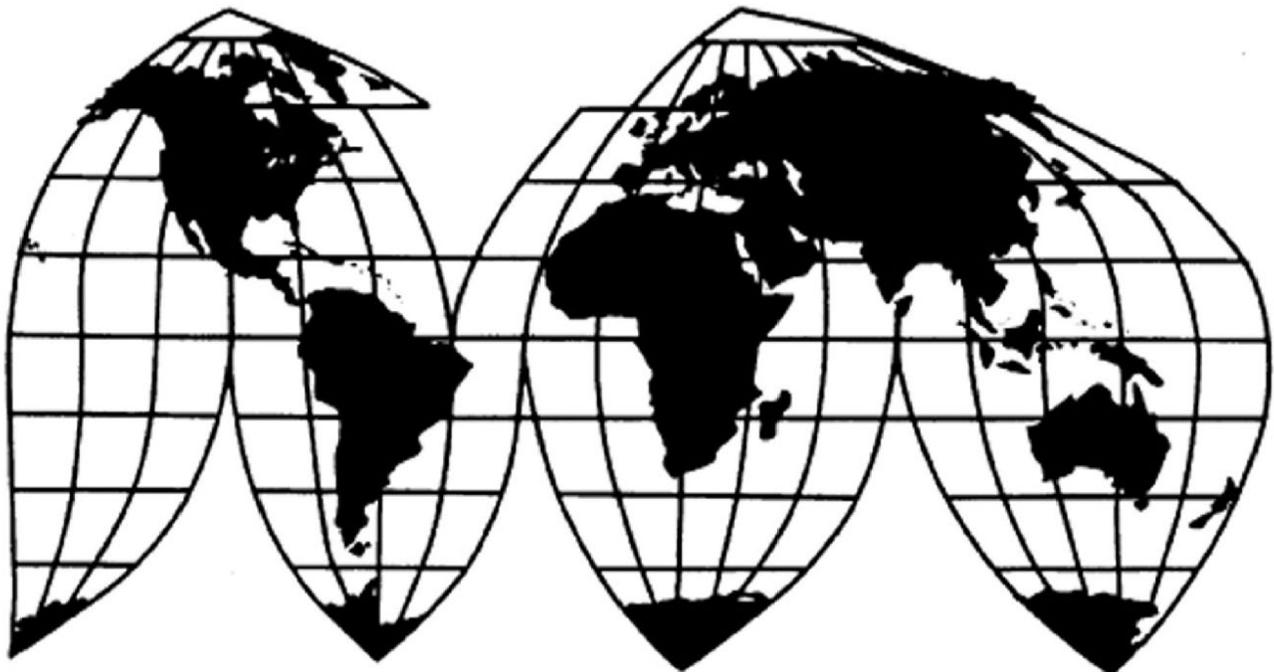
Glass Wine Bottles from China

Investigation No. 701-TA-703 (Final)

Publication 5550

October 2024

U.S. International Trade Commission



Washington, DC 20436

U.S. International Trade Commission

COMMISSIONERS

Amy A. Karpel, Chair
David S. Johanson
Rhonda K. Schmidlein
Jason E. Kearns

Catherine DeFilippo
Director of Operations

Staff assigned

Charles Cummings, Investigator
Allison Utomi, Industry Analyst
Lauren McLemore, Economist
Jessica Lee, Accountant
Jennifer Catalano, Statistician
Michael Haldenstein, Attorney
Mary Beth Jones, Supervisory Investigator

Address all communications to
Secretary to the Commission
United States International Trade Commission
Washington, DC 20436

U.S. International Trade Commission

Washington, DC 20436
www.usitc.gov

Glass Wine Bottles from China

Investigation No. 701-TA-703 (Final)

Publication 5550



October 2024

CONTENTS

	Page
Determination	1
Views of the Commission.....	3
Part I: Introduction.....	I-1
Background.....	I-1
Statutory criteria	I-2
Organization of report.....	I-3
Market summary.....	I-4
Summary data and data sources.....	I-5
Previous and related investigations.....	I-5
Nature and extent of subsidies and sales at LTFV	I-6
Subsidies.....	I-6
Sales at LTFV	I-7
The subject merchandise	I-10
Commerce’s scope	I-10
Tariff treatment.....	I-11
The product.....	I-12
Manufacturing processes	I-16
Domestic like product issues.....	I-27
Physical characteristics and uses.....	I-28
Interchangeability.....	I-29
Channels of distribution	I-29
Customer and producer perceptions	I-30
Manufacturing facilities and production employees	I-31
Price.....	I-32

CONTENTS

Page

Part II: Conditions of competition in the U.S. market.....	II-1
U.S. market characteristics.....	II-1
U.S. purchasers.....	II-2
Impact of section 301 tariffs	II-2
Channels of distribution	II-3
Geographic distribution	II-5
Supply and demand considerations	II-6
U.S. supply	II-6
U.S. demand	II-11
Substitutability issues.....	II-17
Factors affecting purchasing decisions.....	II-17
Purchase factor comparisons of domestic products, subject imports, and nonsubject imports	II-25
Comparison of U.S.-produced and imported glass wine bottles	II-28
Elasticity estimates.....	II-32
U.S. supply elasticity.....	II-32
U.S. demand elasticity	II-32
Substitution elasticity	II-33

CONTENTS

Page

Part III: U.S. producers' production, shipments, and employment	III-1
U.S. producers	III-1
U.S. production, capacity, and capacity utilization	III-7
U.S. producers' production, capacity, and capacity utilization	III-10
Alternative products	III-13
U.S. producers' total shipments and exports and U.S. shipments	III-14
U.S. producers' total shipments and exports	III-14
U.S. producers' U.S. shipments	III-15
Captive consumption	III-17
Transfers and sales	III-17
First statutory criterion in captive consumption	III-17
Second statutory criterion in captive consumption	III-18
U.S. producers' inventories	III-19
U.S. producers' imports from subject sources	III-20
U.S. producers' purchases of imports from subject sources	III-20
U.S. employment, wages, and productivity	III-21

CONTENTS

Page

Part IV: U.S. imports, apparent U.S. consumption, and market shares.....	IV-1
U.S. importers.....	IV-1
U.S. imports.....	IV-3
Bulk packed U.S. imports and case packed U.S. imports, by source and period	IV-7
Negligibility.....	IV-12
Critical circumstances.....	IV-13
Critical circumstances in the China CVD investigation.....	IV-13
Critical circumstances in the China AD investigation	IV-16
Cumulation considerations	IV-18
Fungibility	IV-18
Geographical markets	IV-26
Presence in the market	IV-28
Apparent U.S. consumption and market shares.....	IV-31
Quantity.....	IV-31
Value.....	IV-37

CONTENTS

	Page
Part V: Pricing data	V-1
Factors affecting prices	V-1
Raw material costs	V-1
Transportation costs to the U.S. market.....	V-5
U.S. inland transportation costs	V-5
Pricing practices	V-5
Pricing methods.....	V-5
Sales terms and discounts	V-8
Price leadership	V-9
Price and purchase cost data	V-9
Price data.....	V-10
Import purchase cost data	V-22
Price and purchase cost trends	V-31
Price and purchase cost comparisons.....	V-33
Lost sales and lost revenue	V-37
Part VI: Financial experience of U.S. producers	VI-1
Background.....	VI-1
Operations on glass wine bottles.....	VI-2
Net sales	VI-14
Cost of goods sold and gross profit or loss.....	VI-15
SG&A expenses and operating income or loss.....	VI-19
All other expenses and net income or loss	VI-20
Variance analysis	VI-21
Capital expenditures and research and development expenses.....	VI-24
Assets and return on assets	VI-25
Capital and investment	VI-26

CONTENTS

Page

Part VII: Threat considerations and information on nonsubject countries.....	VII-1
Subject countries.....	VII-3
Changes in operations.....	VII-5
Operations on glass wine bottles.....	VII-10
Installed and overall capacity and alternative products.....	VII-21
Constraints on capacity.....	VII-24
Exports.....	VII-26
U.S. inventories of imported merchandise.....	VII-27
U.S. importers' outstanding orders.....	VII-29
Third-country trade actions.....	VII-29
Information on nonsubject countries.....	VII-30

Appendixes

A. Federal Register notices.....	A-1
B. List of hearing witnesses.....	B-1
C. Summary data.....	C-1
D. U.S. shipments by customer type, packaging type, and period.....	D-1
E. U.S. shipments by product type and weight.....	E-1
F. Apparent U.S. consumption by channels of distribution and packaging type.....	F-1
G. Adjusted official import statistics methodology for nonsubject sources.....	G-1

Note.—Information that would reveal confidential operations of individual concerns may not be published. Such information is identified by brackets in confidential reports and is deleted and replaced with asterisks (***) in public reports.

UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation No. 701-TA-703 (Final)

Glass Wine Bottles from China

DETERMINATION

On the basis of the record¹ developed in the subject investigation, the United States International Trade Commission (“Commission”) determines, pursuant to the Tariff Act of 1930 (“the Act”), that an industry in the United States is not materially injured or threatened with material injury by reason of imports of glass wine bottles from China, provided for in subheading 7010.90.50 of the Harmonized Tariff Schedule of the United States, that have been found by the U.S. Department of Commerce (“Commerce”) to be subsidized by the government of China.²

BACKGROUND

The Commission instituted this investigation effective December 29, 2023, following receipt of petitions filed with the Commission and Commerce by the U.S. Glass Producers Coalition, which is comprised of Ardagh Glass Inc. (Indianapolis, Indiana), and the United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union (Pittsburgh, Pennsylvania). The Commission scheduled the final phase of the investigation following notification of a preliminary determination by Commerce that imports of glass wine bottles from China were being subsidized within the meaning of section 703(b) of the Act (19 U.S.C. 1671b(b)). Notice of the scheduling of the final phase of the Commission’s investigation 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 June 12, 2024 (89 FR 49901).³ The Commission conducted its hearing on August 14, 2024. All persons who requested the opportunity were permitted to participate.

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

² 89 FR 68395 (August 26, 2024).

³ The Commission also published a notice in the *Federal Register* of a revision to its schedule on August 5, 2024 (89 FR 63445).

Views of the Commission

Based on the record in the final phase of these investigations, we determine that an industry in the United States is not materially injured or threatened with material injury by reason of imports of glass wine bottles from China found by the U.S. Department of Commerce (“Commerce”) to be subsidized by the government of China.

I. Background

The petitions in these investigations were filed on December 29, 2023, by the U.S. Glass Producers Coalition, consisting of Ardagh Glass Inc. (“Ardagh”), and the United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union (“the USW”), a union representing workers at the production facilities of the three known domestic producers of glass wine bottles (collectively, “Petitioner”). Although the antidumping duty petitions for glass wine bottles from Chile, China, and Mexico and the countervailing duty petition for glass wine bottles from China were all filed on the same day, December 29, 2023, the investigation schedules became staggered when the U.S. Department of Commerce (“Commerce”) did not postpone the final determination for its countervailing duty investigation regarding China,¹ while it did postpone its final determinations for its antidumping duty investigations for Chile, China, and Mexico.² This necessitates an earlier Commission determination in the final phase countervailing duty investigation on glass wine bottles from China than in the trailing antidumping duty investigations.³ Pursuant to the

¹ *Certain Glass Wine Bottles from the People’s Republic of China: Preliminary Affirmative Countervailing Duty Determination and Preliminary Affirmative Determination of Critical Circumstances*, 89 Fed. Reg. 47533 (June 3, 2024).

² See *Certain Glass Wine Bottles From the People’s Republic of China: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Affirmative Determination of Critical Circumstances, in Part, and Postponement of Final Determination and Extension of Provisional Measures*, 89 Fed. Reg. 65,331 (Aug. 9, 2024); *Certain Glass Wine Bottles From Chile: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures*, 89 Fed. Reg. 65,325 (Aug. 9, 2024); *Certain Glass Wine Bottles From Mexico: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Negative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures*, 89 Fed. Reg. 65,317 (Aug. 9, 2024).

³ Commerce is currently scheduled to issue its final antidumping duty determinations in the trailing investigations regarding Chile, China, and Mexico, no later than 135 days from August 9, 2024, or (Continued...)

statutory cumulation provision on staggered investigations, the record for each of these investigations will be the same except that, prior to the Commission’s determinations in the antidumping duty investigations regarding Chile, China, and Mexico, the Commission shall include the final Commerce antidumping determinations and the parties’ final comments concerning Commerce’s later determinations in the record.⁴

Representatives of Ardagh and the USW appeared at the hearing accompanied by counsel, and Petitioner submitted prehearing and posthearing briefs. In addition, representatives from a domestic producer that is not a member of the petitioning coalition but supportive of the petition, O-I Glass, Inc. (“O-I Glass”), appeared at the hearing accompanied by counsel and submitted prehearing and posthearing briefs.⁵

Several respondent entities participated in these investigations. Berlin Packaging L.L.C. (“Berlin”), a U.S. importer of subject merchandise from Chile, China, and Mexico, appeared at the hearing accompanied by counsel and submitted prehearing and posthearing briefs. Encore Glass, Inc. (“Encore”), a U.S. importer of subject merchandise from China and Mexico, appeared at the hearing accompanied by counsel and submitted a posthearing brief. TricorBraun, Inc., a U.S. importer of subject merchandise from Chile and China, appeared at the hearing accompanied by counsel and submitted prehearing and posthearing briefs. Saverglass S. de R.L. de C.V., a producer and exporter of glass wine bottles in Mexico and Saverglass Inc., a U.S. importer of subject merchandise from Mexico (collectively, “Saverglass”), jointly filed a prehearing brief. Fevisa Industrial S.A. de C.V. and Fevisa Comercial S.A. de C.V., producers and exporters of glass wine bottles in Mexico, appeared at the hearing accompanied by counsel and submitted a brief prehearing statement in support of other respondents’ arguments. Finally, Global Package, LLC, a U.S. importer of subject merchandise from China and distributor of glass wine bottles, filed a posthearing statement in opposition to imposition of duties.

by December 23, 2024. *See, e.g., Certain Glass Wine Bottles From Mexico: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Negative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures*, 89 Fed. Reg. 65,317, 65,319 (Aug. 9, 2024).

The Commission’s final determinations in the trailing investigations are to be made within 45 days after publication of Commerce’s affirmative final determinations. 19 U.S.C. §§ 1671d(b)(2)(B), 1673d(b)(2)(B).

⁴ See 19 U.S.C. § 1677(7)(G)(iii).

⁵ Petitioner and O-I Glass are collectively referred to as “Domestic Parties.”

U.S. industry data are based on questionnaire responses from three domestic producers that accounted for all known domestic production of glass wine bottles in 2023.⁶ U.S. import data are based on the questionnaire responses of 20 U.S. importers, accounting for 71.4 percent of U.S. imports from subject sources and 29.6 percent of U.S. imports from nonsubject sources in 2023.⁷

The Commission received responses to its questionnaire from nine foreign producers of subject merchandise: three producers/exporters in Chile, which estimated that they accounted for approximately *** percent of production of subject merchandise in Chile in 2023, and whose exports to the United States accounted for approximately *** percent of U.S. imports of glass wine bottles from Chile as reported in questionnaire data in 2023; two producers/exporters in China, which estimated that they accounted for approximately *** percent of production of subject merchandise in China in 2023, and whose exports to the United States accounted for approximately *** percent of U.S. imports of glass wine bottles from China as reported in questionnaire data in 2023; and four producers/exporters in Mexico, which estimated that they accounted for approximately *** percent of production of subject merchandise in Mexico in 2023, and whose exports to the United States accounted for approximately *** percent of U.S. imports of glass wine bottles from Mexico as reported in questionnaire data in 2023.⁸

⁶ Confidential Staff Report, INV-WW-105 (Sept. 6, 2024), and as revised in INV-WW-106 (Sept. 12, 2024) (“CR”)/*Glass Wine Bottles from China*, Inv. No. 701-TA-703 (Final), USITC Pub. 5550 (Oct. 2024) (“PR”) at I-3 and III-1.

⁷ CR/PR at IV-1, IV-1 n.3. Questionnaire data are estimated to be equivalent to 99.9 percent of subject imports from Chile, 39.0 percent of subject imports from China, and 87.7 percent of subject imports from Mexico. CR/PR at IV-1. The coverage estimates compare questionnaire data with official import statistics under HTS statistical reporting number 7010.90.5019, a basket category, adjusted to remove out-of-scope imports as reported in questionnaire responses as well as responses from firms that certified that they had not imported glass wine bottles during the period of investigation using proprietary, Census-edited Customs records. The record indicates that the nonsubject coverage figures may be understated because adjusted official import statistics likely contain primarily out-of-scope products. *Id.* at IV-1 n.4.

⁸ CR/PR at VII-3.

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 subject merchandise, the Commission first defines the “domestic like product” and the “industry.”⁹ Section 771(4)(A) of the Tariff Act of 1930, as amended (“the Tariff Act”), defines the relevant domestic industry as the “producers as a whole 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.”¹⁰ In turn, the Tariff 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.”¹¹

By statute, the Commission’s “domestic like product” analysis begins with the “article subject to an investigation,” *i.e.*, the subject merchandise as determined by Commerce.¹² Therefore, Commerce’s determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value is “necessarily the starting point of the Commission’s like product analysis.”¹³ The Commission then defines the domestic like product in light of the imported articles Commerce has identified.¹⁴ 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

⁹ 19 U.S.C. § 1677(4)(A).

¹⁰ 19 U.S.C. § 1677(4)(A).

¹¹ 19 U.S.C. § 1677(10).

¹² 19 U.S.C. § 1677(10). The Commission must accept Commerce’s determination as to the scope of the imported merchandise that is subsidized and/or sold at less than fair value. *See, e.g., USEC, Inc. v. United States*, 34 Fed. App’x 725, 730 (Fed. Cir. 2002) (“The ITC may not modify the class or kind of imported merchandise examined by Commerce.”); *Algoma Steel Corp. v. United States*, 688 F. Supp. 639, 644 (Ct. Int’l Trade 1988), *aff’d*, 865 F.3d 240 (Fed. Cir.), *cert. denied*, 492 U.S. 919 (1989).

¹³ *Cleo Inc. v. United States*, 501 F.3d 1291, 1298 (Fed. Cir. 2007); *see also Hitachi Metals, Ltd. V. United States*, 949 F.3d 710, 715 (Fed. Cir. 2020) (the statute requires the Commission to start with Commerce’s subject merchandise in reaching its own like product determination).

¹⁴ *Cleo*, 501 F.3d at 1298 n.1 (“Commerce’s {scope} finding does not control the Commission’s {like product} determination.”); *Hosiden Corp. v. Advanced Display Mfrs.*, 85 F.3d 1561, 1568 (Fed. Cir. 1996) (the Commission may find a single like product corresponding to several different classes or kinds defined by Commerce); *Torrington Co. v. United States*, 747 F. Supp. 744, 748–52 (Ct. Int’l Trade 1990), *aff’d*, 938 F.2d 1278 (Fed. Cir. 1991) (affirming the Commission’s determination defining six like products in investigations where Commerce found five classes or kinds).

uses” on a case-by-case basis.¹⁵ No single factor is dispositive, and the Commission may consider other factors it deems relevant based on the facts of a particular investigation.¹⁶ The Commission looks for clear dividing lines among possible like products and disregards minor variations.¹⁷

B. Product Description

Commerce defined the scope of the imported merchandise under investigation as follows:

The merchandise covered by the investigation is certain narrow neck glass bottles, with a nominal capacity of 740 milliliters (25.02 ounces) to 760 milliliters (25.70 ounces); a nominal total height between 24.8 centimeters (9.75 inches) to 35.6 centimeters (14 inches); a nominal base diameter between 4.6 centimeters (1.8 inches) to 11.4 centimeters (4.5 inches); and a mouth with an outer diameter of between 25 millimeters (.98 inches) to 37.9 millimeters (1.5 inches); frequently referred to as a “wine bottle.” In scope merchandise may include but is not limited to the following shapes: Bordeaux (also known as “Claret”), Burgundy, Hock, Champagne, Sparkling, Port, Provence, or Alsace (also known as ‘Germanic’). In scope glass bottles

¹⁵ See, e.g., *Cleo Inc. v. United States*, 501 F.3d 1291, 1299 (Fed. Cir. 2007); *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 the following: (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).

¹⁶ See, e.g., S. Rep. No. 96-249 at 90-91 (1979).

¹⁷ *Nippon*, 19 CIT at 455; *Torrington*, 747 F. Supp. at 748-49; see also S. Rep. No. 96-249 at 90-91 (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.”).

generally have an approximately round base and have shapes including but not limited to, straight-sided, a tapered slope from shoulder (i.e., the sloping part of the bottle between the neck and the body) to base, or a long neck with sloping shoulders to a wider base. The scope includes glass bottles, whether or not clear, whether or not colored, with or without a punt (i.e., an indentation on the underside of the bottle), and with or without design or functional enhancements (including, but not limited to, embossing, labeling, or etching). In scope merchandise is made of non-“free blown” glass, i.e., in scope merchandise is produced with the use of a mold and is distinguished by mold seams, joint marks, or parting lines. In scope merchandise is unfilled and may be imported with or without a closure, including a cork, stelvin (screw cap), crown cap, or wire cage and cork closure.

Excluded from the scope of the investigation are: (1) glass containers made of borosilicate glass, meeting United States Pharmacopeia requirements for Type 1 pharmaceutical containers; and (2) glass containers without a “finish” (i.e., the section of a container at the opening including the lip and ring or collar, threaded or otherwise compatible with a type of closure, including but not limited to a cork, stelvin (screw cap), crown cap, or wire cage and cork closure).

Glass bottles subject to the investigation are specified within the Harmonized Tariff Schedule of the United States (HTSUS) under subheading 7010.90.5019. The HTSUS subheading is provided for convenience and customs purposes only. The written description of the scope of the investigation is dispositive.¹⁸

¹⁸ *Certain Glass Wine Bottles From the People’s Republic of China: Final Affirmative Countervailing Duty Determination and Final Affirmative Determination of Critical Circumstances*, 89 Fed. Reg. 68,395, 68,397 (Aug. 26, 2024). The scope is the same as in Commerce’s notice of initiation.

The glass wine bottles subject to investigation are 740 ml to 760 ml (“750 ml”) glass wine bottles with a finish for a closure such as a cork or screw top. Glass is the preferred material for packaging wine because of its chemical resistance to alcohol, its ability to preserve the product’s taste or flavor, its ease of sterilization, and its ability to maintain the health and integrity of the beverage.¹⁹ Glass wine bottles have a round base and are produced in standard wine bottle shapes such as Bordeaux, Burgundy, and Champagne.²⁰ The in-scope 750 ml size glass wine bottles are the most commonly used type of bottle for the packaging and sale of wine.²¹ Although glass wine bottles are produced in smaller and larger sizes, 750 ml glass wine bottles account for the great majority of the domestic producers’ production of glass wine bottles.²²

C. Arguments of the Parties

Petitioner’s Arguments. Petitioner argues that the Commission should define a single domestic like product coextensive with the scope consisting of 750 ml glass wine bottles, as it did in its preliminary determinations.²³ Petitioner argues that glass wine bottles subject to these investigations come in one size, 750 ml, and typically are in distinct and well-known shapes, such as Bordeaux. In contrast, it claims other glass containers have distinct physical characteristics and uses and cannot be used interchangeably with 750 ml wine bottles. Petitioner adds that other glass containers are produced at different facilities through different production processes, are sold through different channels of distribution and sold at different points than in-scope glass wine bottles.²⁴

Respondents’ Arguments. Saverglass contends that the Commission should define the domestic like product more broadly than Commerce’s scope definition to include all glass containers because glass wine bottles exist on a continuum of glass containers. Relying on the

¹⁹ CR/PR at I-15.

²⁰ CR/PR at I-12.

²¹ CR/PR at Table II-10; Conference Tr. at 60-61 (Brandstatter).

²² CR/PR at Table III-10.

²³ *Glass Wine Bottles from Chile, China, and Mexico*, Inv. Nos. 701-TA-703 and 731-TA-1661-1663 (Preliminary), USITC Pub. 5493 (Feb. 2024) (“*Preliminary Determinations*”) at 12.

²⁴ Petitioner’s Prehearing Br. at 9-10.

Commission's findings in *Glass Containers*,²⁵ it contends that the Commission's traditional six-factor analysis supports a broader domestic like product definition.²⁶

Berlin argues that the Commission should define the domestic like product more broadly than the scope definition to include all glass wine bottles in the definition of the domestic like product. It argues that all glass wine bottles (such as 375 ml bottles, 1.5 L bottles) share the same physical characteristics and end uses as in-scope 750 ml glass wine bottles, are perceived by producers and customers to be wine bottles because of their distinctive shapes, and are interchangeable for the packaging and sale of wine. Berlin further claims that in-scope and out-of-scope glass wine bottles are sold directly to wineries at prices based on weight and are made in the same facilities, using the same employees and production processes.²⁷

D. Domestic Like Product Analysis

Based on the record, we define a single domestic like product consisting of glass wine bottles, coextensive with the scope, as the Commission did in its preliminary determinations.

In its preliminary determinations, the Commission rejected respondents' arguments that the Commission should define the domestic like product as all glass containers, as it had defined the domestic like product in the *Glass Containers* investigations.²⁸ The Commission explained that the starting point of the Commission's domestic like product analysis is Commerce's scope definition.²⁹ Therefore, the issue is whether the Commission should define the domestic like product more broadly than Commerce's scope definition in these investigations and not whether the Commission should maintain the definition of the domestic like product found in *Glass Containers*.³⁰

²⁵ *Glass Containers from China*, Inv. No. 731-TA-630, USITC Pub. 5068 (June 2020) (Final) ("*Glass Containers*").

²⁶ Saverglass's Prehearing Br. at 7, 12 (citing *Glass Containers*).

²⁷ Berlin's Prehearing Br. at 13-15.

²⁸ *Preliminary Determinations* at 9-12.

²⁹ *Preliminary Determinations* at 9-10. See 19 U.S.C. § 1677(10); *Cleo Inc. v. United States*, 501 F.3d 1291, 1298 (Fed. Cir. 2007); see also *Hitachi Metals, Ltd. v. United States*, 949 F.3d 710, 717 (Fed. Cir. 2020) (the statute requires the Commission to start with Commerce's subject merchandise in reaching its own like product determination).

³⁰ *Preliminary Determinations* at 9-10. As each Commission determination is *sui generis*, the Commission is not bound by prior domestic like product determinations concerning even the same imported product, let alone determinations involving different products. *Hitachi Metals, Ltd.*, 949 F.3d (Continued...)

The Commission observed that the scope of these investigations includes only 750 ml glass wine bottles, and therefore is much narrower than the scope of the *Glass Containers* investigation, which included glass containers ranging from 0.059 liters to 4.0 liters.³¹ The Commission also noted that in *Glass Containers* it did not consider whether 750 ml glass wine bottles (or any other glass containers) should be defined as a separate domestic like product.³²

In comparing in-scope glass wine bottles with out-of-scope glass containers, the Commission found that in-scope glass wine bottles have a specialized end use and are produced in standard shapes, which largely differ from the uses and shapes of out-of-scope glass containers. It further found that in-scope glass wine bottles have limited interchangeability with other glass containers because of their 750 ml size and standardized shapes and are perceived by producers and customers to be a distinct product sold directly to wineries. The Commission acknowledged that the production process for in-scope glass wine bottles is similar to that for out-of-scope other glass containers, and that they share production facilities in some cases. Nonetheless, the Commission found that glass wine bottles are generally priced similarly to each other and differently than out-of-scope glass containers of different sizes. Accordingly, it defined the domestic like product coextensive with Commerce's scope definition.³³

Based on the information available, we consider below whether the Commission should include out-of-scope glass containers or other types of wine bottles in the definition of the domestic like product.

Whether Out-of-Scope Glass Containers Should Be Included in the Definition of the Domestic Like Product

Physical Characteristics and Uses. The record indicates that in-scope glass wine bottles are produced in certain well-known shapes and are primarily used as containers for wine.³⁴

at 718. “[D]eterminations defining the domestic like product in other investigations of differing products have little utility as each determination is based on the record of each case, including the arguments made by the parties. *Certain Aluminum Plate From South Africa*, Inv. 731-TA-1056 (Preliminary) USITC Pub. 3654 (Dec. 2003) at n. 59, citing *Nippon Steel Corp. v. United States*, 19 CIT 450, 454-55 (1995); *Citrosuco Paulista, S.A. v. United States*, 704 F. Supp. 1075,1087-88 (CIT 1988); *Asociacion Colombiana de Exportadores de Flores v. United States*, 693 F. Supp. 1165, 1669 n.5 (CIT 1988).

³¹ *Preliminary Determinations* at 10 (citing *Glass Containers* at 6).

³² *Glass Containers* at 6; *Glass Containers from China*, Inv. Nos. 701-TA-630 and 731-TA-1462 (Preliminary), USITC Pub. 4996 (Nov. 2019) at 8-12.

³³ *Preliminary Determinations* at 12.

³⁴ CR/PR at I-12 to I-14; Fig.I-2. Glass wine bottles may also be used for juice, other non-alcoholic beverages, and olive oil. CR/PR at II-11.

While sharing the same chemical composition as in-scope glass wine bottles, out-of-scope glass containers come in a variety of shapes and sizes and are primarily used as containers for other types of food and beverages, such as beer.³⁵

Manufacturing Facilities, Production Processes, and Production Workers. According to Petitioner, while the initial glass melting stage may be similar for in-scope glass wine bottles and other glass containers, different molds are used for in-scope glass wine bottles, as compared to the molds that are used to produce out-of-scope glass containers in other shapes and sizes.³⁶ The questionnaire responses of ***, however, indicate that they produce ***.³⁷

Interchangeability. The record indicates that, in general, out-of-scope glass containers cannot be used interchangeably with in-scope glass wine bottles because of their different sizes and shapes,³⁸ although some out-of-scope glass containers are used as containers for wine. Wineries are reportedly hesitant to substitute out-of-scope bottles for in-scope glass wine bottles because specific types of glass wine bottles are tied to wineries' brands.³⁹

Customer and Producer Perceptions. The record indicates that producers and customers view in-scope glass wine bottles as distinct glass products because of their 750 ml size and recognizable shapes.⁴⁰ Out-of-scope glass containers include a variety of containers in different shapes, generally used to contain products other than wine.⁴¹

Channels of Distribution. In-scope glass wine bottles, unlike most other glass containers, are primarily sold directly to end users (wineries). Other glass containers, with the exception of out-of-scope glass wine bottles, would be sold to different end users and distributors.⁴²

Price. Glass containers are sold at varying price points based on their size. Accordingly, in-scope glass wine bottles, all of which are 750 ml, are generally priced similarly whereas smaller out-of-scope glass containers are priced lower than glass wine bottles and larger out-of-scope glass containers are priced higher.⁴³

³⁵ Petitioner's Prehearing Br. at 9; Petition at 13-14.

³⁶ Petitioner's Prehearing Br. at 9-10.

³⁷ U.S. Producer Questionnaire Responses at II-3a. *See also* CR/PR at Table III-10.

³⁸ Petitioner's Prehearing Br. at 9.

³⁹ CR/PR at II-1.

⁴⁰ Petitioner's Prehearing Br. at 9; Petition at 14; CR/PR at Fig. I-2. *See also* Conference Tr. at 21. (“{W}ine bottles . . . are perceived by producers and customers alike to be a distinct product.”) (Brandstatter).

⁴¹ Petitioner's Prehearing Br. at 9.

⁴² CR/PR at Table II-2.

⁴³ *See* CR/PR at Figs. V-3, V-4, V-5; Petitioner's Prehearing Br. at 10.

Conclusion. We do not include other glass containers in the definition of the domestic like product. The 750 ml size and standardized shapes of in-scope glass wine bottles make them uniquely suited for use in bottling wine, unlike the sizes and shapes of out-of-scope glass containers that largely correspond to different end uses and limit their interchangeability with in-scope glass wine bottles. Accordingly, in-scope glass wine bottles are perceived by producers and customers to be a distinct product used to bottle wine and are generally sold through different channels of distribution, direct to wineries, than out-of-scope glass containers. Glass wine bottles are generally priced similarly to each other and differently than out-of-scope glass containers of different sizes. On the other hand, the production process for in-scope glass wine bottles is similar to that for out-of-scope other glass containers, and they share some of the same production facilities. On balance, the record indicates that there is a clear dividing line separating in-scope glass wine bottles from out-of-scope glass containers.⁴⁴ We therefore do not include out-of-scope glass containers in the definition of the domestic like product.⁴⁵

⁴⁴ We also reiterate, as stated in the *Preliminary Determinations*, that the starting point for the domestic like product analysis is Commerce’s scope definition, which in these investigations includes 750 ml glass wine bottles. *Preliminary Determinations* at 9-10. In contrast, the scope of the *Glass Containers* investigations included glass containers ranging from 0.059 liters to 4.0 liters, and the Commission did not consider (and no party argued) whether 750 ml glass wine bottles should be a separate domestic like product within the broader scope definition of these prior investigations. *Glass Containers* at 6; *Glass Containers from China*, Inv. Nos. 701-TA-630 and 731-TA-1462 (Preliminary), USITC Pub. 4996 (Nov. 2019) at 8-12. The *Glass Containers* investigations thus do not control the issues presented in these investigations: whether to define a domestic like product more broadly than Commerce’s scope definition, including whether to include all glass containers or out-of-scope glass wine bottles.

⁴⁵ As a practical matter, the Commission cannot analyze a domestic industry including producers of out-of-scope glass containers because the requisite information was not collected. Under 19 C.F.R. § 207.20(b), the Commission requires parties that wish to raise a domestic like product argument in the final phase of an investigation to state the basis for their argument and request collection of the requisite data in their comments on the draft questionnaires. In comments on the draft questionnaires for the final phase of the investigations, respondents only requested the Commission collect data for other glass wine bottles, not for other glass containers. See Comments on Draft Questionnaires from Berlin Packaging L.L.C.; Encore Glass; TricorBraun, Inc.; Shandong Changyu Glass Co.; Saverglass Inc; Saverglass, S. de R.L. de C.V.; Verallia S.A.; Cristalerias Toro S.p.A; and Cristalerias de Chile S.A. (“Joint Respondents”), EDIS Doc No. 819063 (Apr. 19, 2024) at 2.

Whether Out-of-Scope Glass Wine Bottles Should Be Included in the Definition of the Domestic Like Product

Physical Characteristics and Uses. The record indicates that in-scope glass wine bottles are all 750 ml, the standard container size for packaging and selling wine,⁴⁶ and produced in certain standard shapes and colors (e.g., claret and green) that are primarily used as containers for wine.⁴⁷ According to information provided by Berlin, out-of-scope glass wine bottles are produced in sizes such as 187.5 ml, 375 ml, and 1.5 liters, typically in the same shapes as in-scope wine bottles,⁴⁸ although they may also be shaped as jugs.⁴⁹

Manufacturing Facilities, Production Processes, and Production Workers. According to Petitioner, while the initial glass melting stage may be similar for all glass wine bottles, different molds are used for in-scope glass wine bottles, as compared to molds that are used to produce the different sizes and shapes of out-of-scope glass wine bottles.⁵⁰ The questionnaire responses of ***, however, indicate that they produce ***.⁵¹

Interchangeability. The record indicates that, in general, out-of-scope wine bottles have some interchangeability with in-scope glass wine bottles because both are used as containers for wine.⁵² However, the record also indicates that wineries are hesitant to substitute out-of-scope wine bottles for in-scope wine bottles because specific glass wine bottles are tied to wineries' brands and 750 ml is the standard container size for the packaging and sale of wine.⁵³

Customer and Producer Perceptions. The record indicates that producers and customers view in-scope glass wine bottles as distinct products because of their 750 ml size and recognizable shapes.⁵⁴ In-scope 750 ml wine bottles are the standard size for bottling and

⁴⁶ See CR/PR at I-12. Most wine is packaged in 750 ml bottles.

⁴⁷ CR/PR at I-12 to I-14.

⁴⁸ CR/PR at I-12 n.17.

⁴⁹ Berlin's Prehearing Br. at 12-13 and Exhibit 4 (Ardagh website); The Cary Company, "Types of Wine Bottles - Everything You Need To Know," (cited at CR/PR at I-12 n.19).

⁵⁰ Petitioner's Prehearing Br. at 9-10.

⁵¹ U.S. Producer Questionnaire Responses at II-3a. See also CR/PR at Table III-10.

⁵² Berlin's Prehearing Br. at 13; Petitioner's Prehearing Br. at 9.

⁵³ CR/PR at I-15 and II-1. See also Berlin's Prehearing Br. at 32 ("Once they choose a particular type, it is difficult to switch to another type without harming their brand."). Wineries are generally reluctant to accept replacement bottles due to specific needs such as branding, bottle type, packaging type, and compatibility with labels/capsules. CR/PR at II-29.

⁵⁴ Petitioner's Prehearing Br. at 9; Petition at 14; CR/PR at Fig. I-2. See also Conference Tr. at 21. ("{W}ine bottles . . . are perceived by producers and customers alike to be a distinct product.") (Brandstatter).

selling wine and accounted for over 75.0 percent the domestic industry's production of wine bottles in 2023.⁵⁵ Market participants indicated that the characteristics of glass wine bottles, including size, are important for differentiating wines and establishing brands.⁵⁶ According to Berlin, out-of-scope glass wine bottles are also recognized as glass bottles for the packaging and sale of wine because they are typically produced in the same shapes as 750 ml glass wine bottles.⁵⁷

Channels of Distribution. In-scope glass wine bottles are mostly sold directly to end users (wineries).⁵⁸ According to Berlin, out-of-scope glass wine bottles are also sold directly to wineries.⁵⁹

Price. Berlin argues that all glass wine bottles are sold at varying price points based on their weight.⁶⁰ Accordingly, in-scope glass wine bottles, all of which are 750 ml, are generally priced similarly.⁶¹ On the other hand, out of-scope glass wine bottles would generally be priced higher or lower than in-scope glass wine bottles, depending on their weight.⁶²

Conclusion. We do not include out-of-scope glass wine bottles in the definition of the domestic like product. Out-of-scope glass wine bottles, like in-scope glass wine bottles, are used for the packaging of wine, appear typically to be produced in the same standard shapes by the same employees and production processes, and may also be sold directly to wineries. On the other hand, in-scope glass wine bottles are all 750 ml, which is the preferred, standard size for bottling and selling wine, and are therefore not used interchangeably with out-of-scope glass wine bottles, made in different sizes and shapes, particularly given the importance of packaging to the branding of wine. Accordingly, producers and customers would perceive in-scope glass wine bottles as distinct from out-of-scope wine bottles. Based on the distinctions between in-scope and out-of-scope glass wine bottles other than size, the record indicates that there is a clear dividing line between in-scope 750 ml glass wine bottles and out-of-scope wine

⁵⁵ See CR/PR at Table III-10.

⁵⁶ Wineries seek to distinguish the brand of their product through wine bottle designs, including shape, size, color, finish, and ornamentation. Berlin's Prehearing Br. at 32. Wineries use slight variations in bottle size, color, and weight to differentiate their glass wine bottles but most are 750 ml., notwithstanding the differences. Hearing Tr. at 260 (Fumagalli) ("Again, the one-off slight size differences. Very slight color differentiations, even among green bottles.").

⁵⁷ Berlin's Prehearing Br. at 15.

⁵⁸ CR/PR at Table II-2.

⁵⁹ Berlin's Prehearing Br. at 14.

⁶⁰ Berlin's Prehearing Br. at 15.

⁶¹ See CR/PR at Figs. V-3 to V-7.

⁶² Berlin's Prehearing Br. at 15.

bottles.⁶³ We therefore do not include out-of-scope glass wine bottles in the domestic like product.

In sum, we define a single domestic like product consisting of 750 ml glass wine bottles, coextensive with Commerce's scope definition.

III. Domestic Industry

The domestic industry is defined as the domestic "producers as a whole 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."⁶⁴ In defining the domestic industry, the Commission's general practice has been to include in the industry producers of all domestic production of the like product, whether toll-produced, captively consumed, or sold in the domestic merchant market.

A. Related Parties

We must determine whether any producer of the domestic like product should be excluded from the domestic industry pursuant to section 771(4)(B) of the Tariff Act. This provision allows the Commission, if appropriate circumstances exist, to exclude from the domestic industry producers that are related to an exporter or importer of subject merchandise or which are themselves importers.⁶⁵ Exclusion of such a producer is within the Commission's discretion based upon the facts presented in each investigation.⁶⁶

⁶³ See *Tapered Rolling Bearing from Korea*, Inv. No. 731-TA-1380 (Final), USITC Pub. No. 4806 at 9 (Aug. 2018) (Commission will not confine its domestic like product definition to the scope where differences between products of different sizes would exist regardless of size chosen as dividing line).

⁶⁴ 19 U.S.C. § 1677(4)(A).

⁶⁵ See *Torrington Co. v. United States*, 790 F. Supp. 1161, 1168 (Ct. Int'l Trade 1992), *aff'd without opinion*, 991 F.2d 809 (Fed. Cir. 1993); *Sandvik AB v. United States*, 721 F. Supp. 1322, 1331-32 (Ct. Int'l Trade 1989), *aff'd mem.*, 904 F.2d 46 (Fed. Cir. 1990); *Empire Plow Co. v. United States*, 675 F. Supp. 1348, 1352 (Ct. Int'l Trade 1987).

⁶⁶ The primary factors the Commission has examined in deciding whether appropriate circumstances exist to exclude a related party include the following:

- (1) the percentage of domestic production attributable to the importing producer;
- (2) the reason the U.S. producer has decided to import the product subject to investigation (whether the firm benefits from the LTFV sales or subsidies or whether the firm must import in order to enable it to continue production and compete in the U.S. market);

(Continued...)

Arguments of the Parties

Petitioner observes that domestic producer ***. Petitioner notes that *** and argues that the Commission should therefore not exclude *** from the definition of the domestic industry.⁶⁷ O-I Glass and respondents do not address whether there are appropriate circumstances to exclude *** from the definition of the domestic industry.

Analysis

*** qualifies as a related party because its subsidiary, ***, imported subject merchandise produced in Mexico by another subsidiary, ***.⁶⁸ We consider below whether appropriate circumstances exist to exclude *** from the domestic industry.

*** accounted for *** percent of U.S. production of glass wine bottles in 2023 and was the *** of the three reporting U.S. producers that year in terms of U.S. production volume.⁶⁹ It ***.⁷⁰ ***, imported subject merchandise from *** throughout the January 2021-March 2024 period of investigation (“POI”).⁷¹ *** imports of glass wine bottles from Mexico were *** gross in 2021, *** gross in 2022, and *** gross in 2023; they were *** gross in interim 2024 compared to *** gross in interim 2023.⁷² The ratio of *** subject imports to *** production was *** percent in 2021, *** percent in 2022, and *** percent in 2023; it was *** percent in interim 2024 compared to *** percent in interim 2023.⁷³ *** reported that it imported glass wine bottles from Mexico for “***.”⁷⁴ *** reported capital expenditures throughout the POI, albeit at decreasing levels of \$*** in 2021, \$*** in 2022, and \$*** in 2023; its capital

(3) whether inclusion or exclusion of the related party will skew the data for the rest of the industry;

(4) the ratio of import shipments to U.S. production for the imported product; and

(5) whether the primary interest of the importing producer lies in domestic production or importation. *Changzhou Trina Solar Energy Co. v. USITC*, 100 F. Supp.3d 1314, 1326-31 (Ct. Int’l. Trade 2015), *aff’d*, 879 F.3d 1377 (Fed. Cir. 2018); see also *Torrington Co. v. United States*, 790 F. Supp. at 1168.

⁶⁷ Petitioner’s Prehearing Br. at 10-11. ***.

⁶⁸ CR/PR at III-2 and Tables III-2 and III-14.

⁶⁹ CR/PR at Table III-1.

⁷⁰ CR/PR at Table III-1.

⁷¹ See CR/PR at Table III-16.

⁷² CR/PR at Table III-16.

⁷³ CR/PR at Table III-16.

⁷⁴ CR/PR at II-20.

expenditures were \$*** in interim 2024, compared with \$*** in interim 2023.⁷⁵ Its financial performance was *** than the other two members of the domestic industry.⁷⁶

The ratio of *** was relatively low and stable during the POI. Moreover, ***. The record does not indicate that *** was shielded from subject import competition by virtue of its relationships to an importer of subject merchandise or *** or otherwise benefitted from its status as a related party to such an extent that its inclusion in the domestic industry would mask injury. In light of this, and in the absence of any contrary argument, we find that appropriate circumstances do not exist to exclude *** from the domestic industry.

Accordingly, consistent with our definition of the domestic like product, we define the domestic industry to include all domestic producers of glass wine bottles.

IV. Negligible Imports

Pursuant to Section 771(24) of the Tariff Act, imports from a subject country of merchandise corresponding to a domestic like product that account for less than 3 percent of all such merchandise imported into the United States during the most recent 12 months for which data are available preceding the filing of the petition shall be deemed negligible.⁷⁷

During the most recent 12-month period preceding the filing of the petitions in these investigations (December 2022 through November 2023), imports from China subject to the countervailing duty investigation accounted for *** percent of total imports by quantity.⁷⁸ Imports from Chile and Mexico subject to the antidumping duty investigations accounted for *** percent and *** percent, respectively, of total imports by quantity.⁷⁹ As subject imports

⁷⁵ CR/PR at Table VI-9.

⁷⁶ CR/PR at Table VI-5. During the POI, ***. *See id.* The domestic industry's ratio of operating income to net sales was *** percent in 2021, *** percent in 2022, and *** percent in 2023. It was *** percent in interim 2024 compared to *** percent in interim 2024. *** ratio of operating income to net sales was *** percent in 2021, *** percent in 2022, and *** percent in 2023. It was *** percent in interim 2024 compared to *** percent in interim 2023. *Id.*

The domestic industry's ratio of net income to net sales was *** percent in 2021, *** percent in 2022, and *** percent in 2023. It was *** percent in interim 2024 compared to *** percent in interim 2023. *** ratio of net income to net sales was *** percent in 2021, *** percent in 2022, and *** percent in 2023. It was *** percent in interim 2024 compared to *** percent in interim 2023. *Id.*

⁷⁷ 19 U.S.C. §§ 1671b(a), 1673b(a), 1677(24)(A)(i), 1677(24)(B); *see also* 15 C.F.R. § 2013.1 (developing countries for purposes of 19 U.S.C. § 1677(36)).

⁷⁸ CR/PR at Table IV-6. The volume of imports from China subject to the antidumping and countervailing duty investigations is the same. *Id.*

⁷⁹ CR/PR at Table IV-6.

are above the applicable 3 percent negligibility threshold, we find that imports from China subject to the countervailing duty investigation are not negligible.⁸⁰

V. Cumulation

For purposes of evaluating the volume and effects for a determination of material injury by reason of subject imports, section 771(7)(G)(i) of the Tariff 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 the domestic like product in the U.S. market. In assessing whether subject imports compete with each other and with the domestic like product, the Commission generally has considered four factors:

- (1) the degree of fungibility between subject imports from different countries and between subject 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.⁸¹

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

⁸⁰ We note that imports from Chile, China, and Mexico subject to antidumping investigations are also preliminarily above negligible levels. We will make findings regarding negligibility in these investigations following Commerce's final determinations.

⁸¹ See *Certain Cast-Iron Pipe Fittings from Brazil, the Republic of Korea, and Taiwan*, Inv. 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).

determining whether the subject imports compete with each other and with the domestic like product.⁸² Only a “reasonable overlap” of competition is required.⁸³

A. Arguments of the Parties

Petitioner argues that the Commission should cumulate subject imports from all three subject countries for its analysis of present material injury by reason of subject imports. It contends that subject imports from all sources are fungible with each other and with domestically produced glass wine bottles. It contends that subject imports from Chile, China, and Mexico, and the domestic like product are largely interchangeable, as confirmed by the questionnaire responses of U.S. producers, importers, and purchasers. It observes that all glass wine bottles and the domestic like product are sold in bulk and case packs and are produced to the same size, shapes, and bottle weights. It argues that subject imports from all sources and domestically produced glass wine bottles compete in the same geographic markets and in the same channels of distribution, and that subject imports and domestically produced glass wine bottles were simultaneously present in the U.S. market.⁸⁴ No respondent has argued that the Commission should not cumulate subject imports from all subject countries for the Commission’s present material injury analysis.

B. Analysis

We consider subject imports from Chile, China, and Mexico on a cumulated basis because the statutory criteria for cumulation are satisfied. As an initial matter, Petitioner filed the antidumping and countervailing duty petitions with respect to the three countries on the same day, December 29, 2023.⁸⁵

⁸² See, e.g., *Wieland Werke, AG v. United States*, 718 F. Supp. 50 (Ct. Int’l Trade 1989).

⁸³ The Statement of Administrative Action (SAA) to the Uruguay Round Agreements Act (URAA), 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.” H.R. Rep. No. 103-316, Vol. I at 848 (1994) (*citing Fundicao Tupy, S.A. v. United States*, 678 F. Supp. at 902; see *Goss Graphic Sys., 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”); *Wieland Werke, AG*, 718 F. Supp. at 52 (“Completely overlapping markets are not required.”)).

⁸⁴ Petitioner’s Prehearing Br. at 12-15.

⁸⁵ None of the statutory exceptions to cumulation applies in these investigations. See 19 U.S.C. § 1677(7)(G)(ii).

Fungibility. All responding U.S. producers, most responding U.S. importers, and most responding purchasers reported that subject imports from each source were either “always” or “frequently” interchangeable with the domestic like product and imports from other subject sources.⁸⁶ Large majorities or pluralities of responding purchasers rated domestically produced glass wine bottles as comparable to glass wine bottles imported from each subject country with respect to most of the 17 factors that influence purchasing decisions.⁸⁷

Moreover, most responding purchasers reported shifting purchases from the domestic industry to subject imports from one or more of the subject countries during the POI, indicating head-to-head competition between domestically produced glass wine bottles and subject imports from all three subject countries.⁸⁸

Furthermore, the record indicates that subject imports from each subject country for which data are available overlapped with each other and domestically produced glass wine bottles in terms of packaging (*i.e.*, bulk vs. case), bottle type and color, and bottle weight. In 2023, over *** of U.S. producers’ U.S. shipments of domestically produced glass wine bottles and the *** of importers’ U.S. shipments of subject merchandise from the three subject countries were of case packed glass wine bottles.⁸⁹ In 2023, over *** of U.S. shipments of imports from each subject source and the domestic like product consisted of green claret glass wine bottles.⁹⁰ Another *** or more of U.S. shipments of imports from each subject source and the domestic like product in 2023 consisted of green burgundy style glass wine bottles.⁹¹

⁸⁶ CR/PR at Tables II-12-14.

⁸⁷ CR/PR at Table II-11. The exceptions were that purchasers rated the domestic product superior to subject imports from Chile with respect to price and minimum quantity requirements and purchasers split on the comparability of technical support/service of the domestic product and subject imports from Chile. Purchasers rated the domestic product superior to subject imports from China with respect to technical support/service and delivery time. Purchasers rated the domestic product inferior to subject imports from China with respect to minimum quantity requirements and price. Purchasers split on the comparability of the domestic product and subject imports from China with respect to delivery terms. The large majority of responding purchasers rated the domestic product and subject imports from Mexico as comparable as to all 17 factors. See at CR/PR at Table II-11.

⁸⁸ CR/PR at V-38. Of the 37 responding purchasers, 21 reported that, since 2021, they had purchased imported glass wine bottles from subject countries instead of U.S.-produced product (9 from Chile, 14 from China, and 12 from Mexico). *Id.*

⁸⁹ CR/PR at Table IV-11 and Fig. IV-5. Case packed glass wine bottles accounted for *** percent of U.S. shipments by U.S. producers in 2023. *Id.* The share of U.S. shipments in 2023 accounted for by case packed glass wine bottles was *** percent for subject imports from Chile, *** percent for subject imports from China, and *** percent for subject imports from Mexico. *Id.*

⁹⁰ CR/PR at Table IV-12 and Fig. IV-6.

⁹¹ CR/PR at Table IV-12 and Fig. IV-6.

Finally, the Commission collected data concerning the weights of glass wine bottles from the subject countries and the domestic industry. Glass wine bottles were categorized as weighing less than 500 grams, weighing 500 to 700 grams, and weighing over 700 grams.⁹² The data show an overlap in the weights of glass wine bottles from subject and domestic sources. A substantial portion (***) percent) of U.S. shipments from each subject source and the domestic industry consisted of glass wine bottles weighing under 500 grams.⁹³

Channels of Distribution. Domestically produced glass wine bottles were primarily sold to wineries, which accounted for approximately *** percent of the domestic industry's U.S. shipments during the POI, with the balance sold to distributors.⁹⁴ Subject imports from Chile and China were overwhelmingly sold to wineries, with very small quantities sold to distributors and other end users.⁹⁵ Subject imports from Mexico were primarily sold to wineries, with smaller quantities sold to distributors and other end users.⁹⁶

Geographic Overlap. Domestically produced glass wine bottles were sold in all regions of the contiguous United States, as were subject imports from China and Mexico.⁹⁷ Subject imports from Chile were sold in all regions of the contiguous United States except the Midwest.⁹⁸ Nearly all subject imports from Chile and most subject imports from China and Mexico entered through the Western region in 2023, with a minority of subject imports from

⁹² CR/PR at IV-23.

⁹³ CR/PR at Table IV-13 and Fig. IV-7. Glass wine bottles weighing less than 500 grams accounted for *** percent of U.S. shipments by U.S. producers in 2023. *Id.* The share of U.S. shipments in 2023 accounted for by wine bottles weighing less than 500 grams was *** percent for subject imports from Chile, *** percent for subject imports from China, and *** percent for subject imports from Mexico. *Id.*

⁹⁴ CR/PR at Table II-1. None were reported sold to other end users.

⁹⁵ CR/PR at Table II-1. For subject imports from Chile, the percentage of glass wine bottles shipped to wineries ranged from *** percent to *** percent during the POI, while the percentage shipped to distributors ranged from *** percent to *** percent. The percentage of glass wine bottles shipped to other end users ranged from *** percent to *** percent. *Id.*

For subject imports from China, the percentage of glass wine bottles shipped to wineries ranged from *** percent to *** percent during the POI, while the percentage shipped to distributors ranged from *** percent to *** percent. *Id.* The percentage of glass wine bottles shipped to other end users ranged from *** percent to *** percent. *Id.*

⁹⁶ CR/PR at Table II-1. For subject imports from Mexico, the percentage of glass wine bottles shipped to wineries ranged from *** percent to *** percent during the POI, while the percentage going to distributors ranged from *** percent to *** percent. *Id.* The percentage of glass wine bottles shipped to other end users ranged from *** percent to *** percent. *Id.*

⁹⁷ CR/PR at II-5 and Tables II-2 and II-3.

⁹⁸ CR/PR at Table II-2.

China entering through the Eastern region and a minority of subject imports from Mexico entering through the Southern region.⁹⁹

Simultaneous Presence in Market. Subject imports from each subject country were present in the U.S. market in all 39 months of the POI.¹⁰⁰ Domestically produced glass wine bottles were also present in the U.S. market throughout the POI.¹⁰¹

Conclusion. The record indicates that subject imports from Chile, China, and Mexico are fungible with domestically produced glass wine bottles and each other. The record also indicates that imports from each of the subject countries and domestically produced glass wine bottles were sold in overlapping channels of distribution and geographic markets and were simultaneously present in the U.S. market during the POI. Because there is a reasonable overlap of competition between and among subject imports from Chile, China, and Mexico and domestically produced glass wine bottles, we cumulate subject imports from these sources for our analysis of whether there is material injury by reason of subject imports.

VI. No Material Injury by Reason of Subject Imports

Based on the record in the final phase of this investigation, we find that an industry in the United States is not materially injured by reason of imports of glass wine bottles from China that Commerce has found to be subsidized by the government of China.

A. Legal Standards

In the final phase of antidumping and countervailing duty investigations, the Commission determines whether an industry in the United States is materially injured or threatened with material injury by reason of the imports under investigation.¹⁰² In making this determination, the Commission must consider the volume of subject imports, their effect on prices for the domestic like product, and their impact on domestic producers of the domestic like product, but only in the context of U.S. production operations.¹⁰³ The statute defines

⁹⁹ CR/PR at IV-26 and Table IV-15.

¹⁰⁰ CR/PR at Table IV-16.

¹⁰¹ CR/PR at Tables V-5 through V-9.

¹⁰² 19 U.S.C. §§ 1671d(b), 1673d(b).

¹⁰³ 19 U.S.C. § 1677(7)(B). The Commission “may consider such other economic factors as are relevant to the determination” but shall “identify each {such} factor ... and explain in full its relevance to the determination.” 19 U.S.C. § 1677(7)(B).

“material injury” as “harm which is not inconsequential, immaterial, or unimportant.”¹⁰⁴ 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.¹⁰⁵ 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.”¹⁰⁶

Although the statute requires the Commission to determine whether the domestic industry is “materially injured or threatened with material injury by reason of” unfairly traded imports,¹⁰⁷ it does not define the phrase “by reason of,” indicating that this aspect of the injury analysis is left to the Commission’s reasonable exercise of its discretion.¹⁰⁸ In identifying a causal link, if any, between subject imports and material injury to the domestic industry, the Commission examines the facts of record that relate to the significance of the volume and price effects of the subject imports and any impact of those imports on the condition of the domestic industry. This evaluation under the “by reason of” standard must ensure that subject imports are more than a minimal or tangential cause of injury and that there is a sufficient causal, not merely a temporal, nexus between subject imports and material injury.¹⁰⁹

In many investigations, there are other economic factors at work, some or all of which may also be having adverse effects on the domestic industry. Such economic factors might include nonsubject imports; changes in technology, demand, or consumer tastes; competition among domestic producers; or management decisions by domestic producers. The legislative history explains that the Commission must examine factors other than subject imports to

¹⁰⁴ 19 U.S.C. § 1677(7)(A).

¹⁰⁵ 19 U.S.C. § 1677(7)(C)(iii).

¹⁰⁶ 19 U.S.C. § 1677(7)(C)(iii).

¹⁰⁷ 19 U.S.C. §§ 1671d(b), 1673d(b).

¹⁰⁸ *Angus Chemical Co. v. United States*, 140 F.3d 1478, 1484-85 (Fed. Cir. 1998) (“{T}he statute does not ‘compel the commissioners’ to employ {a particular methodology}.”), *aff’g*, 944 F. Supp. 943, 951 (Ct. Int’l Trade 1996).

¹⁰⁹ The Federal Circuit, in addressing the causation standard of the statute, observed that “{a}s long as its effects are not merely incidental, tangential, or trivial, the foreign product sold at less than fair value meets the causation requirement.” *Nippon Steel Corp. v. USITC*, 345 F.3d 1379, 1384 (Fed. Cir. 2003). This was further ratified in *Mittal Steel Point Lisas Ltd. v. United States*, 542 F.3d 867, 873 (Fed. Cir. 2008), where the Federal Circuit, quoting *Gerald Metals, Inc. v. United States*, 132 F.3d 716, 722 (Fed. Cir. 1997), stated that “this court requires evidence in the record ‘to show that the harm occurred “by reason of” the LTFV imports, not by reason of a minimal or tangential contribution to material harm caused by LTFV goods.’” *See also Nippon Steel Corp. v. United States*, 458 F.3d 1345, 1357 (Fed. Cir. 2006); *Taiwan Semiconductor Industry Ass’n v. USITC*, 266 F.3d 1339, 1345 (Fed. Cir. 2001).

ensure that it is not attributing injury from other factors to the subject imports, thereby inflating an otherwise tangential cause of injury into one that satisfies the statutory material injury threshold.¹¹⁰ In performing its examination, however, the Commission need not isolate the injury caused by other factors from injury caused by unfairly traded imports.¹¹¹ Nor does the “by reason of” standard require that unfairly traded imports be the “principal” cause of injury or contemplate that injury from unfairly traded imports be weighed against other factors, such as nonsubject imports, which may be contributing to overall injury to an industry.¹¹² It is clear that the existence of injury caused by other factors does not compel a negative determination.¹¹³

Assessment of whether material injury to the domestic industry is “by reason of” subject imports “does not require the Commission to address the causation issue in any particular way”

¹¹⁰ SAA at 851-52 (“{T}he Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports.”); S. Rep. 96-249 at 75 (1979) (the Commission “will consider information which indicates that harm is caused by factors other than less-than-fair-value imports.”); H.R. Rep. 96-317 at 47 (1979) (“in examining the overall injury being experienced by a domestic industry, the ITC will take into account evidence presented to it which demonstrates that the harm attributed by the petitioner to the subsidized or dumped imports is attributable to such other factors;” those factors include “the volume and prices of nonsubsidized imports or imports sold at fair value, contraction in demand or changes in patterns of consumption, trade restrictive practices of and competition between the foreign and domestic producers, developments in technology and the export performance and productivity of the domestic industry”); *accord Mittal Steel*, 542 F.3d at 877.

¹¹¹ SAA at 851-52 (“{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports.”); *Taiwan Semiconductor Industry Ass’n*, 266 F.3d at 1345 (“{T}he Commission need not isolate the injury caused by other factors from injury caused by unfair imports Rather, the Commission must examine other factors to ensure that it is not attributing injury from other sources to the subject imports.” (emphasis in original)); *Asociacion de Productores de Salmon y Trucha de Chile AG v. United States*, 180 F. Supp. 2d 1360, 1375 (Ct. Int’l Trade 2002) (“{t}he Commission is not required to isolate the effects of subject imports from other factors contributing to injury” or make “bright-line distinctions” between the effects of subject imports and other causes.); *see also Softwood Lumber from Canada*, Inv. Nos. 701-TA-414 and 731-TA-928 (Remand), USITC Pub. 3658 at 100-01 (Dec. 2003) (Commission recognized that “{i}f an alleged other factor is found not to have or threaten to have injurious effects to the domestic industry, *i.e.*, it is not an ‘other causal factor,’ then there is nothing to further examine regarding attribution to injury”), *citing Gerald Metals*, 132 F.3d at 722 (the statute “does not suggest that an importer of LTFV goods can escape countervailing duties by finding some tangential or minor cause unrelated to the LTFV goods that contributed to the harmful effects on domestic market prices.”).

¹¹² S. Rep. 96-249 at 74-75; H.R. Rep. 96-317 at 47.

¹¹³ *See Nippon Steel Corp.*, 345 F.3d at 1381 (“an affirmative material-injury determination under the statute requires no more than a substantial-factor showing. That is, the ‘dumping’ need not be the sole or principal cause of injury.”).

as long as “the injury to the domestic industry can reasonably be attributed to the subject imports.”¹¹⁴ The Commission ensures that it has “evidence in the record” to “show that the harm occurred ‘by reason of’ the LTFV imports,” and that it is “not attributing injury from other sources to the subject imports.”¹¹⁵ The Federal Circuit has examined and affirmed various Commission methodologies and has disavowed “rigid adherence to a specific formula.”¹¹⁶

The question of whether the material injury threshold for subject imports is satisfied notwithstanding any injury from other factors is factual, subject to review under the substantial evidence standard.¹¹⁷ Congress has delegated this factual finding to the Commission because of the agency’s institutional expertise in resolving injury issues.¹¹⁸

B. Conditions of Competition and the Business Cycle

The following conditions of competition inform our analysis of whether there is material injury by reason of subject imports.

Captive Production Provision

The domestic industry captively consumes a portion of its production of glass wine bottles in the manufacture of bottled wine. We therefore consider the applicability of the statutory captive production provision, and whether to focus our analysis primarily on the

¹¹⁴ *Mittal Steel*, 542 F.3d at 876 & 78; *see also id.* at 873 (“While the Commission may not enter an affirmative determination unless it finds that a domestic industry is materially injured ‘by reason of’ subject imports, the Commission is not required to follow a single methodology for making that determination ... {and has} broad discretion with respect to its choice of methodology.”) *citing United States Steel Group v. United States*, 96 F.3d 1352, 1362 (Fed. Cir. 1996) and S. Rep. 96-249 at 75. In its decision in *Swiff-Train v. United States*, 793 F.3d 1355 (Fed. Cir. 2015), the Federal Circuit affirmed the Commission’s causation analysis as comports with the Court’s guidance in *Mittal*.

¹¹⁵ *Mittal Steel*, 542 F.3d at 873 (quoting from *Gerald Metals*, 132 F.3d at 722), 877-79. We note that one relevant “other factor” may involve the presence of significant volumes of price-competitive nonsubject imports in the U.S. market, particularly when a commodity product is at issue. In appropriate cases, the Commission collects information regarding nonsubject imports and producers in nonsubject countries in order to conduct its analysis.

¹¹⁶ *Nucor Corp. v. United States*, 414 F.3d 1331, 1336, 1341 (Fed. Cir. 2005); *see also Mittal Steel*, 542 F.3d at 879 (“*Bratsk* did not read into the antidumping statute a Procrustean formula for determining whether a domestic injury was ‘by reason’ of subject imports.”).

¹¹⁷ We provide in our discussion below a full analysis of other factors alleged to have caused any material injury experienced by the domestic industry.

¹¹⁸ *Mittal Steel*, 542 F.3d at 873; *Nippon Steel Corp.*, 458 F.3d at 1350, *citing U.S. Steel Group*, 96 F.3d at 1357; S. Rep. 96-249 at 75 (“The determination of the ITC with respect to causation is ... complex and difficult, and is a matter for the judgment of the ITC.”).

merchant market when assessing market share and the factors affecting the financial performance of the domestic industry.¹¹⁹

a. Arguments of the Parties

While not arguing that the captive production provision applies in these investigations, Petitioner urges the Commission to consider captive consumption as a significant condition of competition. Petitioner argues that it is “established practice” for the Commission to focus on the merchant market when internal consumption is significant regardless of whether the captive production provision’s requirements are satisfied.¹²⁰ Respondents do not address the provision’s application in these investigations.

b. Analysis and Conclusion

Threshold Criterion. The captive production provision can be applied only if, as a threshold matter, significant production of the domestic like product is internally transferred and significant production is sold in the merchant market. During the POI, between *** and

¹¹⁹ The captive production provision can be applied only if, as a threshold matter, significant production of the domestic like product is internally transferred and significant production is sold in the merchant market. The provision, 19 U.S.C. § 1677(7)(C)(iv) provides:

(iv) CAPTIVE PRODUCTION – If domestic producers internally transfer significant production of the domestic like product for the production of a downstream article and sell significant production of the domestic like product in the merchant market, and the Commission finds that-

- (I) the domestic like product produced that is internally transferred for processing into that downstream article does not enter the merchant market for the domestic like product, and
- (II) the domestic like product is the predominant material input in the production of that downstream article.

The SAA indicates that where a domestic like product is transferred internally for the production of another article coming within the definition of the domestic like product, such transfers do not constitute internal transfers for the production of a “downstream article” for purposes of the captive production provision. SAA at 853.

The TPEA eliminated what had been the third statutory criterion of the captive production provision. Pub. L. 114-27, § 503(c).

¹²⁰ Petitioner’s Prehearing Br. at 22 (citing *2,4-Dichlorophenoxyacetic Acid (2,4-D) from China and India*, Inv. Nos. 701-TA-710-711 and 731-TA-1673-1674, USITC Pub. 5511 (May 2024) (Preliminary) at 32). In the investigations Petitioner cites as support, however, the Commission found the statutory criteria for the captive production provision satisfied.

*** percent of U.S. producers' U.S. shipments of glass wine bottles were internally consumed or transferred to related firms.¹²¹ The domestic industry sold between *** percent and *** percent of its glass wine bottle production on the merchant market in this period.¹²² Thus, the threshold criterion is satisfied.

First Statutory Criterion. The first statutory criterion tests whether the domestic like product produced that is internally transferred for processing into downstream articles does not enter the merchant market for the domestic like product.¹²³ No domestic producers in these investigations reported diverting glass wine bottles that were to be internally consumed to the merchant market.¹²⁴ This criterion is therefore satisfied.

Second Statutory Criterion. In applying the second statutory criterion, the Commission generally considers whether the domestic like product is the predominant material input into a downstream product by referring to its share of the raw material cost of the downstream product.¹²⁵ In previous investigations, the Commission construed "predominant" material input to mean the main or strongest element, and not necessarily a majority of the inputs by value.¹²⁶

In these investigations, the reporting domestic producer engaged in captive consumption indicated that glass wine bottles account for *** percent of the cost of the downstream products produced from glass wine bottles, which are bottles of wine.¹²⁷ We find that this share is insufficient to satisfy this criterion.

Conclusion. Because the second criterion is not satisfied, we decline to apply the captive production provision in these investigations and will focus on the overall glass wine bottle

¹²¹ CR/PR at Tables III-12 and III-13. These data primarily reflect the shipments of ***. CR/PR at III-17.

¹²² CR/PR at Table III-12.

¹²³ See, e.g., *Hot-Rolled Steel Products from Argentina and South Africa*, Inv. Nos. 701-TA-404, 731-TA-898, 905 (Final), USITC Pub. 3446 at 15-16 (Aug. 2001); *Certain Cold-Rolled Steel Products from Argentina, Brazil, China, Indonesia, Japan, Russia, Slovakia, South Africa, Taiwan, Turkey and Venezuela*, Inv. Nos. 701-TA-393 and 731-TA-829-40 (Final) (Remand), USITC Pub. 3691 at 2 & n.19 (May 2004).

¹²⁴ CR/PR at III-17 to III-18. ***. CR/PR at III-17. These shipments were not, however, intended for internal consumption.

¹²⁵ See generally, e.g., *Polyethylene Terephthalate Film, Sheet and Strip from Brazil, China, Thailand, and the United Arab Emirates*, Inv. Nos. 731-TA-1131-1134 (Final), USITC Pub. 4040 at 17 n.103 (Oct. 2008); *Polyethylene Terephthalate Film, Sheet, and Strip from India and Taiwan*, Inv. Nos. 701-TA-415 and 731-TA-933-934 (Final), USITC Pub. 3518 at 11 & n.51 (June 2002).

¹²⁶ See *Polyvinyl Alcohol from Germany and Japan*, Inv. Nos. 731-TA-1015-1016 (Final), USITC Pub. 3604 (June 2003) at 15 n.69.

¹²⁷ CR/PR at Table III-14.

market in analyzing the market share and financial performance of the domestic industry. We nonetheless consider, as a relevant condition of competition, that a significant portion of domestic production is captively consumed.

Demand Considerations

Glass wine bottles are primarily used by wineries to bottle wine for retail sale.¹²⁸ Glass is the preferred packaging to preserve wine's taste or flavor, and most wine is packaged in glass bottles.¹²⁹ U.S. demand for glass wine bottles depends on the demand for downstream products produced domestically, primarily bottled wine. Domestic demand for glass wine bottles therefore generally tracks domestic wine consumption.¹³⁰ Wine bottle consumption has historically increased by one or two percent per year.¹³¹

The parties indicated that the COVID-19 pandemic temporarily boosted demand for glass wine bottles because of increased consumption of wine at home.¹³² The increase in wine consumption reportedly lasted through 2021 but apparent U.S. consumption of glass wine bottles declined thereafter.¹³³ Thus, the decline in apparent U.S. consumption during the POI appears to reflect a return to normal after the temporary increase in demand from the COVID-19 pandemic, as well as destocking by wineries and reduced consumption of wine as compared to other alcoholic and non-alcoholic drinks.¹³⁴ All domestic producers and a majority of U.S. importers and purchasers reported that demand had declined during the POI.¹³⁵

Several firms reported seasonality due to the grape harvest and the wine making cycle.¹³⁶ Orders for glass wine bottles typically peak in the fourth quarter of the year and first quarter of the following year. Roughly two-thirds of annual volume is ordered in the fourth and first quarters and then delivered to customers in the first and second quarters.¹³⁷

Apparent U.S. consumption of glass wine bottles declined by 12.5 percent from 2021 to 2023, falling from 15.5 million gross in 2021 to 15.3 million gross in 2022 and 13.6 million gross

¹²⁸ CR/PR at II-11.

¹²⁹ Conf. Tr. at 60 (Brandstatter).

¹³⁰ CR/PR at II-13.

¹³¹ CR/PR at II-13.

¹³² CR/PR at II-13.

¹³³ CR/PR at II-13.

¹³⁴ CR/PR at II-13.

¹³⁵ CR/PR at Table II-4.

¹³⁶ CR/PR at II-11.

¹³⁷ CR/PR at II-11.

in 2023.¹³⁸ Apparent U.S. consumption was 13 percent lower at 3.1 million gross in interim 2024, compared to 3.6 million gross in interim 2023.¹³⁹

Supply Considerations

The domestic industry remained the largest supplier to the U.S. market throughout POI and its share of apparent U.S. consumption increased irregularly over the three full years of the period. The domestic industry's market share increased from 70.7 percent in 2021 to 73.0 percent in 2022 and then fell to 71.2 percent in 2023, for an overall increase of 0.5 percentage points between 2021 and 2023.¹⁴⁰ Its share was 70.7 percent in interim 2024, as compared with 72.2 percent in interim 2023.¹⁴¹

Domestic producers Ardagh and O-I Glass announced shutdowns of production facilities and layoffs of workers during the POI, causing the domestic industry's capacity to decline towards the end of the period. In June 2023, Ardagh permanently laid off almost 600 workers and closed its manufacturing facilities located in Ruston, Louisiana and Wilson, North Carolina.¹⁴² In June 2024, Ardagh permanently laid off 220 workers and closed its manufacturing facility in Houston, Texas. In July 2024, Ardagh shut down two additional furnaces in Seattle.¹⁴³ O-I Glass announced the indefinite suspension of glass production at its Portland, Oregon facility, resulting in layoffs for 70 percent of the facility's employees beginning in July 2023.¹⁴⁴ Although the domestic industry's capacity initially increased from 13.5 million

¹³⁸ CR/PR at Tables IV-17 and C-1. In the merchant market, apparent U.S. consumption of glass wine bottles declined by *** percent from 2021 to 2023, falling from *** gross in 2021 to *** gross in 2022 and *** gross in 2023. CR/PR at Tables IV-18 and C-2. It was *** gross in interim 2024 compared to *** gross in interim 2023. *Id.*

¹³⁹ CR/PR at Tables IV-17 and C-1.

¹⁴⁰ CR/PR at Tables IV-17 and C-1. In the merchant market, the domestic industry's market share increased from *** percent in 2021 to *** percent in 2022 and then fell to *** percent in 2023. CR/PR at Tables IV-18 and C-2. Accordingly, in the merchant market the domestic industry's U.S. shipments as a share of apparent U.S. consumption increased by *** percentage points from 2021 to 2023. *Id.* CR/PR at Tables IV-18 and C-2.

¹⁴¹ CR/PR at Tables IV-17 and C-1. The domestic industry's share in the merchant market was *** percent in interim 2024, as compared with *** percent in interim 2023.

¹⁴² CR/PR at Table III-3.

¹⁴³ CR/PR at Table III-3. Ardagh reported that its employment of production related workers (PRWs) declined from *** PRWs in 2023 to *** PRWs in interim 2024. U.S. Producer Questionnaire at II-13.

¹⁴⁴ CR/PR at Table III-3. O-I Glass reported that its employment of production related workers declined from *** PRWs in 2023 to *** PRWs in interim 2024. U.S. Producer Questionnaire at II-13.

gross in 2021 to 13.9 million gross in 2022, the industry's shutdowns in 2023 and 2024 caused its capacity to decline to 12.3 million gross in 2023.¹⁴⁵ It was lower in interim 2024, at 3.0 million gross, than in interim 2023, at 3.4 million gross.¹⁴⁶

Subject imports were the second-largest source of supply to the U.S. market during the POI. Their share of apparent U.S. consumption decreased irregularly during the 2021-23 period, declining from 24.0 percent in 2021 to 21.1 percent in 2022 before increasing to 22.2 percent in 2023, for an overall decline of 1.8 percentage points between 2021 and 2023.¹⁴⁷ Their market share was 23.5 percent in interim 2024, as compared with 21.9 percent in interim 2023.¹⁴⁸

Nonsubject imports were the third-largest source of supply to the U.S. market during the POI.¹⁴⁹ Their share of apparent U.S. consumption increased from 5.3 percent in 2021 to 5.9 percent in 2022 and 6.6 percent in 2023.¹⁵⁰ Their share was 5.8 percent in interim 2024, as compared with 5.9 percent in interim 2023. The largest sources of nonsubject imports were France and Taiwan.¹⁵¹

¹⁴⁵ CR/PR at Table III-7.

¹⁴⁶ CR/PR at Table III-7.

¹⁴⁷ CR/PR at Tables IV-17 and C-1. The subject imports' share of apparent U.S. consumption in the merchant market decreased irregularly from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. CR/PR at Tables IV-18 and C-2. Their share was *** percent in interim 2024, as compared with *** percent in interim 2023. *Id.*

¹⁴⁸ CR/PR at Tables IV-17 and C-1.

¹⁴⁹ We have determined to rely upon questionnaire data to measure nonsubject imports. In the preliminary phase of the investigations, we used questionnaire data to measure subject imports and adjusted official import statistics to measure nonsubject imports because it appeared questionnaire data did not provide sufficient coverage of nonsubject imports. In the final phase of the investigations, we find that questionnaire data provide a more accurate measurement of nonsubject imports than do adjusted official import data. Even after further adjustment of the official import statistics, nonsubject imports based on such statistics appear to consist primarily of out-of-scope glass products. Based on a review of the remaining U.S. importers and foreign suppliers identified from proprietary, Census-edited Customs data, the larger importers of glass containers that entered merchandise under the basket category including in-scope glass wine bottles appear to be importers of out-of-scope products such as liquor bottles. CR/PR at IV-1 n.4. For example, official import statistics indicate that Canada is a large source of nonsubject imports, yet there reportedly are minimal glass wine bottle exports from Canada. See G-3 and Table G-6 note. See also Petitioner's Posthearing Br. at 3-4, Exhibit 1 at 7-17 (emphasizing that official statistics overstate nonsubject imports).

¹⁵⁰ CR/PR at Tables IV-17 and C-1. The nonsubject imports' share of apparent U.S. consumption in the merchant market increased from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. CR/PR at Tables IV-18 and C-2. Their share was *** percent in interim 2024, as compared with *** percent in interim 2023. *Id.*

¹⁵¹ CR/PR at II-9.

One U.S. producer, ***, and 12 of 16 responding importers reported that they had experienced supply constraints during the POI.¹⁵² U.S. importers reported pandemic-related supply chain constraints during 2021 and 2022.¹⁵³ Twenty-three of 37 purchasers reported that they had been declined supply from importers and domestic producers before the filing of the petitions, and 10 of 34 responding purchasers reported that they had been declined supply after the filing of the petitions.¹⁵⁴ Nine of 35 responding purchasers reported that they had been refused or declined orders for reasons such as minimum order sizes or packaging.¹⁵⁵ These included large purchasers such as *** and distributors ***.¹⁵⁶

Ardagh states that in many instances it can service orders, with a surcharge, that do not meet the minimum order quantities, but also added that its ability to run smaller quantities “has been limited over the last year” and that its minimum order quantities have increased.¹⁵⁷ Ardagh also serves smaller customers through distributors that repack the glass wine bottles into cases.¹⁵⁸ Ardagh and TricorBraun entered an exclusivity contract in 2020 that appoints TricorBraun as Ardagh’s exclusive West Coast distributor for servicing orders of 500,000 cases or less.¹⁵⁹ As a result of this arrangement, other distributors, such as ***, are unable to purchase from Ardagh.¹⁶⁰ Domestic producer *** reported that it declined to take new customers in 2021 and part of 2022 when demand was strong and glass wine bottle supplies

¹⁵² CR/PR at II-9

¹⁵³ CR/PR at II-10.

¹⁵⁴ CR/PR at II-10.

¹⁵⁵ CR/PR at II-10.

¹⁵⁶ CR/PR at II-10 and Table V-21. *** reported that it usually has to source bottles in low quantities from import sources because of the high minimum order quantities required by domestic producers. *** reported that Ardagh refused orders based on volumes and availability and *** refused orders for packed glass wine bottles. *** reported that Ardagh does not accept packed orders less than 5,000 cases and that bulk glass production requires at least a five-day run or 1.2 million bottles. It reported that several of its requests for smaller runs had been declined, particularly in 2023. It reported that *** does not accept packed orders less than 10,000 cases and only accepts orders for printed glass wine bottles that are larger than 10,000 on a case-by-case basis. CR/PR at II-10.

¹⁵⁷ CR/PR at II-22.

¹⁵⁸ CR/PR at II-3.

¹⁵⁹ CR/PR at II-1. More subject importers shipped from the Pacific Coast region than any other geographic region in the United States. CR/PR at Table II-2. TricorBraun, Ardagh’s exclusive distributor on the West Coast stated that it agreed to an increase in minimum order quantities from 1,500 cases to 5,000 cases in late 2022, which was significant for its smaller customers. CR/PR at II-22.

¹⁶⁰ CR/PR at II-1.

were still being negatively impacted by the COVID-19 pandemic and related supply chain constraints.¹⁶¹

Substitutability and Other Conditions

We find that there is moderate-to-high degree of substitutability between domestically produced glass wine bottles and subject imports.¹⁶² All responding U.S. producers, most U.S. importers, and most purchasers reported that the domestic like product was either always or frequently interchangeable with glass wine bottles imported from subject sources.¹⁶³ As noted above, large majorities or pluralities of responding purchasers rated domestically produced glass wine bottles as comparable to glass wine bottles imported from each subject country with respect to most of the 17 factors that influence purchasing decisions.¹⁶⁴ Most purchasers also reported that domestic producers and suppliers of subject merchandise from Chile, China, and Mexico usually meet minimum quality requirements.¹⁶⁵ Differences in packaging, lead times, minimum order requirements and quality may limit substitutability to some extent.¹⁶⁶

We find that price is an important factor in purchasing decisions for glass wine bottles, among other important factors. Purchasers reported that the top three factors considered in their purchasing decisions for glass wine bottles were quality, price, and availability/supply.¹⁶⁷ Purchasers most often cited availability, reliability of supply, product consistency, quality meets industry standards, delivery time and price as “very important” in their purchasing decisions.¹⁶⁸ Eighteen of 36 purchasers indicated that they only sometimes purchase the lowest-priced product while 16 reported they usually do; two reported they never purchase the lowest-priced

¹⁶¹ CR/PR at II-10.

¹⁶² CR/PR at II-17.

¹⁶³ CR/PR at Tables II-12, II-13 and II-14.

¹⁶⁴ CR/PR at Table II-11. The exceptions were that purchasers rated the domestic product superior to subject imports from Chile with respect to price and minimum quantity requirements and purchasers split on the comparability of technical support/service of the domestic product and subject imports from Chile. Purchasers rated the domestic product superior to subject imports from China with respect to technical support/service and delivery time. Purchasers rated the domestic product inferior to subject imports from China with respect to minimum quantity requirements and price. Purchasers split on the comparability of the domestic product and subject imports from China with respect to delivery terms. The large majority of responding purchasers rated the domestic product and subject imports from Mexico as comparable as to all 17 factors. See CR/PR at Table II-11.

¹⁶⁵ CR/PR at Table II-9.

¹⁶⁶ CR/PR at II-17.

¹⁶⁷ CR/PR at Table II-7.

¹⁶⁸ CR/PR at Table II-8.

product.¹⁶⁹ Purchasers were mixed in their assessment of the significance of factors other than price in sales of the domestic like product and subject imports from each country.¹⁷⁰

U.S. producers and importers primarily sold directly to wineries with smaller quantities to distributors.¹⁷¹ The majority of U.S. producers' sales were to large wineries, which buy in bulk, while importers' sales of subject imports were mostly to small and medium wineries, which prefer case packs.¹⁷² Approximately three-quarters of domestic producers' sales were in bulk with the remainder case packed.¹⁷³ The vast majority of the subject imports were sold in case packs.¹⁷⁴

Domestic producers reported that *** percent of their commercial shipments were from inventory, with lead times averaging *** days.¹⁷⁵ U.S. importers reported that *** percent of their commercial shipments of glass wine bottles were produced-to-order, with lead times averaging *** days.¹⁷⁶ The remaining *** percent of their shipments came from inventories with lead times averaging *** days from U.S. inventories and *** days from foreign inventories.¹⁷⁷ Twenty-two of 37 responding purchasers reported that their firm's inventory was at its preferred levels in 2023.¹⁷⁸ Twenty-nine of 37 purchasers also reported that their suppliers hold their inventories for them for 30-120 days.¹⁷⁹

U.S. producers reported selling the vast majority of their glass wine bottles through long-term contracts that fix price, and do not allow for price renegotiation.¹⁸⁰ Two producers

¹⁶⁹ CR/PR at II-19.

¹⁷⁰ CR/PR at Table II-17. Domestic producers and U.S. importers disagreed with respect to the importance of differences other than price between the domestic product and subject imports. All responding domestic producers indicated that differences other than price were sometimes or never significant in sales of the domestic like product and subject imports from each source. CR/PR at Table II-15. On the other hand, a majority of importers indicated that differences other than price were always or frequently significant in sales of the domestic like product and subject imports from each country. CR/PR at Table II-16.

¹⁷¹ CR/PR at Table II-1.

¹⁷² CR/PR at Table II-1.

¹⁷³ CR/PR at Table IV-11.

¹⁷⁴ CR/PR at Table IV-11.

¹⁷⁵ CR/PR at II-20. *** reported that *** percent of its shipments were made to order. *Id.* Glass wine bottles can remain in inventory up to two years depending upon packaging. CR/PR at II-16.

¹⁷⁶ CR/PR at II-20.

¹⁷⁷ CR/PR at II-20.

¹⁷⁸ CR/PR at II-16.

¹⁷⁹ CR/PR at II-16.

¹⁸⁰ Table V-4.

reported that some of their long-term contracts are indexed to raw materials.¹⁸¹ U.S. importers also reported selling most of their glass wine bottles under long-term contracts and indicated their annual and long-term contracts fix price but allow for price renegotiation.¹⁸²

Silica (sand), soda ash, limestone, and cullet (furnace-ready, recycled glass) are the primary raw materials used to produce glass wine bottles.¹⁸³ Domestic producers' cost of raw materials increased from \$*** per gross in 2021 to \$*** per gross in 2022 and \$*** per gross in 2023.¹⁸⁴ Their cost of raw materials was \$*** per gross in interim 2024 compared to \$*** per gross in interim 2023.¹⁸⁵ Raw materials accounted for *** percent of the domestic industry's cost of goods sold ("COGS") for glass wine bottles in 2021, *** percent in 2022, and *** percent in 2023.¹⁸⁶ Their share of the domestic industry's COGS was *** percent in interim 2024 compared with *** percent in interim 2023.¹⁸⁷

Effective September 24, 2018, glass wine bottles from China were subject to an additional 10 percent *ad valorem* duty under section 301 of the Trade Act of 1974. On May 10, 2019, the section 301 duty for glass wine bottles was increased to 25 percent.¹⁸⁸

C. Volume of Subject Imports

Section 771(7)(C)(i) of the Tariff 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."¹⁸⁹

Cumulated subject imports, by volume, decreased by 20.6 percent between 2021 and 2023, decreasing from 3.6 million gross in 2021 and 2022 to 2.9 million gross in 2023; cumulated subject imports were 3.6 percent higher in interim 2024, at 855,125 gross, compared with 825,398 gross in interim 2023.¹⁹⁰

Cumulated subject imports as a share of apparent U.S. consumption declined from 24.0 percent in 2021 to 21.1 percent in 2022, before increasing to 22.2 percent in 2023, for an

¹⁸¹ CR/PR at V-7.

¹⁸² CR/PR at V-7.

¹⁸³ CR/PR at V-1.

¹⁸⁴ CR/PR at Table VI-5.

¹⁸⁵ CR/PR at Table VI-1.

¹⁸⁶ CR/PR at Table VI-1.

¹⁸⁷ CR/PR at Table VI-1.

¹⁸⁸ CR/PR at I-11.

¹⁸⁹ 19 U.S.C. § 1677(7)(C)(i).

¹⁹⁰ CR/PR at Table IV-2.

overall decrease of 1.8 percentage points.¹⁹¹ Their share was 1.6 percentage points higher in interim 2024, at 23.5 percent, than in interim 2023, at 21.9 percent.¹⁹² The record indicates that the domestic industry gained 0.5 percentage points of market share from subject imports from 2021 to 2023.¹⁹³ Although cumulated subject imports gained 1.5 percentage points of market share from the domestic industry in interim 2024 compared to interim 2023, the domestic industry's market share in interim 2024, at 70.7 percent, was the same as in 2021; in contrast, cumulated subject imports' market share was lower in interim 2024, at 23.5 percent, than in 2021, at 24 percent.¹⁹⁴

We find that the volume of cumulated subject imports, which accounted more than 20 percent of apparent U.S. consumption throughout the period, is significant in absolute terms and relative to consumption in the United States. For the reasons discussed below, however, we do not find that this volume of cumulated subject imports had either significant price effects or a significant adverse impact on the domestic industry.

¹⁹¹ CR/PR at Tables IV-17 and C-1. In the merchant market, cumulated subject imports as a share of apparent U.S. consumption declined from *** percent in 2021 to *** percent in 2022, before increasing to *** percent in 2023, for an overall decrease of *** percentage points. CR/PR at Tables IV-18 and C-2. Their share was *** percentage points higher in interim 2024, at *** percent, than in interim 2023, at *** percent. *Id.*

¹⁹² CR/PR at Tables IV-17 and C-1. In the merchant market, cumulated subject import market share was *** percentage points higher in interim 2024 at *** percent, compared with *** percent in interim 2023. CR/PR at Tables IV-18 and C-2.

¹⁹³ See CR/PR at Tables IV-17 and C-1. Nonsubject imports gained 1.3 percentage points of market share from subject imports from 2021 to 2023. See CR/PR at Tables IV-17 and C-1. As discussed further below in our price effects and impact analysis, subject import volumes and market share exhibited different trends between subject countries. Subject import volumes and market share declined for subject imports from Chile and China between 2021 and 2023, whereas volumes from Mexico decreased less than apparent U.S. consumption and resulted in an increase of their market share over this period. Subject import volumes from Chile declined *** percent between 2021 and 2023, and those from China declined *** percent. The share of apparent U.S. consumption for subject imports from Chile declined from *** percent in 2021 to *** percent in 2023 and that for China declined from *** percent in 2021 to *** percent in 2023. Subject import volumes from Mexico declined by *** percent between 2021 and 2023, and their share of apparent U.S. consumption increased from *** percent in 2021 to *** percent in 2023. CR/PR at Table C-1.

¹⁹⁴ See CR/PR at Tables IV-17 and C-1. In the merchant market, the domestic industry ended the POI with a higher market share in interim 2024, *** percent, than in 2021, at *** percent. See CR/PR at Tables IV-18 and C-2. In contrast, in the merchant market, cumulated subject imports ended the POI with a lower market share in interim 2024, *** percent, than in 2021, at *** percent. See *Id.*

D. Price Effects of the Subject Imports

Section 771(7)(C)(ii) of the Tariff 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.¹⁹⁵

As discussed in section VI.B.4 above, we find that there is a moderate-to-high degree of substitutability between cumulated subject imports and the domestic like product, and that price is an important factor in purchasing decisions for glass wine bottles, among other important factors.

The Commission collected quarterly quantity and f.o.b. pricing data on sales of five pricing products shipped in case packs to unrelated U.S. customers during the POI.¹⁹⁶ Three U.S. producers and 10 importers provided usable pricing data for sales of the requested

¹⁹⁵ 19 U.S.C. § 1677(7)(C)(ii).

¹⁹⁶ CR/PR at V-9. The five pricing products are:

Product 1.— 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes);

Product 2.— 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes);

Product 3.— 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case-packed (in 12-bottle, plain white unprinted, corrugated boxes);

Product 4.— 750 mL, Burgundy style wine bottle, weighing 25.5 to 27.5 ounces, flint color (includes all variations of flint including by not limited to superflint, high flint, extra flint), without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white unprinted, corrugated boxes); and

Product 5.— 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 29.5 to 31.5 ounces, green color, without frosting, coating, or other decoration, case packed (in 12-bottle, plain-white, unprinted, corrugated boxes). CR/PR at V-9 to V-10.

products, although not all firms reported pricing for all products for all quarters.¹⁹⁷ The pricing data reported by these firms accounted for approximately *** percent of U.S. producers' U.S. shipments of domestically produced glass wine bottles, *** percent of importers' U.S. shipments of subject imports from Chile, *** percent of U.S. shipments of subject imports from China in 2023, and *** percent of U.S. shipments of subject imports from Mexico in 2023.¹⁹⁸

Cumulated subject imports undersold the domestic like product in 9 of 143 quarterly comparisons, or 6.3 percent of the time, with underselling margins ranging between 1.8 percent and 20.8 percent, and averaging 7.8 percent.¹⁹⁹ Cumulated subject imports oversold the domestic like product in the remaining 134 quarterly comparisons, or 93.7 percent of the time, with overselling margins ranging between 0.8 percent and 146.2 percent and averaging 43.8 percent.²⁰⁰ Quarters in which there was underselling accounted for 11.2 percent of total reported subject import sales volume (141,020 gross) covered by the Commission's pricing data during the POI, and quarters in which there was overselling accounted for 88.8 percent of reported total reported subject import sales volume (1,119,070 gross).²⁰¹

The Commission also collected purchase cost data for three pricing products (products 6-8) from 11 importers for their purchases of bulk packed wine bottles.²⁰² These importers were a mix of large distributors that sell both domestic and imported wine bottles such as *** as well as traditional importers.²⁰³ Both types of importers subsequently repackage the imported bulk wine bottles and sell them as case-packed products to wineries or other distributors. Purchase cost data reported by these firms accounted for *** percent of imports from Chile, *** percent of imports from China, and *** percent of imports from Mexico in

¹⁹⁷ CR/PR at V-10.

¹⁹⁸ CR/PR at V-10.

¹⁹⁹ CR/PR at Table V-14.

²⁰⁰ CR/PR at Table V-14.

²⁰¹ CR/PR at Table V-14.

²⁰² CR/PR at V-22. Pricing products 6-8 were the following:

Product 6.— 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed;

Product 7.— 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed;

Product 8.— 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed. CR/PR at V-10. Pricing products 6-8 are the same as products 1-3 except for their packaging. *Id.*

²⁰³ CR/PR at V-22-23 and n.22.

2023.²⁰⁴ For comparison purposes, domestic producers reported prices for their sales of bulk packed pricing products 6-8 to wineries and distributors.²⁰⁵

The landed duty-paid costs for glass wine bottles imported from subject countries were below the domestic producers' sales prices for the domestically produced product in 35 of 80 instances (230,899 gross); price-cost differentials ranged from 1.3 to 65.8 percent and averaged 13.1 percent.²⁰⁶ The landed duty-paid costs for glass wine bottles imported from subject countries were above the domestic producers' sales prices in 45 of 80 instances (290,760 gross); price-cost differentials ranged from 0.2 to 170.7 percent and averaged 27.0 percent.²⁰⁷ By import volume, 44.3 percent of imports were below domestic producers' sales prices and 55.7 percent of imports were above.²⁰⁸

We recognize that import purchase cost data may not reflect the total cost of importing. Therefore, we requested that importers provide additional information regarding the costs and benefits of directly importing glass wine bottles. Seven of 10 importers reported that they incurred additional costs beyond landed duty-paid costs by importing glass wine bottles directly rather than purchasing from a U.S. producer or U.S. importer.²⁰⁹ Of these, five importers estimated the total additional cost incurred. Their estimates generally ranged from 3.0 to 15.0 percent compared to the landed-duty paid value (with one importer reporting an additional cost for "boxes for glass," which it estimates as 20 percent).²¹⁰ Five importers estimated that they saved between *** percent of the purchase price by importing glass wine bottles rather

²⁰⁴ CR/PR at V-22.

²⁰⁵ CR/PR at V-10.

²⁰⁶ CR/PR at Table V-17.

²⁰⁷ CR/PR at Table V-17.

²⁰⁸ CR/PR at V-23. Petitioner requested that the Commission collect purchase cost data in addition to traditional price data because it sells to firms that also act as importers of bulk packed merchandise. See Petitioner's Comments on Draft Questionnaires (Apr. 19, 2024) at 2.

²⁰⁹ CR/PR at V-23.

²¹⁰ CR/PR at V-23. The reported additional costs incurred included boxes for glass (20.0 percent) costs related to longer transit times (6.0 percent); drayage, warehousing and related capital costs (3.0-5.6 percent); personnel costs (1.0-3.1 percent); inventory carrying costs (1.7 percent); palletization (1.3 percent); and insurance, charges at port, brokerage fees, and internal customs compliance (0.04-1.0 percent). CR/PR at V-23. Petitioner disputes the reported costs for "boxes for glass," asserting that "{i}t is plainly inappropriate to add the cost of cardboard boxes, as the comparison is to domestic bulk shipments that do not include the cardboard boxes." Petitioner's Posthearing Br. Answers to Commission Questions at 38.

than purchasing from a U.S. importer, and one importer estimated saving *** percent compared to purchasing the product from a U.S. producer.²¹¹

We have also considered lost sales information reported by responding purchasers. Of 37 responding purchasers, 21 reported that, since January 1, 2021, they had purchased or imported glass wine bottles from subject sources instead of purchasing domestically produced glass wine bottles.²¹² Thirteen of these purchasers reported that the price of subject imports was lower than the price of the domestically produced product.²¹³ Eight of those purchasers also reported that price was a primary reason for their decision to obtain glass wine bottles from the subject countries rather than the domestic like product.²¹⁴ Five purchasers indicated they purchased (or imported) *** gross wine bottles from subject sources because of price,²¹⁵ equivalent to *** percent of the reported purchases and imports of glass wine bottles from subject sources over the POI (27.7 million gross).²¹⁶

Thus, the pricing data show predominant overselling by the subject imports during the POI. The purchase cost data collected by the Commission also show that the landed duty-paid costs of subject imports generally exceeded the sales prices of domestically produced glass wine bottles, even without adding the additional costs associated with distributors importing directly from subject sources.

Domestic Parties argue the pricing data collected by the Commission (pricing data for case-packed bottles, pricing products 1-5) is flawed because pricing data concerning domestic producers' sales to distributors is at a different level of trade than pricing data concerning importers' sales to wineries.²¹⁷ In particular, they argue that U.S. producers' reported pricing data included sales to wineries and sales to distributors such as ***, whereas subject importers

²¹¹ CR/PR at V-24.

²¹² CR/PR at Table V-21

²¹³ CR/PR at Table V-21

²¹⁴ CR/PR at Table V-21

²¹⁵ CR/PR at Table V-21

²¹⁶ CR/PR at Tables V-20 and V-21. This total also equates to approximately *** percent of U.S. producers' commercial shipments, and less than *** percent of apparent U.S. consumption, over the POI. *Derived from* CR/PR at Tables V-21, C-1, and C-2.

²¹⁷ CR/PR at V-11; Hearing Tr. at 26, 55 (Brandstatter, Pickard); Petitioner's Posthearing Br. Answers to Commission Questions, at 70-71. O-I Glass' Posthearing Br. Answers to Commission Questions, at 53-55.

reported pricing data included sales by large distributors to wineries.²¹⁸ Domestic producers argue that when these distributors sell to wineries there is a substantial markup reflecting inter alia services they provide for their winery customers.²¹⁹ Thus, Domestic Parties argue that comparing U.S. producers' sales prices to distributors to U.S. importers' sales prices to wineries results in price comparisons at different levels of trade, and therefore the Commission should not rely on the pricing data for products 1 to 5. We are unpersuaded by this argument.

Domestic Parties' argument appears to be premised on the assumption that its reported pricing data for products 1 to 5 are primarily to distributors whereas subject importers' sales were primarily to wineries.²²⁰ This assumption, however, is not supported by the record. As an initial matter, the pricing data on record does not distinguish between sales to distributors and sales to end-users (wineries) and there is no record evidence that reported domestic producer prices for pricing products 1-5 are primarily to distributors. To the contrary, both domestic producers and importers sell case packed glass wine bottles to wineries.²²¹ While the domestic industry's argument appears to be premised on the assumption that its reported pricing data were of shipments to distributors, U.S. producers' overall U.S. shipments were also primarily to wineries, which generally accounted for over *** percent of their shipments during the POI, not to distributors, which accounted for ***, and these data thus do not support the premise of the domestic industry's argument.²²² Data concerning U.S. shipments by customer type also are consistent with the underselling seen in the pricing data. These U.S. shipment data show that

²¹⁸ See, e.g., O-I Posthearing Br., Answers to Questions at 54 ("...pricing data collected by the Commission on pricing products 1 through 5 involves a comparison of sales by domestic producers to distributors with sales by distributors to winery customers..."); O-I Posthearing Br. at 4; O-I Prehearing Br. at 11-13.

²¹⁹ See, e.g., O-I Prehearing Br. at 12 (arguing that distributors such as *** "provide services that are generally not offered by domestic producers, such as long-term warehousing of customer inventories at no additional cost" and that "large distributors can also act essentially as retailers, offering extremely small quantities of glass wine bottles.") Domestic Parties argue that "{g}iven the implausibly high overselling margins in the case-packed pricing products, it appears that the provision of these additional services created distortions in the reporting of the price of the wine bottles." Petitioners Posthearing Br., Ex. 1 at 40; see also O-I Prehearing Br. at 9.

²²⁰ See, e.g., O-I Posthearing Br., Answers to Questions at 54 ("...pricing data collected by the Commission on pricing products 1 through 5 involves a comparison of sales by domestic producers to distributors with sales by distributors to winery customers..."); Tr. (Kaplan) at 115-117.

²²¹ See Tables D-1 and D-5.

²²² CR/PR at Table II-1. Shipments to distributors constituted *** percent of the industry's U.S. shipments of case packed glass wine bottles in 2023. *Derived from* CR/PR at Table D-1. Between *** percent and *** percent of U.S. shipments of subject imports were to distributors over the POI/CR/PR at Table II-1.

the domestic industry's shipments of case packs to both small and medium wineries and large wineries were generally at lower unit values than U.S. importers' shipments of subject imports in case packs to small and medium wineries and large wineries throughout the POI.²²³ Thus, even when looking at sales of glass wine bottles in the same packaging to the same customers, the unit values of subject import shipments generally exceeded those of the domestic industry's shipments.

Even if the Commission were to give more weight to the purchase cost data as Domestic Parties urge, we do not find the purchase cost data supports a finding of significant underselling. As an initial matter, the purchase cost data show that the landed duty-paid cost of subject imports generally exceeded the sales prices of the domestic like product. Further, although Domestic Parties argue the purchase cost data show that imports from subject sources were increasingly imported at lower costs than the domestic product during the latter portion of the POI, corresponding to market share gain by subject imports at the expense of domestic producers,²²⁴ the record indicates that the subject imports that gained market share during the latter portion of the POI were from Mexico, none of which were purchased at lower cost during that period.²²⁵

Moreover, responding purchasers' responses concerning the relative pricing of subject imports and the domestic product do not support the claim that subject imports were mostly lower-priced.²²⁶

²²³ See CR/PR at D-4 to D-7 and D-28 to D-31. We recognize that unit values may be impacted by differences in product mix. Nonetheless, these data are consistent with the Commission's pricing data that controlled for product differences, and Domestic Industry representatives have themselves characterized glass wine bottles as a "commodity product" of which "the vast majority are interchangeable, substitutable, and fungible." Hearing Tr. at 8 (Pickard); see also O-I Posthearing Br., Answers to Questions at 48-49.

²²⁴ Petitioner's Posthearing Br. at 44-47; O-I Glass' Posthearing Br., Answers to Questions at 1-3.

²²⁵ See CR/PR at Tables V-18 and C-1. Petitioners and O-I Glass identified problems with purchase cost data reported by importers ***. Staff removed data from *** because the importers could not confirm the data met the pricing product definitions. Staff verified that purchase cost data from *** were correctly reported. CR/PR at V-22 n.22.

²²⁶ Most responding purchasers reported that subject imports from Chile were priced higher than the domestic product, subject imports from China were priced lower than the domestic product, and subject imports from Mexico were priced comparably to the domestic like product. See CR/PR at Table II-10. In light of these responses, we find it noteworthy that only subject imports from Mexico gained market share in the total and merchant markets over the POI, whereas subject imports from Chile and China lost market share. *Id.* at Tables IV-17 and IV-18. Thus, lower pricing of the subject imports does not appear to account for any gains in their market share.

Domestic Parties also claim that there are many instances in which purchasers switched to subject imports due to lower prices that are not reflected in the lost sales information collected by the Commission.²²⁷ The correspondence that Domestic Parties submitted does not contradict the lost sales information on the record, however, or indicate that there was a significant volume of lost sales to subject imports beyond that confirmed by responding purchasers.²²⁸ Nor does it detract from the other record evidence, including pricing data, purchase cost data, and shipment data, indicating that subject imports were generally priced higher than the domestic like product, consistent with the small volume of confirmed lost sales.²²⁹

²²⁷ Petitioner and O-I Glass provided ***, as well as a smaller number of emails with wineries and distributors that purport to show that subject imports were priced lower than the domestic industry's glass wine bottles and resulted in lost sales and reduced sales prices. *See, e.g.*, Petitioner's Posthearing Br., Answers to Commissioner Questions at 64; O-I Glass Final Comments at 9-10.

²²⁸ The record does not support Ardagh's claims that it lost significant sales to subject imports due to their lower price. For instance, Ardagh states that it lost its *** customer, ***, to subject imports. Petitioner's Posthearing Br. at Exhibit 26 at para 8 ("****") (Anderson Affidavit). In its questionnaire response, however, ***. *See* *** Purchaser Questionnaire at II-1. *See also* CR/PR at Tables V-20 & 21.

With respect to Ardagh's claims that it lost business with its exclusive distributor, TricorBraun, the record shows that Ardagh did not meet its commitments to supply TricorBraun, resulting in TricorBraun switching its business to ***. *See* TricorBraun's Posthearing Br. Answers to Commissioner Questions at 5-10 and Exhibit 14 (Letter of Oct. 18, 2021). Moreover, TricorBraun's imports and purchases of glass wine bottles from subject sources fell from *** gross in 2021 to *** gross in 2023. *See* TricorBraun's Purchaser Questionnaire at II-1.

Another customer, ***, reports that it was instructed by Ardagh to seek alternative sources of glass wine bottles. CR/PR at V-39 and Table V-21. *** then switched its domestic purchases to ***. *** U.S. Purchaser Questionnaire at III-22. ("****").

With respect to *** winery, Ardagh provided an email from TricorBraun indicating that Ardagh's pricing was "****." Petitioner's Prehearing Br. at Exhibit 6. O-I Glass also claims it was forced to forgo a price increase in order to keep its business with ***. O-I Glass' Final Comments at 9. Not only did the email from TricorBraun fail to identify whether ***, *** purchased significant and increasing volumes of domestically produced glass wine bottles during the POI. Over *** percent of its purchases in 2023 were from domestic sources and its purchases of domestically produced glass wine bottles increased *** percent from 2021 to 2023. *See* Fior De Sole Purchaser Questionnaire at II-1.

O-I Glass also argues that it lost a sale in 2023 to *** to lower-priced subject imports from China but the quantity was a relatively modest *** gross. *See, e.g.*, O-I Glass' Final Comments at 9. Further, in the communications with *** provided by O-I Glass, this firm indicated *** O-I Prehearing Br., Exhibit 1 at Attachment 3. *** did not provide the Commission with a U.S. purchaser questionnaire.

²²⁹ Petitioner argues that the purchase cost data indicate that subject imports displaced sales to distributors. They argue that distributors such as TricorBraun, ***, were directly importing low-cost
(Continued...)

Given the predominant overselling shown by the pricing data and the generally higher purchase cost of the subject imports, the shipment data by customer type showing that the unit values of subject import shipments consistently exceeded the unit values of domestic shipments, the *** volume of confirmed lost sales, and other information in the record indicating that subject imports were not lower-priced than the domestic like product, we find that subject imports did not undersell the domestic like product to a significant degree.

We have also examined price trends during the POI. Between the first quarter of 2021 and the first quarter of 2024, U.S. producers' sales prices for glass wine bottles increased for all products for which data are available, with the exception of product 5.²³⁰ The domestic industry's sales prices for pricing products 1-3 and 6-8 increased from *** to *** percent, depending on the product.²³¹ Only the sales prices of pricing product 5 decreased, by *** percent, although the volumes associated with domestic shipments of that product were the lowest of the various products for which pricing or purchase cost data were collected (aside from pricing product 4, which only saw limited shipments in the early part of the POI).²³²

Sales prices for subject imports of pricing products 1-3 from Chile increased irregularly by *** percent, *** percent, and *** percent, respectively, over the POI.²³³ Sales prices for subject imports of pricing products 1-3, and 5 from China also increased irregularly by *** percent, *** percent, ***, and *** percent, respectively, over the POI.²³⁴ Sales prices for subject imports of pricing products 3 and 5 from Mexico also increased irregularly by *** percent and *** percent, respectively, over the POI.²³⁵ Only sales prices for subject imports of pricing products 1 and 2 from Mexico decreased irregularly over the POI, by *** percent and

subject imports and displacing domestic producers' sales. Petitioner's Prehearing Br. at 42-48. The record does not support this claim. TricorBraun's purchases from domestic producers declined *** percent from 2021 to 2023, while, as described above, its imports and purchases from subject sources declined *** percent over the same period. See TricorBraun's Purchaser Questionnaire at II-1.

²³⁰ CR/PR at Figs. V-3, V-4, V-5, V-6, V-7, V-8, V-9 and V-10.

²³¹ CR/PR at Table V-13. Sales of domestic pricing product 4 wine bottles were confined to 2021 and the first quarter of 2022. See CR/PR at Fig. V-6.

²³² CR/PR at Table V-13.

²³³ CR/PR at Table V-13. There were no sales of subject imports from Chile meeting pricing products 4 and 5. *Id.*

²³⁴ CR/PR at Table V-13. There were no sales of subject imports from China meeting pricing product 5. *Id.*

²³⁵ CR/PR at Table V-13. There were no sales of subject imports from Mexico meeting pricing product 4. *Id.*

*** percent, respectively.²³⁶ Purchase costs of the subject imports also generally increased.²³⁷ Only one of 37 responding purchasers indicated that domestic producers had reduced prices during the POI to compete with lower-priced subject imports.²³⁸ Given this evidence, we find that subject imports did not depress domestic producers' prices to a significant degree.

We have also considered whether subject imports prevented price increases which would otherwise have occurred to a significant degree. As noted above, apparent U.S. consumption, by quantity, declined over the POI.²³⁹ Nonetheless, pricing data indicate that domestic prices increased for six of the eight pricing products over the POI.²⁴⁰ Because the increase in the domestic industry's net sales values between 2021 and 2023 was less than the increase in its unit COGS over the period, however, the domestic industry's COGS to net sales ratio increased irregularly by 1.9 percentage points from 2021 to 2023.²⁴¹ The ratio increased from *** percent in 2021 to *** percent in 2022, before declining to *** percent in 2023.²⁴² The ratio was *** percent in interim 2024, an improvement compared to *** percent in interim 2023.^{243 244}

²³⁶ CR/PR at Table V-13.

²³⁷ Purchase costs for pricing products 6-8 from Chile increased by *** percent, *** percent, and *** percent, respectively, over the POI. CR/PR at Table V-13. Purchase costs for pricing products 6-7 from China decreased by *** percent and *** percent, respectively, and the purchase cost of product 8 from China increased *** percent over the POI. *Id.* Purchase costs for pricing products 8 from Mexico increased by *** percent. *Id.*

²³⁸ Of the 37 responding purchasers, only *** reported that U.S. producers had reduced prices in order to compete with lower-priced imports from China and Mexico; 17 purchasers reported that U.S. producers did not reduce prices to compete, and 14 purchasers reported that they did not know. CR/PR at V-42. The reported estimated price reductions were *** and ***. *Id.*

²³⁹ CR/PR at Table IV-17. By quantity, apparent U.S. consumption was 12.5 percent lower in 2023 than in 2021. *Id.*

²⁴⁰ CR/PR at Figs. Table V-8 and Figs. V-3, V-4, V-5, V-6, V-8, V-9, and V-10. Only domestic prices for pricing product 5 fell over the POI. CR/PR at Fig. V-7

²⁴¹ CR/PR at Table VI-1.

²⁴² CR/PR at Tables VI-1 and C-1. In the merchant market the domestic industry's ratio of COGS to net sales rose by *** percentage points between 2021 and 2023. The ratio increased from *** percent in 2021 to *** percent in 2022 and *** percent in 2023. See CR/PR at Table VI-3 and C-2.

²⁴³ CR/PR at Tables VI-1 and C-1. In the merchant market, the domestic industry's ratio of COGS to net sales was higher, at *** percent in interim 2024, as compared to *** percent in interim 2023. See CR/PR at Table VI-3 and C-2.

²⁴⁴ We note that individual domestic producers had different trends in their COGS to net sales ratios over the POI, which suggests that their cost/price squeeze was due to internal factors, not external, industry-wide factors such as subject imports. ***. CR/PR at Table VI-5.

From 2021 to 2023, the domestic industry's unit COGS increased by \$*** per gross, or *** percent, while its unit net sales value increased by only \$*** per gross, or *** percent.²⁴⁵ Thus, the industry's average unit net sales value increased by \$*** less than its unit COGS.²⁴⁶ Nearly one-half (*** percent) of the increase in the domestic industry's total COGS was driven by other factory costs, which was the largest constituent cost element and which increased by \$*** per gross (*** percent) during the 2021-23 period, from \$*** per gross in 2021 to \$***

²⁴⁵ See CR/PR at Tables VI-1 and VI-2. In the merchant market, as the domestic industry's unit COGS increased by *** percent from 2021 to 2023, the industry's merchant market sales unit values increased by *** percent. See CR/PR at Table VI-3 and C-2.

²⁴⁶ See CR/PR at Tables VI-1, VI-2, and C-1. The industry's unit COGS increased from \$*** per gross in 2021 to \$*** per gross in 2022 and \$*** per gross in 2023; unit COGS were \$*** per gross in interim 2024, compared with \$*** per gross in interim 2023. CR/PR at Tables C-1 and VI-1. The industry's unit net sales values increased from \$*** per gross in 2021 to \$*** per gross in 2022, and \$*** per gross in 2023; they were \$*** per gross in interim 2024, compared with \$*** per gross in interim 2023. *Id.* The domestic industry's unit COGS and net sales values were \$*** per gross (*** percent) and \$*** per gross (*** percent) higher, respectively, in interim 2024 than in interim 2023. *Id.*

In the merchant market, the industry's average commercial sales values increased by \$*** less than its unit COGS. The industry's unit COGS increased by \$*** per gross (*** percent) from 2021 to 2023, from \$*** per gross in 2021 to \$*** per gross in 2022, and then to \$*** per gross in 2023; unit COGS were \$*** per gross in interim 2024, compared with \$*** per gross in interim 2023. CR/PR at Tables VI-3, VI-4, and C-2. The industry's unit commercial sales values increased by \$*** per gross (*** percent) from 2021 to 2023, from \$*** per gross in 2021 to \$*** per gross in 2022, and then to \$*** per gross in 2023; they were \$*** per gross in interim 2024 compared with \$*** per gross in interim 2023. *Id.* The domestic industry's unit COGS and commercial sales values were \$*** per gross (*** percent) and \$*** per gross (*** percent) lower, respectively, in interim 2024 than in interim 2023. *Id.*

per gross in 2022 and \$*** per gross in 2023; they were \$*** per gross (***) higher in interim 2024 at \$*** per gross, compared with \$*** per gross in interim 2023.^{247 248}

The vast majority of domestic industry's sales were made pursuant to long-term contracts, which were indexed to raw material costs and in some instances other input costs, but reportedly did not permit the renegotiation of prices.²⁴⁹ From 2021 to 2023, the domestic industry's unit net sales value increased by *** per gross while its unit COGS increased by *** per gross. The record indicates that over this period, the increase in the industry's unit net sales value more than covered its increased costs for raw materials, energy and direct labor. To the extent that the increase in the unit net sales value slightly lagged the increase in unit COGS, that was attributable to increased other factory costs, which in turn was largely attributable to declining demand and certain non-recurring costs associated with, for example, the flood event at one of O-I Glass' plants and the cyberattack experienced by Gallo.

²⁴⁷ CR/PR at Tables VI-1, VI-2, and C-1. The domestic producers reported recurring items in glass wine bottles related to curtailments and furnace shutdowns. The domestic producers also reported certain notable non-recurring items in other factory costs, namely costs associated with ***, and a ***, each of which resulted in production curtailments. See CR/PR at VI-17, nn.7, 8 & 9. Respondent TricorBraun correctly calculates that once these non-recurring costs are removed from total OFC, the domestic industry's COGS to net sales ratio actually declined between 2021 and 2023 and over the interim periods. TricorBraun Posthearing Br. at Exhibit 8.

Raw material costs increased by \$*** per gross (***) from 2021-2023, from \$*** per gross in 2021 to \$*** per gross in 2022 and \$*** per gross in 2023; they were \$*** per gross (***) lower in interim 2024 at \$*** per gross, compared with \$*** per gross in interim 2023. CR/PR at Tables VI-1 and VI-2.

In the merchant market, other factory costs increased by \$*** per gross (***) from 2021-2023, from \$*** per gross in 2021 to \$*** per gross in 2022 and \$*** per gross in 2023; they were \$*** per gross (***) higher in interim 2024 at \$*** per gross, compared with \$*** per gross in interim 2023. CR/PR at Tables VI-3 and VI-4.

Raw material costs in the merchant market increased by \$*** per gross (***) from 2021-2023, from \$*** per gross in 2021 to \$*** per gross in 2022 and \$*** per gross in 2023; they were \$*** per gross (***) lower in interim 2024 at \$*** per gross, compared with \$*** per gross in interim 2023. CR/PR at Tables VI-3 and VI-4.

²⁴⁸ The Commission notes that of the three U.S. producers, *** registered an increase in the COGS to net sales ratio between 2021 and 2023. CR/PR at Table VI-5. However, during this period *** lost market share not to subject imports (which saw a decline in market share) but primarily to ***, which increased its market share by *** percentage points at the expense of ***. Nonsubject imports also gained market share during this period (plus 1.3 percentage points), but far less than did ***. CR/PR at Table IV-17.

²⁴⁹ CR/PR at V-7.

Petitioner and O-I Glass argue that there was an inventory overhang in the market that suppressed the domestic industry's prices.²⁵⁰ Although subject foreign producers' combined end-of-period inventories increased from 2021 to 2022 and were higher in interim 2024 than interim 2023, U.S. importers' inventories of subject imports declined by 9 percent from 2021 to 2023 and were 20 percent lower in interim 2024 than interim 2023.²⁵¹ Although there was destocking following the pandemic, a majority of purchasers (22 of 37) indicated that they were holding their preferred level of inventories.²⁵² Furthermore, notwithstanding testimony at the hearing that its inventories "continue to grow," Ardagh reported that its ***.²⁵³ This was consistent with the decline in apparent U.S. consumption (12.5 and 13 percent between 2021-2023 and over the interim periods, respectively). On the other hand, Gallo and O-I Glass *** their *** both from 2021 to 2023 and over the interim periods,²⁵⁴ indicating that their inventories did not undermine their ability to increase prices beyond their increased costs.

We also observe that the trends in the volume and market share of the subject imports do not correlate with the increase in the domestic industry's COGS to net sales ratio. The volume of subject imports and their market share declined irregularly from 2021 to 2023, while the domestic industry's COGS to net sales ratio increased.²⁵⁵ In interim 2024, when subject imports were higher both in volume and market share than in interim 2023, the industry's COGS to net sales ratio was lower than in interim 2023.²⁵⁶

Given the domestic industry's increasing sales prices and ability to pass through almost all of its increased costs to purchasers through higher prices during a period of declining apparent U.S. consumption, as well as the absence of significant subject import underselling, we find that subject imports did not suppress prices for the domestic like product to a significant degree.

²⁵⁰ Petitioner's Posthearing Br. at 9-10. O-I Glass's Posthearing Br. at 3-4.

²⁵¹ CR/PR at Tables at VII-11 and VII-17.

²⁵² CR/PR at II-16.

²⁵³ Ardagh's U.S. Producer Questionnaire at II-8; Hearing Tr. at 32 (Anderson).

²⁵⁴ CR/PR at Table VI-5.

²⁵⁵ See CR/PR at Table C-1. The domestic industry's COGS to net sales ratio increased between 2021 and 2022 - when subject import volume declined by 13.3 percent, subject imports lost 2.9 percentage points of market share, and the average unit value of U.S. importers' U.S. shipments of subject imports increased by 19.4 percent (compared to 11.1 percent for U.S. producers' U.S. shipments) - but declined between 2022 and 2023, even as subject imports gained 1.1 percentage points of market share. *Id.*

²⁵⁶ See CR/PR at Table C-1.

In summary, we find that subject imports did not have significant adverse price effects on the domestic industry during the POI.

E. Impact of the Subject Imports²⁵⁷

Section 771(7)(C)(iii) of the Tariff Act provides that examining the impact of subject imports, the Commission “shall evaluate all relevant economic factors which have a bearing on the state of the industry.”²⁵⁸ These factors include output, sales, inventories, capacity utilization, market share, employment, wages, productivity, gross profits, net profits, operating profits, cash flow, return on investment, return on capital, ability to raise capital, ability to service debts, research and development, and factors affecting domestic prices. No single

²⁵⁷ 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 preliminary antidumping duty determination with respect to glass wine bottles from Chile, Commerce preliminarily found dumping margins ranging from 6.64 percent to 173.91 percent, and an all others rate of 29.97 percent. *Certain Glass Wine Bottles From Chile: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures*, 89 Fed. Reg. 65,325 (Aug. 9, 2024). In its preliminary antidumping duty determination with respect to glass wine bottles from China, Commerce preliminarily found dumping margins ranging from 21.77 percent to 27.97 percent, and a China-wide entity rate of 218.15 percent. *Certain Glass Wine Bottles From the People’s Republic of China: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Affirmative Determination of Critical Circumstances, in Part, and Postponement of Final Determination and Extension of Provisional Measures*, 89 Fed. Reg. 65,331 (Aug. 9, 2024). In its preliminary antidumping duty determination with respect to glass wine bottles from Mexico, Commerce preliminarily found dumping margins ranging from 14.96 percent to 96.95 percent, and an all others rate of 15.96 percent. *Certain Glass Wine Bottles From Mexico: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Negative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures*, 89 Fed. Reg. 65,317, 65,319 (Aug. 9, 2024). We take into account in our analysis the fact that Commerce has made preliminary findings that all subject producers in Chile, China, and Mexico are selling subject imports in the United States at less than fair value. In addition to this consideration, our impact analysis has considered other factors affecting domestic prices. Our analysis of the absence of significant underselling or adverse price effects of subject imports, described in both the price effects discussion and below, is particularly probative to an assessment of the impact of the subject imports.

²⁵⁸ 19 U.S.C. § 1677(7)(C)(iii); see also SAA at 851 and 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.”).

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.”²⁵⁹

The domestic industry’s condition worsened over the POI. The domestic industry’s capacity, production, capacity utilization, sales, and shipments fluctuated but declined overall during the period. The observed declines, however, were generally commensurate with the 12.5 percent decline in apparent U.S. consumption from 2021 to 2023.²⁶⁰ The industry reported a number of closures and curtailments. The declines in the industry’s capacity over the three full years reflected declining demand, as the industry’s practical capacity declined by less than the decline in apparent U.S. consumption.²⁶¹ The domestic industry’s employment declined as closures and curtailments led to layoffs during the latter portion of the POI, but the layoffs were consistent with the industry’s reduction in capacity in the face of decreased demand; notably, the largest winemaker in the Northwest, and one of ***’s *** customers, Chateau Ste. Michelle, cut its demand in half in 2023.²⁶²

The industry’s practical capacity declined irregularly by 9.1 percent between 2021 and 2023, increasing from 13.5 million gross in 2021 to 13.9 million gross in 2022 before declining to 12.3 million gross in 2023; it was lower in interim 2024, at 3.0 million gross, compared with interim 2023, at 3.3 million gross.²⁶³ The domestic industry’s production quantity decreased irregularly by 14.2 percent between 2021 and 2023, increasing from 11.9 million gross in 2021 to 12.2 million gross in 2022 and then decreasing to 10.2 million gross in 2023; production was lower in interim 2024, at 2.6 million gross, compared with interim 2023, at 2.8 million gross.²⁶⁴ Capacity utilization decreased by 5.0 percentage points between 2021 and 2023, decreasing from 88.6 percent in 2021 to 87.7 percent in 2022 and 83.6 percent in 2023; capacity utilization was higher in interim 2024, at 87.2 percent, compared with interim 2023, at 83.6 percent.²⁶⁵

The domestic industry’s number of production and related workers (“PRWs”) decreased irregularly by 3.1 percent from 2021 to 2023, increasing from 2,131 in 2021 to 2,137 in 2022, and then decreasing to 2,066 in 2023. The number was 8.8 percent lower in interim 2024, at 1,842 PRWs, compared with interim 2023, at 2,020 PRWs.²⁶⁶ Hours worked decreased by 5.2

²⁵⁹ 19 U.S.C. § 1677(7)(C)(iii).

²⁶⁰ See CR/PR at Table C-1.

²⁶¹ See CR/PR at Table C-1.

²⁶² Berlin’s Posthearing Br. at Exhibit 4; ***’s U.S. Producer Questionnaire at IV-26.²⁶³ CR/PR at Tables III-5 and C-1.

²⁶⁴ CR/PR at Tables III-5 and C-1.

²⁶⁵ CR/PR at Tables III-5 and C-1.

²⁶⁶ CR/PR at Tables III-17 and C-1.

percent between 2021 and 2023, decreasing from 4.2 million hours in 2021 and 2022 to 3.9 million hours in 2023; hours worked were 14.7 percent lower in interim 2024, at 891,000 hours, compared with interim 2023, at 1.0 million hours.²⁶⁷ Wages paid increased by 5.2 percent between 2021 and 2023, rising from \$149.3 million in 2021 to \$156.2 million in 2022, and \$157.1 million in 2023; wages paid were 11.8 percent lower in interim 2024, at \$36.2 million, compared with interim 2023, at \$41.1 million.²⁶⁸ Productivity (in gross per hour) decreased between 2021 and 2023, decreasing from 2.9 gross per hour in 2021 and 2022 to 2.6 gross per hour in 2023; productivity was higher in interim 2024, at 2.9 gross per hour, as compared with interim 2023, at 2.7 gross per hour.²⁶⁹

The domestic industry's shipments declined less than the decline in apparent U.S. consumption over the three full years of the POI, and the industry's market share increased. At the same time, subject imports' share of the U.S. market decreased as their shipments declined by more than apparent U.S. consumption. The domestic industry's U.S. shipments decreased irregularly by 11.9 percent from 2021 to 2023, increasing from 11.0 million gross in 2021 to 11.2 million gross in 2022 and then decreasing to 9.7 million gross in 2023; U.S. shipments were lower in interim 2024, at 2.2 million gross, compared with interim 2023, at 2.6 million gross.²⁷⁰ The industry's share of apparent U.S. consumption increased by 0.5 percentage points between 2021 and 2023, increasing from 70.7 percent in 2021 to 73.0 percent in 2022 and then decreasing to 71.2 percent in 2023.²⁷¹ The industry's market share was lower in interim 2024, at 70.7 percent, compared with interim 2023, at 72.2 percent.²⁷²

The financial indicators of the domestic industry declined from 2021 to 2023, primarily reflecting reduced shipments. Although the industry recovered almost all of its increased costs by increasing its prices from 2021 to 2023, declining demand limited its ability to fully pass through its increased costs to its customers until interim 2024. Reflecting its increased sales

²⁶⁷ CR/PR at Tables III-17 and C-1.

²⁶⁸ CR/PR at Tables III-17 and C-1.

²⁶⁹ CR/PR at Tables III-17 and C-1.

²⁷⁰ CR/PR at Tables III-9 and C-1. The industry's merchant market sales quantity decreased by *** percent from 2021 to 2023, increasing from *** gross in 2021 to *** gross in 2022, before decreasing to *** gross in 2023; commercial sales were lower in interim 2024, at *** gross, compared with interim 2023, at *** gross. CR/PR at Tables VI-3 and C-2.

²⁷¹ CR/PR at Tables IV-9 and C-1. In the merchant market, the industry's market share increased from *** percent in 2021 to *** percent in 2022 and the declined to *** percent in 2023. CR/PR at Tables IV-9 and C-2.

²⁷² CR/PR at Tables IV-9 and C-1. In the merchant market, the industry's market share was *** percent in interim 2024, compared with *** percent in interim 2023. CR/PR at Tables IV-9 and C-2.

prices, the industry's net sales revenues increased irregularly by *** percent between 2021 and 2023, rising from \$*** in 2021 to \$*** in 2022 and then declining to \$*** in 2023; the industry's net sales revenues were lower in interim 2024, at \$***, compared with interim 2023, at \$***, reflecting the industry's reduced sales.²⁷³

The domestic industry's gross profit decreased by *** percent between 2021 and 2023, declining from \$*** in 2021 to \$*** in 2022 and \$*** in 2023; the industry's gross profit was lower in interim 2024, at \$***, compared with interim 2023, at \$***.²⁷⁴ The industry reported operating losses from 2021 to 2023, increasing from an operating loss of \$*** in 2021 to \$*** in 2022 and then declining to an operating loss of \$*** in 2023; the domestic industry reported operating income of \$*** in interim 2024, compared with \$*** in interim 2023.²⁷⁵ The industry also reported net losses between 2021 and 2023, increasing from a net loss of \$*** in 2021 to \$*** in 2022 and \$*** in 2023; the domestic industry reported net income of \$*** in interim 2024, compared with \$*** in interim 2023.²⁷⁶

The domestic industry's ratio of operating income to net sales worsened from *** percent in 2021 to *** percent in 2022 and then improved to *** percent in 2023; it was *** percent in interim 2024, compared with *** percent in interim 2023.²⁷⁷ The domestic industry's net income margin worsened from *** percent in 2021 to *** percent in 2022 and then improved to *** percent in 2023; it was *** percent in interim 2024, compared with ***

²⁷³ CR/PR at Tables VI-1 and C-1. In the merchant market, the industry's commercial sales revenues increased by *** percent between 2021 and 2023, rising from \$*** in 2021 to \$*** in 2022, before declining to \$*** in 2023; the industry's sales revenues were lower in interim 2024, at \$***, compared with interim 2023, at \$***. CR/PR at Tables VI-3 and C-2.

²⁷⁴ CR/PR at Tables VI-1 and C-1. In the merchant market, the industry's gross profit decreased by *** percent between 2021 and 2023, declining from \$*** in 2021 to \$*** in 2022 and \$*** in 2023; the industry's gross profit was lower in interim 2024, at \$***, compared with interim 2023, at \$***. CR/PR at Tables VI-3 and C-2.

²⁷⁵ CR/PR at Tables VI-1 and C-1. In the merchant market, the domestic industry reported operating losses between 2021 and 2023, increasing from \$*** in 2021 to \$*** in 2022 and \$*** in 2023; the domestic industry reported operating income of \$*** in interim 2024, compared with \$*** in interim 2023. CR/PR at Tables VI-3 and C-2.

²⁷⁶ CR/PR at Tables VI-1 and C-1. In the merchant market, the industry reported net losses of \$*** in 2021, \$*** in 2022, and \$*** in 2023. The domestic industry's *** in interim 2024 was larger, at \$***, compared with interim 2023, at \$***. CR/PR at Tables VI-3 and C-2.

²⁷⁷ CR/PR at Tables VI-1 and C-1. In the merchant market, the industry's ratio of operating income to net sales decreased from *** percent in 2021 to *** percent in 2022, and *** percent in 2023; it was *** percent in interim 2024, compared with *** percent in interim 2023. CR/PR at Tables VI-3 and C-2.

percent in interim 2023.²⁷⁸ The industry's net assets increased by *** percent between 2021 and 2023, rising from \$*** in 2021 to \$*** in 2022 and \$*** in 2023.²⁷⁹ The domestic industry's return on assets worsened from *** percent in 2021 to *** percent in 2022 and then improved to *** percent in 2023.²⁸⁰

The domestic industry made substantial capital investments during the POI on furnace rebuilds, machine and component purchases, and general maintenance.²⁸¹ The industry's capital expenditures increased irregularly by *** percent between 2021 and 2023, increasing from \$*** in 2021 to \$*** in 2022, and then falling to \$*** in 2023; capital expenditures were lower in interim 2024, at \$***, compared with interim 2023, at \$***.²⁸² The domestic industry's R&D expenses decreased by *** percent between 2021 and 2023, decreasing from \$*** in 2021 to \$*** in 2022 and to \$*** in 2023; the industry's R&D expenses were \$*** in both interim 2023 and interim 2024.²⁸³

We do not find a nexus between cumulated subject imports and the declines in the domestic industry's performance during the POI. Subject imports declined absolutely and relative to apparent U.S. consumption at the same time the industry's output and financial indicators deteriorated from 2021 to 2023.²⁸⁴ The industry's prices and net sales values increased over the POI, and although the industry was not able to fully recover its increased costs, the record does not indicate that subject imports account for the slight increase in the industry's COGS to net sales ratio. Subject imports predominantly oversold the domestic like product by any measure, and apparent U.S. consumption declined 12.5 percent from 2021 to 2023. There were few confirmed lost sales. Furthermore, increases in the domestic industry's COGS from 2021 to 2023 were driven primarily by other factory costs, and specifically by nonrecurring items as domestic producers reduced their capacity in response to declining demand, as referenced above.

²⁷⁸ CR/PR at Tables VI-1 and C-1. In the merchant market, the industry's net income margin increased from *** percent in 2021 to *** percent in 2022, and then decreased to *** percent in 2023; it was *** percent in interim 2024, compared with *** percent in interim 2023. CR/PR at Tables VI-3 and C-2.

²⁷⁹ CR/PR at Tables VI-13 and C-1.

²⁸⁰ CR/PR at Table VI-14.

²⁸¹ CR/PR at Tables VI- and VI-10.

²⁸² CR/PR at Tables VI- and C-1.

²⁸³ CR/PR at Tables VI- and C-1.

²⁸⁴ Subject imports' share of overall apparent U.S. consumption for U.S. shipments to large wineries, small and medium wineries, and distributors all declined from 2021 to 2023. See CR/PR at Tables F-1, F-2, and F-3 (share of overall apparent U.S. consumption).

Nor do we find a causal nexus between cumulated subject imports and any declines in the domestic industry's performance in interim 2024 compared to interim 2023. Although cumulated subject imports' market share was higher in interim 2024 than in interim 2023, the record does not show that the increase was driven by subject import underselling. Most of the increase in subject import market share in interim 2024 compared to interim 2023 was gained by subject imports from Mexico, yet the purchase cost data do not indicate that subject imports from Mexico were purchased at lower cost than the domestic like product during the interim periods.²⁸⁵ Even in the pricing data, subject imports from Mexico predominantly oversold the domestic like product in interim 2024, as did subject imports overall.²⁸⁶ Moreover, the increase in cumulated subject import market share in interim 2024 compared to interim 2023 did not prevent the domestic industry from increasing its unit net sales values by more than the increase in its unit COGS, causing a reduction in the industry's COGS to net sales ratio in interim 2024 compared to interim 2023.²⁸⁷ This enabled the industry to improve its financial performance by almost every measure in interim 2024 relative to interim 2023.

The record shows that the decline in domestic producers' output indicators and consequent decline in financial indicators are consistent with the decline in apparent U.S. consumption during the POI. Given this, as well as the lack of any market share shift from the domestic industry to cumulated subject imports during the 2021-23 period, the absence of significant underselling or adverse price effects, and the lack of any clear correlation between cumulated subject imports and the domestic industry's performance during the POI, we find that subject imports did not have a significant adverse impact on the domestic industry.

Petitioner and O-I Glass argue that the domestic industry entered the POI in an injured state due to subject imports, and that the industry's condition continues to be poor due to subject import competition during the POI.²⁸⁸ Contrary to this argument, however, the record

²⁸⁵ See CR/PR at Tables IV-17-18, V-18. Subject imports from China also gained 0.6 percentage points of market share in the interim period comparison, yet the price comparisons show no underselling by subject imports from China. See CR/PR at Table V-15.

²⁸⁶ CR/PR at Table V-16. In the quarterly price comparisons in interim 2024, subject imports from Mexico were higher priced than the domestic like product for products 1, 3, and 5, at overselling margins between *** and *** percent, and in quantities totaling *** gross; subject imports from Mexico were lower priced for product 2, at a margin of *** percent, and in quantities totaling *** gross. CR/PR at Tables V-5-7 and Table V-9.

²⁸⁷ See CR/PR at Tables IV-2 and C-1.

²⁸⁸ Petitioner's Prehearing Br. at 62; Petitioner's Posthearing Br., Answers to Questions at 18-21; O-I Glass's Posthearing Br., Answers to Questions at 9-12 (citing closures and articles concerning low-priced glass from China).

from the preliminary phase investigations shows that subject imports pervasively oversold the domestic like product and captured no market share from the domestic industry during the 2020-21 period, prior to the POI of these investigations.²⁸⁹ Nor does the record of the final phase indicate that cumulated subject imports had a significant adverse impact on the domestic industry during the POI, as discussed above.

Petitioner also argues that the shutdowns and the curtailments reported by the domestic industry are evidence of material injury by reason of subject imports.²⁹⁰ As discussed above, however, the timing and magnitude of the reductions in the domestic industry's capacity were consistent with the declines in apparent U.S. consumption over the POI.²⁹¹ The industry's financial condition improved in interim 2024, notwithstanding its shutdowns and reduced capacity. Furthermore, *** of the *** domestic producers that reduced their capacity between 2021 and 2023 reported improved financial performance over the period.²⁹² Petitioner also argues that increasing inventories of the domestic industry are indicative of material injury. However, the *** their financial results from 2021 to 2023 notwithstanding ***.²⁹³

For the foregoing reasons, we find that cumulated subject imports did not have a significant adverse impact on the domestic industry. Accordingly, we find that the domestic

²⁸⁹ From 2020 to 2021, the domestic industry's shipments declined *** percent while shipments of subject imports declined by 1.7 percent. INV-WW-011 (Feb. 5, 2024) at C-1. Quarters in which there was underselling accounted for 3.3 percent of total reported subject import sales volume (17,195 gross) covered by the Commission's pricing data during the POI, and quarters in which there was overselling accounted for 96.7 percent of reported total reported subject import sales volume (497,632 gross). *Id.* at V-12. Additionally, the Commission in its preliminary determinations did not find that subject imports had either depressed domestic prices or prevented price increases to a significant degree. *Preliminary Determinations* at 32-35.

²⁹⁰ Petitioner's Posthearing Br. at 12-13; Petitioner's Prehearing Br. at 22-23 and Exhibit 7 (internal documents). See also O-I Glass's Posthearing Br. at 15.

²⁹¹ See CR/PR at Table C-1. While apparent U.S. consumption declined by 12.5 percent 2021 to 2023, the domestic industry's production capacity declined by 9.1 percent. Similarly, the industry's production capacity was 11.5 percent lower in interim 2024 than in interim 2023 while apparent U.S. consumption was 13.0 percent lower. *Id.*

²⁹² *** reported *** in practical glass wine bottles capacity from 2021 to 2023; *** reported that practical glass wine bottles capacity *** from 2021 to 2023, and *** reported practical glass wine bottles capacity that *** from 2021 to 2023. CR/PR at III-8 n.6. *** in its operating income from during the period, however. See CR/PR at VI-5.

²⁹³ Gallo and O-I Glass *** their *** from 2021 to 2023 and were lower in interim 2024 than in interim 2023. See CR/PR at Table VI-5 and U.S. Producer Questionnaires at II-8.

industry is not materially injured by subject imports from China found by Commerce to be subsidized by the government of China.

VII. No Threat of Material Injury by Reason of Subject Imports

A. Legal Standard

Section 771(7)(F) of the Tariff Act directs the Commission to determine whether the U.S. industry is threatened with material injury by reason of the subject imports by analyzing whether “further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted.”²⁹⁴ The Commission may not make such a determination “on the basis of mere conjecture or supposition,” and considers the threat factors “as a whole” in making its determination whether dumped or subsidized imports are imminent and whether material injury by reason of subject imports would occur unless an order is issued.²⁹⁵ In making our determination, we consider all statutory threat factors that are relevant to these investigations.²⁹⁶

²⁹⁴ 19 U.S.C. § 1677(7)(F)(ii).

²⁹⁵ 19 U.S.C. § 1677(7)(F)(ii).

²⁹⁶ These factors are as follows:

(I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement) and whether imports of the subject merchandise are likely to increase,

(II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,

(III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,

(IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices and are likely to increase demand for further imports,

(V) inventories of the subject merchandise,

(VI) the potential for product-shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products,

...

(Continued...)

B. Cumulation for Threat

Under section 771(7)(H) of the Tariff Act, the Commission may “to the extent practicable” cumulatively assess the volume and price effects of subject imports from all countries as to which petitions were filed on the same day if the requirements for cumulation in the material injury context are satisfied.²⁹⁷

Petitioner’s Arguments. Petitioner argues that the Commission should cumulate subject imports from all three sources in its analysis of threat of material injury because the reasonable overlap of competition during the POI between and among imports from all the subject countries and the domestic like product is likely to continue. Petitioner further claims that in the past, a surge from each subject country has occurred as distributors switched from one subject source to another based upon market conditions.²⁹⁸

Respondents’ Arguments. Berlin argues that subject imports from Chile should not be cumulated for analyzing threat of material injury as they declined precipitously during the POI and the wine bottle industry in Chile focuses on selling to wineries in Chile where there is a large winemaking industry.²⁹⁹

TricorBraun argues that subject imports from China should not be cumulated because they oversold the domestic like product in most instances and a far higher percentage of importers’ shipments of subject imports from China are case packed, compared to imports from Chile and Mexico. It emphasizes that the subject industries have different export patterns, with

(VIII) the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and

(IX) any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).

19 U.S.C. § 1677(7)(F)(i). To organize our analysis, we discuss the applicable statutory threat factors using the same volume/price/impact framework that applies to our material injury analysis. Statutory threat factors (I), (II), (III), (V), and (VI) are discussed in the analysis of subject import volume. Statutory threat factor (IV) is discussed in the analysis of subject import price effects. Statutory factors (VIII) and (IX) are discussed in the analysis of impact. Statutory factor (VII) concerning agricultural products is inapplicable to this investigation.

²⁹⁷ 19 U.S.C. § 1677(7)(H).

²⁹⁸ Petitioner’s Prehearing Br. at 69.

²⁹⁹ Berlin’s Prehearing Br. at 72-73. Encore incorporates by reference the argument of Berlin and TricorBraun concerning the reasons that subject imports from Chile and China should not be cumulated for purpose of analyzing threat of material injury because of their distinct trends in volume and pricing. Encore’s Prehearing Br. at 32.

*** exporting by far the highest percentage (over *** percent) of its total shipments of glass wine bottles to the United States.³⁰⁰

Saverglass, a producer of glass wine bottles in Mexico, argues that subject imports from Mexico should not be cumulated for purposes of threat of material injury because they compete differently from subject imports from Chile and China. It argues that given Owens-Illinois's interest in selling in the U.S. market, exports from Owens America to the United States are less likely to be injurious than subject imports from Chile and China.³⁰¹

Analysis. We have found that there is a reasonable overlap of competition between subject imports of glass wine bottles from Chile, China, and Mexico, and between subject imports from each subject source and the domestic like product. Moreover, there is no information on the record to suggest that the reasonable overlap of competition between and among subject imports and the domestic like product that now exists will not continue into the imminent future. We recognize the potential for some differences in conditions of competition from the three countries but find that they are not significant enough to warrant not cumulating subject imports from any one of the countries. We also observe that there is a moderate-to-high degree of substitutability between subject imports and the domestic like product and that distributors generally import and sell imports from more than one subject country.³⁰²

For these reasons, we exercise our discretion to cumulate subject imports from Chile, China, and Mexico for our analysis of whether there is a threat of material injury to the domestic industry.

C. Likely Volume of Subject Imports

Cumulated subject imports, by volume, decreased by 20.6 percent between 2021 and 2023, but were 3.6 percent higher in interim 2024 compared with interim 2023.³⁰³ Cumulated subject imports as a share of apparent U.S. consumption declined from 24.0 percent in 2021 to 21.1 percent in 2022, and 22.2 percent in 2023, for an overall decrease of 1.8 percentage

³⁰⁰ TricorBraun's Prehearing Br. at 44-45.

³⁰¹ Saverglass's Prehearing Br. at 20-21.

³⁰² See CR/PR at Table IV-1.

³⁰³ CR/PR at Table IV-2. A plurality of U.S. producers, importers, and purchasers reported that section 301 tariffs had affected the supply of subject imports from China. CR/PR at II-2.

points.³⁰⁴ Their share was 1.6 percentage points higher in interim 2024, at 23.5 percent, than in interim 2023, at 21.9 percent.³⁰⁵ The record indicates that the domestic industry and nonsubject imports gained market share from subject imports from 2021 to 2023, and that subject imports ended the POI with a lower market share than at the beginning of the period.³⁰⁶ Cumulated subject import trends during the POI do not indicate that there is a likelihood of a significant increase in cumulated subject imports in the imminent future absent relief.³⁰⁷

Other record evidence also indicates that no significant increase in subject imports is likely to occur in the imminent future. U.S. importers reported arranging for declining volumes of subject imports in the second through fourth quarters of 2024.³⁰⁸ U.S. importers' inventories

³⁰⁴ CR/PR at Tables IV-17 and C-1. In the merchant market, cumulated subject imports as a share of apparent U.S. consumption declined from *** percent in 2021 to *** percent in 2022, and *** percent in 2023, for an overall decrease of *** percentage points. CR/PR at Tables IV-18 and C-2.

³⁰⁵ CR/PR at Tables IV-17 and C-1. In the merchant market, cumulated subject import market share was *** percentage points higher in interim 2024 at *** percent, compared with *** percent in interim 2023. CR/PR at Tables IV-18 and C-2.

³⁰⁶ See CR/PR at Tables IV-17 and C-1. Nonsubject imports gained 1.3 percentage points of market share from subject imports from 2021 to 2023. *Id.*

³⁰⁷ The increase in subject imports in interim 2024 compared with interim 2023 reversed the downward trend in the volume of subject imports from 2021 to 2023. We do not find that the 3.6 percent increase in subject imports during the first quarter of 2024 indicates that substantially increased subject imports are likely given the long-term downward trend in subject imports over the previous three calendar years.

³⁰⁸ CR/PR at Table VII-18. U.S. importers' arranged imports of subject merchandise were *** gross in April-June 2024, *** gross in July-September 2024, *** gross in October-December 2024, and *** gross in January-March 2025. *Id.* Further, the total of arranged imports for the last three quarters of 2024, 1,701,646 gross, combined with the 855,125 gross volume of subject imports in the first quarter of 2024, suggests that subject imports will decline to 2.6 million gross in 2024 from 2.9 million gross in 2023. See CR/PR at Table IV-2 and VII-18.

Petitioner argues that arranged imports from subject sources for the second quarter of 2024 total *** gross. Petitioner's Prehearing Br. at 27 and Exhibit 10. Petitioner's figure appears to include imports from all sources rather than only subject sources. Prehearing Report, INV-WW-093 (Aug. 1, 2024) at VII-18.

Petitioner further argues that the Commission should ignore importers reported arranged inventories for July 2024 through March 2025 and instead "annualize" data from the first six months by doubling the combined sum of U.S. shipments of subject imports in January-March 2024 with arranged import levels for April-June 2024. Ardagh Final Comments at 13-14. While arranged imports likely understate eventual import levels, we find Petitioner's proposed mixing of data sets and assumptions of future import levels to be unreasonable. Indeed, monthly import data over the POI indicate higher import levels in the spring and summer, with lower import levels in the fourth quarter. CR/PR at Table IV-16 & Fig. IV-8.

decreased during the POI.³⁰⁹ Foreign producers' inventories increased as their exports to the United States and other markets decreased during the POI, suggesting increasing inventories are not likely to serve as a source of increased exports.³¹⁰ Foreign producers also project that their inventories will decrease in 2024 and 2025.³¹¹

Additional information regarding subject producers in Chile, China, and Mexico lend further support to our finding that there is unlikely to be an imminent increase in subject import volumes.³¹² Subject producers' production capacity and production declined from 2021 to 2023.³¹³ Subject producers' cumulated capacity utilization also declined from 2021 to 2023, but remained high at 85.5 percent in 2023 and 85.4 percent in interim 2024.³¹⁴ Although subject producers increased their capacity in interim 2024 compared to interim 2023, and project increased capacity in 2024 and 2025, they also project that their capacity utilization will

³⁰⁹ See CR/PR at Table VII-18.

³¹⁰ See CR/PR at Tables VII-11 and VII-17.

³¹¹ U.S. importers' end-of-period inventories increased from 1.3 million gross in 2021 to 1.6 million gross in 2022, before declining to 1.2 million gross in 2023. They were 1.3 million gross in interim 2024, compared to 1.6 million gross in interim 2023. CR/PR at Table VII-17.

Foreign producers' end-of-period inventories increased from 1.9 million gross in 2021 to 2.2 million gross in 2022 and 2.5 million gross in 2023. They were 2.8 million gross in interim 2024, compared to 2.7 million gross in interim 2023. CR/PR at Table VII-17. Foreign producers, however, projected their end-of-period inventories would decline to 2.3 million gross in 2024 and 2.1 million gross in 2025. CR/PR at Table VII-11.

³¹² We find that questionnaire responses from foreign producers of subject merchandise provide the best information available for assessing the likelihood of increased subject imports from the subject countries. They include responses from nine firms in the three subject countries that account for the majority of subject imports from each subject country. Specifically, the three reporting producers/exporters in Chile estimated that they accounted for approximately *** percent of subject imports from Chile in 2023. The two reporting producers/exporters in China estimated that they accounted for approximately *** percent of subject imports from China in 2023. The four reporting producers/exporters in Mexico estimated that they accounted for approximately *** percent of subject imports from Mexico in 2023. CR/PR at Table VII-1. The publicly available information concerning the foreign industries concern a far broader category of glass products than the questionnaire data specific to the subject merchandise consisting of only glass wine bottles. CR/PR at VII-16.

In addition, as discussed above, subject imports from each subject country decreased overall from 2021 to 2023, prior to the filing of the petitions. These trends do not indicate that the industries in Chile, China, and Mexico producing glass wine bottles are likely to imminently increase shipments of subject merchandise to the U.S. market.

³¹³ CR/PR at Table VII-11. Foreign producers reported production capacity of 12.4 million gross in 2021 and 2022, and 12.2 million gross in 2023. Subject producers' production followed similar trends; it was 11.9 million gross in 2021, 11.7 million gross in 2022, and 10.5 million gross in 2023. *Id.*

³¹⁴ CR/PR at Table VII-9.

increase in 2024 and 2025.³¹⁵ Thus, the subject producers' excess capacity in 2023, which did not result in any material injury to the domestic industry by reason of subject imports, is projected to decline in 2024 and 2025.³¹⁶

We recognize that public information indicates that the subject industries account for a substantial portion of global exports of glass containers, a broad product category, by value over the POI.³¹⁷ The subject industries, however, are largely focused on producing out-of-scope glass products other than glass wine bottles.³¹⁸ Subject producers also do not have a history of switching production among different glass products, with the shares of their production consisting of in-scope and out-of-scope products remaining relatively stable during the POI.³¹⁹

Furthermore, the subject foreign industries' exports to the United States declined from 2021 to 2023,³²⁰ both in absolute terms and as a share of their total shipments.³²¹ Likewise, the

³¹⁵ CR/PR at Table VII-11. Subject producers' capacity was 3.5 million gross in interim 2024 and 2.9 million gross in interim 2023. *Id.* Capacity is projected to increase to 12.5 million gross in 2024 and 12.9 million gross in 2025. Production was 3.0 million gross in interim 2024 and 2.7 million gross in interim 2023; production was projected to be 11.1 million gross in 2024 and 11.5 million gross in 2025. *Id.* Subject producers' capacity utilization was 85.4 percent in interim 2024 compared to 92.6 percent in interim 2023. They projected increases in capacity utilization rates to 88.8 percent in 2024 and 89.1 percent in 2025. *Id.*

³¹⁶ The foreign producers' excess capacity was 1.8 million gross in 2023, equivalent to 13.1 percent of apparent U.S. consumption in 2023, and is projected to decline to 1.4 million gross in 2024 and 2025. CR/PR at Table IV-18 and VII-11. Given the other factors we have considered, including the downward trend in subject import volumes, exports, production, and capacity, we do not find that this excess capacity indicates that substantially increased subject imports are likely in the imminent future.

³¹⁷ See CR/PR at Table VII-19 (roughly one-quarter of exports).

³¹⁸ See CR/PR at Table VII-13. The predominant share of overall production was accounted for by glass bottles other than wine bottles. Out-of-scope bottles accounted for between 71.0 percent and 76.6 percent of production during the POI. CR/PR at VII-22.

³¹⁹ Out-of-scope products accounted for 76.8 percent of the foreign industries' total production in 2021, 77.7 percent in 2022 and 79.8 percent in 2023. CR/PR at Table VII-13. The share was 75.4 percent in interim 2024 and 80.1 percent in interim 2023. *Id.*

³²⁰ The foreign industries' exports to the United States decreased from 3.7 million gross in 2021 to 3.4 million gross in 2022 and 2.8 million gross in 2023. CR/PR at Table VII-10. Their exports were 1.0 million gross in interim 2024 and 762,049 gross in interim 2023. *Id.* They are projected to be 3.3 million in 2024 and 3.4 million in 2025. *Id.*

³²¹ CR/PR at Table VII-10. The share of exports to the United States to total shipments decreased from 30.6 percent in 2021 to 29.8 percent in 2022 and 27.9 percent in 2023; the share was 37.7 percent in interim 2024 and 34.7 percent in interim 2023. *Id.* They are projected to be 29.5 percent in 2024 and 29.2 percent in 2025. *Id.* The share of export shipments to all other markets to total shipments initially decreased from 13.2 percent of total shipments in 2021 to 11.8 percent in 2022 before increasing to 15.3 percent in 2023; they were 9.7 percent in interim 2024 and 10.7 percent in interim 2023. *Id.* They are projected to be 13.0 percent in 2024 and 12.5 percent in 2025. *Id.*

foreign industries' total exports and the share of the foreign industries' exports to their total shipments declined from 2021 to 2023, although they were higher in interim 2024 compared to interim 2023.³²² The foreign industries' home market shipments decreased in absolute terms but increased as a share of their total shipments from 2021 to 2023 as home market shipments accounted for the majority of subject foreign producers' total shipments throughout the POI.³²³ Although these trends reversed over the interim periods, as the share of subject producers' shipments exported to the United States increased while the share made to home market customers declined, subject producers project a continuation of the trends over the 2021-23 period in 2024 and 2025, with declining exports to the United States and increased home market shipments.³²⁴ And, as noted above, subject imports' market share was lower in interim 2024 at 23.5 percent than in 2021, the beginning of the POI, at 24 percent.³²⁵ There are also no known trade barriers in third country markets that might otherwise restrict the ability of subject producers to increase exports to such markets.³²⁶

In light of the foregoing, including the decline in subject import volumes and market share over most of the POI and the subject industry's declining capacity and production and

³²² The foreign industries' exports decreased from 5.2 million gross in 2021 to 4.7 million gross in 2022 and 4.3 million gross in 2023. CR/PR at Table VII-10. Their exports were 1.3 million gross in interim 2024 and 996,772 gross in interim 2023. They are projected to be 4.7 million in 2024 and 4.8 million in 2025. *Id.*

The share of foreign industries' exports fell from 43.8 percent in 2021 of total shipments to 41.6 percent in 2022 and then increased to 43.1 in 2023. The share exported was 47.4 percent in interim 2024 and 45.4 percent in interim 2023. *Id.*

³²³ CR/PR at Table VII-11. The home market shipments of the subject producers accounted for 56.2 percent of total shipments in 2021, 58.4 percent in 2022, and 56.9 percent in 2023. Their home market shipments were 52.6 percent of total shipments in interim 2024 and 54.6 percent in interim 2023. *Id.*

³²⁴ See CR/PR at Table VII-11.

³²⁵ CR/PR at Table C-1. The same is true when looking at the merchant market: subject imports' market share was lower in interim 2024 at 27.8 percent than in 2021, the beginning of the POI, at 28.4 percent.

³²⁶ CR/PR at VII-29. We further note that Commerce found that producer/exporter Shandong Changyu and all other producers and/or exporters benefited from prohibited export-contingent programs. These include the Export Buyer's Credit Program and Subsidy for International Trade Remedy. See *Commerce's Issues and Decision Memorandum for the Final Affirmative Determination in the Countervailing Duty Investigation of Certain Glass Wine Bottles from the People's Republic of China from Scot Fullerton to Ryan Majerus*, C-570-163, (Aug. 24, 2024) at 6-8. Nonetheless, because these subsidies did not result in increases in subject import volumes from China during the POI, we find that the record does not otherwise support that they will likely result in increases in the imminent future.

reduced reliance on export shipments, we do not find a likelihood of substantially increased cumulated subject imports in the imminent future.

D. Likely Price Effects of Subject Imports

As explained in section VI.D above, pricing data indicate that there was predominant overselling by cumulated subject imports over the POI and the purchase cost data indicate that the landed duty-paid costs of subject imports generally exceeded domestic sales prices, even before factoring in the additional costs associated with direct imports.³²⁷ We further found that domestic sales prices generally increased over the POI and that subject imports did not depress domestic prices to a significant degree.³²⁸ We found that the domestic industry had been able to pass through the vast majority of its increased costs to purchasers notwithstanding weak market conditions. We also observed that although the subject imports' market share was higher in interim 2024 than in interim 2023, the industry's COGS to net sales ratio was lower. We therefore found that subject imports did not suppress prices for the domestic like product to a significant degree. We concluded that cumulated subject imports did not have significant adverse price effects on the domestic industry during the POI.

Given our finding that cumulated subject import volumes are not likely to increase significantly in the imminent future, the absence of significant underselling or adverse price effects during the POI, and the absence of any evidence that subject import pricing patterns are likely to change significantly in the imminent future, we further find that the lack of significant underselling and price effects observed during the POI will likely continue in the imminent future. Although the purchase cost of subject imports from Chile and China declined towards the end of the POI, falling below domestic sales prices to an increasing extent, their combined market share was lower in interim 2024 than interim 2023.³²⁹ Furthermore, subject imports from Mexico, which continued to be predominantly higher priced than domestically manufactured glass wine bottles and glass wine bottles from the other two subject countries, accounted for most of the increase in cumulated subject import market share in interim 2024

³²⁷ CR/PR at Tables V-16-V-18.

³²⁸ CR/PR at Figs. V-3-V-10.

³²⁹ CR/PR at Tables IV-17 and V-19.

compared to interim 2023.³³⁰ Pricing data indicate that cumulated subject imports continued to pervasively oversell the domestic like product in 2023 and interim 2024.³³¹

Accordingly, we find that cumulated subject imports are unlikely to enter at prices that would be likely to have a significant depressing or suppressing effect on domestic prices or are likely to increase demand for such imports.

E. Likely Impact of Subject Imports

As discussed in section VI.E above, the domestic industry's declines in production and shipments, which resulted in declining financial performance, stemmed from declines in apparent U.S. consumption, rather than subject import competition. Subject imports declined absolutely and as a share of apparent U.S. consumption in the total market, for U.S. shipments to large wineries, small and medium wineries, and distributors, from 2021 to 2023.³³² Subject imports predominantly oversold the domestic like product throughout the POI and had no significant adverse price effects on the domestic industry. The domestic industry's financial performance declined from 2021 to 2023 while cumulated subject imports declined, consistent with declining demand and the costs associated with shutdowns related to declining demand. Over the interim periods, and despite an increase in cumulated subject import market share, the domestic industry improved its capacity utilization rate, registered higher average unit values, improved its operating margin, and reduced its COGS to net sales ratio.³³³ Thus, the record indicates that declines in the domestic industry's performance during the POI resulted from declining demand and not cumulated subject imports.

Petitioner argues that the domestic industry is vulnerable to the threat of material injury because of lost market share to subject imports, declining financial performance over the POI, shutdowns, and high fixed costs.³³⁴ As discussed above, however, the record does not

³³⁰ CR/PR at Tables V-18 and V-19. Consistent with purchase cost data, shipment data indicates that subject imports from Mexico were higher priced than domestic industry shipments towards the end of the POI. At the end of the POI, the unit value of importers' shipments of subject imports from Mexico in case packs to small and medium wineries were higher than the domestic industry's shipments in case packs to small and medium wineries. The unit values of the industry's shipments were \$*** in 2023, and \$*** per gross in interim 2024, compared to \$*** per gross in interim 2023. CR/PR at D-6, D-7. The unit values of shipments of subject imports from Mexico were \$*** in 2023, and \$*** per gross in interim 2024, compared to \$*** per gross in interim 2023. CR/PR at D-24-D-25.

³³¹ CR/PR at Table V-16.

³³² See CR/PR at Tables F-1-F-3.

³³³ CR/PR at Table C-1.

³³⁴ Petitioner's Prehearing Br. at 77-78

show that the domestic industry lost market share to subject imports. Instead, the industry's reduced sales and shipments, as well as its capacity reductions, resulted from declining demand. Demand conditions, however, are likely to improve, according to Petitioner and O-I Glass, as the effects of the decline after the COVID-19 pandemic induced spike on demand levels out.³³⁵ The domestic industry returned to profitability in interim 2024 and is likely to improve its condition further given that it has fewer facilities operating at higher capacity utilization rates, with correspondingly lower unit fixed costs.

There is no evidence of any change in conditions of competition that would cause cumulated subject imports to become injurious in the imminent future. As noted, much of the domestic industry's declining production and shipments resulted not from cumulated subject imports, but from falling demand for glass wine bottles, and demand conditions are likely to improve. Further, although the domestic industry closed plants and shut down furnaces to reduce capacity in the latter portion of the POI, the industry's financial position improved in interim 2024 relative to interim 2023 and, with the industry's reduced unit fixed costs and stable or increasing demand, are likely to continue to improve.³³⁶ Given our finding that the domestic industry is not vulnerable, as well as our findings that cumulated subject imports are unlikely to increase significantly in volume or have significant adverse price effects, we find that cumulated subject imports are not likely to have a significant adverse impact on the domestic industry in the imminent future. Accordingly, we find that subject imports from China found by Commerce to be subsidized by the government of China do not threaten material injury to an industry in the United States in the imminent future.

VIII. Conclusion

For the reasons stated above, we determine that an industry in the United States is not materially injured or threatened with material injury by reason of subject imports of glass wine bottles from China that are subsidized by the government of China.

³³⁵ Petitioner indicated that demand "is expected to flatten out in the immediate future." Hearing Tr. at 49 (Kaplan). O-I Glass indicated that demand is likely to resume its historical trend of increasing one or two percent per year. Hearing Tr. at 141 (Rosenthal).

³³⁶ See CR/PR at Table C-1.

Part I: Introduction

Background

These investigations result from petitions filed with the U.S. Department of Commerce (“Commerce”) and the U.S. International Trade Commission (“USITC” or “Commission”) by the U.S. Glass Producers Coalition, which is comprised of Ardagh Glass Inc. (Indianapolis, Indiana) and the United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International Union (Pittsburgh, Pennsylvania), on December 29, 2023, alleging that an industry in the United States is materially injured and threatened with material injury by reason of subsidized imports of glass wine bottles¹ from China and less-than-fair-value (“LTFV”) imports of glass wine bottles from Chile, China, and Mexico. Table I-1 presents information relating to the background of these investigations.^{2 3}

Table I-1
Glass wine bottles: Information relating to the background and schedule of this proceeding

Effective date	Action
December 29, 2023	Petitions filed with Commerce and the Commission; institution of the Commission investigations (89 FR 809, January 5, 2024)
January 18, 2024	Commerce’s notices of initiation (89 FR 4905 and 4911, January 25, 2024)
February 12, 2024	Commission’s preliminary determinations (89 FR 12380, February 16, 2024)
May 28, 2024	Commerce’s preliminary affirmative CVD determination and preliminary affirmative determination of critical circumstances with respect to China (89 FR 47533, June 3, 2024); scheduling of final phase of Commission investigations (89 FR 49901, June 12, 2024)
July 30, 2024	Revisions to Commission’s schedule (89 FR 63445, August 5, 2024)
August 2, 2024	Commerce’s preliminary affirmative AD determinations and preliminary affirmative determination of critical circumstances, in part, with respect to China (89 FR 65317, 65325, and 65331, August 9, 2024)
August 14, 2024	Commission’s hearing
August 26, 2024	Commerce’s final CVD determination and final affirmative determination of critical circumstances (89 FR 68395, August 26, 2024)
September 20, 2024	Commission’s CVD vote
October 9, 2024	Commission’s CVD views

¹ See the section entitled “The subject merchandise” in Part I of this report for a complete description of the merchandise subject in this proceeding.

² Pertinent Federal Register notices are referenced in appendix A and may be found at the Commission’s website (www.usitc.gov).

³ Appendix B presents the witnesses who appeared at the Commission’s hearing.

Effective date	Action
December 23, 2024	Scheduled date for Commerce's final AD determinations

Statutory criteria

Section 771(7)(B) of the Tariff Act of 1930 (the “Act”) (19 U.S.C. § 1677(7)(B)) provides that in making its determinations of injury to an industry in the United States, the Commission--

shall consider (I) the volume of imports of the subject merchandise, (II) the effect of imports of that merchandise on prices in the United States for domestic like products, and (III) the impact of imports of such merchandise on domestic producers of domestic like products, but only in the context of production operations within the United States; and. . . may consider such other economic factors as are relevant to the determination regarding whether there is material injury by reason of imports.

Section 771(7)(C) of the Act (19 U.S.C. § 1677(7)(C)) further provides that--⁴

In evaluating the volume of imports of merchandise, 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.. . .In evaluating the effect of imports of such merchandise on prices, 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.. . . In examining the impact required to be considered under subparagraph (B)(i)(III), the Commission shall evaluate (within the context of the business cycle and conditions of competition that are distinctive to the affected industry) all relevant economic factors which have a bearing on the state of the industry in the United States, including, but not limited to. . . (I) actual and potential decline in output, sales, market share, gross profits, operating profits, net profits, ability to service debt, productivity, return on investments, return on assets, and utilization of capacity, (II) factors affecting domestic prices, (III) actual and potential negative effects on cash flow, inventories, employment, wages, growth, ability to raise capital, and investment, (IV) actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more

⁴ Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

advanced version of the domestic like product, and (V) in {an antidumping investigation}, the magnitude of the margin of dumping.

In addition, Section 771(7)(J) of the Act (19 U.S.C. § 1677(7)(J)) provides that—⁵

(J) EFFECT OF PROFITABILITY.—The Commission may not determine that there is no material injury or threat of material injury to an industry in the United States merely because that industry is profitable or because the performance of that industry has recently improved.

Organization of report

Part I of this report presents information on the subject merchandise, subsidy/dumping margins, and domestic like product. Part II of this report presents information on conditions of competition and other relevant economic factors. Part III presents information on the condition of the U.S. industry, including data on capacity, production, shipments, inventories, and employment. Parts IV and V present the volume of subject imports and pricing of domestic and imported products, respectively. Part VI presents information on the financial experience of U.S. producers. Part VII presents the statutory requirements and information obtained for use in the Commission's consideration of the question of threat of material injury as well as information regarding nonsubject countries.

⁵ Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

Market summary

Glass wine bottles are generally intended for the conveyance or packing of wine. Glass is a preferred packaging to preserve a product's taste or flavor and maintain the health and integrity of the food or beverage. The three known U.S. producers of glass wine bottles are petitioning firm, Ardagh Glass Inc. ("Ardagh"), as well as Gallo Glass Company ("Gallo") and O-I Glass, Inc. ("O-I Glass"). Leading producers of glass wine bottles outside the United States include Cristalerias de Chile S.A. ("Cristalerias de Chile"), Cristalerias Toro Spa ("Cristalerias Toro"), and Verallia Chile S.A. ("Verallia Chile") of Chile; Shandong Changyu Glass Co., Ltd. ("Shandong Changyu") of China; and Fevisa Industrial S.A. de C.V., Fevisa Comercial S.A. de C.V. ("Fevisa") and Owens América, S. de R.L. de C.V. ("Owens America") of Mexico.

The leading U.S. importers of glass wine bottles from Chile are ***. The leading importers of glass wine bottles from China are ***. The leading importers of glass wine bottles from Mexico are ***. Leading importers of glass wine bottles from nonsubject countries include ***. U.S. purchasers of glass wine bottles are primarily distributors and end users such as wineries. Large purchasers include ***.

Apparent U.S. consumption of glass wine bottles for the total market was approximately 13.6 million gross⁶ (\$1.2 billion) in 2023. U.S. producers' U.S. shipments of glass wine bottles totaled 9.7 million gross (\$662.3 million) in 2023 and accounted for 71.2 percent of total market apparent U.S. consumption by quantity (56.6 percent by value). U.S. imports from subject sources totaled 3.0 million gross (\$374.6 million) in 2023 and accounted for 22.2 percent of total market apparent U.S. consumption by quantity (32.0 percent by value). U.S. imports from nonsubject sources totaled 900.8 thousand gross (\$133.2 million) in 2023 and accounted for 6.6 percent of total market apparent U.S. consumption by quantity (11.4 percent by value).

⁶ Gross is a unit of measurement whereby 1 gross is equal to 144 discrete glass containers.

Apparent U.S. consumption of glass wine bottles for the merchant market was approximately *** gross (\$***) in 2023. U.S. producers' U.S. commercial shipments⁷ of glass wine bottles totaled *** gross (\$***) in 2023 and accounted for *** percent of apparent U.S. consumption of the merchant market by quantity (*** percent by value). U.S. imports from subject sources accounted for *** percent of apparent U.S. consumption in the merchant market by quantity (*** percent by value). U.S. imports from nonsubject sources accounted for *** percent of apparent U.S. consumption in the merchant market by quantity (*** percent by value).

Summary data and data sources

A summary of data collected in these investigations is presented in appendix C (table C-1 for the total market and table C-2 for the merchant market). Except as noted, U.S. industry data are based on questionnaire responses of three firms that accounted for all known U.S. production of glass wine bottles during 2023. U.S. imports are based on questionnaire responses of 20 U.S. importers of glass wine bottles.

Previous and related investigations

Glass wine bottles have not been the subject of prior countervailing or antidumping duty investigations in the United States. Glass wine bottles were included in the scope of the countervailing and antidumping duty investigations on glass containers from China, which were instituted in September 2019 (USITC investigation nos. 701-TA-630 and 731-TA-1462). In those investigations, the Commission determined that an industry in the United States was not materially injured or threatened with material injury by reason of imports of glass containers from China.⁸

⁷ ***.

⁸ 85 FR 39932, July 2, 2020 and 85 FR 70651, November 5, 2020.

Nature and extent of subsidies and sales at LTFV

Subsidies

On August 26, 2024, Commerce published a notice in the Federal Register of its final determination of countervailable subsidies for producers and exporters of glass wine bottles from China.⁹ Table I-2 presents Commerce's findings of subsidization of glass wine bottles in China.

Table I-2
Glass wine bottles: Commerce's final subsidy determinations with respect to imports from China

Company	Final countervailable subsidy rate (percent ad valorem)
Shandong Changyu Glass Co., Ltd.	21.31
Boliva International Limited	212.58
Bright Glassware	212.58
Shandong Dingxin Electronic	212.58
Wenden Wensheng Glass Co., Ltd.	212.58
Wuixi Hua Zhong Glass Co. Ltd.	212.58
Xiamen Jane Jonson Co. Ltd.	212.58
Yamamura Glass Qinhuangdao	212.58
Yantai Prime Packaging Co., Ltd	212.58
Zibo Regal Glass Products Co. Ltd.	212.58
All others	21.31

Source: 89 FR 68395, August 26, 2024.

Note: For further information on programs determined to be countervailable, see Commerce's associated Issues and Decision Memorandum.

Note: Commerce finds that Shandong Changyu is cross-owned with Yantai Changyu Glass Co., Ltd.; Yantai Changyu Investment Co., Ltd.; Yantai Changyu Glass Printing Co., Ltd.; Yantai Changyu Fuel Co., Ltd.; and Yantai Changyu Storage and Transportation Co., Ltd.

Note: The rates for Boliva International Limited; Bright Glassware; Shandong Dingxin Electronic; Wenden Wensheng Glass Co., Ltd.; Wuixi Hua Zhong Glass Co. Ltd.; Xiamen Jane Jonson Co. Ltd; Yamamura Glass Qinhuangdao; Yantai Prime Packaging Co., Ltd.; and Zibo Regal Glass Products Co. Ltd. are based on adverse facts available.

⁹ 89 FR 68395, August 26, 2024.

Sales at LTFV

On August 9, 2024, Commerce published a notice in the Federal Register of preliminary determinations of sales of glass wine bottles at LTFV with respect to imports from Chile,¹⁰ China,¹¹ and Mexico.¹² Tables I-3, I-4, and I-5 present Commerce's dumping margins with respect to Chile, China, and Mexico, respectively.

Table I-3
Glass wine bottles: Commerce's preliminary weighted-average LTFV margins with respect to imports from Chile

Exporter/producer	Preliminary estimated weighted-average dumping margin (percent)
Cristalerias de Chile S.A.	34.46
Cristalerias Toro SAIC	173.91
Verallia Chile S.A.	6.64
All others	29.97

Source: 89 FR 65325, August 9, 2024.

Note: The Cristalerias Toro SAIC rate is based on adverse facts available.

¹⁰ 89 FR 65325, August 9.

¹¹ 89 FR 65331, August 9, 2024. Commerce also preliminarily determined that critical circumstances exist with respect to imports of wine bottles from China for the China-wide entity, but that critical circumstances do not exist for Qinhuangdao Ruiquan Glassware Co., Ltd. (Ruiquan), Shandong Changyu Glass Co., Ltd. (Shandong Changyu), and the non-selected companies eligible for a separate rate.

¹² 89 FR 65317, August 9, 2024. Commerce also preliminarily found that critical circumstances do not exist for Fevisa Industrial S.A. de C.V. (Fevisa), Owens América S. de R.L. de C.V. (Owens América), and the non-individually investigated companies.

Table I-4**Glass wine bottles: Commerce's preliminary weighted-average LTFV margins with respect to imports from China**

Producer	Exporter	Preliminary weighted-average dumping margin (percent)	Preliminary cash deposit rate (adjusted for subsidy offsets) (percent)
Guangdong Huaxing Glass Co., Ltd	Qinhuangdao Ruiquan Glassware Co., Ltd	27.97	17.34
Foshan Huaxing Glass Co., Ltd	Qinhuangdao Ruiquan Glassware Co., Ltd	27.97	17.34
Qinhuangdao Fangyuan Packaging Glass Co., Ltd	Qinhuangdao Ruiquan Glassware Co., Ltd	27.97	17.34
Qinhuangdao Suokun Glassware Co., Ltd	Qinhuangdao Ruiquan Glassware Co., Ltd	27.97	17.34
Shandong Changyu Glass Co., Ltd./Yantai Changyu Glass Co., Ltd./Yantai Changyu Glass Printing Co., Ltd	Shandong Changyu Glass Co., Ltd./Yantai Changyu Glass Co., Ltd./Yantai Changyu Glass Printing Co., Ltd	21.77	11.14
Chongqing Lanya Glass Co., Limited	Chongqing Jewhui Packaging Co., Ltd	22.59	11.96
Chongqing Hoson Glass Packaging Co., Ltd	Chongqing Hoson Glass Packaging Co., Ltd	22.59	11.96
Xuzhou Huihe International Trade Co., Ltd	Xuzhou Huihe International Trade Co., Ltd	22.59	11.96
Shandong Huapeng Shidao Glass Products Co., Ltd	Zibo Creative International Trade Co., Ltd	22.59	11.96
Shandong Jingbo Group Co., Ltd	Zibo Creative International Trade Co., Ltd	22.59	11.96
Yantai NBC Glass Packaging Co., Ltd	Zibo Creative International Trade Co., Ltd	22.59	11.96
Shandong Jingbo Group Co., Ltd	Zibo Sunfect International Trade Co., Ltd	22.59	11.96
Yantai NBC Glass Packaging Co., Ltd	Zibo Sunfect International Trade Co., Ltd	22.59	11.96
China-Wide Entity		218.15	207.52

Source: 89 FR 65331, August 9, 2024.

Note: Commerce preliminarily determined that Shandong Changyu Glass Co., Ltd.; Yantai Changyu Glass Co., Ltd.; Yantai Changyu Glass Printing Co., Ltd. comprise a single entity.

Note: The China-wide entity rate was based on adverse facts available.

Table I-5

Glass wine bottles: Commerce's preliminary weighted-average LTFV margins with respect to imports from Mexico

Exporter and/or producer	Preliminary estimated weighted-average dumping margin (percent)
Fevisa Industrial S.A. de C.V./Fevisa Comercial S.A. de C.V./Fábrica de Envases de Vidrio S.A. de C.V./Fábrica de Envases de Vidrio del Potosi, S.A. de C.V.	14.96
Glass & Glass S.A. de C.V.	96.95
JOCOGLASS	96.95
Owens América S. de R.L. de C.V.	18.08
Pavisa Group	96.95
All others	15.96

Source: 89 FR 65317, August 9, 2024.

Note: The rates for Glass & Glass S.A. de C.V.; JOCOGLASS; and Pavisa Group are based on adverse facts available.

The subject merchandise

Commerce's scope

In the current proceeding, Commerce has defined the scope as follows:¹³

The merchandise covered by the investigation is certain narrow neck glass bottles, with a nominal capacity of 740 milliliters (25.02 ounces) to 760 milliliters (25.70 ounces); a nominal total height between 24.8 centimeters (9.75 inches) to 35.6 centimeters (14 inches); a nominal base diameter between 4.6 centimeters (1.8 inches) to 11.4 centimeters (4.5 inches); and a mouth with an outer diameter of between 25 millimeters (.98 inches) to 37.9 millimeters (1.5 inches); frequently referred to as a "wine bottle." In scope merchandise may include but is not limited to the following shapes: Bordeaux (also known as "Claret"), Burgundy, Hock, Champagne, Sparkling, Port, Provence, or Alsace (also known as "Germanic"). In scope glass bottles generally have an approximately round base and have shapes including but not limited to, straight-sided, a tapered slope from shoulder (i.e., the sloping part of the bottle between the neck and the body) to base, or a long neck with sloping shoulders to a wider base. The scope includes glass bottles, whether or not clear, whether or not colored, with or without a punt (i.e., an indentation on the underside of the bottle), and with or without design or functional enhancements (including, but not limited to, embossing, labeling, or etching). In scope merchandise is made of non-"free blown" glass, i.e., in scope merchandise is produced with the use of a mold and is distinguished by mold seams, joint marks, or parting lines. In scope merchandise is unfilled and may be imported with or without a closure, including a cork, stelvin (screw cap), crown cap, or wire cage and cork closure.

Excluded from the scope of the investigation are: (1) glass containers made of borosilicate glass, meeting United States Pharmacopeia requirements for Type 1 pharmaceutical containers; and (2) glass containers without a "finish" (i.e., the section of a container at the opening including the lip and ring or collar, threaded or otherwise compatible with a type of closure, including but not limited to a cork, stelvin (screw cap), crown cap, or wire cage and cork closure).

¹³ 89 FR 68395, August 26, 2024.

Tariff treatment

Based upon the scope set forth by Commerce, information available to the Commission indicates that the merchandise subject to these investigations are imported under Harmonized Tariff Schedule of the United States (“HTS”) statistical reporting number 7010.90.5019. The 2024 general rate of duty is free.¹⁴ Decisions on the tariff classification and treatment of imported goods are within the authority of U.S. Customs and Border Protection.

Effective September 24, 2018, glass wine bottles originating in China were subject to an additional 10 percent ad valorem duty under section 301 of the Trade Act of 1974. Effective May 10, 2019, the section 301 duty for glass wine bottles was increased to 25 percent.¹⁵

¹⁴ USITC, HTS (2024) Revision 8, Publication 5537, August 2024, pp. 70-13.

¹⁵ 83 FR 47974, September 21, 2018; 84 FR 20459, May 9, 2019. See also HTS headings 9903.88.03 and 9903.88.04 and U.S. notes 20(e)–20(g) to subchapter III of chapter 99 and related tariff provisions for this duty treatment USITC, HTS (2024) Revision 8, Publication 5537, August 2024, pp. 99-III-28–99-III-52, 99-III-301. Goods exported from China to the United States prior to May 10, 2019, and entering the United States prior to June 1, 2019, were not subject to the escalated 25 percent duty (84 FR 21892, May 15, 2019).

The product

Glass wine bottles are containers that can be clear or colored; with or without a punt;¹⁶ and with or without designs or functional enhancements such as embossing, labeling, or etching. They contain finishes (entire lip and collar of a bottle) with or without closures such as a cork, stelvin (screw cap), crown cap, or wire cage.¹⁷ In the wine industry, glass bottles typically have round bases with a “standard” nominal capacity of 750 milliliters and weigh between 11 to 35 ounces.¹⁸ Glass wine bottles are generally manufactured using a mold which causes vertical raised lines also known as “mold seams” through the length of the bottle (where the edges of different mold sections came together during the production process).¹⁹ The common wine bottle shapes are Alsace (also known as “Germanic” or “Hock”), Bordeaux (also known as “Claret”), Burgundy, Champagne (also known as “Sparkling”), Port, and Provence.²⁰ Coloring in glass wine bottles is designed to preserve wine and prevent oxidation from sunlight exposure. Two of the most common colors are dark green, often used for red wines, and amber, used for white wines.²¹ Other common colors include flint, super flint, and antique green.²²

¹⁶ An indentation on the underside of the bottle

¹⁷ The subject merchandise may have a nominal capacity between 740 milliliters (25.02 ounces) to 760 milliliters (25.70 ounces); a nominal total height between 24.8 centimeters (9.75 inches) to 35.6 centimeters (14 inches); a nominal base diameter between 4.6 centimeters (1.8 inches) to 11.4 centimeters (4.5 inches); and a mouth with an outer diameter of between 25 millimeters (0.98 inches) to 37.9 millimeters (1.5 inches).

¹⁸ The weight of the wine bottle varies based on the amount of glass it takes to produce the bottle (a result of design and functional enhancement) and the weight of its content. Wine Racks, “Wine Bottle Dimensions and Sizes,” retrieved July 15, 2024, https://wineracks.com/pages/wine-bottle-dimensions-sizes?_pos=1&_sid=0b9a3353b&_ss=r; Other common sizes are piccolo/split (6.3 oz (187.5ml)), demi/half (12.7 oz (375 ml)), magnum (50.7 oz (1.5 L)). Berlin Packaging, “Wine Bottle Sizes, Shapes and Colors Guide,” n.d. <https://www.berlinpackaging.com/wine-bottles-shapes-and-colors-buying-guide/>; and Petitioner’s Post Conference Brief, *exh. 1, p. 3*.

¹⁹ Mold seams are also referred to as “joint marks” or “parting lines”. Packaging Institute, “Forming Process,” n.d., <https://www.gpi.org/forming-process>, accessed January 12, 2024; O. Berk, “Let’s Make a Bottle,” March 6, 2018, <https://www.oberk.com/packagingcrash-course/glass-bottle-formation>, accessed January 12, 2024.

²⁰ The Cary Company, “Types of Wine Bottles - Everything You Need To Know,” n.d., <https://www.thecarycompany.com/insights/articles/wine-bottle-shapes#:~:text=Also%20called%20Alsace%2C%20Rhine%2C%20Mosel,bottles%20features%20the%20steepest%20shoulder>.

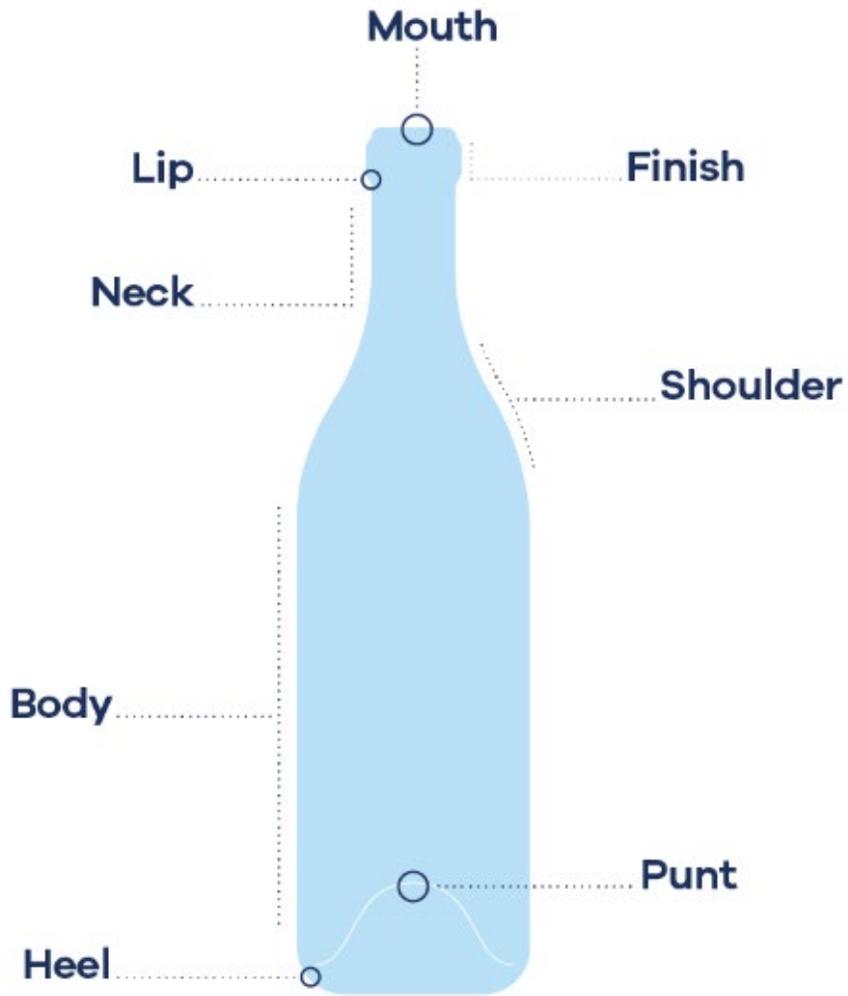
²¹ Berlin Packaging, “Wine Bottle Sizes, Shapes and Colors Guide,” n.d. <https://www.berlinpackaging.com/wine-bottles-shapes-and-colors-buying-guide/>.

²² Flint and super flint are clear glass, often distinguished by level of clarity and used most often to bottle white and rose wine. Berlin Packaging, “Wine Bottle Sizes, Shapes and Colors Guide,” n.d. <https://www.berlinpackaging.com/wine-bottles-shapes-and-colors-buying-guide/>.

Figure I-1 displays the characteristic components of a wine bottle, which include a mouth, lip, finish, neck, shoulder, body, heel, and punt. Wine bottles have a finish at the opening (“mouth”) that includes the lip (extends a bit wider than the mouth) and “collar” or “ring” that is threaded, ribbed, or otherwise designed to be compatible with a closure (lid, cap, cork, etc.) to seal the bottle’s contents. The shoulder is the sloping part of the bottle between the neck (the narrowest portion of the bottle below the mouth) and the body (the widest part of the bottle where the shoulder ends and continues down the remaining length), and its variation is a distinguishing characteristic for bottle shape classifications (see figure I-2).²³ The heel is the base of the bottle. The punt—or indentation—on the underside of the base of the bottle is, for the most part, a design feature that can vary in depth (not all wine bottles have a punt). Historically, the greater depth of the punt was an indicator of higher quality wine. Practical purposes of the punt include ease of pour when holding the bottle, and bottle stability by increasing the weight of the base. The punt also allows wine to chill faster by increasing the surface area of the bottle.

²³ The neck helps control the flow of the wine from the bottle.

Figure I-1
Glass wine bottles: Main components



Source: The Cary Company, "Types of Wine Bottles - Everything You Need To Know," retrieved July 15, 2024, <https://www.thecarycompany.com/insights/articles/wine-bottle-shapes#:~:text=Also%20called%20Alsace%2C%20Rhine%2C%20Mosel,bottles%20features%20the%20steepest%20shoulder.=>

Figure I-2
Glass wine bottles: Common Shapes



Source: Firstleaf, “Guide to Wine Bottle Shapes,” retrieved July 15, 2024, <https://www.firstleaf.com/wine-school/article/guidewine-bottle-shapes>.

Glass wine bottles are generally intended for the packaging and sale of wine. Glass is a preferred material because of its chemical resistance to alcohol, its ability to preserve a product’s taste or flavor, its ease of sterilization, and its ability to maintain the health and integrity of the beverage. Wine bottles are generally recognized as safe (“GRAS”) by the U.S. Food and Drug Administration.²⁴ There are several possible certifications from the International Organization for Standardization (ISO) that a manufacturer of glass wine bottles could attain – some of which include ISO 9001, ISO 22000, ISO 22002-4, ISO 14001, and ISO 50001.²⁵ More specifically, ISO 9001 includes standards for the capacity to develop, produce, control, and deliver glass container bottles. Glass wine bottles are recyclable and can be reused without any loss in purity or quality.²⁶

²⁴ Glass Packaging Institute, “What Is Glass,” retrieved July 15, 2024, <https://www.gpi.org/what-is-glass>.

²⁵ ISO 9001 - standard ensures consistent quality levels by including standards addressing the capacity to develop, produce, control and deliver products following a constant process.

ISO 22000 & ISO 22002-4 address food safety.

ISO 14001 – occupational health and safety to reduce work-related accidents.

ISO 5001 – improving energy efficiency of operations.

Saverglass, “World Reference for Quality,” accessed July 21, 2024, <https://www.saverglass.com/en/our-expertise/world-reference-for-quality>.

²⁶ Glass Packaging Institute, “What Is Glass,” retrieved July 15, 2024, <https://www.gpi.org/what-is-glass>.

Manufacturing processes

The primary raw materials used to produce glass wine bottles are silica (sand), soda ash,²⁷ limestone,²⁸ and cullet (furnace-ready, recycled glass). Secondary raw materials include fining agents (remove bubbles from the melt); decolorizers/colorizers;²⁹ sometimes formers, network modifiers, and intermediates;³⁰ and melting accelerants.³¹ Cullet is often used because it improves furnace efficiencies and energy consumption. Recycled glass requires additional processing to remove non-glass contaminants and create the size uniformity associated with cullet. It is usually color separated, crushed, screened, and vacuumed to remove contaminants. The most common fining agents are sulfates in combination with carbon. Of the sulfates used, sodium sulfate, or salt cake, is the most common. Sodium sulfate acts as a wetting agent to aid in melting the silica source and also as a fining agent.

All manufacturing processes for wine bottles are similar and use similar machinery and personnel. Production is a continuous operation done in three main stages: mixing, melting, and forming (figure I-3).

²⁷ Soda ash is sodium carbonate which is made up of sodium and acid (Na_2CO_3).

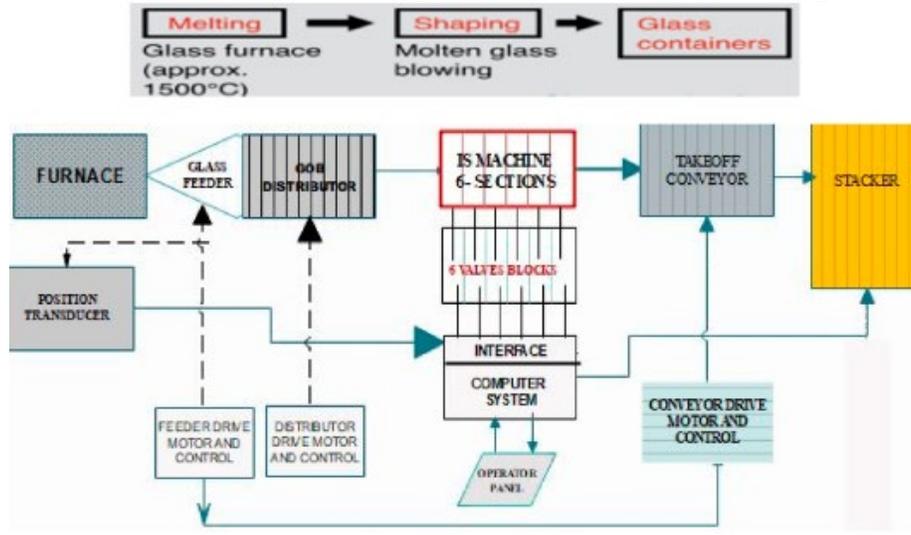
²⁸ Limestone is calcium carbonate (CaCO_3), a type of sedimentary rock.

²⁹ Petition, p. 6.

³⁰ Formers, network modifiers, and intermediates can be used to alter the glass structure, composition, and characteristics. Grayson, "Glass 101: Using Glass Modifiers to Change Glass Characteristics," September 16, 2019, <https://mo-sci.com/using-glass-modifiers/>.

³¹ Furszyfer Del Rio et al., "Decarbonizing the glass industry: A critical and systematic review of developments, sociotechnical systems and policy options," *Renewable and Sustainable Energy Reviews*, Vol. 155, Elsevier Ltd, 2022, <https://www.sciencedirect.com/science/article/abs/pii/S1364032121011527>.

Figure I-3
Glass wine bottles: Process flow chart of a typical individual section-forming machine



Source: Okwuobi et al., “A Reliability-Centered Maintenance Study for an Individual Section-Forming Machine,” October 26, 2018, <https://www.mdpi.com/2075-1702/6/4/50>.

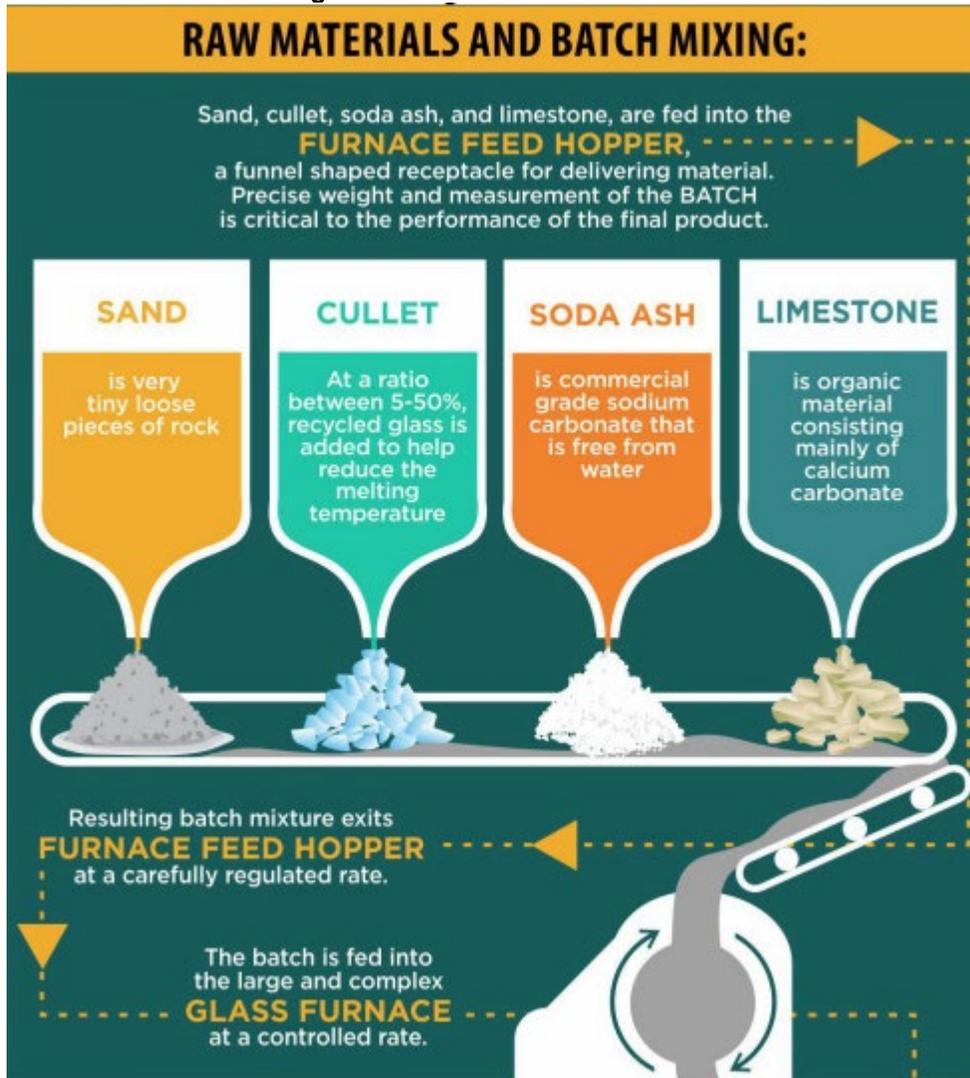
Mixing

The glass-making process starts at the batch house, which stores the raw materials in large silos before they are used in glass furnace operations. Raw materials are first weighed and sent to a mixer.³² Cullet may be added to the mixture and may comprise up to 75 percent of the total mix. This mixture of sand, soda ash, limestone, cullet, and small quantities of other chemicals (such as stabilizers, formers, and fluxes) and decolorizers/colorizers is referred to as the batch (figure I-4). Once the cullet is fully incorporated with the other raw materials, the batch mixture is transported to the furnace.³³

³² Materials are first classed by grain size, weighed, and then blended. All of the source material used in the batch affects the final weight and properties of the final glass product. Furszyfer Del Rio et al., Decarbonizing the glass industry: A critical and systematic review of developments, sociotechnical systems and policy options,” *Renewable and Sustainable Energy Reviews*, Vol. 155, Elsevier Ltd, 2022, <https://www.sciencedirect.com/science/article/abs/pii/S1364032121011527>.

³³ O. Berk, “Let’s Make a Bottle,” March 6, 2018, <https://www.oberk.com/packaging-crash-course/glass-bottle-formation>, accessed January 12, 2024.

Figure I-4
Glass wine bottles: Batch mixing



Source: O. Berk, "How Glass Bottles are Made," April 25, 2017, retrieved July, 2024, <https://www.oberk.com/packaging-crash-course/from-grit-to-glass-how-it-is-made>.

Melting

During the melting process, the batch is fed into the furnace (commonly known as the “hot end” or “melting end”) at a controlled rate creating a glass melt. Glass melts are a product of co-melting the silica with minerals/raw materials that contain the oxides to form the desired glass composition and to remove bubbles from the molten glass.³⁴ The furnace used during the melting process typically consists of three main parts: the melter, the refiner, and the forehearth. Most furnaces are designed to use natural gas but can use alternate fuels such as oil, propane, and electricity if necessary (typically used to power fans, mechanical pressing, and conveyors).³⁵ The batch travels through the furnace at an average temperature of more than 2,300 degrees Fahrenheit.

A tank furnace (typically rectangular) with a regenerative system is used to create glass wine bottles because of its ability to reclaim waste-heat.³⁶ The most popular regenerative system used is the Siemens furnace, which has two common variants: the side-port regenerative furnace (ports located on the side walls) (figure I-5), and the end-port regenerative furnace (ports located on the back wall) (figure I-6). The end-port furnace is used for production amounts less than 230 tons per day and the side-port furnace is used for production amounts greater than 230 tons per day.³⁷ Both furnaces take approximately 12 days to reach the melting temperature of 2,732 degrees Fahrenheit, which is very high energy consumption. Therefore, it is impractical to shut down glass furnace operations. Furthermore, glass material in its cooling phase can damage furnace components such as the “throat” and

³⁴ Karmakar, “Fundamentals of Glass and Glass Nanocomposites,” Science Direct, 2016, retrieved July 21, 2024, <https://www.sciencedirect.com/topics/engineering/glass-melt>.

³⁵ An all-electric furnace is uncommon in glass wine bottle production because it is typically associated with a much higher cost than natural gas or fossil fuels. Furszyfer Del Rio et al., Decarbonizing the glass industry: A critical and systematic review of developments, sociotechnical systems and policy options, “*Renewable and Sustainable Energy Reviews*,” Vol. 155, Elsevier Ltd, 2022, <https://www.sciencedirect.com/science/article/abs/pii/S1364032121011527>.

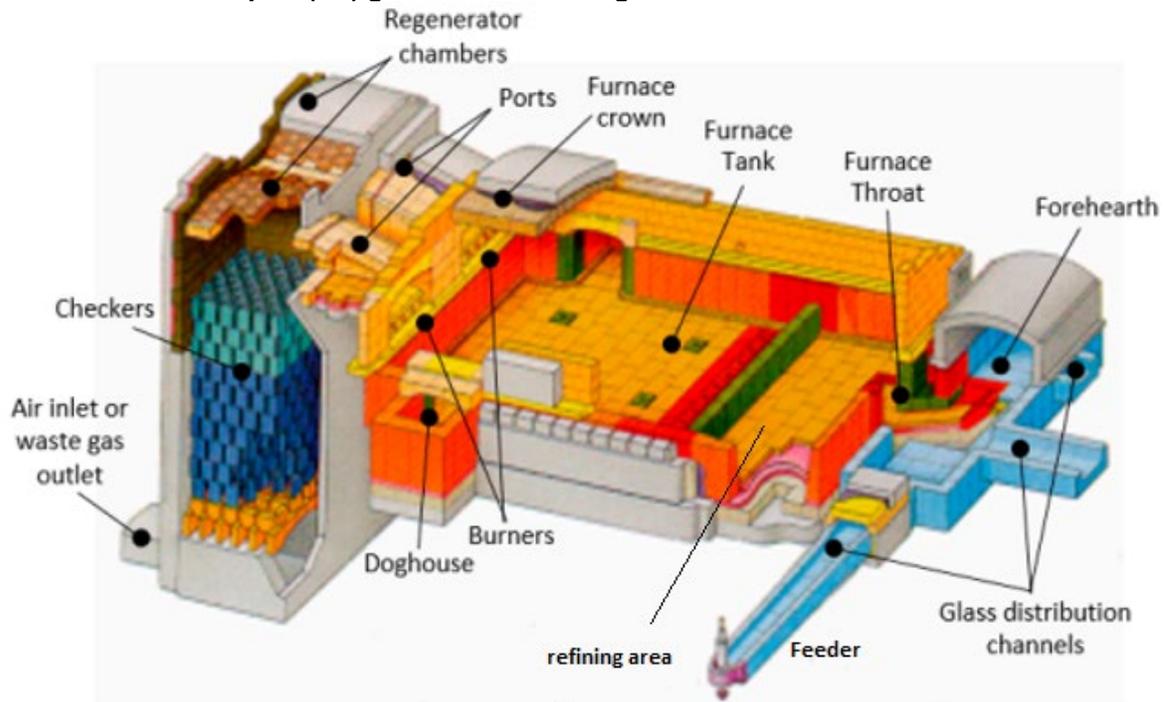
³⁶ The tank furnace is fitted with a heat producing system that can be regenerative, recuperative, oxygen-fueled, or all-electric. The regenerative furnace has regenerator chambers made of refractory material making it cost effective and efficient. Grayson, “Glass 101: Glass Furnace Types,” December 18, 2019, Glass 101: Glass Furnace Types - Mo-Sci and GlassGlobal Consulting, Reports, “Glass Melting Furnaces,” retrieved July 15, 2024, <https://www.glassglobal.com/consulting/reports/technology/>

³⁷ GlassGlobal Consulting, Reports, “Glass Melting Furnaces,” retrieved July 15, 2024, <https://www.glassglobal.com/consulting/reports/technology/>.

A regenerative system is typically used for container glass. However, some glass container manufacturers use oxyfuel technology. GalloGlass, “About Us,” retrieved July 18, 2024, <https://www.galloglass.com/>.

the refractory material used in creating the furnace.³⁸ The end-port and side-port regenerative furnaces are designed to operate 24 hours a day year-round. Both the side-port and end-port regenerative furnaces' useful life is approximately 8 – 12 years because the bricks (checkers) and insulation are continuously exposed to extremely high temperatures.³⁹

Figure I-5
Glass wine bottles: End-port (EP) glass furnaces design



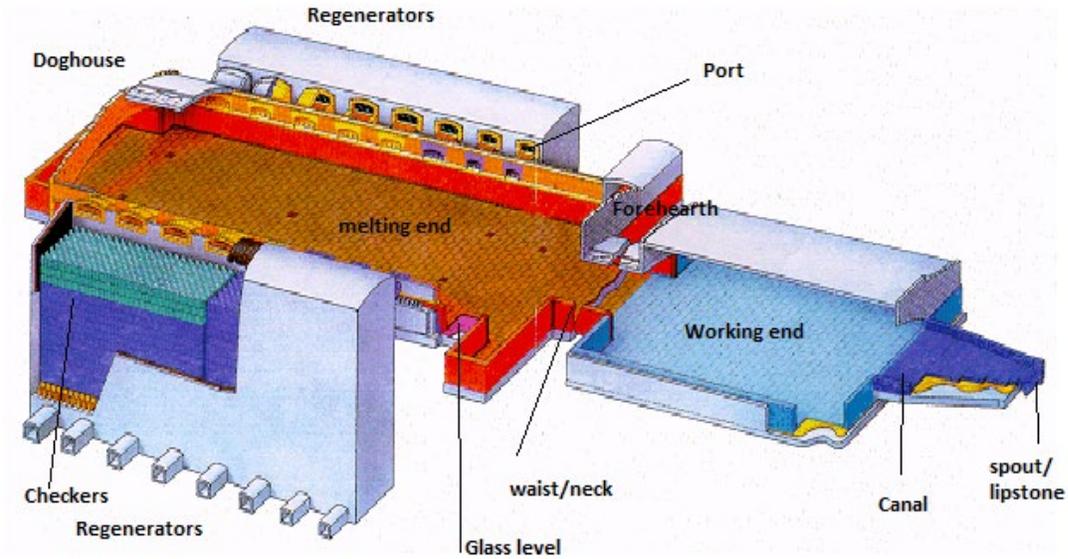
Source: GlassGlobal Consulting, Reports, "Glass Melting Furnaces," retrieved July 15, 2024, <https://www.glassglobal.com/consulting/reports/technology/>.

³⁸ Berlin Packaging, Insights, Packaging Resources, Packaging Fundamentals, "Answers to Questions about Glass Manufacturing, Molding, & Shaping," January 26, 2020, <https://www.berlinpackaging.com/insights/packaging-resources/answers-to-questions-about-glass-manufacturing>.

Glass furnaces last 10 to 15 years before they need to be rebuilt. Hearing transcript (Walton), p. 20.

³⁹ The regenerative furnace preheats the incoming combustion air using the waste-heat from the hot regenerator bricks (checkers). Combustion occurs over the surface of the glass when the heated air enters an inlet port to the furnace and mixes with the injected fuel. GlassGlobal Consulting, Reports, "Glass Melting Furnaces," retrieved July 15, 2024, <https://www.glassglobal.com/consulting/reports/technology/>; Silman Industries, "Bottling Plant Facility Improvements," retrieved July 15, 2024, <https://silmanindustries.com/case-study/industrial-furnace-building-foundation-steel-erection/>; and Grayson, "Glass 101: Glass Furnace Types," December 18, 2019, <https://mo-sci.com/glass-furnace-types/>.

Figure I-6
Glass wine bottles: Side-port (EP) glass furnaces design



GlassGlobal Consulting, Reports, "Glass Melting Furnaces," retrieved July 15, 2024, <https://www.glassglobal.com/consulting/reports/technology/>.

Along each side of the melter, above glass level, are typically three to seven ports, which contain the natural gas burners and the direct combustion air and exhaust gases. The molten glass then flows through the refiner. The refiner acts as a holding basin where the glass is allowed to cool to a uniform temperature before entering the forehearth. The mixture is then fed into the forehearth and carefully cooled to a desired temperature and viscosity before reaching the feeder.⁴⁰

⁴⁰ Petition, p. 8.

Forming

Once the material has been melted and fed through the forehearth to cool, the molten glass flows through the bottom of the feeder in specific amounts, known as gobs.⁴¹ Two gobs can be collected at the same time from the feeder using a cuvette with a double orifice. It is possible to collect up to four gobs per forming section of the individual section (IS) machine (1 mold per gob).⁴² The amount of molten glass allowed through the feeder is controlled by a ceramic plunger. The amount of gob is calibrated in weight and shape and can range from one-fifth of a pound to about 10 pounds.⁴³ The gobs are gravity fed into the individual section forming machine (figure I-7). The gob drops into the blank side mold, which produces a hollow and partially formed container, known as a parison.⁴⁴

⁴¹ Shaping of a glass container is typically done at around 1652 degrees Fahrenheit. Berlin Packaging, Insights, Packaging Resources, Packaging Fundamentals, “Answers to Questions about Glass Manufacturing, Molding, & Shaping,” January 26, 2020, <https://www.berlinpackaging.com/insights/packaging-resources/answers-to-questions-about-glass-manufacturing>.

⁴² Some machines can have 10 or more sections. Berlin Packaging, Insights, Packaging Resources, Packaging Fundamentals, “Answers to Questions about Glass Manufacturing, Molding, & Shaping,” January 26, 2020, <https://www.berlinpackaging.com/insights/packaging-resources/answers-to-questions-about-glass-manufacturing>.

It is possible to have molds that are not identical in in the same form section.

⁴³ Saverglass, “Glassmaking at Saverglass,” retrieved June 22, 2024, <https://www.saverglass.com/en/our-expertise/glassmaker-at-saverglass>.

⁴⁴ O.Berk, “Let’s Make a Bottle,” March 6, 2018, <https://www.oberk.com/packaging-crash-course/glass-bottle-formation>.

Figure I-7
Glass wine bottles: Individual Section Machine (for Glass Container Forming)



Source: ETW Cloud, "Individual Section Machine (for Glass Container Forming)," retrieved July 22, 2024, <https://etwinternational.mx/3-individual-section-machine-69344.html>.

Glass wine bottle molds are created using cast iron (the core is composed of grey cast iron and the external surface white cast iron; the grey cast iron and white cast iron is separated by an alloyed cast iron) because of its ability to withstand high pressure and its excellent thermal conductivity (figure I-8).⁴⁵ Molds are preheated in an oven and coated with a durable film lubricant before they are mounted onto the IS machine.⁴⁶ If a mold needs to be changed, it can take 2 to 6 hours and sometimes a full workday.⁴⁷ Molds need to be constantly maintained

⁴⁵ The grey cast iron is in contact with the glass. Heat transfer of the cast iron is efficient during the shaping process. The cast iron allows the mold to cool the molten glass quickly which retains the desired shape and dimensions. Also, it is relatively inexpensive to produce. Liu, "Unveiling the Mold Materials: The Foundation of Glass Bottle Shaping," June 14, 2024, <https://www.linkedin.com/pulse/unveiling-mold-materials-foundation-glass-bottle-shaping-lucia-liu-p2czc> and Wieczorek, "Technical Article on Glass Moulds within the Glass Packaging Production Process," June 1, 2020, <https://www.aegg.co.uk/blog/news/item/technical-article-on-glass-moulds-within-the-glass-packaging-production-process>.

⁴⁶ The lubricant will prevent the glass from adhere to the coating. Wieczorek, "Technical Article on Glass Moulds within the Glass Packaging Production Process," June 1, 2020, <https://www.aegg.co.uk/blog/news/item/technical-article-on-glass-moulds-within-the-glass-packaging-production-process>.

⁴⁷ The time it takes to change a mold depends on what is being produced and the requirement to set up the mold. After the desired quantity of glass is reached and the molds are being changed, the glass gobs are diverted from the feeders into special cooling water tanks instead of the molds. If necessary (continued...)

during production and cleaned after production. A set of glass molds is expected to produce about 400,000 bottles. However, service life of a mold varies based on the frequency of use and maintenance.

Figure I-8
Glass wine bottles: Mold



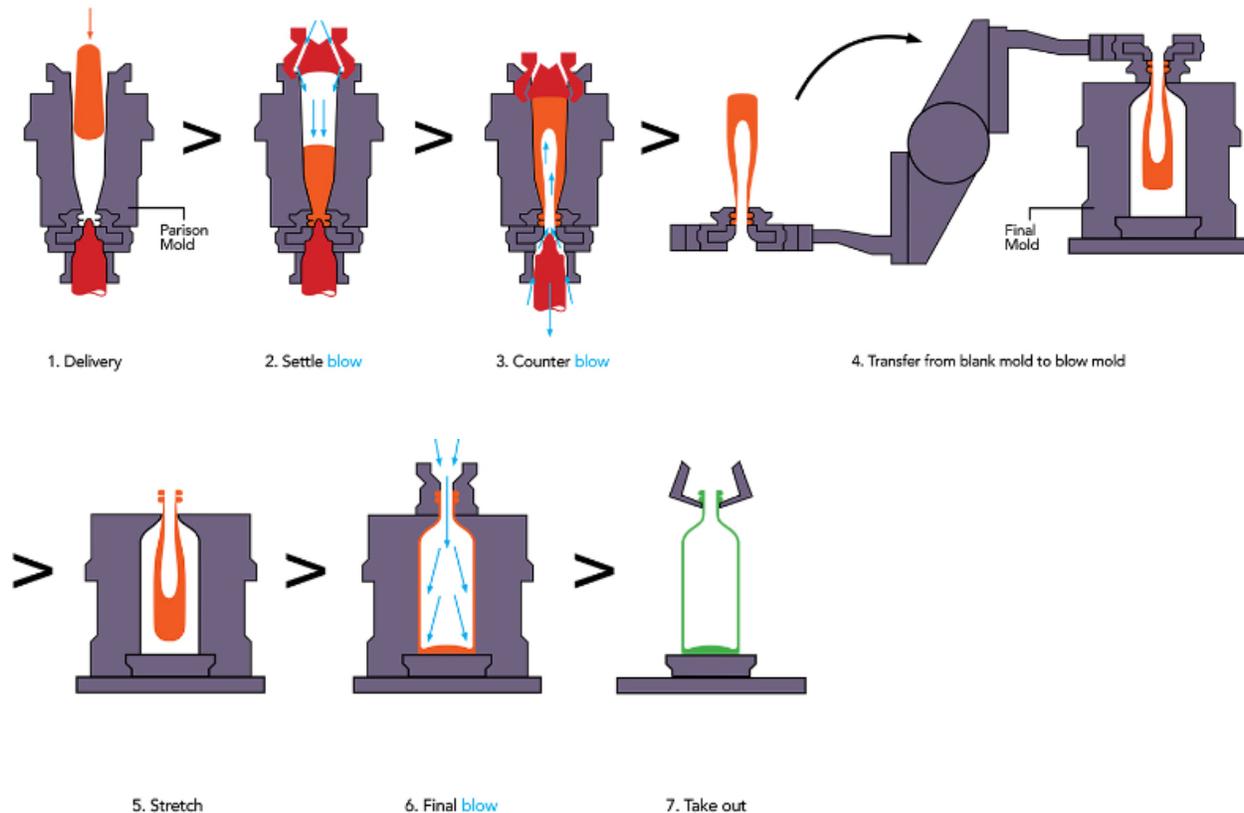
Source: Glass Bottle Wholesale, “Custom Glass Bottles,” retrieved July 22, 2024, <https://glassbottlewholesale.com/custom-glass-bottles/>.

The wine bottles are then typically formed using the blow and blow method, a production process in which the parison is blown and then blown again to produce the final container shape, as shown in figure I-9. A gob is guided into a blank mold, and air is injected into the mold and the neck is formed. The parison is inverted 180 degrees and transferred from the blank mold to the blow mold. After the parison is reheated, air is generally injected to blow

new weight parameters are set, mold are replaced and cuvettes through which the glass gob passes are also replaced. Berlin Packaging, Insights, Packaging Resources, Packaging Fundamentals, “Answers to Questions about Glass Manufacturing, Molding, & Shaping,” January 26, 2020, <https://www.berlinpackaging.com/insights/packaging-resources/answers-to-questions-about-glass-manufacturing>.

the container into shape.⁴⁸ It takes 10 to 15 seconds to transform the glass gob into a glass bottle. The finished container is then taken out of the mold and moved on to the annealing process (lasts 1–2 hours) to eliminate surface tension.⁴⁹

Figure I-9
Glass wine bottles: *Blow and blow* method using an individual section (“IS”) machine



Source: Corning Museum of Glass, “The Fabulous Monster: Owens Bottle Machine,” October 25, 2011, <https://www.cmog.org/article/fabulous-monster-owens-bottle-machine>, accessed January 10, 2024.

The blow and blow method uses an individual section (“IS”) machine, which is separated into varying sections to produce several containers of the same size simultaneously. After the containers are released from the molds, they cross a cooling plate where the temperature drops to around 900 degrees Fahrenheit. They are then loaded into the annealinglehr and heat treatment is performed to ensure the strength of the glass wine bottles.⁵⁰ During heat

⁴⁸ Petition, p. 8.

⁴⁹ Berlin Packaging, Insights, Packaging Resources, Packaging Fundamentals, “Answers to Questions about Glass Manufacturing, Molding, & Shaping,” January 26, 2020, <https://www.berlinpackaging.com/insights/packaging-resources/answers-to-questions-about-glass-manufacturing>.

⁵⁰ A lehr is a long, temperature controlled kiln.

treatment, the temperature is raised back up to near the melting point (around 1,040 degrees Fahrenheit), then slowly reduced to below 900 degrees. This process, along with hot and cold end sprays, relieves stresses caused by the rapid cooling and produces stronger, more shock resistant containers (it takes about a half hour to four hours depending on the production and the weight of the finished product).⁵¹ After the bottles leaves the lehr, they receive a final surface treatment that makes the glass smoother and reduces the risk of scuffing during transportation.⁵²

Inspection, Packaging, and Shipping

After the wine bottles are cooled, they pass through the inspection process, which optically and physically tests the containers for defects. Any rejected bottles are sent back as cullet and remelted, starting the production process again. Bottles that pass inspection are packaged, typically either in bulk packaging where glass containers are packed directly on pallets with corrugated sheets between each layer, or carton packaging where the product is packed in the customers' shipping cartons. The finished product is palletized and either shipped directly to the customer or stored in the warehouse.⁵³

⁵¹ O. Berk, "Let's Make a Bottle," March 6, 2018, <https://www.oberk.com/packaging-crash-course/glass-bottle-formation>, accessed January 12, 2024 and Saverglass, "Glassmaking at Saverglass," retrieved June 22, 2024, <https://www.saverglass.com/en/our-expertise/glassmaker-at-saverglass> and Petition, pp. 8-9.

⁵² Saverglass, "Glassmaking at Saverglass," retrieved June 22, 2024, <https://www.saverglass.com/en/our-expertise/glassmaker-at-saverglass>.

⁵³ O. Berk, "Let's Make a Bottle," March 6, 2018, <https://www.oberk.com/packaging-crash-course/glass-bottle-formation>, accessed January 12, 2024 and Petition, p. 9.

Domestic like product issues

In the preliminary phase of these investigations, the Commission defined a single domestic like product encompassing all glass wine bottles within the scope of the investigations.⁵⁴ In the final phase of these investigations, the petitioner proposes a single domestic like product, coextensive with the scope.⁵⁵ Domestic producer O-I Glass agrees with the analysis and arguments set forth in the petitioner's prehearing brief.⁵⁶

Respondent Encore Glass made no arguments with respect to the domestic like product definition in its prehearing or posthearing briefs. Respondent TricorBraun does not contest a domestic like product coextensive with the scope of these investigations.⁵⁷ Respondent Berlin argues for a domestic like product broader than the scope and states that the Commission should find that the domestic like product consists of all glass wine bottles, regardless of size.⁵⁸ Respondent Saverglass argues that the Commission should expand the domestic like product to include other glass bottles including beer bottles, spirits bottles, and other food and beverage containers.⁵⁹

The Commission's decision regarding the appropriate domestic product(s) that are "like" the subject imported product is based on a number of factors including: (1) physical characteristics and uses; (2) interchangeability; (3) channels of distribution; (4) common manufacturing facilities, production processes, and production employees; (5) customer and producer perceptions; and (6) price. Information regarding these factors as argued by respondents Berlin and Saverglass as well as by the petitioner is discussed as follows.

⁵⁴ Glass Wine Bottles from Chile, China, and Mexico; Inv. Nos. 701-TA-703 and 731-TA-1661-1663 (Preliminary); USITC Publication 5493, February 2024, p. 12.

⁵⁵ Petitioner's prehearing brief, p. 8.

⁵⁶ Domestic producer O-I Glass's prehearing brief, p. 1. Domestic producer O-I Glass's posthearing brief, p. 1.

⁵⁷ Respondent TricorBraun's prehearing brief, p. 6.

⁵⁸ Respondent Berlin's prehearing brief, p. 6. Hearing transcript, pp. 200-202 (Galvin). Respondent Berlin's posthearing brief, pp. 3-4.

⁵⁹ Respondent Saverglass's prehearing brief, p. 5.

Physical characteristics and uses

Berlin arguments

Berlin argues that in-scope and out-of-scope wine bottles regardless of size share the same physical characteristics and end uses. Berlin argues that both in-scope and out-of-scope wine bottles are produced in the same well-known shapes (e.g., claret, burgundy, sparkling), they share the same distinct colors (e.g., antique green, champagne green, cobalt blue, flint), and are primarily used as containers for wine.⁶⁰

Saverglass arguments

Saverglass cites to the Commission's views in the Glass Containers from China proceeding and argues that glass containers share the same essential physical characteristics across the spectrum and are ultimately used for the same end use: containers for food and beverage. Saverglass states that the beverage packaging industry uses glass containers because of their durability, strength, impermeability, and because glass is an inert material (that transfers no chemicals to the food or beverage preserved internally and therefore does not affect taste).⁶¹

Petitioner arguments

The petitioner argues all subject wine bottles are part of the same domestic like product, and other glass bottles are a separate domestic like product. The petitioner notes that wine bottles subject to these investigations are 750 ml, typically are made to distinct and well-known shapes (e.g., Bordeaux shape). The petitioner argues that other glass containers have distinct physical characteristics and uses. The petitioner argues that different glass containers are produced to different dimensions and capacities, ranging from very small food containers with a capacity of 1.5 milliliters to 3-liter jugs.⁶²

⁶⁰ Respondent Berlin's prehearing brief, pp. 12-13. Hearing transcript, p. 201 (Galvin).

⁶¹ Respondent Saverglass's prehearing brief, pp. 7-9.

⁶² Petitioner's prehearing brief, p. 9.

Interchangeability

Berlin arguments

Berlin states that glass wine bottles are interchangeable, as customers who purchase wine in 740-760 ml bottles also purchase other sized bottles. Berlin notes that the Commission recognized in its preliminary views for this proceeding that some out-of-scope glass containers are used for wine, thereby implying that those out-of-scope glass containers that are used for wine are interchangeable with 750 ml glass wine bottles.⁶³

Saverglass arguments

Saverglass argues that due to the lack of inclusion of separate questions regarding the wider glass bottle industry in the questionnaires, there is limited available data regarding interchangeability on the record. Saverglass notes that in the Glass Containers from China proceeding, the Commission found that glass containers with similar designs may be interchangeable and have similar prices.⁶⁴

Petitioner arguments

The petitioner argues that other glass containers are not interchangeable with 750 ml wine bottles and states that other glass containers are different in size and physical characteristics and therefore cannot be used interchangeably with 750 ml wine bottles. For example, a container that is smaller than 750 ml could not hold 750 ml of wine.⁶⁵

Channels of distribution

Berlin arguments

Berlin argues that the Commission described in the preliminary determination for this proceeding that glass wine bottles, unlike most other glass containers, are primarily sold directly to wineries. Other glass containers, with the exception of out-of-scope glass wine bottles, would be sold to different end-users. Berlin states that it believes the Commission has already identified, correctly, that out-of-scope glass wine bottles are sold to the same end-users as in-scope glass wine bottles, namely, wineries.⁶⁶

⁶³ Respondent Berlin's prehearing brief, pp. 9 and 13. Hearing transcript, p. 201 (Galvin).

⁶⁴ Respondent Saverglass's prehearing brief, pp. 11-12.

⁶⁵ Petitioner's prehearing brief, p. 9.

⁶⁶ Respondent Berlin's prehearing brief, p. 14. Hearing transcript, pp. 201-202 (Galvin).

Saverglass arguments

Saverglass argues that due to the lack of inclusion of separate questions regarding the wider glass bottle industry in the questionnaires, there is limited available data regarding channels of distribution on the record. Saverglass cites to the Commission's views in the Glass Containers from China proceeding where the Commission found that glass containers of all types shared similar channels of distribution.⁶⁷

Petitioner arguments

The petitioner argues that other glass containers are often distributed through different channels of distribution than 750 ml wine bottles. Wine bottles are typically sold either directly to wineries or through distributors. The petitioner argues that producers of other glass containers have different ultimate customers than producers of 750 ml wine bottles, including food producers, breweries, etc.⁶⁸

Customer and producer perceptions

Berlin arguments

Berlin argues that producer and customer perceptions of wine bottles are based on the end uses of the bottle and the distinct wine bottle shape, rather than the size. Berlin notes that the petition explains that wine bottles are recognized by consumers due to their typical shapes (e.g. Burgundy, Bordeaux, Champagne). Berlin thus argues it is shape, rather than size, that makes wine bottles distinct to the market.⁶⁹

Saverglass arguments

Saverglass argues that due to the lack of inclusion of separate questions regarding the wider glass bottle industry in the questionnaires, there is limited available data regarding customer and producer perceptions on the record.⁷⁰

Petitioner arguments

The petitioner argues that customers and producers perceive other glass containers to be distinct from 750 ml wine bottles. Wine bottles are recognized by consumers due to their

⁶⁷ Respondent Saverglass's prehearing brief, p. 11.

⁶⁸ Petitioner's prehearing brief, p. 9.

⁶⁹ Respondent Berlin's prehearing brief, p. 15. Hearing transcript, p. 202 (Galvin).

⁷⁰ Respondent Saverglass's prehearing brief, pp. 11-13.

typical shapes (e.g. burgundy, Bordeaux, champagne), while, a beer bottle or mustard container, for example, are clearly viewed by consumers as distinct products.⁷¹

Manufacturing facilities and production employees

Berlin arguments

Berlin argues that different sizes of glass wine bottles are all made in the same facilities, using the same employees, and same production processes and that the glass melting stage is the same for all glass containers. Berlin notes that the domestic producers' questionnaire responses indicate that in-scope and out-of-scope glass wine bottles are both produced in the same production facilities, with the same employees and production processes. Berlin notes that while the Commission noted in the preliminary determination that different molds are used for glass wine bottles, as compared to molds that are used to produce different sizes and shapes of glass containers, Berlin argues that every unique size and shape of bottle has a distinct mold, including the differently shaped bottles that all fall within the scope (i.e. that are all 740-760 ml). Berlin argues that the fact that an out-of-scope glass wine bottle that is 375 ml uses a different mold than an in-scope 750 ml wine bottle is no different than an in-scope 750 ml Claret wine bottle using a different mold than an in-scope 750 ml Burgundy wine bottle.⁷²

Saverglass arguments

Saverglass argues that the Commission collected extensive information on the manufacturing processes for glass wine bottles, not only in these investigations but also in the Glass Containers from China proceeding. It argues that for all type III glass containers, the primary inputs are silica sand, soda ash, limestone, and cullet (recycled glass) with secondary raw materials including fining agents, decolorizers, and colorizers. Saverglass argues that the manufacturing process for glass containers is a continuous operation and consists of three production stages: melting, mixing, and forming. It argues the Commission's previous views in the Glass Containers from China proceeding confirm the similarities between in-scope glass wine bottles and glass containers. Saverglass argues that U.S. producers can produce different shapes by using different molds on an IS machine, and all domestic producers have the necessary capability to manufacture all glass containers.⁷³

⁷¹ Petitioner's prehearing brief, p. 9.

⁷² Respondent Berlin's prehearing brief, p. 14. Hearing transcript, p. 201 (Galvin).

⁷³ Respondent Saverglass's prehearing brief, pp. 9-11.

Petitioner arguments

The petitioner argues that producing other glass containers requires different production processes and production employees. The petitioner argues that while the initial glass melting stage may be similar for 750 ml wine bottles and other glass containers, different molds are used for wine bottles, as compared to molds that are used to produce different sizes and shapes of glass containers. The petitioner argues that producers that produce both 750 ml wine bottles and other glass containers typically have different production facilities for different products.⁷⁴

Price

Berlin arguments

Berlin notes that the Commission found in its preliminary determination that in-scope glass wine bottles are generally priced similarly, whereas smaller out-of-scope glass containers are priced lower than glass wine bottles and larger out-of-scope glass containers are priced higher. Berlin states that while it generally does not disagree, it argues that what drives glass wine bottle pricing is the bottle's weight, rather than its volume. Accordingly, a heavier glass wine bottle that is 500 ml could be the same price or even more expensive than a lighter glass wine bottle that is 750 ml. Berlin argues that with sustainability efforts coming to the forefront in the wine bottle industry, bottle weights and volumes are even more likely to diverge with sustainable, lightweight bottles consistently cheaper than the heavier, traditional bottles, regardless of volumes.⁷⁵

Saverglass arguments

Saverglass argues that due to the lack of inclusion of separate questions regarding the wider glass bottle industry in the questionnaires, there is limited available data regarding price on the record. Saverglass cites to the Commission's views in the Glass Containers from China proceeding where the Commission found that glass containers of all types shared similar prices.⁷⁶

⁷⁴ Petitioner's prehearing brief, pp. 9-10.

⁷⁵ Respondent Berlin's prehearing brief, p. 15. Hearing transcript, p. 202 (Galvin).

⁷⁶ Respondent Saverglass's prehearing brief, p. 11.

Petitioner arguments

The petitioner argues that other glass containers are sold at varying price points from 750 ml wine bottles. Other bottles' prices are typically dependent on their size, with smaller bottles having lower price points than 750 ml wine bottles and larger bottles having higher price points than 750 ml wine bottles.⁷⁷

⁷⁷ Petitioner's prehearing brief, p. 10.

Part II: Conditions of competition in the U.S. market

U.S. market characteristics

Wine bottles are generally intended for the conveyance or packing of wine. Glass is a preferred packaging to preserve a product's taste or flavor and maintain the health and integrity of the food or beverage. The wine bottles can be clear or colored, with or without designs or functional enhancements such as embossing, labeling, or etching. Wine bottles have a "finish" at the opening that includes the lip and "collar" or "ring" that is threaded, ribbed, or otherwise designed to be compatible with a closure (i.e., lid, cap, cork, etc.) in order to seal the bottle's contents.¹ Case-packed glass wine bottles are shipped in 6- or 12-pack cardboard cases with cardboard partitions between the bottles, and bulk-packed bottles are packed directly onto pallets with corrugated sheets between each layer.²

One of 3 U.S. producers, 11 of 17 importers, and 22 of 32 purchasers indicated that the market was subject to distinctive conditions of competition.³ Specifically, firms reported that U.S. producers have supply agreements with large customers and affiliated wineries and minimum order requirements that exclude small to medium sized customers; that the glass wine bottle market experienced shortages in 2021 and 2022 as well as cost pressures from increased ocean freight costs, tariffs, and energy costs; and importer *** reported that its primary U.S. supplier, Ardagh, took down multiple glass furnaces in 2022-23. Importer *** reported that customers are generally inflexible about the type of wine bottle they require because of branding. Additionally, *** reported third-party fillers that many small and mid-sized customers rely on require inventory on hand within days' notice.

Petitioner Ardagh and TricorBraun entered an exclusivity contract in 2020 that appoints TricorBraun as Ardagh's exclusive West Coast distributor that services orders of 500,000 cases or less, and Ardagh will sometimes drop ship directly to TricorBraun's customers.⁴ As a result of this exclusivity contract, other distributors are unable to purchase from Ardagh, including Berlin Packaging.⁵

¹ Petition, pp. 6-7.

² Hearing transcript, p. 189 (Guzman).

³ Importer *** reported that the demand for glass wine bottles is driven by demand for wine, while some liquor and spirit bottles (that fall within the product scope) follow entirely different trends.

⁴ Hearing transcript, pp. 107, 109, 169, 179-180 (Humes, Anderson, Brandstatter, Fumagalli).

⁵ Hearing transcript, p. 194 (Brandt).

Apparent U.S. consumption of glass wine bottles decreased during the period of investigation. Overall, apparent U.S. consumption in the total market in 2023 was 12.5 percent lower than in 2021 and was 13.0 percent lower in January-March 2024 than in January-March 2023.

U.S. purchasers

The Commission received 37 usable questionnaire responses from firms that purchased glass wine bottles during January 2021-March 2024.^{6 7 8} Twenty-seven responding purchasers are wineries, eight are distributors, and one (***) identified as an “other end user.” In general, responding U.S. purchasers were located in the Pacific Coast region. Large purchasers of glass wine bottles include ***.

Impact of section 301 tariffs

U.S. producers, importers, and purchasers were asked to report the impact of section 301 tariffs on overall demand, supply, prices, or raw material costs. A plurality responding firms (***) 9 importers, and 15 purchasers) reported that the section 301 tariffs did have an impact on the market for glass wine bottles. U.S. producer *** reported that the section 301 tariffs led to a temporary decrease in imports from China that contributed to a

⁶ The following firms provided purchaser questionnaire responses: ***.

⁷ Of the 33 responding purchasers, 25 purchased the domestic glass wine bottles, 14 purchased imports of the subject merchandise from Chile, 23 purchased imports of the subject merchandise from China, 20 purchased imports of the subject merchandise from Mexico, 23 purchased imports of glass wine bottles from nonsubject sources, and 5 purchased glass wine bottles from unknown sources.

⁸ Twenty-five purchasers indicated they had marketing/pricing knowledge of domestic product, 19 of Chile product, 26 of China product, 21 of Mexico product, and 16 of other sources, including Australia, Bulgaria, Canada, Colombia, Czechia, France, Germany, India, Iraq, Italy, Moldova, the Philippines, Poland, Slovenia, Spain, Taiwan, Thailand, Turkey, the United Arab Emirates, the United Kingdom, and Vietnam.

surge in imports from Chile and Mexico, and that China responded by lowering its prices. Several importers reported that these tariffs caused them to shift to alternative sources of supply, and most responding importers reported that these tariffs caused supply of glass bottles to decrease and the price of glass wine bottles to increase. *** three purchasers reported that these tariffs did not have an impact, and the remaining firms responded that they did not know.

Channels of distribution

U.S. producers sold mainly to large wineries,⁹ importers of glass wine bottles from Chile and China sold mainly to small and medium-sized wineries, and importers of glass wine bottles from Mexico sold substantial shares to large and small and medium-sized wineries (“SME”), as shown in table II-1.¹⁰ Petitioner Ardagh argued that it does serve SME wineries through distributors who generally repack the glass wine bottles into cases.¹¹ Respondent Encore stated that imports of glass wine bottles are typically sold to SME wineries due to flexibility, variety, availability, and quality, and respondent Berlin Packaging stated that it has not been able to get the colors and customization needed without high minimum order quantities.¹²

⁹ Large wineries are defined as wineries that produce more than or equal to 500,000 cases annually of bottled wine.

¹⁰ Appendix F also provides more detailed data by breaking out apparent U.S. consumption and U.S. market shares by channels of distribution (see tables F-1 through F-4).

¹¹ Hearing transcript, pp. 110-111 (Connors).

¹² Hearing transcript, pp. 187, 195 (Guzman, Brandt).

Table II-1
Glass wine bottles: Share of U.S. shipments by source, channel of distribution, and period

Shares in percent

Source	Channel	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
United States	Distributors	***	***	***	***	***
United States	Large wineries	***	***	***	***	***
United States	SME wineries	***	***	***	***	***
United States	Other end users	***	***	***	***	***
Chile	Distributors	***	***	***	***	***
Chile	Large wineries	***	***	***	***	***
Chile	SME wineries	***	***	***	***	***
Chile	Other end users	***	***	***	***	***
China	Distributors	***	***	***	***	***
China	Large wineries	***	***	***	***	***
China	SME wineries	***	***	***	***	***
China	Other end users	***	***	***	***	***
Mexico	Distributors	***	***	***	***	***
Mexico	Large wineries	***	***	***	***	***
Mexico	SME wineries	***	***	***	***	***
Mexico	Other end users	***	***	***	***	***
Subject	Distributors	***	***	***	***	***
Subject	Large wineries	***	***	***	***	***
Subject	SME wineries	***	***	***	***	***
Subject	Other end users	***	***	***	***	***
Nonsubject	Distributors	***	***	***	***	***
Nonsubject	Large wineries	***	***	***	***	***
Nonsubject	SME wineries	***	***	***	***	***
Nonsubject	Other end users	***	***	***	***	***
All imports	Distributors	***	***	***	***	***
All imports	Large wineries	***	***	***	***	***
All imports	SME wineries	***	***	***	***	***
All imports	Other end users	***	***	***	***	***

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Bulk versus case packaging

Larger wineries are more likely to buy in bulk, while SME wineries are more likely to buy in cases, because they cannot afford to purchase in bulk and because their bottling machines cannot handle bulk pallets of product.¹³ U.S. producer O-I Glass stated that it stopped offering case-packed wines in August 2022, and that it continues to provide case-packed wine bottles through third party fulfillment centers.¹⁴

As will be discussed in Part IV, more than *** of U.S.-produced glass wine bottles were shipped in bulk in 2023, while most glass wine bottles from subject sources were sold in case packaging (*** percent of U.S. shipments of U.S. imports from Chile, *** percent of U.S. shipments of U.S. imports from China, and *** percent of U.S. shipments of U.S. imports from Mexico).¹⁵

Purchasers were asked to estimate the share of purchases by country source that was purchased in bulk and in cases in 2023. Of the 28 purchasers that reported for the United States, 11 reported that at least 90 percent of their purchases were in bulk, and 6 purchasers reported that 100 percent of their purchases of domestic glass wine bottles were case-packed. Six of 10 purchasers of glass wine bottles from Chile, 13 of 15 purchasers of glass wine bottles from China, and 9 of 18 purchasers of glass wine bottles from Mexico reported that more than 90 percent of their purchases were case-packed in 2023. Purchaser/importer *** reported that Chilean producers had limited capacity for case packing so it imported in bulk and repacked a large share of those purchases for resale in the United States. Purchaser/importer *** reported that changes to the packed minimum order quantities at Ardagh and Gallo led to a larger share of bulk purchases that desired, and that it repacks bulk glass wine bottles into cases.

Geographic distribution

U.S. producers reported selling glass wine bottles to *** (table II-2). Importers reported selling to all regions in the contiguous United States, and importers from China reported also selling to other regions. For U.S. producers, *** percent of sales were within 100 miles of their production facility, *** percent were between 101 and 1,000 miles, and *** percent were over 1,000 miles. Importers sold ***

¹³ Preliminary staff report, pp. II-3-4; Hearing transcript, pp. 176, 190 (Binkowski, Guzman).

¹⁴ Hearing transcript, p. 24 (Connors).

¹⁵ Appendix F also provides more detailed data by breaking out apparent U.S. consumption and U.S. market shares by channels of distribution (see tables F-1 through F-4).

percent within 100 miles of their U.S. point of shipment, *** percent between 101 and 1,000 miles, and *** percent over 1,000 miles.

Table II-2
Glass wine bottles: Count of U.S. producers' and U.S. importers' geographic markets

Count of firms reporting

Region	U.S. producers	Chile	China	Mexico	Subject sources
Northeast	***	3	6	3	10
Midwest	***	0	5	3	7
Southeast	***	1	5	5	10
Central Southwest	***	1	7	3	10
Mountains	***	1	8	4	11
Pacific Coast	***	3	10	8	15
Other	***	0	3	0	3
All regions (except Other)	***	0	4	3	6
Reporting firms	3	4	10	8	16

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

Note: Other U.S. markets include AK, HI, PR, and VI.

Supply and demand considerations

U.S. supply

Table II-3 provides a summary of the supply factors regarding glass wine bottles from U.S. producers and from subject countries.

Table II-3
Glass wine bottles: Supply factors that affect the ability to increase shipments to the U.S. market, by country

Quantity in gross; ratios and shares in percent; count in number of firms reporting

Factor	Measure	United States	Chile	China	Mexico	Subject suppliers
Capacity 2021	Quantity	13,476,253	***	***	***	12,438,231
Capacity 2023	Quantity	12,251,619	***	***	***	12,239,640
Capacity utilization 2021	Ratio	88.6	***	***	***	96.0
Capacity utilization 2023	Ratio	83.6	***	***	***	85.5
Inventories to total shipments 2021	Ratio	28.5	***	***	***	15.9
Inventories to total shipments 2023	Ratio	42.4	***	***	***	25.3
Home market shipments 2023	Ratio	***	***	***	***	***
Non-US export market shipments 2023	Ratio	***	***	***	***	***
Ability to shift production	Count	***	***	***	***	***

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

Note: Responding U.S. producers accounted for all known U.S. production of glass wine bottles in 2023. Responding foreign producer/exporter firms accounted for *** percent of U.S. imports of glass wine bottles from Chile during 2023, *** percent of imports from China, and *** percent of imports from Mexico. For additional data on the number of responding firms and their share of U.S. production and of U.S. imports from each subject country, please refer to Part I, “Summary Data and Data Sources.”

Domestic production

Based on available information, U.S. producers of glass wine bottles have the ability to respond to changes in demand with large changes in the quantity of shipments of U.S.-produced glass wine bottles to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the large overall capacity, the availability of unused capacity, large inventories, and the ability to shift production to or from alternate products.

Practical glass wine bottle capacity fluctuated over the period of investigation but decreased by 9.1 percent from 2021-2023 and was 11.5 percent lower in January-March 2024 than in January-March 2023. Capacity utilization also decreased during 2021-2023 from 88.6 percent to 83.6 percent but was 3.6 percentage points higher in January-March 2024 than in January-March 2023. Other products that producers reportedly can produce on the same equipment as glass wine bottles are spirits bottles and bottles that range from *** in size. Factors affecting U.S. producers’ ability to shift production include specialized equipment such as molds and other variable equipment that requires specially trained labor. Some purchasers reported that U.S. producer Ardagh declined orders because it was discontinuing production on some of its lines.

Subject imports from Chile

Based on available information, producers of glass wine bottles from Chile have the ability to respond to changes in demand with moderate changes in the quantity of shipments of glass wine bottles to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the availability of unused capacity and moderately-sized inventories, the ability to shift shipments from alternate markets, and the ability to shift production to or from alternate products.

Practical glass wine bottle capacity fluctuated over the period of investigation but decreased by *** percent from 2021-2023 and was *** percent lower in January-March 2024 than in January-March 2023. Capacity utilization also decreased during 2021-2023 from *** percent to *** percent but was *** percentage points lower in January-March 2024 than in January-March 2023. Factors affecting foreign producers' ability to shift production include the production method (“blow and blow” versus “press and blow” methods),¹⁶ as well as the time available to change molds and colors. Chilean producer *** estimated that changing a mold required 3 to 8 hours of downtime and color changes require two to four days of downtime. Chilean producer *** estimated that it takes approximately *** to develop a new mold.

Subject imports from China

Based on available information, producers of glass wine bottles from China have the ability to respond to changes in demand with moderately large changes in the quantity of shipments of glass wine bottles to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the ability to shift shipments from alternate markets and large inventories, and ability to shift production to, or from, alternate products. Factors mitigating responsiveness of supply include limited availability of unused capacity.

Practical glass wine bottle capacity fluctuated over the period of investigation but decreased by *** percent from 2021-2023 and was *** percent higher in January-March 2024 than in January-March 2023. Capacity utilization remained constant during January 2021-March 2024 between *** percent. Other products that responding foreign producers reportedly can produce on the same equipment as glass wine bottles are other out-of-scope glass bottles. Chinese producers reported that it is “quite easy” to switch between

¹⁶ Chilean producer *** reported that beer, water, and juice glass bottles and food glass containers are produced with the “press and blow” method, and that *** percent of its production capacity is allotted for the “blow and blow” method.

products with the appropriate molds and if the glass color is the same. One Chinese producer estimated that changing mold gears take approximately *** hours but estimated that a change in color would take *** days.

Subject imports from Mexico

Based on available information, producers of glass wine bottles from Mexico have the ability to respond to changes in demand with moderately large changes in the quantity of shipments of glass wine bottles to the U.S. market. The main contributing factors to this degree of responsiveness of supply are the availability of unused capacity and large inventories, and some ability to shift production to, or from, alternate products. Factors mitigating responsiveness of supply include limited ability to shift shipments from alternate markets.

Practical glass wine bottle capacity increased over the period of investigation by *** percent from 2021-2023 and was *** percent higher in January-March 2024 than in January-March 2023. Capacity utilization also decreased during 2021-2023 from *** percent to *** percent and was *** percentage points lower in January-March 2024 than in January-March 2023. Factors affecting foreign producers' ability to shift production include furnace color changes, process changes ("blow and blow" versus "press and blow"), and mold changes. Mexican producer *** reported that changing between products requires a large capital investment for equipment as well as several months' time. Mexican producer *** reported that it serves *** and that the cost of color changes, the development of specific product molds, the price of raw materials, and availability of external cullet for the wine bottles all affect its ability to shift production.

Imports from nonsubject sources

Nonsubject imports accounted for 19.9 percent of total U.S. imports in 2023, based on questionnaire data. U.S. importers named the following nonsubject countries as import sources: Australia, Canada, Colombia, France, Italy, Spain, and Taiwan. Imports from Taiwan accounted for *** percent of nonsubject imports in 2023, and imports from France accounted for *** percent of nonsubject imports in 2023.

Supply constraints

*** of 3 U.S. producers reported that they had experienced supply constraints since January 1, 2021, while 12 of 16 responding importers reported that they had experienced supply constraints. U.S. producer *** reported that it declined to take new customers in

2021 and part of 2022 when demand was strong and the supply of glass was still negatively impacted by the COVID-19 pandemic and related supply chain constraints. U.S. importers reported that, especially during 2021 and 2022, COVID-19 pandemic-related supply chain constraints, labor shortages, and high freight costs and shipping container shortages limited supply, and several importers reported that high demand led to “maxed-out” North American capacity.

Twenty-three of 37 purchasers reported that they had been declined supply before the filing of the petition, and 10 of 34 responding purchasers reported that they had been declined supply after the filing of the petition. Purchasers reported extreme delays, production shortages, and limited production capacity of U.S. producers and some foreign producers, COVID-19 related supply chain issues and high costs of shipping, primarily in 2021, minimum order quantity changes, forced changes of colors or molds, and lack of inventory prior to the filing of the petition. Purchaser/importer *** reported that U.S. producers O-I Glass and Ardagh refused supply to limit competition. Post-petition, purchasers reported lack of inventory and extended delivery times, in addition to the “risk of AD and CVD” and increased freight costs. Purchaser *** reported that supply has been tightening in recent months with delivery delays, but that it expects supply to “keep up.”

Nine of 35 responding purchasers reported that they had been refused or declined orders due to order size since January 1, 2021. Purchaser/importer *** reported that it usually has to source bottles in low quantities from import sources because of the high minimum order quantities required by domestic producers. Purchaser *** reported that U.S. producer Ardagh refused orders based on volumes and availability and O-I Glass refused orders for packed glass wine bottles. Purchaser/importer *** reported that Ardagh does not accept packed orders less than 5,000 cases and that bulk glass production requires at least a five-day run or 1.2 million bottles. It reported that several of its requests for smaller runs had been declined, particularly in 2023. It reported that Gallo does not accept packed orders less than 10,000 cases and only accepts orders for printed glass wine bottles that are larger than 10,000 on a case-by-case basis.

New suppliers

Six of 37 purchasers indicated that new suppliers entered the U.S. market since January 1, 2021. Purchasers cited Arglass (U.S.), Western Container (U.S.), West Coast Glass & Packaging (U.S.), and Stoelzle (U.S.).

U.S. demand

Based on available information, the overall demand for glass wine bottles is likely to experience moderate changes in response to changes in price. The main contributing factors are the availability of some substitute products and the moderate cost share of glass wine bottles in the cost of bottled wine.

End uses and cost share

U.S. demand for glass wine bottles depends on the demand for U.S.-produced downstream products, primarily the packaging of wine. Some firms also reported that glass wine bottles are also used to package juice or sparkling juice, other non-alcoholic beverages, and olive oil. Firms reported a large range in the cost share of glass wine bottles in the end use of bottled wine, but firms most commonly reported a cost share ranging from 10 percent to 35 percent. Importer *** reported that 55 percent of the cost of bulk packed empty wine bottles and 60 percent of the cost of case-packed empty wine bottles is attributable to the glass wine bottles themselves.

Business cycles

Two U.S. producers ***, 16 of 18 responding importers, and 25 of 34 purchasers indicated that the market was subject to business cycles. Several firms (2 U.S. producers, 9 importers, and 12 purchasers) reported seasonality due to the grape harvest season and the wine making cycle. During the preliminary phase of these investigations, Ardagh stated that the market is seasonal to some extent during the summer, but it is pretty steady from year to year for the larger customers that bottle consistently.¹⁷ Respondent Berlin stated that there are two harvest seasons in the wine industry - red grapes are usually harvested in July, August, and September, and the white grapes are harvested earlier in the year.¹⁸ It added that seasonality is a critical part of the business and the ability to provide just-in-time deliveries to small customers with small order sizes is essential.¹⁹

Importer *** reported that the harvest period is typically from late July to mid-October and that customers tend to bottle red wines during summer and white wine during early spring. Importer *** detailed the bottling cycle by region: U.S. and

¹⁷ Conference transcript, p. 60 (Curtin).

¹⁸ Conference transcript, p. 120 (Brosch).

¹⁹ Conference transcript, p. 123 (Jacobson); respondent Berlin's postconference brief, p. 20; hearing transcript, p. 198 (Azevedo).

Western Canada wine markets fluctuate seasonally and vary based on abnormal weather or other events like fires. California growers typically harvest in fall while the Pacific Northwest growers begin filling earlier in the year. Wine bottles are usually filled 2-5 months following harvest. When combining these needs and the roughly 4-month lead times, ordering typically peaks in the first and fourth quarters of each year. Roughly two-thirds of annual volume is ordered in the fourth and first quarters and is delivered to customers in the first and second quarters. Importer *** noted that the grape harvest was very late in 2023, leading to a later bottling date than in years past and noted that the U.S. glass wine bottle industry is heavily reliant on detailed planning and forecasting and cannot support last minute changes to production changes and quantities, which small and medium sized customers often need. Importers also cited fluctuations in alcohol consumption, particularly during economic downturns, and shifts in consumer purchases to lower priced options.

Purchaser forecasts

Fifteen purchasers reported that they generally know their purchaser order sizes between one and six months in advance, 14 know their purchaser order sizes more than six months in advance, and 2 know their purchase order sizes less than 30 days in advance. Forecasts are made based on harvests, although some firms (such as ***) reported that they bottle year-round and their forecasts are not driven by harvest cycles. Purchaser/importer *** reported that it runs a forecasting exercise with its customers on an annual basis, usually in the fall shortly after harvest, and accounts for actual grape yield, production plans, and the impact of weather events.

Demand trends

Most firms reported a decrease in U.S. demand for glass wine bottles since January 1, 2021 (table II-4).²⁰ Reasons cited for the decrease in U.S. demand were fluctuations due to the COVID-19 pandemic, alternative packaging options, excess supply/inventory, competition including imports, heavy market pressure from imports, poor harvests due to extreme weather, and lower consumer demand for wine and increased preference for seltzer, beer, and spirit products. Importer *** reported that wineries were cautious and overordered wine bottles due to earlier shortages, and now have large inventories which have decreased demand.

²⁰ Importer *** reported that U.S. demand both fluctuated up and fluctuated down.

U.S. demand for glass wine bottles depends on the demand for U.S.-produced downstream products, primarily the packaging of wine. As shown in figure II-1 and table II-5, U.S. wine consumption irregularly decreased between January 2021-June 2024.²¹ Petitioners stated that the wine bottle market has historically grown by one or two percent per year.²² Petitioner also stated that wine bottle demand increased during the COVID-19 pandemic as wine consumption increased as people were staying home, and this lasted through 2021, at which point demand declined.²³ This decline has been attributed to de-stocking, production problems at wineries, and lower demand for wine as compared to other alcoholic and non-alcoholic options.²⁴

Petitioners stated that demand has decreased and is expected to flatten out in the immediate future.²⁵

Table II-4
Glass wine bottles: Count of firms' responses regarding overall domestic and foreign demand, by firm type

Count of firms reporting

Market	Firm type	Steadily Increase	Fluctuate Up	No change	Fluctuate Down	Steadily Decrease
Domestic demand	U.S. producers	0	0	0	2	1
Domestic demand	Importers	1	7	0	7	5
Domestic demand	Purchasers	5	3	2	14	6
Foreign demand	U.S. producers	0	0	0	1	0
Foreign demand	Importers	0	3	1	3	4
Foreign demand	Purchasers	0	1	4	11	3
Demand for end use products	Purchasers	3	6	0	20	2

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

²¹ These data account for consumption of U.S.-produced wine only and may exclude some consumption that falls outside of these categories.

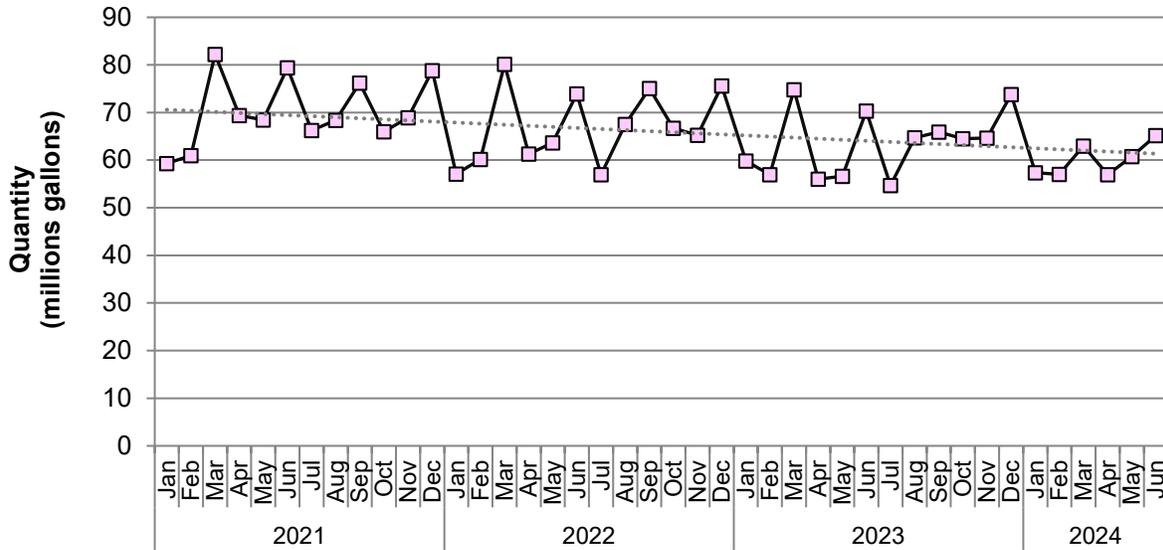
²² Hearing transcript, p. 25 (Brandstatter); O-I Glass posthearing brief, Answers to Commission Questions, p. 49.

²³ Conference transcript, p. 22 (Brandstatter); Petitioner postconference brief, p. 11.

²⁴ Conference transcript, p. 116 (Brosch); Respondent Berlin's postconference brief, pp. 14-15; Hearing transcript, p. 197 (Azevedo).

²⁵ Hearing transcript, pp. 49, 139 (Pickard, Anderson).

Figure II-1
U.S. wine shipments: Gallons of wine, taxable withdrawals plus tax-free withdrawals for export, monthly, January 2021-June 2024



Source: U.S. Department of Treasury, Alcohol and Tobacco Tax and Trade Bureau, National Wine Report, August 26, 2024, <https://www.ttb.gov/media/79951/download?inline>, accessed August 28, 2024.

Note: The "Linear" line is the linear trendline average consumption over the period.

Note: These data account for consumption of U.S.-produced wine only and may exclude some consumption that falls outside of these categories.

Table II-5**U.S. wine shipments: Gallons of wine, taxable withdrawals plus tax-free withdrawals for export, monthly, January 2021-June 2024**

Quantity in millions of gallons of wine; n.a. is unavailable

Month	2021	2022	2023	2024
January	59.31	57.11	59.86	57.38
February	60.96	60.17	56.95	57.04
March	82.23	80.17	74.80	62.99
April	69.37	61.32	56.04	56.99
May	68.42	63.65	56.59	60.77
June	79.42	73.96	70.33	65.18
July	66.22	56.99	54.69	n.a.
August	68.38	67.51	64.70	n.a.
September	76.18	75.09	65.94	n.a.
October	65.99	66.72	64.50	n.a.
November	68.92	65.22	64.65	n.a.
December	78.80	75.60	73.80	n.a.

Source: U.S. Department of Treasury, Alcohol and Tobacco Tax and Trade Bureau, National Wine Report, August 26, 2024, <https://www.ttb.gov/media/79951/download?inline>, accessed August 28, 2024.

Note: These data account for consumption of U.S.-produced wine only and may exclude some consumption that falls outside of these categories.

Some firms noted that demand generally increased during the COVID-19 pandemic and then generally decreased in 2023. One importer (***) noted that there were steady to tiny increases in demand until 2023, when demand decreased. Importer *** reported that demand has steadily decreased over the past year due to an excess of filled wine bottles in the marketplace. It also reported that wineries were cautious due to recent wine bottle shortages and had over-ordered wine bottles during the period of investigation. It continued that this inventory build-up ultimately caused sales for low-priced wine volumes to trend down in the past year. Importer *** reported that wineries are shutting down due to decreasing demand for wine post-COVID pandemic and also due to inflationary pressure. It continued that its customers are small, most of which had very low sales figures since the COVID-19 pandemic because they generally sell direct-to-consumer (“DTC”) and were forced to be closed during part of the pandemic. Lastly, it reported that increased glass prices and the unavailability of domestically produced glass has played a large part in driving some of its customers out of business.

When discussing seasonality, importer *** reported that U.S. glass wine bottle supply is heavily reliant on detailed planning and forecasting, and therefore cannot support last minute changes to production dates and quantities that can be driven by the seasonality of the business. It continued that domestic suppliers are particularly inflexible towards small- and

medium-sized customers which often cannot provide firm forecasts many months in advance as is often required by the domestic suppliers.

Inventory overhang

Twenty-two of 37 responding purchasers reported that their firm's inventory was at its preferred levels in 2023; 14 purchasers reported holding more inventory than preferred, and one reported that its inventory was lower than preferred. Several purchasers reported that they had overpurchased during the COVID-19 pandemic and that the decline in demand in 2022 and 2023 led to destocking. Petitioners and respondents stated that importers, distributors, and their customers stockpiled subject imports which resulted in an inventory overhang in 2022 and 2023 and resulted in a decline in demand for glass wine bottles in 2023.²⁶

Twenty-nine of 37 purchasers reported that their suppliers hold their inventories for them. Purchasers reported that suppliers will hold inventory for 30-120 days. Purchaser *** reported that it provides its suppliers with its forecasted orders and its suppliers then produce to their best schedule and supplies it as requested, which helps them maximize their efficiencies. Purchaser *** reported that safety stocks of products are made per its forecasts and are held by its suppliers.

Petitioners stated that glass wine bottles in bulk can be held in inventory for up to two years, while case-packed wine bottles can be held for up to one year because cartons and other packaging may start to deteriorate. U.S. producers will sell glass wine bottles that have been in inventory for too long at a discount or scrap the glass wine bottles entirely.²⁷

Substitute products

All 3 U.S. producers, 11 of 19 importers, and 11 of 37 purchasers reported that there are substitutes. Most purchasers reported that there are not substitutes for glass wine bottles. Reported substitutes include flexible bag/pouches/packaging, aluminum cans, tetra pack, plastic bottles, kegs, box and plastic bladder or bag-in-a-box, and PET. Most firms that reported substitutes reported that the price of the substitute does not impact the price of glass wine bottles. *** reported that substitute packaging reduces market share directly and puts pressure on pricing over time.

²⁶ Hearing transcript, pp. 22 (Connors).

²⁷ Hearing transcript, pp. 34, 130, 137, 197 (Anderson, Brandstatter, Azevedo).

Substitutability issues

This section assesses the degree to which U.S.-produced glass wine bottles and imports of glass wine bottles from subject countries can be substituted for one another by examining the importance of certain purchasing factors and the comparability of glass wine bottles from domestic and imported sources based on those factors. Based on available data, staff believes that there is a moderate-to-high degree of substitutability between domestically produced glass wine bottles and glass wine bottles imported from subject sources.^{28 29} Factors contributing to this level of substitutability include little preference for particular country of origin or producers, similarities between domestically produced glass wine bottles and glass wine bottles imported from subject countries across multiple purchase factors, and general interchangeability between domestic and subject sources. Factors reducing substitutability include quality differences, limited availability of domestic product, different lead times from domestic and subject sources, certain types of glass wine bottles only being available only from subject sources, some bottle weight variation, availability of case packaging, large minimum order requirements, and significant factors other than price that firms consider. Some purchasers indicated that at least one domestic producer would not sell to them at all.

Factors affecting purchasing decisions

Purchaser decisions based on source

As shown in table II-6, the majority of purchasers always or usually make purchasing decisions based on the producer while the majority sometimes or never make purchasing decisions based on the country of origin. Most purchasers reported that their customers sometimes or never make purchasing decisions based on either producer or country of origin. Of the 20 purchasers that reported that they always or usually make decisions based the manufacturer, 10 firms cited quality, other reasons cited include availability, dependability, cost/price, specific molds that are produced in China are appealing to customers, and decoration capabilities from Taiwan. Firms that reported they sometimes make purchasing

²⁸ The degree of substitution between domestic and imported glass wine bottles depends upon the extent of product differentiation between the domestic and imported products and reflects how easily purchasers can switch from domestically produced glass wine bottles to the glass wine bottles imported from subject countries (or vice versa) when prices change. The degree of substitution may include such factors as quality differences (e.g., grade standards, defect rates, etc.), and differences in sales conditions (e.g., lead times between order and delivery dates, reliability of supply, product services, etc.).

²⁹ Petitioners believe this estimate to be understated. Petitioners' posthearing brief, Answers to Commissioner Questions, pp. 3-5; O-I Glass posthearing brief, Answers to Commission Questions, p. 48.

decisions based on the manufacturer reported that supply chain diversity is critical, there are limited numbers of skilled and trustworthy producers of wine bottles, glass mold design, some preference for domestically produced glass wine bottles, and that they use caution when purchasing from China due to lead times.

Table II-6
Glass wine bottles: Count of purchasers' responses regarding frequency of purchasing decisions based on producer and country of origin

Count of firms reporting

Firm making decision	Decision based on	Always	Usually	Sometimes	Never
Purchaser	Producer	8	12	8	8
Customer	Producer	1	4	6	19
Purchaser	Country	5	6	17	8
Customer	Country	1	2	9	17

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

Importance of purchasing domestic product

Thirty-five of 37 purchasers reported that most or all of their purchases did not require purchasing U.S.-produced product. Four reported it was required by their customers (for 2 to 60 percent of their purchases), and one reported other preferences for domestic product due to contractual terms; none reported that domestic product was required by law.

Most important purchase factors

The most often cited top three factors firms consider in their purchasing decisions for glass wine bottles were quality (33 firms), price (29 firms), and availability/supply (22 firms), as shown in table II-7. Sales support/service, product line/range, contract, and volume commitments were also cited frequently. Quality was the most frequently cited first-most and second-most important factor (cited by 13 firms and 14 firms, respectively), followed by price (11 firms and 8 firms respectively); and price was the most frequently reported third-most important factor (10 firms).

Table II-7

Glass wine bottles: Count of ranking of factors used in purchasing decisions as reported by U.S. purchasers, by factor

Factor	First	Second	Third	Total
Price/Cost	11	8	10	29
Quality	13	14	6	33
Availability/supply	7	7	8	22
Sales support/service	1	2	3	6
Product line/range	3	3	1	7
Contract	2	0	4	6
Volume commitments/MOQ	0	0	1	1
All other factors	0	3	4	NA

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

Note: Other factors include supplier relationships, domestically produced/origin, reliability, payment terms, lead times, and sustainability. Several purchasers reported one of the top factors as “other important factors” in this question, and those responses are included in the “Total” column above.

Half of purchasers (18 of 36) reported that they only sometimes purchase the lowest-priced product while 16 reported they usually do and 2 reported they never purchase the lowest-priced product; none reported they always purchase the lowest-priced product.

Importance of specified purchase factors

Purchasers were asked to rate the importance of 20 factors in their purchasing decisions (table II-8). The factors rated as very important by more than half of responding purchasers were availability and reliability of supply (37 firms each), product consistency (36), quality meets industry standards (33), delivery time and price (31 each), technical support and service (23), quality exceeds industry standards (23), and availability of case-packed glass wine bottles (19). The majority of purchasers rated minimum quantity requirements, delivery terms, product range, and U.S. transportation costs as at least somewhat important.

Table II-8
Glass wine bottles: Count of U.S. purchasers' responses regarding importance of purchase factors, by factor

Count of firms reporting

Factor	Very important	Somewhat important	Not important
Availability	37	0	0
Availability of case-packed	19	8	10
Delivery terms	17	15	5
Delivery time	31	4	2
Discounts offered	14	11	11
Minimum quantity requirements	14	14	8
Packaging	17	16	4
Payment terms	11	20	4
Pre-labeling (on box or bottles)	7	14	17
Price	31	5	1
Product consistency	36	1	0
Product range	15	16	4
Quality exceeds industry standards	23	14	0
Quality meets industry standards	33	4	0
Reliability of supply	37	0	0
Technical support/service	23	12	2
U.S. transportation costs	15	18	4

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

Lead times

U.S. producers reported that *** percent of their commercial shipments of glass wine bottles were sold from inventory, with lead times averaging *** days. U.S. producer *** reported that *** percent of its sales were made-to-order in 2023, with a lead time of *** days. Importers reported that *** percent of their commercial shipments of glass wine bottles were produced-to-order, with lead times averaging *** days. The remaining *** percent of their commercial shipments came from inventories, with lead times averaging *** days from U.S. inventories and *** days from foreign inventories.

Respondents Encore and TricorBraun stated that wineries must fill bottles with the harvest-based timeframe which is limited and inflexible. Most small and medium wineries do not have their own bottling lines and either rent mobile bottling lines or co-packers months in advance so it is important that the glass bottles are delivered on time and in full. According to Respondents, the domestic industry has longer lead times that do not work for smaller wineries.³⁰

³⁰ Conference transcript, p. 106 (Guzman); Respondent TricorBraun's postconference brief, pp. 13-14.

Respondent Berlin added that small and micro-wineries do not necessarily know the size of their crop yields so have a difficult time forecasting their demand ahead of time,³¹ but Petitioner argues that the wine industry has very predictable harvest and bottling schedules, with at least several months or years between harvest and bottling.³²

Supplier certification

Twenty-three of 37 responding purchasers require their suppliers to become certified or qualified to sell glass wine bottles to their firm. Purchasers reported that the time to qualify a new supplier ranged from 5 to 365 days, with 12 purchasers reporting between 30 and 90 days. Purchasers reported that the certification processes can include audits; quality control inspections; review of acceptable quality limits (“AQLs”); review of quality standards, work conditions, and social accountability; sample review; mold testing; equipment compatibility; ISO certification; adherence to CA Prop 65 and heavy metals standards; and trial runs.

Three purchasers reported that a domestic or foreign supplier had failed in its attempt to qualify glass wine bottles or had lost its approved status since 2021. Purchaser *** reported that initial QC tests of Mexican, Chilean, and domestic glass did not meet expectations; purchaser *** reported that Fusion Y Formas (Mexico) failed; purchaser *** did not report which supplier had failed.

Minimum order quantities

Most U.S. producers (2 of 3) and importers (12 of 17) reported that they had not refused, declined, or turned down potential orders due to order size, while one U.S. producer and five importers reported that they had. *** reported that it directs wineries with low annual volume to its distributor partners. *** indicated that it would “always accept the order if it was presented with a profitable sale.” Importer *** reported that it tries not to facilitate orders less than one container due to shipping and trucking costs, that it is not well suited to service customers under a certain size because it is a manufacturer, and it utilizes key distribution partners to service these customers that would like its product.

All 3 U.S. producers and 10 of 16 importers reported that they had a minimum production run size to fill orders in 2023. Some firms have stated that the minimum order requirements for subject imports are less than domestic minimum order requirements.³³

³¹ Conference transcript, p. 120 (Brosch).

³² Petitioner postconference brief, p. 12.

³³ Hearing transcript, pp. 176, 195, 245, 253-254 (Binkowski, Brandt, Fumagalli, Azevedo)

Petitioner Ardagh stated that for bottle production, it generally requires a three-day minimum run³⁴ but reported that it can have a production run as low as *** cases. *** reported that it refers customers with less than *** annual total gross to distributor partners, and *** reported that production runs depend on plant, line, size, and capability range of *** gross per day. Importers reported minimum production runs varied, ranging from the equivalent of one to three days of production (*** bottles to *** bottles), depending on the supplier. Importer *** reported that it generally requires a minimum order of one container load but that it will also aggregate customer orders to meet producers' minimum order quantities.

Two U.S. producers and 10 importers reported that there is a production run size requirement before they can economically make a new design of glass wine bottles (such as a new mold, new glass input, etc.). U.S. producer *** reported that it requires *** annual committed volume before buying new mold gear but will ***. U.S. producer *** reported that it requires ***.

Nine of 35 responding purchasers reported that they had orders refused, declined, or turned down due to order size since January 1, 2021. Six purchasers specifically cited U.S. producers declining orders due to size, two purchasers cited Verallia (France and Chile), and one purchaser specifically cited Fesiva (Mexico).

Minimum order quantities generally do not apply to stock wine bottles that can be sold from inventory.³⁵ Petitioners stated that in many instances they are able to service orders that do not meet the minimum order quantities with a surcharge, but also added that their ability to run smaller quantities "has been limited over the last year" and that its minimum order quantities have increased.³⁶ TricorBraun, Ardagh's exclusive distributor on the West Coast stated that it agreed to an increase in minimum order quantities from 1,500 cases to 5,000 cases in late 2022, which was significant for its smaller customers.³⁷ Respondents stated that SME wineries are willing to pay more for quality glass wine bottles when they are provided in lower minimum order quantities because they do not have to overbuy and incur inventory costs for storing excess glass wine bottles.³⁸

³⁴ Hearing transcript, p. 108 (Brandstatter).

³⁵ Hearing transcript, p. 27 (Brandstatter).

³⁶ Hearing transcript, pp. 25, 28, 108 (Connors, Brandstatter); O-I Glass posthearing brief, p. 2.

³⁷ Hearing transcript, p. 182 (Fumagalli).

³⁸ Hearing transcript, p. 176 (Binkowski).

Minimum quality specifications

As can be seen from table II-9, the majority of responding purchasers (19 of 34) responded that domestically produced product usually met minimum quality specifications. Similarly, 10 responding purchasers reported that glass wine bottles from Chile, 18 responding purchasers reported that glass wine bottles from China, and 14 responding purchasers reported that glass wine bottles from Mexico usually met minimum quality specifications.

Table II-9
Glass wine bottles: Count of U.S. purchasers' responses regarding suppliers' ability to meet minimum quality specifications, by source

Count of firms reporting

Source of purchases	Always	Usually	Sometimes	Rarely or never	Don't Know
United States	8	19	2	0	5
Chile	5	10	2	0	18
China	6	18	3	0	8
Mexico	7	14	2	1	12
Nonsubject sources	10	6	0	0	8

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

Note: Purchasers were asked how often domestically produced or imported glass wine bottles meets minimum quality specifications for their own or their customers' uses.

All 37 responding purchasers reported factors that determined quality, which include color; clarity; free of imperfections, blemishes, or defects; consistency of shape, color, and specifications; weight; design; neck size and straightness; adherence to AQLs; dimensional conformance; and label panel quality.

Bottle weight variation

Purchasers were asked how frequently glass wine bottles of different weights can be used interchangeably if the volumes are the same (e.g., 750 ml). Twenty-three of 36 responding purchasers reported that sometimes they could be used interchangeably. Eleven purchasers reported that if bottles had a weight difference of less than one ounce, they could be used interchangeably. Eight purchasers reported that bottles could have a weight difference of 1-2 ounces to be used interchangeably, three reported an acceptable weight difference of 2-5 ounces, and seven reported that the weight difference did not matter in regard to interchangeability.

Changes in purchasing patterns

Thirteen purchasers reported that they had changed suppliers since January 1, 2021, while 24 reported that they had not. Specifically, firms dropped or reduced purchases from Berlin and Verallia due to inability to meet supply needs in a timely manner; Saxco (no reason provided); Owens Glass during contract negotiations; Yamamura Glass Qinhuangdao Co, Ltd. (YGQ) because it went out of business; Ardagh Glass because of quality, value, and service; and Encore was dropped in January 2024. Firms added or increased purchases from O-I Glass, Saverglass, Gallo, Yantai Chengyu Glass (replaced YGQ as Chinese supplier); Ardagh added due to purchasing new facility; West Coast Glass and Packaging added due to an acquisition; TricorBraun because of a new contract through an investor. Firms also reported that volumes fluctuate with all vendors due to price, quality, availability, and service. Purchaser *** reported that it ***.

Purchasers were also asked about changes in their purchasing patterns from different countries since January 1, 2021 (table II-10); their responses were generally mixed. Purchasers reported increased purchases of U.S.-produced product because of demand, lead time, availability, no tariffs, package mix, change in vendor contract, and to reduce supply chain risk partly in response to the glass containers petition filed in 2019 and delivery issues related to the COVID-19 pandemic. Purchasers reported decreased purchases of U.S.-produced product because of quality, decreasing demand, pricing increased, no availability, inventory, willingness to supply declined, and lower production requirement. Purchasers reported decreased purchases of product from Chile because of poor quality and used product from Chile only to cover domestic shortfall in 2023, and capacity constraints of the Chilean supplier, Cristal Chile. Purchasers reported decreased purchases of product from China because of potential tariffs, freight constraints and container availability, price increases, focus on U.S. supply chain, fewer clients filling, and based on what glass was sourced for the purchaser. Purchasers reported increased purchases of product from Mexico because the purchaser added a supplier who primarily produces glass in Mexico, price, business growth, limited freight/container availability out of Taiwan, and availability. Purchasers reported changed purchases of product from nonsubject countries mostly because of availability.

Table II-10
Glass wine bottles: Count of purchasers' responses regarding changes in purchase patterns from the United States, subject, and nonsubject countries

Count of firms reporting

Source of purchases	Steadily Increase	Fluctuate Up	No change	Fluctuate Down	Steadily Decrease	Did not purchase
United States	9	7	3	9	5	4
Chile	1	4	3	3	6	0
China	1	4	6	4	9	8
Mexico	2	10	7	4	3	5
Nonsubject sources	0	11	9	10	2	2
Sources unknown	0	0	7	1	2	8

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

Purchase factor comparisons of domestic products, subject imports, and nonsubject imports

Purchasers were asked a number of questions comparing glass wine bottles produced in the United States, subject countries, and nonsubject countries. First, purchasers were asked for a country-by-country comparison on the same 17 factors (tables II-11) for which they were asked to rate the importance.

Most purchasers reported that U.S. and glass wine bottles imported from Chile were comparable on 12 of 17 factors; there were mixed responses with respect to availability of case-packed glass wine bottles, minimum quantity requirements, packaging, price, and technical support/service. Most purchasers reported that U.S. and glass wine bottles imported from China were comparable on 12 of 17 factors; there were mixed responses on delivery terms, delivery time, minimum quantity requirements, price, and technical support/service. Most purchasers reported that U.S. and glass wine bottles imported from Mexico were comparable on all 17 factors.

Most purchasers reported that U.S. and nonsubject glass wine bottles were comparable on 10 factors; responses were mixed with respect to availability, delivery terms, delivery time, discounts offered, price, quality meets industry standards, and technical support/service.

Table II-11
Glass wine bottles: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair

Count of firms reporting

Factor	Country pair	Superior	Comparable	Inferior
Availability	U.S. vs Chile	2	9	2
Availability of case-packed	U.S. vs Chile	5	6	1
Delivery terms	U.S. vs Chile	3	8	2
Delivery time	U.S. vs Chile	4	8	1
Discounts offered	U.S. vs Chile	2	7	1
Minimum quantity requirements	U.S. vs Chile	4	6	3
Packaging	U.S. vs Chile	3	5	4
Payment terms	U.S. vs Chile	2	10	1
Pre-labeling (on box or bottles)	U.S. vs Chile	1	8	0
Price	U.S. vs Chile	6	6	1
Product consistency	U.S. vs Chile	2	11	0
Product range	U.S. vs Chile	4	8	0
Quality exceeds industry standards	U.S. vs Chile	2	10	1
Quality meets industry standards	U.S. vs Chile	1	10	2
Reliability of supply	U.S. vs Chile	2	7	4
Technical support/service	U.S. vs Chile	3	6	3
U.S. transportation costs	U.S. vs Chile	3	7	2

Table continued.

Table II-11 Continued
Glass wine bottles: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair

Count of firms reporting

Factor	Country pair	Superior	Comparable	Inferior
Availability	U.S. vs China	3	12	8
Availability of case-packed	U.S. vs China	2	12	8
Delivery terms	U.S. vs China	6	11	6
Delivery time	U.S. vs China	10	7	6
Discounts offered	U.S. vs China	3	14	4
Minimum quantity requirements	U.S. vs China	4	10	8
Packaging	U.S. vs China	3	14	6
Payment terms	U.S. vs China	4	17	1
Pre-labeling (on box or bottles)	U.S. vs China	1	11	6
Price	U.S. vs China	5	6	11
Product consistency	U.S. vs China	3	16	4
Product range	U.S. vs China	1	15	7
Quality exceeds industry standards	U.S. vs China	4	15	3
Quality meets industry standards	U.S. vs China	2	16	4
Reliability of supply	U.S. vs China	3	12	8
Technical support/service	U.S. vs China	7	10	6
U.S. transportation costs	U.S. vs China	5	13	4

Table continued.

Table II-11 Continued**Glass wine bottles: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair**

Count of firms reporting

Factor	Country pair	Superior	Comparable	Inferior
Availability	U.S. vs Mexico	3	12	1
Availability of case-packed	U.S. vs Mexico	0	11	3
Delivery terms	U.S. vs Mexico	3	11	2
Delivery time	U.S. vs Mexico	3	11	2
Discounts offered	U.S. vs Mexico	1	12	2
Minimum quantity requirements	U.S. vs Mexico	2	10	3
Packaging	U.S. vs Mexico	1	13	1
Payment terms	U.S. vs Mexico	1	14	1
Pre-labeling (on box or bottles)	U.S. vs Mexico	0	9	3
Price	U.S. vs Mexico	1	12	3
Product consistency	U.S. vs Mexico	1	11	4
Product range	U.S. vs Mexico	0	12	4
Quality exceeds industry standards	U.S. vs Mexico	1	13	1
Quality meets industry standards	U.S. vs Mexico	1	13	2
Reliability of supply	U.S. vs Mexico	1	12	3
Technical support/service	U.S. vs Mexico	1	12	3
U.S. transportation costs	U.S. vs Mexico	2	13	1

Table continued.

Table II-11 Continued
Glass wine bottles: Count of purchasers' responses comparing U.S.-produced and imported product, by factor and country pair

Count of firms reporting

Factor	Country pair	Superior	Comparable	Inferior
Availability	U.S. vs Nonsubject sources	5	8	4
Availability of case-packed	U.S. vs Nonsubject sources	2	10	3
Delivery terms	U.S. vs Nonsubject sources	5	8	3
Delivery time	U.S. vs Nonsubject sources	8	4	5
Discounts offered	U.S. vs Nonsubject sources	3	7	5
Minimum quantity requirements	U.S. vs Nonsubject sources	4	10	3
Packaging	U.S. vs Nonsubject sources	2	9	4
Payment terms	U.S. vs Nonsubject sources	2	11	4
Pre-labeling (on box or bottles)	U.S. vs Nonsubject sources	1	10	3
Price	U.S. vs Nonsubject sources	5	6	6
Product consistency	U.S. vs Nonsubject sources	2	10	5
Product range	U.S. vs Nonsubject sources	4	10	4
Quality exceeds industry standards	U.S. vs Nonsubject sources	3	13	1
Quality meets industry standards	U.S. vs Nonsubject sources	3	8	6
Reliability of supply	U.S. vs Nonsubject sources	4	9	4
Technical support/service	U.S. vs Nonsubject sources	7	6	4
U.S. transportation costs	U.S. vs Nonsubject sources	5	10	2

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

Note: With respect to cost/price factors, a rating of superior means that price/transportation cost for the first source in the country pair is generally lower. For example, if a firm reported "U.S. superior," it meant that the U.S. product was generally priced lower than the imported product.

Comparison of U.S.-produced and imported glass wine bottles

In order to determine whether U.S.-produced glass wine bottles can generally be used in the same applications as imports from Chile, China, and Mexico, U.S. producers, importers, and purchasers were asked whether the products can always, frequently, sometimes, or never be used interchangeably. As shown in tables II-12 to II-14, U.S. producers reported that domestically produced glass wine bottles are always or frequently interchangeable with glass wine bottles imported from all sources. Importer responses were mixed, though pluralities reported that domestically produced product and glass wine bottles imported from subject sources are frequently interchangeable. The majority of purchasers reported that domestically produced product and glass wine bottles imported from subject sources are always or frequently interchangeable.

Factors limiting interchangeability include customer specifications, quality, variations of colors, dimensions, weight, acceptance thresholds, specialty shapes, and finish types/sizes. Importer *** reported that its customers' experiences indicate that domestically

produced glass wine bottles are of poorer quality and are prone to breakage when compared to glass wine bottles produced in China and that China produced many bottles that the United States and Mexico do not. Importer *** reported that Mexican producers and producers in other countries often produce complex, high-end heavy bottles and/or custom bottles that are not produced in the United States, including combining glass and decoration such as screen-printing, acid etching, or coating. Importer *** reported that domestically produced glass wine bottles and those produced in Chile have different colors, finish types, and sizes. Comparing the U.S.-produced glass wine bottles to Chinese product, *** reported that a subset of bottles is similar, but vendors offer a different mix of weight and packing options. It also reported that U.S. wineries have a different neck finish than that used in most other countries and substitutability depends on the specific mold. Importer *** reported that customers have specific needs for glass wine bottles and will not usually accept a replacement bottle due to branding, bottle type, packaging type, compatibility with labels/capsules, etc.

Table II-12
Glass wine bottles: Count of U.S. producers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Count of firms reporting

Country pair	Always	Frequently	Sometimes	Never
United States vs. Chile	2	1	0	0
United States vs. China	2	1	0	0
United States vs. Mexico	2	1	0	0
Chile vs. China	1	1	0	0
Chile vs. Mexico	1	1	0	0
China vs. Mexico	1	1	0	0
United States vs. Other	1	0	0	0
Chile vs. Other	1	0	0	0
China vs. Other	1	0	0	0
Mexico vs. Other	1	0	0	0

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

Table II-13

Glass wine bottles: Count of importers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Count of firms reporting

Country pair	Always	Frequently	Sometimes	Never
United States vs. Chile	1	5	4	0
United States vs. China	2	7	4	0
United States vs. Mexico	3	5	3	0
Chile vs. China	1	3	3	0
Chile vs. Mexico	1	3	1	0
China vs. Mexico	1	5	3	0
United States vs. Other	0	4	6	0
Chile vs. Other	0	4	2	0
China vs. Other	0	5	2	0
Mexico vs. Other	0	5	1	0

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

Table II-14

Glass wine bottles: Count of purchasers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Count of firms reporting

Country pair	Always	Frequently	Sometimes	Never
United States vs. Chile	1	9	5	2
United States vs. China	2	16	6	0
United States vs. Mexico	2	11	7	0
Chile vs. China	2	9	4	1
Chile vs. Mexico	1	6	4	1
China vs. Mexico	1	10	5	0
United States vs. Other	0	11	7	2
Chile vs. Other	0	6	2	1
China vs. Other	0	6	5	0
Mexico vs. Other	0	6	5	0

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

In addition, U.S. producers, importers, and purchasers were asked to assess how often differences other than price were significant in sales of glass wine bottles from the United States, subject countries, or nonsubject countries. As seen in tables II-15 to II-17, all U.S. producers reported that there are sometimes or never significant differences other than price between domestically produced glass wine bottles and glass wine bottles from all other sources while the majority of responding importers reported that there are always or frequently significant differences between all sources. Purchaser responses were mixed, with a majority reporting other factors are sometimes or never significant with respect to China and a slight majority reporting other factors are sometimes or never significant with respect to Chile and Mexico.

In addition to the factors previously listed that limit interchangeability, importers cited limited supply available from domestic producers, flexibility in minimum order quantities and packaging, performance on the winery's bottling lines, unique or custom offerings, bottles produced in extra white flint glass in Mexico and other countries that are not available in the United States or China, and domestic producers not selling to ***.

Table II-15
Glass wine bottles: Count of U.S. producers reporting the significance of differences other than price between product produced in the United States and in other countries, by country pair

Count of firms reporting

Country pair	Always	Frequently	Sometimes	Never
United States vs. Chile	0	0	1	2
United States vs. China	0	0	1	2
United States vs. Mexico	0	0	1	2
Chile vs. China	0	0	1	1
Chile vs. Mexico	0	0	1	1
China vs. Mexico	0	0	1	1
United States vs. Other	0	0	1	0
Chile vs. Other	0	0	1	0
China vs. Other	0	0	1	0
Mexico vs. Other	0	0	1	0

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

Table II-16
Glass wine bottles: Count of importers reporting the significance of differences other than price between product produced in the United States and in other countries, by country pair

Count of firms reporting

Country pair	Always	Frequently	Sometimes	Never
United States vs. Chile	3	3	2	1
United States vs. China	3	4	4	1
United States vs. Mexico	2	4	3	1
Chile vs. China	2	1	3	0
Chile vs. Mexico	2	1	1	0
China vs. Mexico	2	3	3	0
United States vs. Other	2	6	1	0
Chile vs. Other	1	2	1	0
China vs. Other	1	3	1	0
Mexico vs. Other	0	2	2	0

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

Table II-17

Glass wine bottles: Count of purchasers reporting the significance of differences other than price between product produced in the United States and in other countries, by country pair

Count of firms reporting

Country pair	Always	Frequently	Sometimes	Never
United States vs. Chile	6	2	6	3
United States vs. China	10	1	14	1
United States vs. Mexico	9	1	10	1
Chile vs. China	5	1	9	3
Chile vs. Mexico	4	1	7	1
China vs. Mexico	7	2	6	2
United States vs. Other	10	2	7	2
Chile vs. Other	3	1	5	2
China vs. Other	6	1	4	2
Mexico vs. Other	4	1	6	2

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

Elasticity estimates

This section discusses elasticity estimates. Petitioner’s comments on substitution elasticity estimates are summarized below.

U.S. supply elasticity

The domestic supply elasticity for glass wine bottles measures the sensitivity of the quantity supplied by U.S. producers to changes in the U.S. market price of glass wine bottles. The elasticity of domestic supply depends on several factors including the level of excess capacity, the ease with which producers can alter capacity, producers’ ability to shift to production of other products, the existence of inventories, and the availability of alternate markets for U.S.-produced glass wine bottles. Analysis of these factors above indicates that the U.S. industry has the ability to greatly increase or decrease shipments to the U.S. market; an estimate in the range of 6 to 10 is suggested.

U.S. demand elasticity

The U.S. demand elasticity for glass wine bottles measures the sensitivity of the overall quantity demanded to a change in the U.S. market price of glass wine bottles. This estimate depends on factors discussed above such as the existence, availability, and commercial viability of substitute products, as well as the component share of the glass wine bottles in the production of any downstream products. Based on the available information, the aggregate demand for glass wine bottles is likely to be inelastic; a range of -0.25 to -0.40 is suggested.

Substitution elasticity

The elasticity of substitution depends upon the extent of product differentiation between the domestic and imported products.³⁹ Product differentiation, in turn, depends upon such factors as quality (e.g., chemistry, appearance, etc.) and conditions of sale (e.g., availability, sales terms/discounts/promotions, etc.). Based on available information, the elasticity of substitution between U.S.-produced glass wine bottles and imported glass wine bottles is likely to be in the range of 3 to 5. Generally, U.S.-produced glass wine bottles are comparable with glass wine bottles from Chile, China, and Mexico although minimum order requirements and exclusivity agreements are reported to sometimes limit sourcing options.

Petitioners argued that minimum order quantities and limited availability of U.S.-produced glass wine bottles are not limiting factors and suggested an elasticity range of 5 to 7.⁴⁰

³⁹ The substitution elasticity measures the responsiveness of the relative U.S. consumption levels of the subject imports and the domestic like products to changes in their relative prices. This reflects how easily purchasers switch from the U.S. product to the subject products (or vice versa) when prices change.

⁴⁰ Petitioners' posthearing brief, Answers to Commissioner Questions, pp. 3-5; O-I Glass posthearing brief, Answers to Commission Questions, p. 48.

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 subsidies and dumping margins was presented in Part I of this report and information on the volume and pricing of imports of the subject merchandise is presented in Part IV and Part V. Information on the other factors specified is presented in this section and/or Part VI and (except as noted) is based on the questionnaire responses of three firms that accounted for all known U.S. production of glass wine bottles during 2023.

U.S. producers

The Commission issued U.S. producer questionnaires to three firms based on information contained in the petition, and all three firms provided usable data on their operations. Staff believes that these responses represent all U.S. production of glass wine bottles. Table III-1 lists U.S. producers of glass wine bottles, their production locations, positions on the petition, and shares of total production for both the total market as well as the merchant market.

Table III-1
Glass wine bottles: U.S. producers, their positions on the petition, production locations, and shares of reported production, 2023

Share in percent

Firm	Position on petition	Production location(s)	Share of total market production	Share of merchant market production
Ardagh	Petitioner	Madera, CA Sapulpa, OK Port Allegany, PA Seattle, WA	***	***
Gallo	***	Modesto, CA	***	***
O-I Glass	***	Tracy, CA Vernon, CA Kalama, WA Portland, OR	***	***
All firms	Various	Various	100.0	100.0

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

Note: ***.

Table III-2 presents information on U.S. producers' ownership and related and/or affiliated firms. As shown in the table, *** reported being fully owned by ***, while *** reported being fully owned by ***. The parent company of *** (***) imports subject merchandise, while *** reported two of its subsidiaries as being importers/exporters of the subject merchandise.

*** reported that it has subsidiaries that are producers or exporters of the subject merchandise in ***. U.S. producer *** reported that it has affiliates that are producers/exporters of the subject merchandise in ***.

**Table III-2
Glass wine bottles: U.S. producers' ownership, related and/or affiliated firms**

Reporting firm	Relationship type and related firm	Details of relationship
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***
***	***	***

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

Table III-3 presents events in the U.S. industry since January 1, 2021.

**Table III-3
Glass wine bottles: Important industry events since January 1, 2021**

Item	Firm	Event
COVID-19 pandemic	Industry-wide	At the onset of the COVID-19 pandemic in 2020-2021, domestic demand for glass wine bottles increased sharply as consumers increased alcohol consumption and supplemented dining out with increased purchases of wine for consumption at home.
Supply partnership	Ardagh Group (AGP)	In February 2021, AGP-North America renewed a supply contract with Waterloo Container, a large glass packaging provider in the Eastern U.S. and Canada.
Company-wide cyberattack	Ardagh Group (AGP)	On May 17, 2021, AGP was forced to shut down some operating systems due to a cyberattack. Production at all manufacturing facilities continued, although shipping delays occurred. The financial cost of the cyberattack was an estimated \$34 million.
Production suspension	O-I Glass	In June 2023, the firm announced the indefinite suspension of glass production at its Portland, OR facility, resulting in layoffs for 70 percent of facility staff beginning in July 2023.
Emissions violations	O-I Glass	In August 2023, a subsidiary of O-I Glass—Owens-Brockway Glass Container, Inc.—received a \$213,600 penalty for emissions standards violations from the Oregon Department of Environmental Quality. This follows a \$1 million fine in 2021 over multiple air-quality violations. The Oregon facility melts used beer and wine bottles to create new glass containers.
Closure and Curtailment	Ardagh Group (AGP)	In June 2023, AGP permanently laid off workers and closed its manufacturing facilities located in Ruston, Louisiana (257 workers) and Wilson, North Carolina (340 workers). The North Carolina facility has since been sold to a company outside the glass packaging industry. Also in June 2023, AGP shut down and indefinitely curtailed production at one of three production furnaces located in Seattle, Washington.
Supply partnership	Ardagh Group (AGP)	In November 2023, Ardagh and Oliver Winery—a large Indiana-based winery—renewed a supply partnership, ensuring that most of the firm's wine bottles will continue to be manufactured by AGP-North America.

Table continued.

Table III-3 Continued

Glass wine bottles: Important industry events since January 1, 2021

Item	Firm	Event
Federal funding	O-I Glass, and Gallo Glass	<p>On March 25, 2024, O-I Glass, Libbey Glass, and Gallo Glass projects were chosen by the Department of Energy Industrial Demonstrations Program. The Industrial Demonstrations Program aims to reduce greenhouse gas emissions from manufacturing processes. The selected glass projects are: Gallo Glass - Hybrid Electric Glass Furnace Project at the Modesto, California facility which received up to \$75 million in federal cost share. It includes the installation of a demonstration hybrid electric furnace. The hybrid electric furnace will reduce natural gas use by 70% and increase recycled content by 30% in the glass bottle production process.</p> <p>O-I Glass: Glass Furnace Decarbonization Technology at the Zanesville, Ohio, Toano, Virginia, and Tracy, California facilities received up to \$125 million in federal cost share to rebuild four furnaces. The rebuilt furnaces will reduce scope one carbon dioxide emissions by an average of 40% across three facilities and reduce process NOx emissions across the furnaces and their production lines.</p> <p>The selected project leaders will enter a negotiation process prior to the agency issuing funding which the Department of Energy has the right to rescind.</p>
Closure	O-I Glass	<p>In May 2024, O-I Glass closed its 607,200-square-foot distribution warehouse in Fairfield, California. The facility packed and distributed glass bottles. The Fairfield closure impacted 16 employees.</p>
Construction	O-I Glass	<p>On April 26, 2024, O-I Glass commemorated the placement of the last steel beam in its new packaging production facility in Bowling Green, Kentucky. O-I Glass plans to invest up to \$240 million in multiple expansion phases at this plant. O-I Glass plans to utilize the new MAGMA technology that is designed to bring flexibility and modularity to glass production and can reduce the environmental footprint of glass production. Overtime, the company plans to create up to 140 new jobs in the region.</p>
Closure	Ardagh Group (AGP)	<p>In June 2024, AGP announced that it will permanently close its facility located in Houston, Texas. The closure will affect 220 employees.</p>
Layoffs	Ardagh Group (AGP)	<p>On July 1, 2024, AGP permanently laid off 244 workers and curtailed the last two operating furnaces at its facility located in Seattle, Washington.</p>

Source: Ardagh Group, “Partnering with Waterloo Container,” February 1, 2021, <https://www.ardaghgroup.com/news-centre/partnering-with-waterloo-container>; Dabo, “Ardagh and Oliver Winery,” November 8, 2023, <https://www.packaging-gateway.com/news/ardagh-oliver-winery-renew-wine-bottle-making-partnership/?cf-view>; Lane Report, “O-I Glass tops off facility that will bring 140 jobs to Bowling Green,” April 26, 2024, <https://www.lanereport.com/173224/2024/04/o-i-glass-tops-off-facility-that-will-bring-140-jobs-to-bowling-green/>; Morris, “Cyber-attack costs Ardagh Group \$34 million,” August 9, 2021, <https://www.glass-international.com/news/cyber-attack-costs-ardagh-group-34-million>; Morris, “O-I Glass makes Portland facility layoffs,” June 27, 2023, <https://www.glass-international.com/news/o-i-glass-makes-portland-facility-layoffs>; Morris, “U.S. glassmakers in decarbonization funding success,” March 25, 2024, <https://www.glass-international.com/news/us-glassmakers-in-decarbonisation-funding-success>; Packaging Gateway, “Ardagh Group to manufacture wine glass bottles for Plata Wine,” August 7, 2020, <https://www.packaging-gateway.com/news/ardagh-group-plata-wine/?cf-view>; Quackenbush, “Wine bottle maker cutting 16 jobs on exit from Solano County after nearly 2 decades,” April 16, 2024, <https://www.northbaybusinessjournal.com/article/industrynews/solano-california-wine-bottle-real-estate-layoffs/#:~:text=Wine%20bottle%20maker%20cutting%2016,County%20after%20nearly%20two%20decades&text=The%20North%20Bay's%20largest%20wine,summer%20after%20nearly%20two%20decades>; Rogoway, “Owens-Brockway’s Portland glass recycling plant will lay off 81,” June 17, 2023,

<https://www.oregonlive.com/business/2023/06/owens-brockways-portland-glass-recycling-plant-will-lay-off-81.html>; Schlitz, Heather, "Shortage of glass bottles," October 19, 2021, <https://www.businessinsider.com/wine-bottle-glass-shortage-different-taste-supply-chain-issues-2021-10>;; and Wozniacka, "Oregon's largest glass-bottle recycler fined 10th time for emissions violations," August 25, 2023, <https://www.oregonlive.com/environment/2023/08/oregons-largest-glass-bottle-recycler-fined-10th-time-for-emissions-violations.html>.

Producers in the United States were asked to report any change in the character of their operations or organization relating to the production of glass wine bottles since January 1, 2021. All three producers indicated in their questionnaires that they had experienced such changes. Table III-4 presents the changes identified by these producers.

Table III-4
Glass wine bottles: U.S. producers' reported changes in operations, since January 1, 2021

Item	Firm name and narrative response on changes in operations
Plant closings	***
Prolonged shutdowns	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***

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

Tables III-5 presents U.S. producers' additional narrative descriptions regarding plant closing, prolonged shutdowns, and/or idled production lines.

Table III-5
Glass wine bottles: U.S. producers' additional narrative description regarding plant closing, prolonged shutdowns, or idled production lines, since January 1, 2021

Reporting firm	Narrative response on additional details for closings/shutdowns/idlings
***	***
***	***
***	***

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

Table III-6 presents the locations, reasons, and timing of reported plant closings, prolonged shutdowns, or idled production lines as reported by the U.S. producers.

Table III-6
Glass wine bottles: U.S. producers' additional narrative details regarding plant closing, prolonged shutdowns, or idled production lines, since January 1, 2021

Reporting firm	Location	Reason for the closings/shutdowns/idling	When idled/closed furnace was first brought online	When idled/closed furnace was last refurbished/nature of repair
***	***	***	***	***
***	***	***	***	***
***	***	***	***	***
***	***	***	***	***
***	***	***	***	***

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

U.S. production, capacity, and capacity utilization

Table III-7 presents data on U.S. producers' installed and practical capacities and production using the same equipment and/or employees as subject production. Installed or "theoretical" overall capacity measures the level of production firms could have attained based solely on existing capital investments and not considering other constraints such as availability of material inputs, labor force, and normal downtime. The two practical capacity measures take into consideration both existing capital investment as well as non-capital investment constraints. Practical overall capacity measures firms' capacity to produce glass wine bottles as well as any other products produced using the same equipment/machinery, whereas practical glass wine bottles capacity measures only the practical capacity of firms to produce glass wine bottles based on firms' actual product mixes over the period.

From 2021-23, the firms' installed overall capacity decreased irregularly by 5.9 percent (from approximately 23.5 million gross in 2021 to 22.2 million gross in 2023).¹ The firms' collective installed overall capacity was also 4.8 percent lower in interim 2024 as compared to interim 2023.² The firms' production using the same machinery decreased 18.2 percent from 2021-23 (approximately 16.2 million gross in 2023 as compared to 19.8 million gross in 2021).³ Total production was 2.9 percent lower across the interim periods (approximately 4.1 million gross in interim 2024 compared to 4.2 million gross in interim 2023).⁴ Installed overall capacity utilization ratios reported by all three firms decreased from 2021-23 resulting in an overall decrease of 11.0 percentage points from 2021-23 (from 84.0 percent in 2021 to 73.0 percent in 2023).

¹ *** reported *** installed overall capacity levels from 2021-23, while *** reported ***. As noted in table III-4, ***.

² *** reported *** installed overall capacity levels across the interim periods, while *** reported ***.

³ ***'s total production using the same machinery decreased irregularly (by *** and *** percent, respectively), while ***'s total production increased irregularly by *** percent from 2021-23.

⁴ ***.

From 2021-23, the firms' collective practical overall capacity level decreased 11.9 percent (from approximately 21.8 million gross in 2021 to 19.2 million gross in 2023).⁵ The firms' practical overall capacity was also 9.7 percent lower in interim 2024 than in interim 2023. As shown in table III-8, firms reported several factors that constrained the ability of domestic firms to reach installed capacity from practical overall levels, such as ***.

As noted, total production using the same machinery was 18.2 percent lower in 2023 than in 2021 (approximately 16.2 million gross in 2023 as compared to 19.8 million gross in 2021), and 2.9 percent lower in interim 2024 than in interim 2023 (approximately 4.1 million gross in interim 2024 compared to 4.2 million gross in interim 2023). Resultingly, practical overall capacity utilization ratios decreased from 90.8 percent in 2021 to 84.3 percent in 2023 (a decrease of 6.5 percentage points). The practical overall capacity utilization rate in interim 2024, however, was higher than the rate in interim 2023 (91.2 percent in interim 2024 as compared to 84.8 percent in interim 2023, or 6.4 percentage points higher).

The practical capacity figures the firms reported as being allocated to glass wine bottles decreased 9.1 percent irregularly from 2021-23 (increasing from approximately 13.5 million gross in 2021 to 13.9 million gross in 2022 before decreasing to 12.3 million gross in 2023).⁶ The practical capacity allocated to glass wine bottles was also 11.5 percent lower in interim 2024 as compared to interim 2023 (approximately 3.0 million gross in interim 2024 as compared to 3.3 million gross in interim 2023).

Practical glass wine bottles production decreased irregularly by 14.2 percent from 2021-23 (with an increase of 1.9 percent from 2021-22 followed by a decrease of 15.9 percent from 2022-23).⁷ Glass wine bottles production was also 7.7 percent lower in interim 2024 than in interim 2023. Resultingly, practical glass wine bottles capacity utilization decreased 5.0 percentage points from 2021-23 (from 88.6 percent in 2021 to 83.6 percent in 2023). Practical glass wine bottles capacity utilization, however, was 3.6 percentage points higher in interim

⁵ ***.

⁶ *** reported *** in practical glass wine bottles capacity from 2021-23, *** reported that practical glass wine bottles capacity *** from 2021-23, and *** reported practical glass wine bottles capacity that *** from 2021-23.

⁷ From 2021-23, ***.

2024 than in interim 2023 (87.2 percent in interim 2024 as compared to 83.6 percent in interim 2023).

Table III-7

Glass wine bottles: U.S. producers' installed and practical capacity and production on the same equipment as subject production, by period

Capacity and production in gross; utilization in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Installed overall	Capacity	23,548,345	23,754,534	22,151,175	5,508,465	5,245,599
Installed overall	Production	19,772,108	19,198,781	16,172,577	4,210,065	4,088,381
Installed overall	Utilization	84.0	80.8	73.0	76.4	77.9
Practical overall	Capacity	21,764,376	21,687,832	19,174,758	4,965,637	4,482,074
Practical overall	Production	19,772,108	19,198,781	16,172,577	4,210,065	4,088,381
Practical overall	Utilization	90.8	88.5	84.3	84.8	91.2
Practical glass wine bottles	Capacity	13,476,253	13,882,913	12,251,619	3,342,651	2,959,793
Practical glass wine bottles	Production	11,941,827	12,170,888	10,241,212	2,795,770	2,581,045
Practical glass wine bottles	Utilization	88.6	87.7	83.6	83.6	87.2

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

Table III-8 presents U.S. producers' reported narratives regarding practical capacity constraints.

Table III-8

Glass wine bottles: U.S. producers' reported capacity constraints since January 1, 2021

Item	Firm name and narrative response on constraints to practical overall capacity
Existing labor force	***
Existing labor force	***
Supply of material inputs	***
Other constraints	***
Other constraints	***
Other constraints	***

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

U.S. producers' production, capacity, and capacity utilization

Table III-9 and figure III-1 present U.S. producers' production, capacity, and capacity utilization. As previously noted, the practical capacity figures the firms reported as being allocated to glass wine bottles decreased irregularly from approximately 13.5 million gross in 2021 to 13.9 million gross in 2022 before decreasing to 12.3 million gross in 2023, a decrease of 9.1 percent across the period.⁸ The practical capacity allocated to glass wine bottles was also 11.5 percent lower in interim 2024 as compared to interim 2023 (approximately 3.0 million gross in interim 2024 as compared to 3.3 million gross in interim 2023).

Practical glass wine bottles production decreased irregularly by 14.2 percent from 2021 to 2023 (with an increase of 1.9 percent from 2021-22 followed by a decrease of 15.9 percent from 2022-23).⁹ Glass wine bottles production was also 7.7 percent lower in interim 2024 than in interim 2023. Resultingly, practical glass wine bottles capacity utilization decreased 5.0 percentage points from 2021-23 (from 88.6 percent in 2021 to 83.6 percent in 2023). Practical glass wine bottles practical capacity utilization, however, was 3.6 percentage points higher in interim 2024 than in interim 2023 (87.2 percent in interim 2024 as compared to 83.6 percent in interim 2023).

In 2021 and 2022, *** was largest producer of glass wine bottles by quantity with *** percent and *** percent of reported production in those years, respectively, but was surpassed by *** in 2023 (in 2023, *** held the largest share of glass wine bottles production with *** percent of production as compared to *** percent of production for ***). *** represented the smallest share of production in all reporting periods with between *** and *** percent of production by quantity.

In interim 2024, *** continued to be the largest producer by quantity with *** percent of production, followed by *** with *** percent of production, and *** with *** percent of production.

⁸ *** reported *** in practical glass wine bottles capacity from 2021-23, *** reported that practical glass wine bottles capacity *** from 2021-23, and *** reported practical glass wine bottles capacity that *** from 2021-23.

⁹ From 2021-23, ***.

Table III-9
Glass wine bottles: U.S. producers' output, by firm and period
Practical capacity

Capacity in gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	13,476,253	13,882,913	12,251,619	3,342,651	2,959,793

Table continued.

Table III-9 Continued
Glass wine bottles: U.S. producers' output, by firm and period
Production

Production in gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	11,941,827	12,170,888	10,241,212	2,795,770	2,581,045

Table continued.

Table III-9 Continued
Glass wine bottles: U.S. producers' output, by firm and period
Capacity utilization

Capacity utilization in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	88.6	87.7	83.6	83.6	87.2

Table continued.

Table III-9 Continued
Glass wine bottles: U.S. producers' output, by firm and period
Share of production

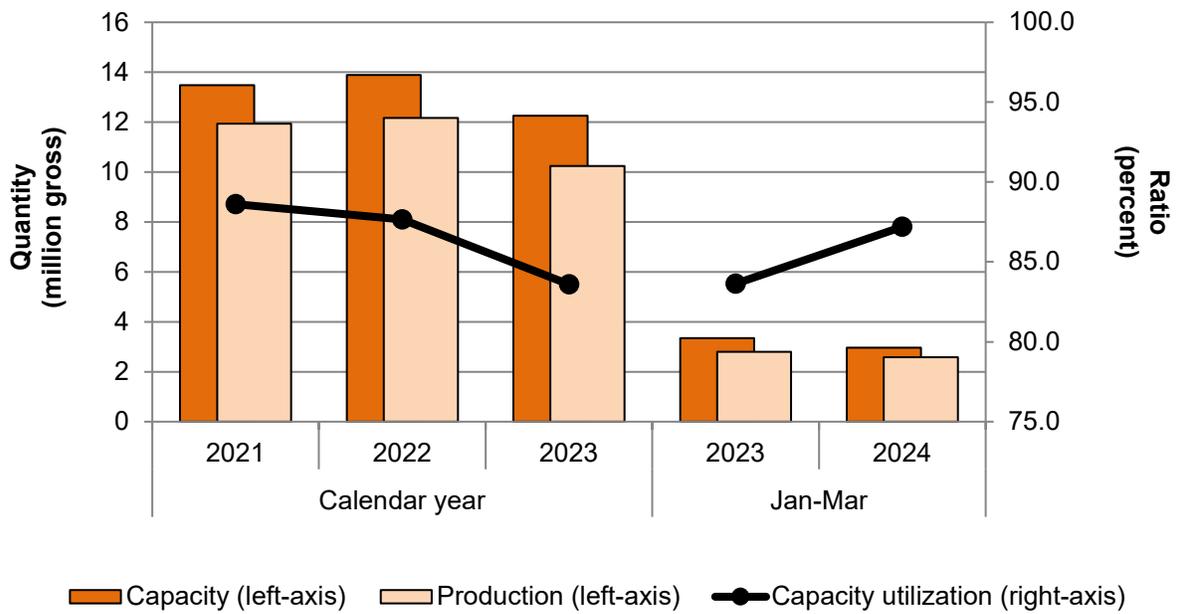
Share in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	100.0	100.0	100.0	100.0	100.0

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

Note: Capacity utilization ratio represents the ratio of the U.S. producer's production to its production capacity.

Figure III-1
Glass wine bottles: U.S. producers' output, by period



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

Alternative products

Table III-10 shows data for products produced using the same equipment and/or employees as subject production during the investigation period by U.S. producers. All three firms reported producing other out-of-scope wine bottles as well as glass bottles for products other than wine. All three responding U.S. producers also reported that they use the blow and blow production method to manufacture glass wine bottles. *** also reported also using the press and blow method. For additional information on manufacturing processes see Part I.

Glass wine bottles that meet the scope definition accounted for between 60.4 and 66.4 percent of production during the period using the same equipment or employees. Glass wine bottles not matching the scope definition (wine bottles with capacities less than 740 ml or greater than 760 ml) accounted for between *** and *** percent of production, while non-wine bottles accounted for between *** and *** percent of production during the period. During 2021-23, production of other wine bottles and production of glass bottles for products other than wine both decreased, but production of both out-of-scope product types were higher in interim 2024 compared to interim 2023. Overall production of out-of-scope products on the same equipment decreased by 24.3 percent during 2021-23 but was 6.6 percent higher in interim 2024 than in interim 2023.

Table III-10
Glass wine bottles: U.S. producers' overall production on the same equipment as subject production, by period

Quantity in gross; Share in percent

Product type	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Glass wine bottles	Quantity	11,941,827	12,170,888	10,241,212	2,795,770	2,581,045
>740 ml or <760 ml wine bottles	Quantity	***	***	***	***	***
Non-wine bottles	Quantity	***	***	***	***	***
Other products	Quantity	***	***	***	***	***
All out-of-scope products	Quantity	7,830,281	7,027,893	5,931,365	1,414,295	1,507,336
All products	Quantity	19,772,108	19,198,781	16,172,577	4,210,065	4,088,381
Glass wine bottles	Share	***	***	***	***	***
>740 ml or <760 ml wine bottles	Share	***	***	***	***	***
Non-wine bottles	Share	***	***	***	***	***
Other products	Share	***	***	***	***	***
All out-of-scope products	Share	39.6	36.6	36.7	33.6	36.9
All products	Share	100.0	100.0	100.0	100.0	100.0

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

U.S. producers' total shipments and exports and U.S. shipments

U.S. producers' total shipments and exports

Table III-11 presents U.S. producers' U.S. shipments, export shipments, and total shipments. U.S. shipments accounted for the vast majority of U.S. producers' reported shipment types accounting for between *** and *** percent of total shipments by quantity (*** and *** percent by value) across the reporting periods. Export shipments decreased from *** percent of total shipment by quantity in 2021 (*** percent by value) to *** percent of total shipments in interim 2024 (*** percent by value).

U.S. shipments, by quantity, decreased irregularly by 11.9 percent from 2021 to 2023 (increasing 2.0 percent from 2021-22 before decreasing 13.6 percent from 2022-23). U.S. shipments by quantity were 14.8 percent lower in interim 2024 compared to interim 2023. U.S. shipments, by value, increased irregularly by 5.5 percent from 2021-23 (increasing 13.3 percent from 2021-22 before decreasing 6.9 percent from 2022-23). U.S. shipments by value were 14.2 percent lower in interim 2024 than in interim 2023. The unit values of U.S. shipments increased 19.7 percent from 2021-23 and were 0.7 percent higher in interim 2024 than in interim 2023.

Table III-11
Glass wine bottles: U.S. producers' total shipments, by destination and period

Quantity in gross; value in 1,000 dollars; unit value in dollars per gross; shares in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. shipments	Quantity	10,976,527	11,198,135	9,675,050	2,581,297	2,198,972
Export shipments	Quantity	***	***	***	***	***
Total shipments	Quantity	***	***	***	***	***
U.S. shipments	Value	627,763	711,253	662,317	178,703	153,357
Export shipments	Value	***	***	***	***	***
Total shipments	Value	***	***	***	***	***
U.S. shipments	Unit value	57.19	63.52	68.46	69.23	69.74
Export shipments	Unit value	***	***	***	***	***
Total shipments	Unit value	***	***	***	***	***
U.S. shipments	Share of quantity	***	***	***	***	***
Export shipments	Share of quantity	***	***	***	***	***
Total shipments	Share of quantity	100.0	100.0	100.0	100.0	100.0
U.S. shipments	Share of value	***	***	***	***	***
Export shipments	Share of value	***	***	***	***	***
Total shipments	Share of value	100.0	100.0	100.0	100.0	100.0

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

U.S. producers' U.S. shipments

Table III-12 presents U.S. producers' U.S. shipments by type. Commercial U.S. shipments accounted for the majority of U.S. shipments representing between *** and *** percent of total U.S. shipments by quantity (and between *** and *** percent of total U.S. shipments by value) across the reporting periods. Transfers to related firms accounted for the remainder U.S. shipments in each reporting period (accounting for between *** and *** percent of U.S. producers' U.S. shipments of glass wine bottles by quantity and between *** and *** percent of U.S. producers' U.S. shipments of glass wine bottles by value).

The vast majority of transfers were reported by ***. ***'s transfer shipments accounted for between *** and *** percent of total U.S. shipments by quantity (*** and *** percent by value) across the reporting periods. *** reported that its transfer shipments were sent to related firm ***. *** also reported transferring wine glass bottles to ***, which were then sold as empty wine bottles for sale in the merchant market. ***'s reported transfers accounted for between *** and *** percent of total U.S. shipments by quantity in all reporting periods (and between *** and *** percent by value).

Table III-12
Glass wine bottles: U.S. producers' U.S. shipments, by type and period

Quantity in gross; value in 1,000 dollars; unit value in dollars per gross; shares in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Commercial U.S. shipments	Quantity	***	***	***	***	***
Transfers to related firms sold as is ***	Quantity	***	***	***	***	***
Transfers to related firms further processed ***	Quantity	***	***	***	***	***
All transfers to related firms	Quantity	***	***	***	***	***
U.S. shipments	Quantity	10,976,527	11,198,135	9,675,050	2,581,297	2,198,972
Commercial U.S. shipments	Value	***	***	***	***	***
Transfers to related firms sold as is ***	Value	***	***	***	***	***
Transfers to related firms further processed ***	Value	***	***	***	***	***
All transfers to related firms	Value	***	***	***	***	***
U.S. shipments	Value	627,763	711,253	662,317	178,703	153,357
Commercial U.S. shipments	Unit value	***	***	***	***	***
Transfers to related firms sold as is ***	Unit value	***	***	***	***	***
Transfers to related firms further processed ***	Unit value	***	***	***	***	***
Transfers to related firms	Unit value	***	***	***	***	***
U.S. shipments	Unit value	57.19	63.52	68.46	69.23	69.74
Commercial U.S. shipments	Share of quantity	***	***	***	***	***
Transfers to related firms sold as is ***	Share of quantity	***	***	***	***	***
Transfers to related firms further processed ***	Share of quantity	***	***	***	***	***
All transfers to related firms	Share of quantity	***	***	***	***	***
U.S. shipments	Share of quantity	100.0	100.0	100.0	100.0	100.0
Commercial U.S. shipments	Share of value	***	***	***	***	***
Transfers to related firms sold as is ***	Share of value	***	***	***	***	***
Transfers to related firms further processed ***	Share of value	***	***	***	***	***
All transfers to related firms	Share of value	***	***	***	***	***
U.S. shipments	Share of value	100.0	100.0	100.0	100.0	100.0

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

Captive consumption

Section 771(7)(C)(iv) of the Act states that—¹⁰

If domestic producers internally transfer significant production of the domestic like product for the production of a downstream article and sell significant production of the domestic like product in the merchant market, and the Commission finds that—

- (I) the domestic like product produced that is internally transferred for processing into that downstream article does not enter the merchant market for the domestic like product,*
- (II) the domestic like product is the predominant material input in the production of that downstream article, and*

then the Commission, in determining market share and the factors affecting financial performance . . . , shall focus primarily on the merchant market for the domestic like product.

Transfers and sales

As reported in table III-12, transfers to related firms accounted for between *** and *** percent of U.S. producers' U.S. shipments of glass wine bottles by quantity during the investigation period.¹¹ As noted, one U.S. producer, ***, reported transfers to related firms of glass wine bottles for the production of downstream wine bottles filled with wine for consumption.¹² The other U.S. producer, ***, reported transferring wine glass bottles to ***.

First statutory criterion in captive consumption

The first requirement for application of the captive consumption provision is that the domestic like product that is internally transferred for processing into that downstream article not enter the merchant market for the domestic like product. U.S. producers reported transfers of glass wine bottles for the production of downstream glass wine bottles filled with wine for consumption. No U.S. producer, however, reported diverting glass wine bottles intended for

¹⁰ Amended by PL 114-27 (as signed, June 29, 2015), Trade Preferences Extension Act of 2015.

¹¹ U.S. producers did not report any internal consumption during the period of investigation.

¹² *** did not report diverting glass wine bottles intended for internal consumption to the merchant market.

internal consumption to the merchant market. Table III-13 shows U.S. producers' transfers to related firms used in downstream products, by type of consumption and period.

Table III-13
Glass wine bottles: U.S. producers' transfers to related firms used in downstream products, by type of consumption and period

Quantity in gross; shares in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Sold as is	Quantity	***	***	***	***	***
Processed into downstream products	Quantity	***	***	***	***	***
All internal consumption and transfers	Quantity	***	***	***	***	***
Sold as is	Share	***	***	***	***	***
Processed into downstream products	Share	***	***	***	***	***
All internal consumption and transfers	Share	100.0	100.0	100.0	100.0	100.0

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

Note: ***'s transfers to related firms re-entered the merchant market and were reported being sold as is, whereas ***'s transfers to related firms were used to produce downstream bottled wine by the related firm.

Second statutory criterion in captive consumption

The second criterion of the captive consumption provision concerns whether the domestic like product is the predominant material input in the production of the downstream article that is captively produced. With respect to the downstream articles resulting from captive production, as shown in table III-14, *** estimated that glass wine bottles comprise *** percent of the finished cost and *** percent of the finished weight of the downstream product.

Table III-14
Glass wine bottles: U.S. producer *'s glass wine bottle contribution to downstream product**

Share in percent

Material input	Share of value	Share of quantity
Glass wine bottles	***	***
All other material inputs (e.g., wine)	***	***
Total	100.0	100.0

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

Note: U.S. producer *** reported no internal consumption, rather it reported transfers to the related firm ***, which in turn used the wine bottles to produce bottled wine.

U.S. producers' inventories

Table III-15 presents U.S. producers' end-of-period inventories and the ratio of these inventories to U.S. producers' production, U.S. shipments, and total shipments. U.S. producers' end-of-period inventories increased across the period from approximately 3.2 million gross in 2021 to 4.2 million gross in 2023, an increase of 30.6 percent from 2021-23. Inventories were also 15.0 percent higher at the end of the January through March 2024 interim period as compared to the interim 2023 period (approximately 4.6 million gross as compared to 4.0 million gross).

End-of-period inventories as a ratio to U.S. production, U.S. shipments, and total shipments were all increased from 2021-23 and were all higher in the interim 2024 period as compared to the interim 2023 period. From 2021-23, these ratios increased by 14.1, 14.1, and *** percentage points, respectively. Across the interim periods, these ratios increased by 8.8, 13.6, and *** percentage points, respectively.

Table III-15
Glass wine bottles: U.S. producers' inventories and their ratio to select items, by period

Quantity in gross; ratio in percent

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
End-of-period inventory quantity	3,216,052	3,867,612	4,199,925	4,016,496	4,619,436
Inventory ratio to U.S. production	26.9	31.8	41.0	35.9	44.7
Inventory ratio to U.S. shipments	29.3	34.5	43.4	38.9	52.5
Inventory ratio to total shipments	***	***	***	***	***

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

U.S. producers' imports from subject sources

One U.S. producer (***) reported that its subsidiary (***) imported glass wine bottles from subject sources.¹³ These data are presented in table III-16. ***'s subsidiary's subject imports from *** accounted for between *** percent and *** percent of the related U.S. producer's U.S. wine glass bottle production during all reporting periods. ***'s reported reasons for importing were, "****."

Table III-16

Glass wine bottles: *'s U.S. production, subject imports by subsidiary, and ratio of subject imports by subsidiary to production, by source and period**

Quantity in gross; ratio in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. production	Quantity	***	***	***	***	***
Imports from ***	Quantity	***	***	***	***	***
Imports from *** to U.S. production	Ratio	***	***	***	***	***

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

U.S. producers' purchases of imports from subject sources

No U.S. producers reported purchases of imports of glass wine bottles from subject sources during the period of investigation.

¹³ Additionally, U.S. producer ***'s parent company *** also reported imports of (***) from nonsubject sources (***) during 2023 which were all internally consumed. The company indicated its reasons for importing were, "****."

U.S. employment, wages, and productivity

Table III-17 shows U.S. producers' employment-related data. From 2021-23, the total number of production and related workers (PRWs), total hours worked, and hours worked per PRW all decreased irregularly. Average PRWs employed decreased 3.1 percent from 2021 to 2023 resulting in 65 fewer PRWs being employed in 2023 on average than in 2021.¹⁴ The companies reported a 5.2 percent decrease in total hours worked from 2021-23 (or a decrease of approximately 216,000 hours worked).¹⁵ Hours worked per PRW were 43 hours lower in 2023 than in 2021 (1,905 hours worked per PRW in 2023 as compared to 1,948 hours worked per PRW in 2021).¹⁶ PRWs, total hours worked, and hours worked per PRW were all lower in interim 2024 than in interim 2023 (PRWs and total hours worked were 8.8 and 14.7 percent lower in interim 2024, respectively).

Total wages paid, hourly wages, and unit labor costs were all higher in 2023 than in 2021. Total wages paid were 5.2 percent higher in 2023 (157.0 million hours as compared to 149.3 million hours), hourly wages were 11.0 percent higher in 2023 (\$39.91 per hour as compared to \$35.95 per hour), and unit labor costs were 22.7 percent higher in 2023 than in 2021 (\$15.34 per gross as compared to \$12.50 per gross). Average hourly wages were 3.4 percent higher in interim 2024 than in interim 2023 (\$40.66 per hour as compared to \$39.34 per hour).

Wages paid were 11.8 percent lower in interim 2024 compared to interim 2023 (\$36.2 million as compared to \$41.1 million). Unit labor costs were 4.5 percent lower in interim 2024 compared to interim 2023 (\$14.04 per pounds compared to \$14.69 per pound). Productivity as measured in pounds per hour decreased from 2021-23 by 0.3 pounds but was 0.2 pounds higher in interim 2024 than interim 2023.

¹⁴ *** reported more average PRWs employed in 2023 than in 2021, but this increase was offset by *** reporting fewer PRWs employed in 2023 than in 2021.

¹⁵ *** reported an increase in total hours worked by its PRWs. However, this increase was offset by decreases in total hours worked as reported by ***.

¹⁶ Hours worked per PRW were higher in 2023 than 2021 for *** but lower for ***.

Table III-17**Glass wine bottles: U.S. producers' employment related information, by period**

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Production and related workers (PRWs) (number)	2,131	2,137	2,066	2,020	1,842
Total hours worked (1,000 hours)	4,152	4,204	3,936	1,044	891
Hours worked per PRW (hours)	1,948	1,967	1,905	517	484
Wages paid (\$1,000)	149,285	156,181	157,082	41,076	36,231
Hourly wages (dollars per hour)	\$35.95	\$37.15	\$39.91	\$39.34	\$40.66
Productivity (gross per hour)	2.9	2.9	2.6	2.7	2.9
Unit labor costs (dollars per gross)	\$12.50	\$12.83	\$15.34	\$14.69	\$14.04

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

Ardagh provided the following explanation for its employment trends, “***.” Gallo provided the following explanation for its employment trends, “***.” Lastly, O-I Glass provided the following explanation for its employment trends, “***.”

Part IV: U.S. imports, apparent U.S. consumption, and market shares

U.S. importers

The Commission issued importer questionnaires to 59 firms believed to be importers of subject glass wine bottles, as well as to all U.S. producers of glass wine bottles.¹ Usable questionnaire responses were received from 20 companies.² These responses are estimated to represent the following shares of U.S. imports:³

- Chile: over 99.9 percent
- China: 39.0 percent
- Mexico: 87.7 percent
- Subject sources: 71.4 percent
- Nonsubject sources: 29.6 percent⁴
- All import sources: 55.8 percent

¹ The Commission issued questionnaires to those firms identified in the petitions; staff research; and proprietary, Census-edited Customs' import records.

² Additionally, 13 firms submitted responses certifying that their firm had not imported glass wine bottles since January 1, 2021: ***.

³ These estimates were obtained by comparing import data reported in the questionnaire responses to official U.S. imports statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting number 7010.90.5019, accessed July 17, 2024, which were then adjusted to remove out-of-scope imports as reported in questionnaire responses as well as responses from firms that certified that they had not imported glass wine bottles during the period of investigation using proprietary, Census-edited Customs records using HTS statistical reporting number 7010.90.5019, accessed June 7, 2024.

⁴ This estimate is based on adjusted official import statistics as reported in app. G at table G-5, which in addition to adjusting using out-of-scope imports as reported in questionnaire responses as well as responses from firms that certified that they had not imported glass wine bottles during the period of investigation using proprietary, Census-edited Customs records, also removes all reported imports from Canada. While some of additional volumes reflected in adjusted official import statistics in Table G-5 may relate to glass wine bottles, after a review of the remaining U.S. importers and foreign suppliers identified using proprietary, Census-edited Customs import records, staff believes even this further adjusted official import statistics contain primarily out-of-scope products. As such, the nonsubject and all import sources coverage estimates are still likely understated.

Table IV-1 lists all responding U.S. importers of glass wine bottles from Chile, China, and Mexico and other sources, their locations, and their shares of U.S. imports, in 2023.

Table IV-1
Glass wine bottles: U.S. importers, their headquarters, and share of imports within each source, 2023

Share in percent

Firm	Headquarters	Chile	China	Mexico	Subject sources	Nonsubject sources	All import sources
Berlin	Chicago, IL	***	***	***	***	***	***
Bonterra	Hopland, CA	***	***	***	***	***	***
Brotherhood	Washingtonville, NY	***	***	***	***	***	***
Domaine Chandon	Youtnville, CA	***	***	***	***	***	***
E. & J. Gallo	Modesto, CA	***	***	***	***	***	***
Encore	Fairfield, CA	***	***	***	***	***	***
Global Package	Napa, CA	***	***	***	***	***	***
Innovative Sourcing	Yakima, WA	***	***	***	***	***	***
M.A. Silva Corks	Santa Rosa, CA	***	***	***	***	***	***
MoreFlavor	Pittsburg, CA	***	***	***	***	***	***
O-I Packaging	Plano, TX	***	***	***	***	***	***
Packform USA	Santa Clarita, CA	***	***	***	***	***	***
Pavisa USA	Austin, TX	***	***	***	***	***	***
Richards	Mississauga, ON	***	***	***	***	***	***
Saverglass	Fairfield, CA	***	***	***	***	***	***
Saxco	Fairfield, CA	***	***	***	***	***	***
TricorBraun	St Louis, MO	***	***	***	***	***	***
Verallia USA	Fairfield, CA	***	***	***	***	***	***
Veritiv	Atlanta, GA	***	***	***	***	***	***
West Coast	El Dorado Hills, CA	***	***	***	***	***	***
All firms	Various	100.0	100.0	100.0	100.0	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "--".

U.S. imports

Table IV-2 presents data for U.S. imports of glass wine bottles from Chile, China, Mexico, and all other sources compiled from responses to Commission questionnaires. Overall, total imports decreased irregularly by 17.7 percent from 2021-23 by quantity (from 4.4 million gross in 2021, increasing to 4.7 million gross in 2022, and then decreasing to 3.6 million gross in 2023). By value, total imports increased irregularly by 0.1 percent from 2021-23 (from \$317.4 million in 2021, to \$394.3 million in 2022, and then to \$317.6 million in 2023). Total imports were 0.1 percent higher by quantity and 6.4 percent higher by value in interim 2024 than interim 2023 (approximately 1.0 million in both periods and \$89.6 million compared to \$84.2 million).

Imports from subject sources decreased 20.6 percent from 2021-23 by quantity (from greater than 3.6 million gross in 2021 to less than 3.6 million gross in 2022 and ending at 2.9 million gross in 2023). By value, imports from subject sources decreased irregularly by 7.1 percent from 2021-23 (from \$261.5 million in 2021 then increasing to \$291.4 million in 2022 and ending at \$243.0 million in 2023). Imports from subject sources were 3.6 percent higher by quantity and 10.1 higher by value in interim 2024 than interim 2023 (855.1 thousand gross compared to 825.4 thousand gross and \$70.8 million compared to \$64.3 million).

Subject imports represented the majority of imports by quantity in 2021 at 83.0 percent of imports in 2021 but decreased to 80.1 percent of imports by quantity in 2023 (with imports from nonsubject sources representing the remainder). By value, imports from subject sources accounted for 82.4 percent of total import value in 2021 but decreased to 76.5 percent of the total import value in 2023. Imports from subject sources represented a greater portion of total imports in interim 2024 than interim 2023 (82.9 percent by quantity in interim 2024 compared to 80.1 percent in interim 2023 and 79.0 percent by value in interim 2024 compared to 76.3 percent in interim 2023).

Imports from Chile decreased irregularly by *** percent from 2021-23 by quantity (from *** gross in 2021 to *** gross in 2022 to *** gross in 2023). By value, imports from Chile also decreased irregularly by *** percent from 2021-23 (from \$*** in 2021 to \$*** in 2022 and then decreasing to \$*** in 2023). Imports from Chile were *** percent lower by quantity and *** percent lower by value in interim 2024 than interim 2023 (*** gross compared to *** gross and \$*** compared to \$***). Imports from Chile represented between *** and *** percent of total imports by quantity and between *** and *** percent by value across the reporting periods.

Imports from China decreased by *** percent from 2021-23 by quantity (from *** gross in 2021 to *** gross in 2022 to *** gross in 2023). By value, imports from China also decreased irregularly by *** percent from 2021-23 (from \$*** in 2021 to \$*** in 2022 and decreasing to \$*** in 2023). Imports from China were *** percent higher by quantity and *** higher by value in interim 2024 than interim 2023 (*** gross compared to *** gross and \$*** compared to \$***). Imports from China represented between *** and *** percent of total imports by quantity and between *** and *** percent by value.

Imports from Mexico decreased by *** percent from 2021-23 by quantity (from *** gross in 2021, to *** gross in 2022, and to *** gross in 2023). By value, imports from Mexico increased *** percent from 2021-23 (from \$*** in 2021 to \$*** in 2022 and \$*** in 2023). Imports from Mexico were *** percent higher by quantity and *** higher by value in interim 2024 than interim 2023 (*** gross compared to *** gross and \$*** compared to \$***). Imports from Mexico represented between *** and *** percent of total imports by quantity and between *** and *** percent by value.

Imports from nonsubject sources⁵ decreased irregularly by 4.0 percent from 2021-23 by quantity (from 747.2 thousand gross in 2021, increasing to 1.1 million gross in 2022, and then decreasing to 717.6 thousand gross in 2023). By value, imports from nonsubject sources increased irregularly by 33.4 percent from 2021-23 (from \$55.9 million in 2021, increasing to \$102.9 million in 2022, and then decreasing to \$74.6 million in 2023). Imports from nonsubject sources were 14.1 percent lower by quantity in interim 2024 than interim 2023 and 5.5 percent lower by value (176.0 thousand gross compared to 204.8 thousand gross and \$18.8 million compared to \$19.9 million). Imports from nonsubject represented between 17.0 and 24.2 percent of total imports by quantity and between 17.6 and 26.1 percent by value.

Unit values of imports from Chile, Mexico, subject sources, nonsubject sources, and all sources were all higher in 2023 than in 2021 (by ***, ***, ***, ***, and *** percent, respectively). Unit values of imports from China were *** percent lower in 2023 than in 2021. Unit values were lower in interim 2024 than interim 2023 for U.S. imports from Chile and China (by *** and *** percent, respectively) but were higher for U.S. imports from Mexico, subject sources, nonsubject sources, and all import sources (by ***, ***, ***, and *** percent, respectively).

⁵ U.S. importers reported imports from the following nonsubject countries: Australia, Canada, Colombia, France, Germany, Italy, Spain, and Taiwan.

Table IV-2
Glass wine bottles: U.S. imports by source and period

Quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	3,645,409	3,554,993	2,895,809	825,398	855,125
Nonsubject sources	Quantity	747,171	1,136,511	717,619	204,827	176,029
All import sources	Quantity	4,392,580	4,691,504	3,613,428	1,030,225	1,031,154
Chile	Value	***	***	***	***	***
China	Value	***	***	***	***	***
Mexico	Value	***	***	***	***	***
Subject sources	Value	261,502	291,414	242,994	64,292	70,796
Nonsubject sources	Value	55,941	102,898	74,641	19,926	18,838
All import sources	Value	317,443	394,312	317,635	84,218	89,634
Chile	Unit value	***	***	***	***	***
China	Unit value	***	***	***	***	***
Mexico	Unit value	***	***	***	***	***
Subject sources	Unit value	71.73	81.97	83.91	77.89	82.79
Nonsubject sources	Unit value	74.87	90.54	104.01	97.28	107.02
All import sources	Unit value	72.27	84.05	87.90	81.75	86.93

Table continued.

Table IV-2 Continued
Glass wine bottles: Share of U.S. imports by source and period

Share and ratio in percent

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Chile	Share of quantity	***	***	***	***	***
China	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Subject sources	Share of quantity	83.0	75.8	80.1	80.1	82.9
Nonsubject sources	Share of quantity	17.0	24.2	19.9	19.9	17.1
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
Chile	Share of value	***	***	***	***	***
China	Share of value	***	***	***	***	***
Mexico	Share of value	***	***	***	***	***
Subject sources	Share of value	82.4	73.9	76.5	76.3	79.0
Nonsubject sources	Share of value	17.6	26.1	23.5	23.7	21.0
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	30.5	29.2	28.3	29.5	33.1
Nonsubject sources	Ratio	6.3	9.3	7.0	7.3	6.8
All import sources	Ratio	***	***	***	***	***

Table continued.

Table IV-2 Continued

Glass wine bottles: Changes in import quantity, values, and unit values between comparison periods

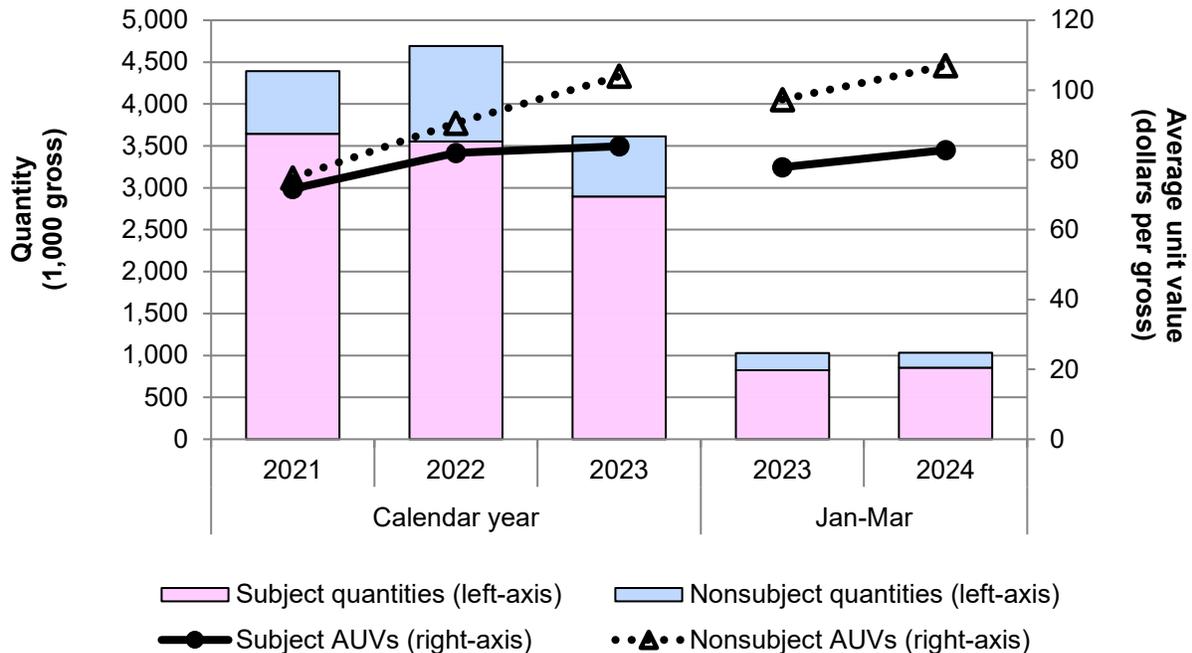
Changes (Δ) in percent

Source	Measure	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Chile	% Δ Quantity	▼***	▲***	▼***	▼***
China	% Δ Quantity	▼***	▼***	▼***	▲***
Mexico	% Δ Quantity	▼***	▼***	▼***	▲***
Subject sources	% Δ Quantity	▼(20.6)	▼(2.5)	▼(18.5)	▲3.6
Nonsubject sources	% Δ Quantity	▼(4.0)	▲52.1	▼(36.9)	▼(14.1)
All import sources	% Δ Quantity	▼(17.7)	▲6.8	▼(23.0)	▲0.1
Chile	% Δ Value	▼***	▲***	▼***	▼***
China	% Δ Value	▼***	▲***	▼***	▲***
Mexico	% Δ Value	▲***	▲***	▲***	▲***
Subject sources	% Δ Value	▼(7.1)	▲11.4	▼(16.6)	▲10.1
Nonsubject sources	% Δ Value	▲33.4	▲83.9	▼(27.5)	▼(5.5)
All import sources	% Δ Value	▲0.1	▲24.2	▼(19.4)	▲6.4
Chile	% Δ Unit value	▲***	▲***	▼***	▼***
China	% Δ Unit value	▼***	▲***	▼***	▼***
Mexico	% Δ Unit value	▲***	▲***	▲***	▲***
Subject sources	% Δ Unit value	▲17.0	▲14.3	▲2.4	▲6.3
Nonsubject sources	% Δ Unit value	▲38.9	▲20.9	▲14.9	▲10.0
All import sources	% Δ Unit value	▲21.6	▲16.3	▲4.6	▲6.3

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

Figure IV-1

Glass wine bottles: U.S. import quantities and average unit values, by source and period



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

Bulk packed U.S. imports and case packed U.S. imports, by source and period

Table IV-3 presents data on bulk packed U.S. imports, by source and period, table IV-4 presents data on case packed U.S. imports, by source and period, and table IV-5 presents data on bulk packed and case packed U.S. imports as shares of total imports, by source and period, based on U.S. importer responses to Commission questionnaires. Figure IV-2 also presents data on the shares of U.S. imports and U.S. shipments of imports that are bulk packed, by source and period.

In 2023, U.S. importers reported that 65.9 percent of their total U.S. imports were case packed with the remaining 34.1 percent of U.S. imports being bulk packed (approximately 2.4 million gross case packed compared to 1.2 million gross bulk packed). Across the reporting periods, case packed imports accounted for between 57.4 and 69.3 percent of total imports by quantity (with bulk packed imports representing between 30.7 and 42.6 percent of total imports across reporting periods).

The vast majority of imports from subject sources overall, imports from China, and imports from Mexico were case packed. Across the reporting periods, case packed imports from subject sources accounted for between 69.1 and 80.0 percent of reported total imports from subject imports. Across the reporting periods, case packed imports from China accounted for between *** and *** percent of total U.S. imports from China. Case packed imports from Mexico accounted for between *** and *** percent of total U.S. imports from Mexico across the reporting periods. The share of U.S. imports from subject sources that were case packed rose throughout the period of investigation and was highest during interim 2024 (80.0 percent of imports in interim 2024).

Comparatively, the majority of imports from Chile and from nonsubject sources were bulk packed. Across the reporting periods, bulk packed imports from Chile accounted for between *** and *** percent of U.S. imports from Chile. Bulk packed imports from nonsubject sources accounted for between *** and *** percent of U.S. imports from nonsubject sources across the reporting periods by quantity. Bulk and case packed import ratios by source were fairly steady across the period of investigation.

In 2023, U.S. importers reported that *** percent of their U.S. imports from Chile were bulk packed with the remaining *** percent of U.S. imports being case packed (approximately *** gross bulk packed compared to *** gross case packed).

Table IV-3
Glass wine bottles: Bulk packed U.S. imports, by source and period

Quantity in gross; Value in 1,000 dollars; Unit values in dollars per gross

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	1,086,335	992,027	620,851	255,259	170,991
Nonsubject sources	Quantity	641,594	946,297	611,020	184,070	145,833
All import sources	Quantity	1,727,929	1,938,324	1,231,871	439,329	316,824
Chile	Value	***	***	***	***	***
China	Value	***	***	***	***	***
Mexico	Value	***	***	***	***	***
Subject sources	Value	76,079	77,377	49,309	18,232	14,662
Nonsubject sources	Value	48,753	84,803	66,057	18,141	16,249
All import sources	Value	124,832	162,180	115,366	36,373	30,911
Chile	Unit value	***	***	***	***	***
China	Unit value	***	***	***	***	***
Mexico	Unit value	***	***	***	***	***
Subject sources	Unit value	70.03	78.00	79.42	71.43	85.75
Nonsubject sources	Unit value	75.99	89.62	108.11	98.55	111.42
All import sources	Unit value	72.24	83.67	93.65	82.79	97.57
Chile	Share of quantity	***	***	***	***	***
China	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Subject sources	Share of quantity	62.9	51.2	50.4	58.1	54.0
Nonsubject sources	Share of quantity	37.1	48.8	49.6	41.9	46.0
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
Chile	Share of value	***	***	***	***	***
China	Share of value	***	***	***	***	***
Mexico	Share of value	***	***	***	***	***
Subject sources	Share of value	60.9	47.7	42.7	50.1	47.4
Nonsubject sources	Share of value	39.1	52.3	57.3	49.9	52.6
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0

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

Table IV-4
Glass wine bottles: Case packed U.S. imports, by source and period

Quantity in gross; Value in 1,000 dollars; Unit values in dollars per gross

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	2,559,074	2,562,966	2,274,958	570,139	684,134
Nonsubject sources	Quantity	105,577	190,214	106,599	20,757	30,196
All import sources	Quantity	2,664,651	2,753,180	2,381,557	590,896	714,330
Chile	Value	***	***	***	***	***
China	Value	***	***	***	***	***
Mexico	Value	***	***	***	***	***
Subject sources	Value	185,423	214,037	193,685	46,060	56,134
Nonsubject sources	Value	7,188	18,095	8,584	1,785	2,589
All import sources	Value	192,611	232,132	202,269	47,845	58,723
Chile	Unit value	***	***	***	***	***
China	Unit value	***	***	***	***	***
Mexico	Unit value	***	***	***	***	***
Subject sources	Unit value	72.46	83.51	85.14	80.79	82.05
Nonsubject sources	Unit value	68.08	95.13	80.53	86.00	85.74
All import sources	Unit value	72.28	84.31	84.93	80.97	82.21
Chile	Share of quantity	***	***	***	***	***
China	Share of quantity	***	***	***	***	***
Mexico	Share of quantity	***	***	***	***	***
Subject sources	Share of quantity	96.0	93.1	95.5	96.5	95.8
Nonsubject sources	Share of quantity	4.0	6.9	4.5	3.5	4.2
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
Chile	Share of value	***	***	***	***	***
China	Share of value	***	***	***	***	***
Mexico	Share of value	***	***	***	***	***
Subject sources	Share of value	96.3	92.2	95.8	96.3	95.6
Nonsubject sources	Share of value	3.7	7.8	4.2	3.7	4.4
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0

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

Table IV-5
Glass wine bottles: U.S. imports, by packaging type, source, and period

Shares and ratios in percent

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Chile: Bulk	Quantity	***	***	***	***	***
Chile: Case	Quantity	***	***	***	***	***
Chile: All	Quantity	***	***	***	***	***
Chile: Bulk	Share	***	***	***	***	***
Chile: Case	Share	***	***	***	***	***
Chile: All	Share	100.0	100.0	100.0	100.0	100.0
China: Bulk	Quantity	***	***	***	***	***
China: Case	Quantity	***	***	***	***	***
China: All	Quantity	***	***	***	***	***
China: Bulk	Share	***	***	***	***	***
China: Case	Share	***	***	***	***	***
China: All	Share	100.0	100.0	100.0	100.0	100.0
Mexico: Bulk	Quantity	***	***	***	***	***
Mexico: Case	Quantity	***	***	***	***	***
Mexico: All	Quantity	***	***	***	***	***
Mexico: Bulk	Share	***	***	***	***	***
Mexico: Case	Share	***	***	***	***	***
Mexico: All	Share	100.0	100.0	100.0	100.0	100.0
Subject sources: Bulk	Quantity	1,086,335	992,027	620,851	255,259	170,991
Subject sources: Case	Quantity	2,559,074	2,562,966	2,274,958	570,139	684,134
Subject sources: All	Quantity	3,645,409	3,554,993	2,895,809	825,398	855,125
Subject sources: Bulk	Share	29.8	27.9	21.4	30.9	20.0
Subject sources: Case	Share	70.2	72.1	78.6	69.1	80.0
Subject sources: All	Share	100.0	100.0	100.0	100.0	100.0
Nonsubject: Bulk	Quantity	641,594	946,297	611,020	184,070	145,833
Nonsubject: Case	Quantity	105,577	190,214	106,599	20,757	30,196
Nonsubject: All	Quantity	747,171	1,136,511	717,619	204,827	176,029
Nonsubject: Bulk	Share	85.9	83.3	85.1	89.9	82.8
Nonsubject: Case	Share	14.1	16.7	14.9	10.1	17.2
Nonsubject: All	Share	100.0	100.0	100.0	100.0	100.0
All import sources: Bulk	Quantity	1,727,929	1,938,324	1,231,871	439,329	316,824
All sources: Case	Quantity	2,664,651	2,753,180	2,381,557	590,896	714,330
All import sources: All	Quantity	4,392,580	4,691,504	3,613,428	1,030,225	1,031,154
All import sources: Bulk	Share	39.3	41.3	34.1	42.6	30.7
All sources: Case	Share	60.7	58.7	65.9	57.4	69.3
All import sources: All	Share	100.0	100.0	100.0	100.0	100.0

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

Figure IV-2

Glass wine bottles: Share of U.S. importers' U.S. imports and U.S. shipments of imports that are bulk packed, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as show in previous table (for imports) and appendix D (for shipments of imports).

Note: CL=Chile; CN=China; MX=Mexico; NON=Nonsubject sources; Imp = U.S. imports; and, Ship = U.S. shipments of imports. As this figure shows, imports from Mexico and China are primarily imported in case packs (not bulk) and then sold in the same packaging style to their U.S. customers; whereas imports from Chile and nonsubject sources are primarily imported in bulk, but then sold in case packed to their U.S. customers indicating that the U.S. importers from Chile and nonsubject sources are breaking down bulk pallets into individual case packs in the United States prior to shipping to their customers.

Negligibility

The statute requires that an investigation be terminated without an injury determination if imports of the subject merchandise are found to be negligible.⁶ Negligible imports are generally defined in the Act, as amended, as imports from a country of merchandise corresponding to a domestic like product where such imports account for less than 3 percent of the volume of all such merchandise imported into the United States in the most recent 12-month period for which data are available that precedes the filing of the petition or the initiation of the investigation. However, if there are imports of such merchandise from a number of countries subject to investigations initiated on the same day that individually account for less than 3 percent of the total volume of the subject merchandise, and if the imports from those countries collectively account for more than 7 percent of the volume of all such merchandise imported into the United States during the applicable 12-month period, then imports from such countries are deemed not to be negligible.⁷

As shown in table IV-6, imports from all three subject sources were well above the three percent negligibility threshold. U.S. imports from Chile accounted for *** percent, China accounted for *** percent, and Mexico accounted for *** percent, respectively, of total imports of glass wine bottles by quantity during 2023.

Table IV-6
Glass wine bottles: U.S. imports in the twelve-month period preceding the filing of the petition, December 2022 through November 2023

Quantity in gross; share in percent

Source of imports	Quantity	Share of quantity
Chile	***	***
China	***	***
Mexico	***	***
All other sources	686,705	18.1
All import sources	3,789,938	100.0

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

⁶ Sections 703(a)(1), 705(b)(1), 733(a)(1), and 735(b)(1) of the Act (19 U.S.C. §§ 1671b(a)(1), 1671d(b)(1), 1673b(a)(1), and 1673d(b)(1)).

⁷ Section 771 (24) of the Act (19 U.S.C § 1677(24)).

Critical circumstances

On August 26, 2024, Commerce issued its final determination in its CVD investigation that “critical circumstances” exist with respect to imports of glass wine bottles from China from Shandong Changyu Glass Co., Ltd. (Shandong Changyu); Yantai Prime Packaging Co., Ltd. (YPP); all other producers and/or exporters; and the non-responsive companies.⁸ On August 9, 2024, Commerce preliminarily determined in the context of the AD investigation that critical circumstances exist with respect to imports of glass wine bottles from China from the China-wide entity but that critical circumstances do not exist for Qinhuangdao Ruiquan Glassware Co., Ltd. (Ruiquan), Shandong Changyu Glass Co., Ltd. (Shandong Changyu), and the non-selected companies eligible for a separate rate.⁹ In these investigations, if both Commerce and the Commission make affirmative final critical circumstances determinations, certain subject imports may be subject to antidumping duties retroactive by 90 days from June 3, 2024, the effective date of Commerce’s preliminary affirmative CVD determination and/or August 9, 2024, the effective date of Commerce’s preliminary affirmative AD determination.

Critical circumstances in the China CVD investigation

Table IV-7 and figure IV-3 present U.S. imports from China subject to Commerce’s final affirmative critical circumstances determination in the context of the CVD investigation, by month. Table IV-8 presents U.S. importers’ U.S. inventories of imports from China in relation to Commerce’s final affirmative critical circumstances determination in the context of the CVD investigation. In the CVD investigation, Commerce found critical circumstances exist for imports from all suppliers in China. As such, tables IV-7 and IV-8 and figure IV-3 present data for imports from all suppliers.

⁸ 89 FR 68395, August 26, 2024, referenced in app. A. When petitioners file timely allegations of critical circumstances, Commerce examines whether there is a reasonable basis to believe or suspect that (1) either 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 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 LTFV and that there was likely to be material injury by reason of such sales; and (2) there have been massive imports of the subject merchandise over a relatively short period.

⁹ 89 FR 65331, August 9, 2024. Commerce also preliminarily found that critical circumstances do not exist in the context of the AD investigation with respect to imports from Mexico from Fevisa Industrial S.A. de C.V. (Fevisa), Owens América S. de R.L. de C.V. (Owens América), and the non-individually investigated companies. 89 FR 65317, August 9, 2024.

Table IV-7

Glass wine bottles: U.S. imports from China subject to final affirmative Commerce critical circumstances determination in the CVD investigation, by month

Quantity in gross

Month	Relation to petition	All suppliers quantity
July 2023	Before	***
August 2023	Before	***
September 2023	Before	***
October 2023	Before	***
November 2023	Before	***
December 2023	Before	***
January 2024	After	***
February 2024	After	***
March 2024	After	***
April 2024	After	***
May 2024	After	***
June 2024	After	***

Table continued.

Table IV-7 continued

Glass wine bottles: U.S. imports from China subject to final affirmative Commerce critical circumstances determination in the CVD investigation, by differing number of months before and after the filing of the petition

Quantity in gross

Comparison pre-post petition period	Cumulative before period quantity	Cumulative after period quantity	Difference in percent
1 month	***	***	***
2 months	***	***	***
3 months	***	***	***
4 months	***	***	***
5 months	***	***	***
6 months	***	***	***

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

Note: In the CVD investigation, Commerce found in its final determination that critical circumstances exist for imports from all suppliers in China. 89 FR 68395, August 26, 2024.

Figure IV-3

Glass wine bottles: U.S. imports from China subject to a final affirmative Commerce critical circumstances determination in the CVD investigation, by month

* * * * *

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

Note: In the CVD investigation, Commerce found in its final determination that critical circumstances exist for imports from all suppliers in China. 89 FR 68395, August 26, 2024.

Table IV-8

Glass wine bottles: U.S. importers' U.S. inventories of imports from China for analysis in relation to a final affirmative Commerce critical circumstances determination in the CVD investigation, by date

Quantity in gross; Index in percent where December 2023 = 100.0 percent

Date	Quantity	Index
December 2023	***	100.0
January 2024	***	***
February 2024	***	***
March 2024	***	***
April 2024	***	***
May 2024	***	***
June 2024	***	***

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

Note: Index based on end of period inventories on December 31, 2023, equal to 100.0 percent.

Note: In the CVD investigation, Commerce in its final determination found critical circumstances exist for imports from all suppliers in China. 89 FR 68395, August 26, 2024.

Critical circumstances in the China AD investigation

Table IV-9 and figure IV-4 present U.S. imports from China subject to Commerce’s preliminary affirmative critical circumstances determination in the context of the AD investigation, by month. Table IV-10 presents U.S. importers’ U.S. inventories of imports from China in the context of Commerce’s preliminary affirmative critical circumstances AD determination. In the AD investigation, Commerce preliminarily found critical circumstances exist for imports from the China-wide entity. As such, tables IV-9 and IV-10 and figure IV-4 only present data related to imports from the China-wide entity.

Table IV-9

Glass wine bottles: U.S. imports from China subject to preliminary affirmative Commerce critical circumstances determination in the AD investigation, by month

Quantity in gross

Month	Relation to petition	China-wide entity quantity
July 2023	Before	***
August 2023	Before	***
September 2023	Before	***
October 2023	Before	***
November 2023	Before	***
December 2023	Before	***
January 2024	After	***
February 2024	After	***
March 2024	After	***
April 2024	After	***
May 2024	After	***
June 2024	After	***

Table continued.

Table IV-9 continued

Glass wine bottles: U.S. imports from China subject to preliminary affirmative Commerce critical circumstances determination in the AD investigation, by differing number of months before and after the filing of the petition

Quantity in gross; Index in percent where December 2023 = 100.0 percent

Comparison pre-post petition period	Cumulative before period quantity	Cumulative after period quantity	Difference in percent
1 month	***	***	***
2 months	***	***	***
3 months	***	***	***
4 months	***	***	***
5 months	***	***	***
6 months	***	***	***

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

Note: In the AD investigation, Commerce preliminarily found critical circumstances exist for imports from the China-wide entity. 89 FR 65331, August 9, 2024.

Figure IV-4

Glass wine bottles: U.S. imports from China subject to preliminary affirmative Commerce critical circumstances determination in the AD investigation, by month

* * * * *

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

Table IV-10

Glass wine bottles: U.S. importers' U.S. inventories of imports from China for analysis in relation to preliminary affirmative Commerce critical circumstances determination in the AD investigation, by date

Quantity in gross; Index in percent where December 2023 = 100.0 percent

Date	Quantity	Index
December 2023	***	100.0
January 2024	***	***
February 2024	***	***
March 2024	***	***
April 2024	***	***
May 2024	***	***
June 2024	***	***

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

Note: Index based on end of period inventories on December 31, 2023, equal to 100.0 percent.

Note: In the AD investigation, Commerce preliminarily found critical circumstances exist for imports from the China-wide entity. 89 FR 65331, August 9, 2024.

Cumulation considerations

In assessing whether imports should be cumulated, the Commission determines whether U.S. imports from the subject countries compete with each other and with the domestic like product and has generally considered four factors: (1) fungibility, (2) presence of sales or offers to sell in the same geographical markets, (3) common or similar channels of distribution, and (4) simultaneous presence in the market. Information regarding channels of distribution, market areas, and interchangeability appear in Part II. Additional information concerning fungibility, geographical markets, and simultaneous presence in the market is presented as follows.

Fungibility

Tables IV-11 through IV-13 and figures IV-5 through IV-7 present information on U.S. producers' and U.S. importers' U.S. shipments of glass wine bottles in 2023 by three different breakouts: by bulked packed or case packed, by bottle style, and by weight.¹⁰

¹⁰ Appendixes D and E also contain further breakouts of U.S. shipments by customer type, packaging type and by product type, weight, respectively.

U.S. shipments by bulk or by case

Table IV-11 and figure IV-5 present information on U.S. producers' and U.S. importers' U.S. shipments of glass wine bottles by whether the shipments were shipped bulk packed or case packed. As previously shown in tables IV-3 and IV-4, most imports from subject sources overall, China, and Mexico were case packed, whereas most imports from Chile and nonsubject sources were bulk packed.

As shown in table IV-11 and figure IV-5, U.S. shipments of imports from Chile,¹¹ China, and Mexico in 2023 were mostly case packed. Approximately *** percent of U.S. shipments of U.S imports from Chile, *** percent of U.S. shipments of U.S imports from China, and *** percent of U.S. shipments of U.S imports from Mexico were case packed.

Comparatively, *** percent of U.S. producers' U.S. shipments in 2023 were bulk packed (*** gross bulk packed compared to *** gross case packed). The majority of U.S. shipments of U.S. imports from nonsubject sources in 2023 were also bulk packed (*** percent in 2023) with *** gross bulk packed compared to *** gross case packed).

Table IV-11
Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and by type, 2023

Quantity in gross

Source	Bulk	Case	All packaging types
U.S. producers	***	***	***
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
Subject sources	***	***	***
Nonsubject sources	***	***	***
All import sources	***	***	***
All sources	***	***	***

Table continued.

¹¹ ***

Table IV-11 Continued

Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and packaging type, 2023

Share across in percent

Source	Bulk	Case	All packaging types
U.S. producers	***	***	100.0
Chile	***	***	100.0
China	***	***	100.0
Mexico	***	***	100.0
Subject sources	***	***	100.0
Nonsubject sources	***	***	100.0
All import sources	***	***	100.0
All sources	***	***	100.0

Table continued.

Table IV-11 Continued

Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and packaging type, 2023

Share down in percent

Source	Bulk	Case	All packaging types
U.S. producers	***	***	***
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
Subject sources	***	***	***
Nonsubject sources	***	***	***
All import sources	***	***	***
All sources	100.0	100.0	100.0

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

Figure IV-5

Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and packaging type, 2023

* * * * *

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

U.S. shipments by bottle style

Table IV-12 and figure IV-6 present information on U.S. producers' and U.S. importers' U.S. shipments of glass wine bottles by bottle style (green, claret style; green, burgundy style; flint style; or 750 mL wine bottles of other styles or colors). U.S. producers and U.S. importers from each of the sources shipped bottles in all five style categories. Claret style green was the most commonly shipped style for each source.

U.S. producers shipped glass wine bottles in all four styles in 2023 with the following shares for each style: claret: *** percent; burgundy: *** percent; flint: *** percent; and other styles: *** percent. U.S. importers from all three subject sources also reported U.S. shipments in all four styles in 2023. U.S. importers from Chile reported the following shares of their U.S. shipments by style: claret: *** percent; burgundy: *** percent; flint: *** percent; and other styles: *** percent. U.S. importers from China reported the following shares of their U.S. shipments by style: claret: *** percent; burgundy: *** percent; flint: *** percent; and other styles: *** percent. U.S. importers from Mexico reported the following shares of their U.S. shipments by style: claret: *** percent; burgundy: *** percent; flint: *** percent; and other styles: *** percent. Lastly, U.S. importers from nonsubject sources reported the following shares of their U.S. shipments by style: claret: *** percent; burgundy: *** percent; flint: *** percent; and other styles: *** percent.

Table IV-12
Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and style, 2023

Quantity in gross

Source	Claret style green	Burgundy style green	Flint style	Other styles and colors	All styles
U.S. producers	***	***	***	***	***
Chile	***	***	***	***	***
China	***	***	***	***	***
Mexico	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
All sources	***	***	***	***	***

Table continued.

Table IV-12 Continued

Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and style, 2023

Share across in percent

Source	Claret style green	Burgundy style green	Flint style	Other styles and colors	All styles
U.S. producers	***	***	***	***	100.0
Chile	***	***	***	***	100.0
China	***	***	***	***	100.0
Mexico	***	***	***	***	100.0
Subject sources	***	***	***	***	100.0
Nonsubject sources	***	***	***	***	100.0
All import sources	***	***	***	***	100.0
All sources	***	***	***	***	100.0

Table continued.

Table IV-12 Continued

Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and style, 2023

Share down in percent

Source	Claret style green	Burgundy style green	Flint style	Other styles and colors	All styles
U.S. producers	***	***	***	***	***
Chile	***	***	***	***	***
China	***	***	***	***	***
Mexico	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***
All sources	100.0	100.0	100.0	100.0	100.0

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

Figure IV-6

Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and style, 2023

* * * * *

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

U.S. shipments by weight

Table IV-13 and figure IV-7 present information on U.S. producers' and U.S. importers' U.S. shipments of glass wine bottles by weight: bottles weighing 500 grams or less, bottles weighing 501 to 700 grams, and bottles weighing greater than 700 grams. U.S. producers and U.S. importers from each of the sources shipped bottles in all three weight ranges. U.S. producers accounted for the majority of shipments (***) percent) of bottles weighing 500 grams or less.

U.S. producers shipped glass wine bottles in all three weights in 2023 with the following shares for each weight: 500 grams or less: *** percent; 501 to 700 grams: *** percent; greater than 700 grams: *** percent. U.S. importers from all three subject sources also reported U.S. shipments in all three weight ranges in 2023. U.S. importers from Chile reported the following shares of their U.S. shipments by weight range: 500 grams or less: *** percent; 501 to 700 grams: *** percent; greater than 700 grams: *** percent. U.S. importers from China reported the following shares of their U.S. shipments by weight range: 500 grams or less: *** percent; 501 to 700 grams: *** percent; greater than 700 grams: *** percent. U.S. importers from Mexico reported the following shares of their U.S. shipments by weight range: claret: 500 grams or less: *** percent; 501 to 700 grams: *** percent; greater than 700 grams: *** percent. Lastly, U.S. importers from nonsubject sources reported the following shares of their U.S. shipments by weight range: 500 grams or less: *** percent; 501 to 700 grams: *** percent; greater than 700 grams: *** percent.

Table IV-13
Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and weight, 2023

Quantity in gross

Source	Weight ≤ 500 grams	Weight = 501-700 grams	Weight > 700 grams	All weights
U.S. producers	***	***	***	***
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
All sources	***	***	***	***

Table continued.

Table IV-13 Continued
Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and weight, 2023

Share across in percent

Source	Weight ≤ 500 grams	Weight = 501-700 grams	Weight > 700 grams	All weights
U.S. producers	***	***	***	100.0
Chile	***	***	***	100.0
China	***	***	***	100.0
Mexico	***	***	***	100.0
Subject sources	***	***	***	100.0
Nonsubject sources	***	***	***	100.0
All import sources	***	***	***	100.0
All sources	***	***	***	100.0

Table continued.

Table IV-13 Continued
Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by source and weight, 2023

Share down in percent

Source	Weight ≤ 500 grams	Weight = 501-700 grams	Weight > 700 grams	All weights
U.S. producers	***	***	***	***
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
Subject sources	***	***	***	***
Nonsubject sources	***	***	***	***
All import sources	***	***	***	***
All sources	100.0	100.0	100.0	100.0

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

Figure IV-7
Glass wine bottles: U.S. producers' and U.S. importers' U.S. shipments, by weight, 2023

* * * * *

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

Overlap in largest identified customers

Table IV-14 presents U.S. producers' and subject U.S. importers' overlap in largest identified customers in 2023. Comparison group 1 shows overlap between U.S. producers' largest identified customers and the largest reported customers of subject U.S. importers that reported pricing data. Comparison group 2 shows overlap between U.S. producers' largest identified customers and the largest reported customers of subject U.S. importers that reported purchase cost data. Of the *** identified customers in comparison group 1, *** firms appeared on both the top customer lists of the U.S. producers and of the U.S. importers that reported pricing data. Of the *** identified customers in comparison group 2, *** firms appeared on both the top customer lists of the U.S. producers and of the U.S. importers that reported purchase cost data.

Table IV-14
Glass wine bottles: U.S. producers' and subject U.S. importers' overlap in largest identified customers, by type of pricing or purchase cost data submitted, 2023

Count in number of instances; Shares (of instances) in percent

Item	Grouping	Count	Share
No overlap between U.S. producers' top 10 customers and subject U.S. importers' that reported pricing data top 10 customers	Comparison grouping 1	***	***
No overlap between subject U.S. importers' that reported pricing data top 10 customers and U.S. producers' top 10 customers	Comparison grouping 1	***	***
Overlap between U.S. producers' top 10 customers and subject U.S. importers' that reported pricing data top 10 customers	Comparison grouping 1	***	***
All identified customers: For U.S. producers and U.S. importers that reporting pricing data	Comparison grouping 1	***	100.0
No overlap between U.S. producers' top 10 customers and subject U.S. importers' that reported purchase cost data (reporting firm itself)	Comparison grouping 2	***	***
No overlap between subject U.S. importers' that reported purchase cost data (reporting firm itself) and U.S. producers' top 10 customers	Comparison grouping 2	***	***
Overlap between U.S. producers' top 10 customers and subject U.S. importers' that reported purchase cost data (reporting firm itself)	Comparison grouping 2	***	***
All identified entities: For U.S. producers that reported pricing data and U.S. importers that reporting purchase cost data	Comparison grouping 2	***	100.0

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

Geographical markets

Table IV-15 presents U.S. import quantities of the HTS statistical reporting number containing glass wine bottles by source and border of entry region during 2023. Glass wine bottles produced in the United States are shipped nationwide. In 2023, official import statistics show that approximately 66.1 percent of U.S. imports from subject sources reported under statistical reporting number 7010.90.5019¹² entered through customs entry districts in the Western region¹³ of the United States. Approximately 18.9 percent of imports from subject sources entered through customs entry districts in the Southern region.¹⁴ The remainder of imports from subject sources entered through the Eastern¹⁵ and Northern¹⁶ regions, with those regions accounting for 12.5 and 2.5 percent, respectively, of imports from subject sources.

Imports from Chile, China, and Mexico all most commonly entered the United States in 2023 through the Western border. Imports from Chile entered almost exclusively from the Western region in 2023 (97.7 percent of imports), while 66.4 percent of imports from China entered through the Western region and 60.8 percent of imports from Mexico entered through the Western region. Approximately 31.6 percent of imports from Mexico entered through the Southern region in 2023, and approximately 22.3 percent of imports from China entered through the eastern region. By comparison, the following shares of imports from nonsubject sources entered the United States by region: East: 41.2 percent; West: 28.5 percent; North: 25.6 percent; and South: 4.6 percent.

¹² HTS statistical reporting number 7010.90.5019 contains glass wine bottles matching the scope of these investigations as well products outside the scope of these investigations.

¹³ The western border encompasses the following customs entry districts: Anchorage, Alaska; Los Angeles, San Diego, and San Francisco, California; Honolulu, Hawaii; Columbia-Snake, Oregon; and Seattle, Washington.

¹⁴ The southern border encompasses the following customs entry districts: Mobile, Alabama; New Orleans, Louisiana; Miami and Tampa, Florida; and Dallas-Fort Worth, El Paso, Houston-Galveston, and Laredo, Texas.

¹⁵ The eastern border of entry encompasses the following customs entry districts: Washington, DC; Savannah, Georgia; Portland, Maine; Baltimore, Maryland; Boston, Massachusetts; Charlotte, North Carolina; Buffalo and Ogdensburg, New York; Philadelphia, Pennsylvania; San Juan, Puerto Rico; Charleston, South Carolina; Norfolk, Virginia; and St. Albans, Vermont.

¹⁶ The northern border encompasses the following customs entry districts: Chicago, Illinois; Detroit, Michigan; St. Louis, Missouri; Duluth and Minneapolis, Minnesota; Great Falls, Montana; Pembina, North Dakota; and Cleveland, Ohio.

Table IV-15**Glass bottles >473 mL but less than ≤1,000 mLd with a mouth <38 mm: U.S. imports by source and border of entry, 2023**

Quantity in gross

Source	East	North	South	West	All borders
Chile	8,895	40	551	404,380	413,866
China	371,910	114,471	74,676	1,106,458	1,667,515
Mexico	190,145	---	786,004	1,511,246	2,487,395
Subject sources	570,950	114,511	861,231	3,022,084	4,568,776
Nonsubject sources	1,408,324	874,549	158,672	972,603	3,414,148
All import sources	1,979,274	989,060	1,019,903	3,994,687	7,982,924

Table continued.

Table IV-15 Continued**Glass bottles >473 mL but less than ≤1,000 mLd with a mouth <38 mm: U.S. imports by source and border of entry, 2023**

Share in percent

Source	East	North	South	West	All borders
Chile	2.1	0.0	0.1	97.7	100.0
China	22.3	6.9	4.5	66.4	100.0
Mexico	7.6	---	31.6	60.8	100.0
Subject sources	12.5	2.5	18.9	66.1	100.0
Nonsubject sources	41.2	25.6	4.6	28.5	100.0
All import sources	24.8	12.4	12.8	50.0	100.0

Table continued.

Table IV-15 Continued**Glass bottles >473 mL but less than ≤1,000 mLd with a mouth <38 mm: U.S. imports by source and border of entry, 2023**

Share in percent

Source	East	North	South	West	All borders
Chile	0.4	0.0	0.1	10.1	5.2
China	18.8	11.6	7.3	27.7	20.9
Mexico	9.6	---	77.1	37.8	31.2
Subject sources	28.8	11.6	84.4	75.7	57.2
Nonsubject sources	71.2	88.4	15.6	24.3	42.8
All import sources	100.0	100.0	100.0	100.0	100.0

Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number 7010.90.5019, accessed July 17, 2024. Imports are based on the imports for consumption data series. These data are overstated as the HTS statistical reporting number contains products outside the scope of these investigations.

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Presence in the market

Table IV-16 and figures IV-8 and IV-9 present monthly official U.S. import statistics for subject countries and nonsubject sources for the HTS statistical reporting number containing glass wine bottles. The monthly import statistics indicate that U.S. imports under the HTS statistical reporting number containing glass wine bottles from both subject and nonsubject sources as well as by each individual subject source were present in each month from January 2021 through May 2024.

Table IV-16
Glass bottles >473 mL but less than ≤1,000 mLd with a mouth <38 mm: Quantity of U.S. imports, by month and source

Quantity in gross

Year	Month	Chile	China	Mexico	Subject sources	Nonsubject sources	All import sources
2021	January	22,064	109,021	298,305	429,390	345,657	775,047
2021	February	29,992	127,469	257,011	414,472	389,049	803,521
2021	March	45,212	129,164	296,277	470,653	398,715	869,368
2021	April	24,861	180,033	334,556	539,450	512,869	1,052,319
2021	May	34,547	149,414	261,331	445,292	326,916	772,208
2021	June	66,617	124,545	305,633	496,795	316,990	813,785
2021	July	58,741	96,043	297,322	452,106	399,543	851,649
2021	August	80,971	133,727	352,213	566,911	450,956	1,017,867
2021	September	97,489	119,262	310,433	527,184	434,165	961,349
2021	October	48,887	117,384	260,500	426,771	401,994	828,765
2021	November	63,502	144,380	276,827	484,709	391,241	875,950
2021	December	50,526	122,196	263,725	436,447	368,360	804,807
2022	January	18,379	176,036	248,036	442,451	378,497	820,948
2022	February	57,785	143,900	256,483	458,168	420,511	878,679
2022	March	49,858	152,429	286,980	489,267	494,625	983,892
2022	April	72,900	162,574	321,453	556,927	507,765	1,064,692
2022	May	62,342	221,584	305,403	589,329	612,204	1,201,533
2022	June	147,441	181,917	249,862	579,220	591,232	1,170,452
2022	July	45,517	163,969	236,788	446,274	401,173	847,447
2022	August	101,672	101,811	265,666	469,149	506,660	975,809
2022	September	54,255	139,092	242,355	435,702	410,903	846,605
2022	October	66,704	101,503	187,088	355,295	359,377	714,672
2022	November	28,861	105,280	237,973	372,114	301,359	673,473
2022	December	63,364	126,361	229,652	419,377	332,280	751,657

Table continued.

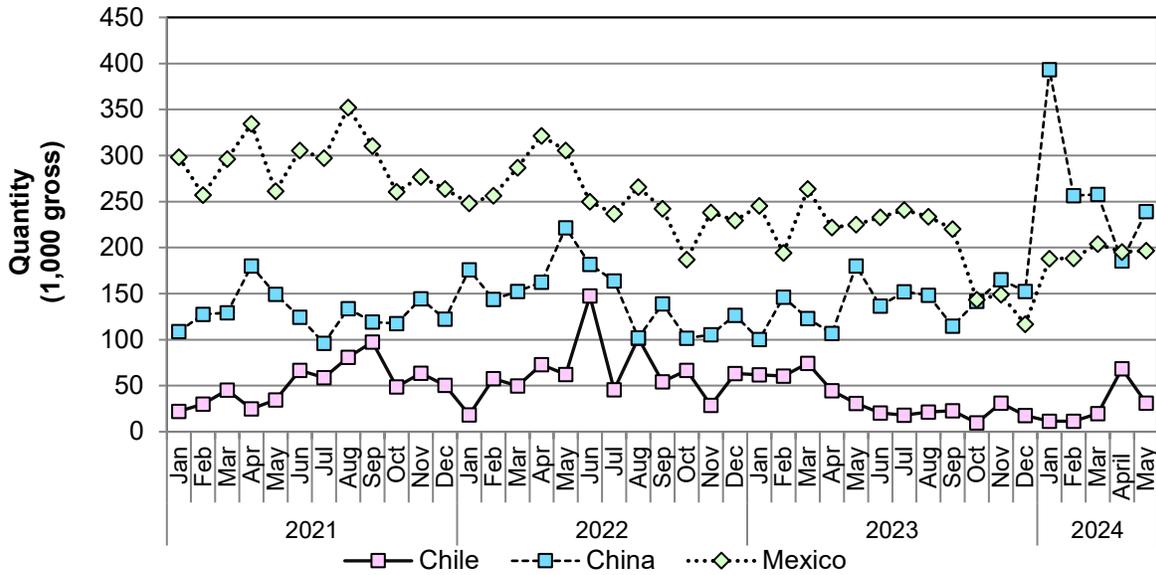
Table IV-16 Continued.**Glass bottles >473 mL but less than <=1,000 mLd with a mouth <38 mm: Quantity of U.S. imports, by source and month**

Quantity in gross

Year	Month	Chile	China	Mexico	Subject sources	Nonsubject sources	All import sources
2023	January	61,722	100,393	245,560	407,675	315,893	723,568
2023	February	60,596	146,154	194,212	400,962	259,643	660,605
2023	March	74,486	123,085	263,617	461,188	357,284	818,472
2023	April	44,726	106,779	221,918	373,423	265,961	639,384
2023	May	30,635	179,972	225,107	435,714	307,763	743,477
2023	June	20,587	136,538	232,960	390,085	226,170	616,255
2023	July	18,031	152,150	240,821	411,002	299,690	710,692
2023	August	21,532	148,440	233,575	403,547	270,202	673,749
2023	September	22,895	114,652	220,133	357,680	261,642	619,322
2023	October	9,567	141,821	143,613	295,001	301,428	596,429
2023	November	31,309	165,234	149,094	345,637	279,494	625,131
2023	December	17,780	152,297	116,785	286,862	268,978	555,840
2024	January	11,356	393,289	187,970	592,615	264,413	857,028
2024	February	11,503	256,288	188,416	456,207	232,962	689,169
2024	March	19,890	257,687	204,062	481,639	230,938	712,577
2024	April	68,452	185,447	195,438	449,337	345,991	795,328
2024	May	31,126	239,110	196,788	467,024	250,455	717,479

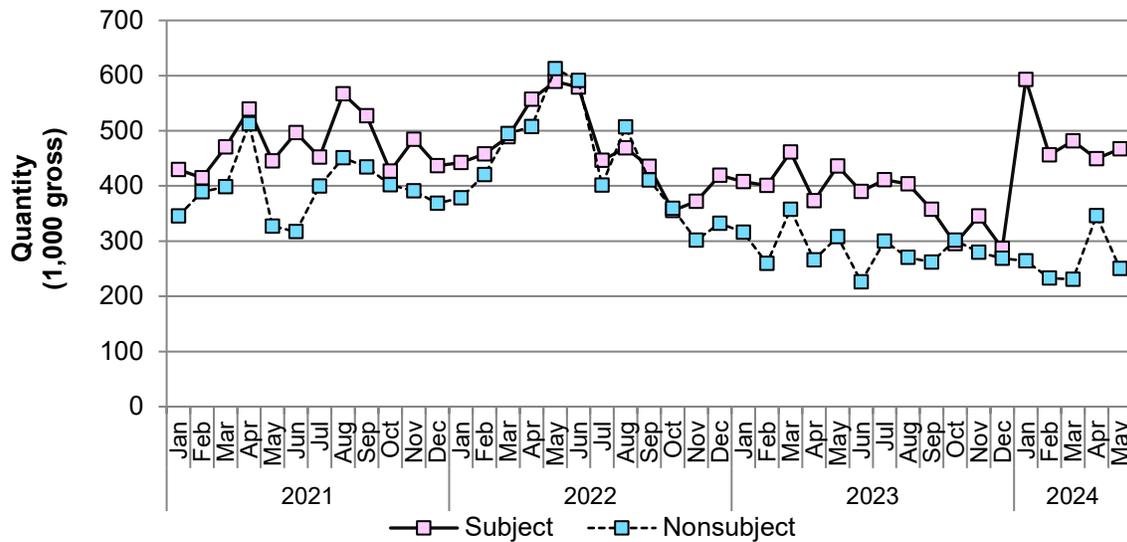
Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number 7010.90.5019, accessed July 17, 2024. Imports are based on the imports for consumption data series. These data are overstated as the HTS statistical reporting number contains products outside the scope of this investigation and include all glass bottles from 473 mL to 1000 mL inclusive of both in-scope glass wine bottles 750mL +/- 10 mL, and other glass containers both above and below that in-scope range.

Figure IV-8
Glass bottles >473 mL but less than <=1,000 mLd with a mouth <38 mm: U.S. imports from individual subject sources, by source and by month



Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number(s) 7010.90.5019, accessed July 17, 2024. Imports are based on the imports for consumption data series. These data are overstated as the HTS statistical reporting number contains products outside the scope of this investigation.

Figure IV-9
Glass bottles >473 mL but less than <=1,000 mLd with a mouth <38 mm: U.S. imports from aggregated subject and nonsubject sources, by month



Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number(s) 7010.90.5019, accessed July 17, 2024. Imports are based on the imports for consumption data series. These data are overstated as the HTS statistical reporting number contains products outside the scope of this investigation.

Apparent U.S. consumption and market shares

Tables IV-17 through IV-20 and figures IV-10 through IV-13 present apparent U.S. consumption and market shares by quantity and value for the total and merchant markets.¹⁷

Quantity

Total market

Table IV-17 and figure IV-10 present data on apparent U.S. consumption and U.S. market shares by quantity for glass wine bottles.

During 2021-23, total market apparent U.S. consumption, by quantity, decreased by 12.5 percent. It was 13.0 percent lower in interim 2024 compared to interim 2023. U.S. producers' market share increased irregularly from 70.7 percent in 2021 to 71.2 percent in 2023, an increase of 0.5 percentage points. It was lower, at 70.7 percent in interim 2024 compared to 72.2 percent in interim 2023. The market share of subject imports decreased irregularly from 24.0 percent to 22.2 percent during 2021-23. It was higher, at 23.5 percent in interim 2024 compared to 21.9 percent in interim 2023.

During 2021-23, the market share of U.S. shipments of U.S. imports from Chile decreased by *** percentage points (from *** percent to *** percent), the market share of U.S. shipments of U.S. imports from China decreased by *** percentage points (from *** percent to *** percent), and the market share of U.S. shipments of U.S. imports from Mexico increased by *** percentage points (from *** to *** percent). The market share of U.S. shipments of U.S. imports from all subject sources were higher by 1.6 percentage points in interim 2024 compared to interim 2023. The share of U.S. shipments of U.S. imports from nonsubject sources increased by 1.3 percentage points during 2021-23. It was 0.2 percentage points lower in interim 2024 compared to interim 2023.

¹⁷ Appendix F also further breaks out data on apparent U.S. consumption and U.S. market shares by channels of distribution: shipments reported as being to distributors, large wineries, small and medium wineries, and other end-users (Tables F-1 through F-4) as well as by packaging type: bulk packed shipments and case pack shipments (Tables F-5 and F-6).

Table IV-17

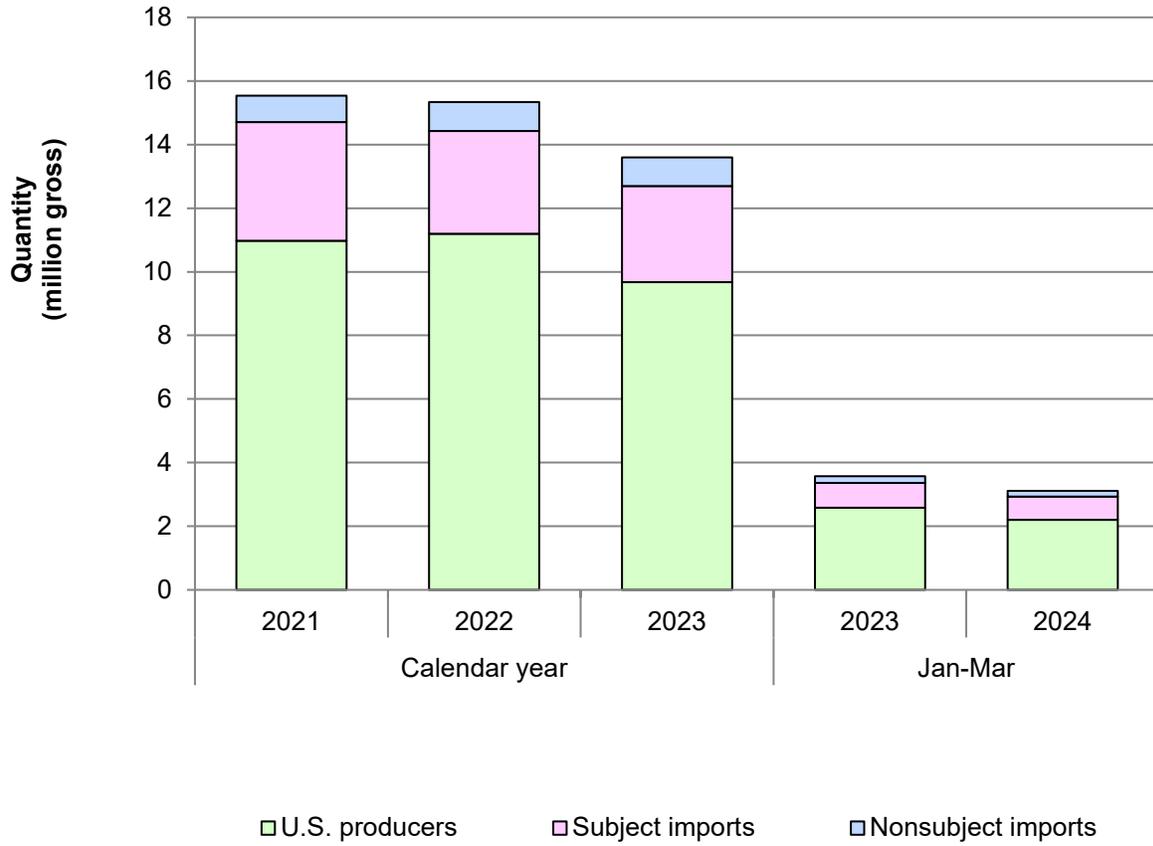
Glass wine bottles: Apparent U.S. total market consumption and market shares based on quantity, by source and period

Quantity in gross; shares in percent

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers: Ardagh	Quantity	***	***	***	***	***
U.S. producers: Gallo	Quantity	***	***	***	***	***
U.S. producers: O-I Glass	Quantity	***	***	***	***	***
U.S. producers: All firms	Quantity	10,976,527	11,198,135	9,675,050	2,581,297	2,198,972
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	3,726,299	3,231,320	3,021,512	782,517	***
Nonsubject sources	Quantity	830,619	903,279	900,752	212,118	179,757
All import sources	Quantity	4,556,918	4,134,599	3,922,264	994,635	910,588
All sources	Quantity	15,533,445	15,332,734	13,597,314	3,575,932	3,109,560
U.S. producers: Ardagh	Share	***	***	***	***	***
U.S. producers: Gallo	Share	***	***	***	***	***
U.S. producers: O-I Glass	Share	***	***	***	***	***
U.S. producers: All firms	Share	70.7	73.0	71.2	72.2	70.7
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	24.0	21.1	22.2	21.9	23.5
Nonsubject sources	Share	5.3	5.9	6.6	5.9	5.8
All import sources	Share	29.3	27.0	28.8	27.8	29.3
All sources	Share	100.0	100.0	100.0	100.0	100.0

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

Figure IV-10
Glass wine bottles: Apparent U.S. *total market* consumption based on quantity, by source and period



Source: Compiled from data submitted in response to Commission questionnaires

Merchant market

Table IV-18 and figure IV-11 present data on apparent U.S. consumption and U.S. market shares by quantity for glass wine bottles.

During 2021-23, merchant market apparent U.S. consumption, by quantity, decreased by *** percent. It was *** percent lower in interim 2024 compared to interim 2023. U.S. producers' market share increased irregularly from *** percent in 2021 to *** percent in 2023. It was lower at *** percent in interim 2024 compared to *** percent in interim 2023. The market share of U.S. shipments of subject imports decreased from *** percent in 2021 to *** in 2023. It was higher, at *** percent in interim 2024 compared to *** percent in interim 2023.

During 2021-23, the market share of U.S. shipments of U.S. imports from Chile decreased by *** percentage points, the market share of subject U.S. shipments of U.S. imports from China decreased by *** percentage points, and the market share of U.S. shipments of U.S. imports from Mexico increased by *** percentage point. The market share of U.S. shipments of U.S. imports from all subject sources combined was higher in interim 2024 compared to interim 2023 (*** compared to *** percent). The share of U.S. shipments of U.S. imports from nonsubject sources increased by *** percentage points during 2021-23 (from *** percent in 2021 to *** percent in 2023). It was approximately *** percentage points lower in interim 2024 compared to interim 2023 (approximately *** percent in interim 2024 compared to approximately *** percent in interim 2023).

Table IV-18

Glass wine bottles: Apparent U.S. merchant market consumption and market shares based on quantity, by source and period

Value in 1,000 dollars; shares in percent

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers: Ardagh	Quantity	***	***	***	***	***
U.S. producers: Gallo	Quantity	***	***	***	***	***
U.S. producers: O-I Glass	Quantity	***	***	***	***	***
U.S. producers: All firms	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	3,726,299	3,231,320	3,021,512	782,517	730,831
Nonsubject sources	Quantity	830,619	903,279	900,752	212,118	179,757
All import sources	Quantity	4,556,918	4,134,599	3,922,264	994,635	910,588
All sources	Quantity	***	***	***	***	***
U.S. producers: Ardagh	Share	***	***	***	***	***
U.S. producers: Gallo	Share	***	***	***	***	***
U.S. producers: O-I Glass	Share	***	***	***	***	***
U.S. producers: All firms	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

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

Note: ***.

Figure IV-11
Glass wine bottles: Apparent U.S. merchant market consumption based on quantity, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires

Value

Total market

Table IV-19 and figure IV-12 present data on apparent U.S. consumption and U.S. market shares by quantity for glass wine bottles.

During 2021-23, total market apparent U.S. consumption, by value, increased irregularly by 7.3 percent. It was 15.1 percent lower in interim 2024 compared to interim 2023. U.S. producers' market share decreased from 57.6 percent in 2021 to 56.6 percent in 2023. It was higher, at 58.6 percent in interim 2024 compared to 58.0 percent in interim 2023. The market share of subject imports decreased irregularly from 33.9 percent to 32.0 percent during 2021-23. It was higher, at 32.0 percent in interim 2024 compared to 31.3 percent in interim 2023.

During 2021-23, the market share of U.S. shipments of U.S. imports from Chile decreased by *** percentage points, the market share of U.S. shipments of U.S. imports from China decreased by *** percentage points, and the market share of U.S. shipments of U.S. imports from Mexico increased by *** percentage point. The market share of U.S. shipments of U.S. imports from Mexico and subject sources overall were higher in interim 2024 compared to interim 2023 but lower in interim 2024 compared to interim 2023 for U.S. shipments of U.S. imports from Chile, China, and all import sources. The share of U.S. shipments of U.S. imports from nonsubject sources increased by 2.8 percentage points during 2021-23. It was 1.3 percentage points lower in interim 2024 compared to interim 2023.

Table IV-19

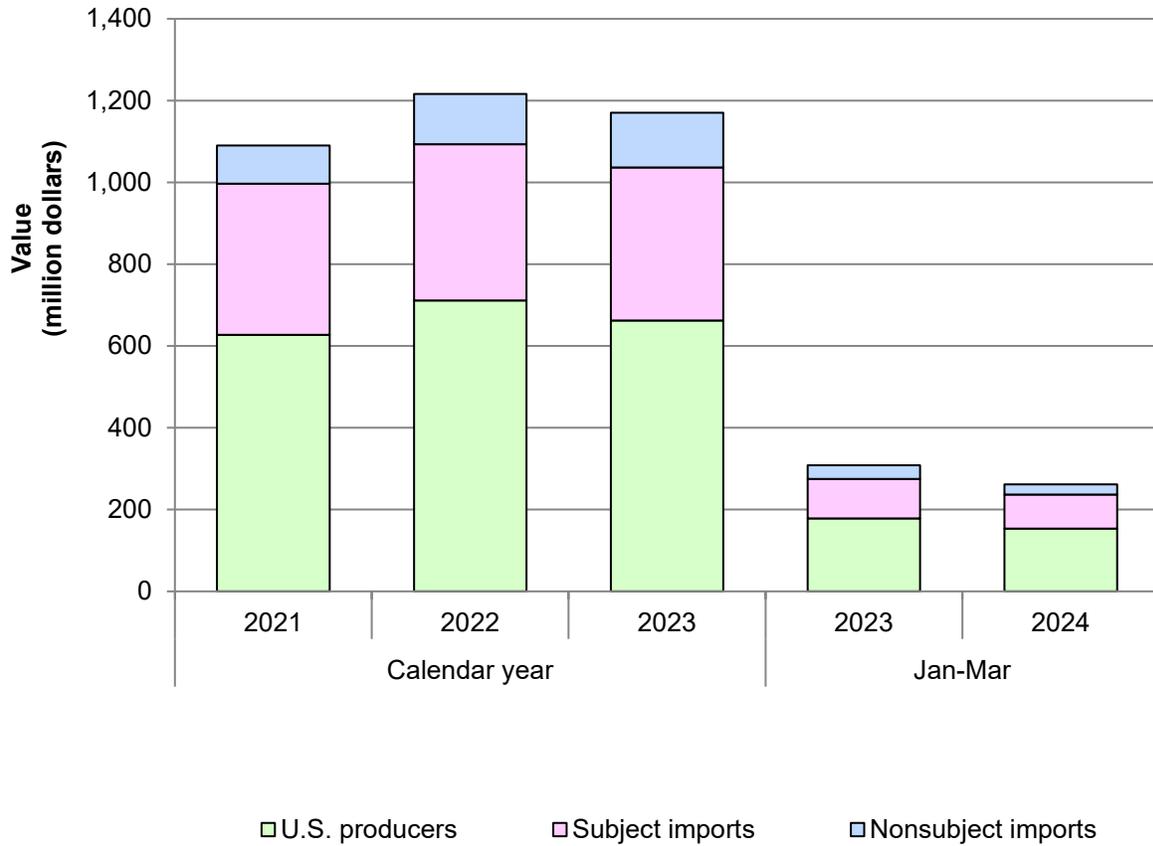
Glass wine bottles: Apparent U.S. total market consumption and market shares based on value, by source and period

Quantity in gross; shares in percent

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers: Ardagh	Value	***	***	***	***	***
U.S. producers: Gallo	Value	***	***	***	***	***
U.S. producers: O-I Glass	Value	***	***	***	***	***
U.S. producers: All firms	Value	627,763	711,253	662,317	178,703	153,357
Chile	Value	***	***	***	***	***
China	Value	***	***	***	***	***
Mexico	Value	***	***	***	***	***
Subject sources	Value	369,235	382,302	374,605	96,393	83,757
Nonsubject sources	Value	93,088	123,092	133,225	33,041	24,528
All import sources	Value	462,323	505,394	507,830	129,434	108,285
All sources	Value	1,090,086	1,216,647	1,170,147	308,137	261,642
U.S. producers: Ardagh	Share	***	***	***	***	***
U.S. producers: Gallo	Share	***	***	***	***	***
U.S. producers: O-I Glass	Share	***	***	***	***	***
U.S. producers: All firms	Share	57.6	58.5	56.6	58.0	58.6
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	33.9	31.4	32.0	31.3	32.0
Nonsubject sources	Share	8.5	10.1	11.4	10.7	9.4
All import sources	Share	42.4	41.5	43.4	42.0	41.4
All sources	Share	100.0	100.0	100.0	100.0	100.0

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

Figure IV-12
Glass wine bottles: Apparent U.S. total market consumption based on value, by source and period



Source: Compiled from data submitted in response to Commission questionnaires

Merchant market

Table IV-20 and figure IV-13 present data on apparent U.S. consumption and U.S. market shares by value for glass wine bottles.

During 2021-23, merchant market apparent U.S. consumption, by value, increased irregularly by *** percent. It was *** percent lower in interim 2024 compared to interim 2023. U.S. producers' market share decreased irregularly from *** percent in 2021 to *** percent in 2023. It was *** percentage points lower, at *** percent in interim 2023 and *** percent in interim 2024. The market share of U.S. shipments of U.S. imports from subject imports decreased irregularly from *** percent to *** percent during 2021-23. It was higher, at *** percent in interim 2024 compared to *** percent in interim 2023.

During 2021-23, the market share of U.S. shipments of U.S. imports from Chile decreased by *** percentage points, the market share of subject U.S. shipments of U.S. imports from China decreased by *** percentage points, and the market share of U.S. shipments of U.S. imports from Mexico increased by *** percentage point. The market share of U.S. shipments of U.S. imports from all subject sources were higher in interim 2024 compared to interim 2023. The share of U.S. shipments of U.S. imports from nonsubject sources increased by *** percentage points during 2021-23. It was *** percentage points lower in interim 2024 compared to interim 2023.

Table IV-20

Glass wine bottles: Apparent U.S. merchant market consumption and market shares based on value, by source and period

Value in 1,000 dollars; shares in percent

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers: Ardagh	Value	***	***	***	***	***
U.S. producers: Gallo	Value	***	***	***	***	***
U.S. producers: O-I Glass	Value	***	***	***	***	***
U.S. producers: All firms	Value	***	***	***	***	***
Chile	Value	***	***	***	***	***
China	Value	***	***	***	***	***
Mexico	Value	***	***	***	***	***
Subject sources	Value	***	***	***	***	***
Nonsubject sources	Value	***	***	***	***	***
All import sources	Value	***	***	***	***	***
All sources	Value	***	***	***	***	***
U.S. producers: Ardagh	Share	***	***	***	***	***
U.S. producers: Gallo	Share	***	***	***	***	***
U.S. producers: O-I Glass	Share	***	***	***	***	***
U.S. producers: All firms	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0

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

Note: ***.

Figure IV-13

Glass wine bottles: Apparent U.S. merchant market consumption based on value, by source and period

* * * * *

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

Part V: Pricing data

Factors affecting prices

Raw material costs

The major raw materials used in the production of glass wine bottles are silica (sand), soda ash, limestone, and cullet (furnace-ready, recycled glass).¹ These materials are mixed and then melted in furnaces that use natural gas or electricity.² U.S. producers reported that raw materials as a share of cost of goods sold was *** percent in 2023, and energy costs accounted for *** percent.

All three U.S. producers reported that the cost of raw materials had steadily increased since January 2021 and 15 of 16 responding importers reported that the cost of raw materials had either fluctuated upwards or steadily increased over the period. Seventeen of 37 purchasers reported that they were familiar with raw material costs, and 13 of 29 responding purchasers reported that raw material costs affected their contracts. Purchaser/importer *** reported that its contracts with high-volume suppliers generally include a cost pass-through formula that is based on a weighted index of raw material prices and purchaser/importer *** reported that it ***.

Figure V-1 and table V-1 show indexed raw materials over the period of investigation. Reported prices for industrial sand remained relatively constant through April 2022 (the most recent period for which data are available), decreasing by 5.0 percentage points overall.³ Reported prices for natural sodium carbonates and sulfates (including soda ash) fluctuated but increased by 13.6 percentage points between January 2021 and March 2022 (the most recent period for which data are available).⁴ Electricity and natural gas prices generally increased over the period of investigation (figure and table V-2). The price of electricity increased by 33.5 percent between January 2021 and June 2024, and the price of natural gas increased by 43.2 percent between January 2021 and May 2024 (the most recent data available).

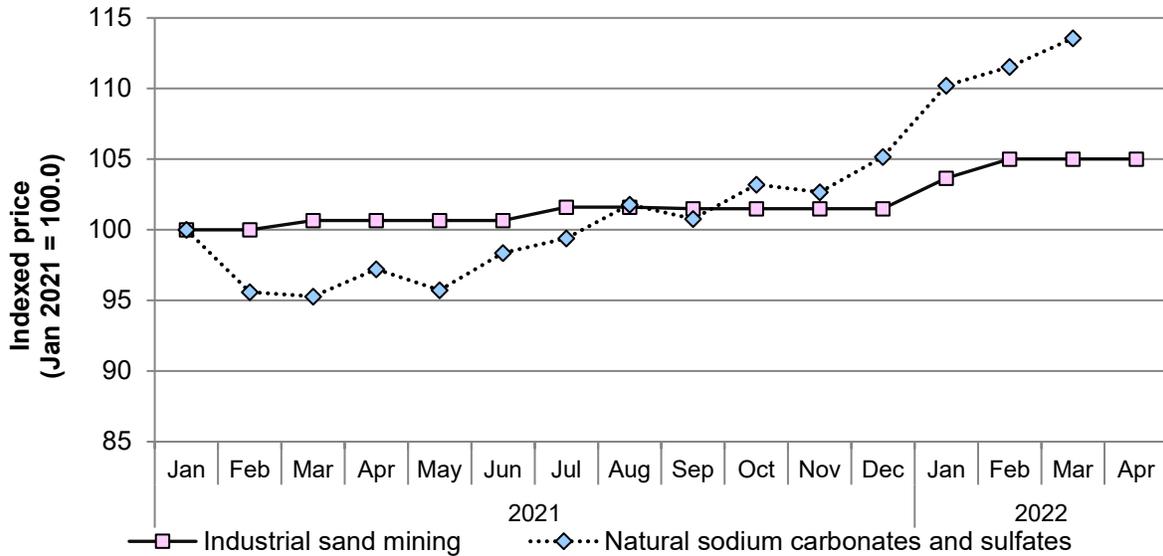
¹ Petition, p. 6.

² Petition, p. 7.

³ U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Industrial Sand Mining PCU212322212322, retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/PCU2123912123913>, January 23, 2024.

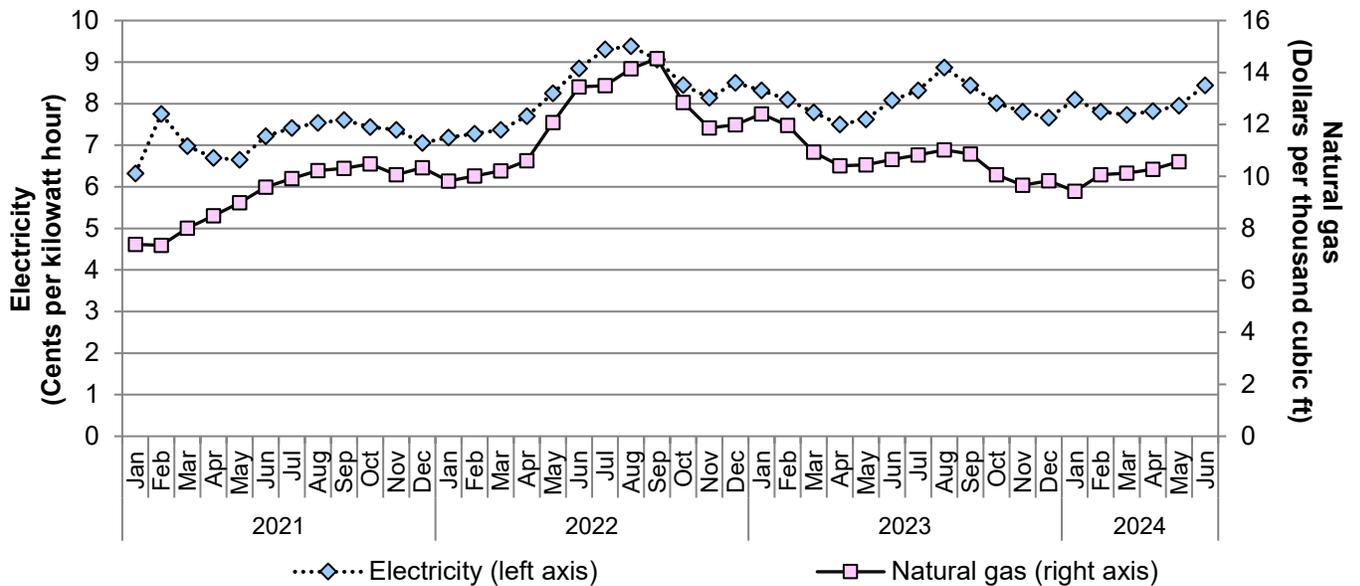
⁴ U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Other Nonmetallic Mineral Mining and Quarrying: Natural Sodium Carbonates and Sulfates PCU2123912123913, retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/PCU2123912123913>, January 23, 2024.

Figure V-1
Glass wine bottles: Indexed U.S. raw material prices, Jan 2021=100, January 2021 to April 2022, monthly



Source: U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Industrial Sand Mining PCU212322212322, and Other Nonmetallic Mineral Mining and Quarrying: Natural Sodium Carbonates and Sulfates PCU2123912123913, retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/PCU212322212322> and <https://fred.stlouisfed.org/series/PCU2123912123913>, July 22, 2024.

Figure V-2
U.S. price of natural gas sold to commercial customers and average price of electricity sold to industrial customers, January 2021 to June 2024, monthly



Source: Energy Information Administration, <https://www.eia.gov/electricity/data.php#sales> and <https://www.eia.gov/dnav/ng/hist/n3020us3m.htm>, retrieved August 29, 2024.

Table V-1
Glass wine bottles: Indexed U.S. raw material prices, Jan 2021=100, January 2021 to April 2022,
monthly

Index, January 2021=100.0

Period	Industrial sand mining	Natural sodium carbonates and sulfates
Jan-21	100.0	100.0
Feb-21	100.0	95.6
Mar-21	100.7	95.3
Apr-21	100.7	97.2
May-21	100.7	95.7
Jun-21	100.7	98.4
Jul-21	101.6	99.4
Aug-21	101.6	101.8
Sep-21	101.5	100.8
Oct-21	101.5	103.2
Nov-21	101.5	102.7
Dec-21	101.5	105.2
Jan-22	103.7	110.2
Feb-22	105.0	111.5
Mar-22	105.0	113.6
Apr-22	105.0	n.a.

Source: U.S. Bureau of Labor Statistics, Producer Price Index by Industry: Industrial Sand Mining PCU212322212322, and Other Nonmetallic Mineral Mining and Quarrying: Natural Sodium Carbonates and Sulfates PCU2123912123913, retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/PCU212322212322> and <https://fred.stlouisfed.org/series/PCU2123912123913>, July 22, 2024.

Table V-2
U.S. price of natural gas sold to commercial customers and average price of electricity sold to industrial customers, January 2021 to June 2024, monthly

Natural gas price in dollars per thousand cubic feet; electricity price in cents per kilowatt hour

Period	Natural gas price	Electricity price
Jan-21	7.38	6.32
Feb-21	7.35	7.75
Mar-21	8.01	6.98
Apr-21	8.49	6.70
May-21	8.99	6.65
Jun-21	9.59	7.22
Jul-21	9.92	7.42
Aug-21	10.23	7.54
Sep-21	10.31	7.61
Oct-21	10.48	7.44
Nov-21	10.06	7.37
Dec-21	10.34	7.06
Jan-22	9.82	7.19
Feb-22	10.02	7.28
Mar-22	10.21	7.37
Apr-22	10.6	7.70
May-22	12.07	8.25
Jun-22	13.45	8.85
Jul-22	13.5	9.31
Aug-22	14.14	9.38
Sep-22	14.54	9.06
Oct-22	12.84	8.45
Nov-22	11.87	8.14
Dec-22	11.99	8.50
Jan-23	12.41	8.32
Feb-23	11.97	8.10
Mar-23	10.93	7.79
Apr-23	10.41	7.50
May-23	10.44	7.62
Jun-23	10.65	8.08
Jul-23	10.83	8.32
Aug-23	11.02	8.87
Sep-23	10.86	8.44
Oct-23	10.07	8.01
Nov-23	9.66	7.81
Dec-23	9.83	7.66
Jan-24	9.43	8.10
Feb-24	10.06	7.81
Mar-24	10.13	7.73

Table continued.

Table V-2 Continued

U.S. price of natural gas sold to commercial customers and average price of electricity sold to industrial customers, January 2021 to April 2024, monthly

Natural gas price in dollars per thousand cubic feet; electricity price in cents per kilowatt hour

Period	Natural gas price	Electricity price
Apr-24	10.27	7.82
May-24	10.57	7.95
Jun-24	n.a.	8.44

Source: Energy Information Administration, <https://www.eia.gov/electricity/data.php#sales> and <https://www.eia.gov/dnav/ng/hist/n3020us3m.htm>, retrieved August 29, 2024.

Transportation costs to the U.S. market

Transportation costs for glass wine bottles shipped from subject countries to the United States averaged 29.4 percent of the landed duty paid value for Chile, 14.8 percent for China, and 2.9 percent for Mexico during 2023. These estimates were derived from official import data and represent the transportation and other charges on imports.⁵

U.S. inland transportation costs

All responding U.S. producers and importers reported that they typically arrange transportation to their customers. U.S. producers reported that their U.S. inland transportation costs ranged from *** percent and most importers reported costs of *** percent.⁶

Pricing practices

Pricing methods

U.S. producers and importers reported setting prices using transaction-by-transaction negotiations, contracts, and price lists. U.S. importers also reported using other methods, including lower prices to incentivize new customers and a sell price list with a minimum “floor” price (table V-3). Twenty-eight of 37 purchasers reported that their purchases involve negotiations with their suppliers, based on forecasted volume, commodity indices, quality, availability, payment terms, storage, transportation costs, supply chain risk, and lead time. Most responding purchasers reported that they did not share competing prices.

⁵ The estimated transportation costs were obtained by subtracting the customs value from the c.i.f. value of the imports for 2023 and then dividing by the customs value based on the HTS statistical reporting number 7010.90.5019.

⁶ Three importers reported high inland U.S. transportation costs ranging from *** percent.

Table V-3
Glass wine bottles: Count of U.S. producers' and importers' reported price setting methods

Count in number of firms

Method	U.S. producers	U.S. importers
Transaction-by-transaction	***	11
Contract	***	10
Set price list	***	11
Other	***	2
Responding firms	3	16

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

Note: The sum of responses down may not add up to the total number of responding firms as each firm was instructed to check all applicable price setting methods employed.

U.S. producers reported selling the vast majority of their glass wine bottles through long-term contracts, and four responding importers also reported selling more than half of their glass wine bottles under long-term (usually ***) contracts (table V-4). Petitioner Ardagh stated that most of its long-term contracts are for three years and that purchasers provide forecasts and submit their orders in 90-day buckets.⁷ Respondent Berlin stated that it is working on capacity-based agreements with producers so it can support the small- and medium-sized farmers that are associated with the industry and that its typical supply contract is an annual contract but could be multi-year depending on the relationship with the supplier.⁸ U.S. producers reported selling *** percent of their shipments on the spot market, and U.S. importers reported selling approximately *** percent of their shipments on the spot market.

⁷ Conference transcript, p. 48 (Curtin).

⁸ Conference transcript, p. 119 (Brosch).

Table V-4
Glass wine bottles: U.S. producers' and importers' shares of commercial U.S. shipments by type of sale, 2023

Share in percent

Sale type	U.S. producers	Subject U.S. importers
Long-term contracts	***	***
Annual contract	***	***
Short-term contracts	***	***
Spot sales	***	***
All sales types	100.0	100.0

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

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

U.S. producers reported that long-term contracts are ***. Two U.S. producers reported that some long-term contracts ***. U.S. importers generally reported that their annual and long-term contracts are fixed price and/or quantity and most responding importers allow for price renegotiation in their long-term contracts. Importer *** reported that its long-term contracts are indexed to raw material prices such as the producer price indices for glass sand, silica sand, feldspar, and gravel. Importer *** reported that it indexes prices to the natural gas index, the consumer price index, and an ocean freight index. Purchaser/importer *** reported that its contracts with high-volume suppliers generally include a cost-passthrough formula that is based on a weighted index of raw material prices and purchaser/importer *** reported that it ***.

Ten purchasers reported that they purchase product daily, 8 purchase weekly, 10 purchase monthly, 6 purchase quarterly, and 2 purchase annually. Purchaser/importer *** reported that the bulk of its purchases occur on a monthly basis during December through June, and purchaser/importer *** reported purchasing glass wine bottles three times per year. Thirty-two of 37 responding purchasers reported that their purchasing frequency had not changed since 2021. Purchaser/importers *** reported making more emergency purchases due to domestic supply shortages. Purchaser *** reported that it must purchase all domestic glass wine bottles in December for the following year.

Most (20 of 35) purchasers contact one to three suppliers before making a purchase. Purchaser/importer *** reported contacting between 2 to 13 suppliers.

Petitioner Ardagh stated that it is typical to see prices increase by two to three percent per year on pace with inflation.⁹ Additionally, Petitioner stated that it tries to pass on rising costs, including raw materials, labor, and energy, in renegotiating contracts.¹⁰ Ardagh relies on producer price indices for labor, raw materials, and electricity for the cost pass-through component of its pricing structure.¹¹ TricorBraun, Ardagh's exclusive distributor on the West Coast, agreed to amendments to the distributorship agreement in 2020 and 2023 including four price increases totaling 24 percent for glass wine bottles in bulk packaging and 30 percent for glass wine bottles in case packaging.¹²

Petitioners stated that their customers negotiate prices during the contract renegotiation process, but sometimes mid-contract, and that the cost passthrough mechanism is usually the point of negotiation.¹³ Many of U.S. producers' contracts are dual supply, and U.S. producers are contracted to supply a certain percentage. During renegotiations, U.S. producers may lose a share of the contracted volume to keep their customers.¹⁴

Sales terms and discounts

Two U.S. producers reported quoting prices on *** basis and one U.S. producer reported quoting prices on *** basis. Twelve importers reported quoting prices on an f.o.b. basis. All three U.S. producers reported offering *** discounts, and two reported also offering *** discounts.¹⁵ U.S. producer *** reported that it negotiates discounts individually with each contract. Seven importers reported offering total volume discounts and six reported offering quantity discounts. U.S. importer *** reported that it offers discounts only for large volume orders or contracts and will provide spot pricing for non-contract, lower volume customers. It added that it will sell at listing price for low volume products. Nine importers reported no discounts or no official discount policy.

⁹ Conference transcript, pp. 16, 26, 28, 29 (Walton, Anderson).

¹⁰ Conference transcript, p. 27 (Anderson).

¹¹ Conference transcript, p. 34, 74, 77 (Curtin, Anderson).

¹² Hearing transcript, pp. 182-183 (Fumagalli). For additional contractual details, see TricorBraun's posthearing brief, Response to Commissioner Questions, p. 2-4, Exhibits 1 and 2.

¹³ Hearing transcript, p. 77 (Pickard).

¹⁴ Hearing transcript, p. 96 (Brandstatter, Anderson).

¹⁵ U.S. producer *** reported that it offers ***.

Price leadership

Twenty-one of 37 purchasers reported that there were no price leaders in the glass wine bottles market or they did not know, while 13 reported that domestic producers were price leaders (8 reported Ardagh, 7 reported O-I Glass, and 4 reported Gallo). Three purchasers reported foreign producers or distributors as price leaders. Purchasers indicating the presence of price leaders indicated that these price leaders led by transparent pricing, innovative product offerings, and “value-driven solutions.” Purchaser *** reported that as the largest suppliers of glass wine bottles, the direction and magnitude of price changes is often followed by other vendors; purchaser/importer *** reported that international price movements tend to be based on Ardagh and O-I Glass’ price movements; and purchaser/importer *** reported that Gallo Glass and O-I Glass are the largest providers and influence the market with decisions around production minimum order quantities, which molds are or are not able to be produced, printed, and packed. Respondent Berlin Packaging stated that domestic producers usually offer the lowest price due to their proximity (lower shipping costs) and higher economies of scale.¹⁶

Price and purchase cost data

The Commission requested U.S. producers and importers to provide quarterly data for the total quantity and f.o.b. value of the following glass wine bottles products shipped to unrelated U.S. customers during January 2021 to March 2024.

Product 1.— 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes)

Product 2.— 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes)

Product 3.—750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case-packed (in 12-bottle, plain white unprinted, corrugated boxes)

¹⁶ Hearing transcript, p. 195 (Brandt).

Product 4.— 750 mL, Burgundy style wine bottle, weighing 25.5 to 27.5 ounces, flint color (includes all variations of flint including by not limited to superflint, high flint, extra flint), without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white unprinted, corrugated boxes)

Product 5.— 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 29.5 to 31.5 ounces, green color, without frosting, coating, or other decoration, case packed (in 12-bottle, plain-white, unprinted, corrugated boxes)

Firms that imported these products from Chile, China, and Mexico for internal use or repackaging were requested to provide import purchase cost data for products 6-8. Domestic producers reported U.S. prices for products 6-8 for their sales of bulk packed products to wineries and distributors.

Product 6.— 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Product 7.— 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Product 8.— 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Price data

Three U.S. producers and 10 importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all quarters.¹⁷ Pricing data reported by these firms for the case-packed pricing products (products 1-5) accounted for approximately *** percent of U.S. producers' shipments of glass wine bottles and *** percent of subject imports from Chile, *** percent of subject imports from China, and *** percent of subject imports from Mexico in 2023.

Price data for products 1-5 are presented in tables V-5 to V-9 and figures V-3 to V-7.

¹⁷ Per-unit pricing data are calculated from total quantity and total value data provided by U.S. producers and importers. The precision and variation of these figures may be affected by rounding, limited quantities, and producer or importer estimates.

Petitioners argue that U.S.-produced glass wine bottles compete against imports that are sold through the same importer/distributors that also purchase U.S. product. They argue that the comparisons between U.S. prices and prices of imported case-packed products (products 1-5) are not appropriate because they compare U.S. producers' sales to distributors and end users to the sales of the distributors to end users.¹⁸

As discussed in part II, less than *** of U.S. producers' U.S. shipments were sold to distributors (which Petitioners argue is a different level of trade) and the remaining shipments were to wineries.¹⁹ In 2023, most U.S.-produced case-packed glass wine bottles were sold to wineries (*** percent to large and SME wineries); *** percent of U.S.-produced case-packed glass wine bottles were sold to distributors.²⁰ Most imported case-packed glass wine bottles from subject sources (***) were sold to large and SME wineries, and *** percent of imported case-packed glass wine bottles were sold to distributors.²¹

¹⁸ Hearing transcript, pp. 26, 55 (Brandstatter, Pickard); O-I Glass posthearing brief, Answers to Commission Questions, pp. 53-55.

¹⁹ See table II-1.

²⁰ See table D-1.

²¹ Sales by importer/distributors accounted for *** percent of imports of pricing products 1-5 from Chile (***), 58 percent from China (***, and *** percent from Mexico (***). Overall, imports by distributors accounted for 55 percent of shipments of subject imports of products 1-5.

Table V-5**Glass wine bottles: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by quarter**

Price in dollars per gross, quantity in gross, margin in percent.

Period	U.S. price	U.S. quantity	Chile price	Chile quantity	Chile margin	China price	China quantity	China margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin	Subject price	Subject quantity	Subject margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 1: 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes).

Table V-6

Glass wine bottles: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), by quarter

Price in dollars per gross, quantity in gross, margin in percent.

Period	U.S. price	U.S. quantity	Chile price	Chile quantity	Chile margin	China price	China quantity	China margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin	Subject price	Subject quantity	Subject margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 2: 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes).

Table V-7**Glass wine bottles: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by quarter**

Price in dollars per gross, quantity in gross, margin in percent.

Period	U.S. price	U.S. quantity	Chile price	Chile quantity	Chile margin	China price	China quantity	China margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin	Subject price	Subject quantity	Subject margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 3: 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case-packed (in 12-bottle, plain white unprinted, corrugated boxes).

Table V-8
Glass wine bottles: Weighted-average f.o.b. prices and quantities of domestic and imported product 4 and margins of underselling/(overselling), by quarter

Price in dollars per gross, quantity in gross, margin in percent.

Period	U.S. price	U.S. quantity	Chile price	Chile quantity	Chile margin	China price	China quantity	China margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin	Subject price	Subject quantity	Subject margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 4: 750 mL, Burgundy style wine bottle, weighing 25.5 to 27.5 ounces, flint color (includes all variations of flint including by not limited to superflint, high flint, extra flint), without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white unprinted, corrugated boxes)

Table V-9**Glass wine bottles: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by quarter**

Price in dollars per gross, quantity in gross, margin in percent.

Period	U.S. price	U.S. quantity	Chile price	Chile quantity	Chile margin	China price	China quantity	China margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico price	Mexico quantity	Mexico margin	Subject price	Subject quantity	Subject margin
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 5: 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 29.5 to 31.5 ounces, green color, without frosting, coating, or other decoration, case packed (in 12-bottle, plain-white, unprinted, corrugated boxes).

Figure V-3
Glass wine bottles: Weighted-average prices and quantities of domestic and imported product 1, by quarter

Price of product 1						
*	*	*	*	*	*	*

Volume of product 1						
*	*	*	*	*	*	*

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

Note: Product 1: 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes).

Figure V-4
Glass wine bottles: Weighted-average prices and quantities of domestic and imported product 2, by quarter

Price of product 2						
*	*	*	*	*	*	*

Volume of product 2						
*	*	*	*	*	*	*

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

Note: Product 2: 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white, unprinted, corrugated boxes).

Figure V-5
Glass wine bottles: Weighted-average prices and quantities of domestic and imported product 3, by quarter

Price of product 3						
*	*	*	*	*	*	*

Volume of product 3						
*	*	*	*	*	*	*

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

Note: Product 3: 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, case-packed (in 12-bottle, plain white unprinted, corrugated boxes).

Figure V-6
Glass wine bottles: Weighted-average prices and quantities of domestic and imported product 4, by quarter

Price of product 4						
*	*	*	*	*	*	*

Volume of product 4						
*	*	*	*	*	*	*

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

Note: Product 4: 750 mL, Burgundy style wine bottle, weighing 25.5 to 27.5 ounces, flint color (includes all variations of flint including by not limited to superflint, high flint, extra flint), without embossing, frosting, coating, or other decoration, case packed (in 12-bottle, plain white unprinted, corrugated boxes)

Figure V-7
Glass wine bottles: Weighted-average prices and quantities of domestic and imported product 5, by quarter

Price of product 5						
*	*	*	*	*	*	*

Volume of product 5						
*	*	*	*	*	*	*

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

Note: Product 5: 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 29.5 to 31.5 ounces, green color, without frosting, coating, or other decoration, case packed (in 12-bottle, plain-white, unprinted, corrugated boxes).

Import purchase cost data

Eleven importers reported useable import purchase cost data for products 6-8. Purchase cost data reported by these firms accounted for *** percent of imports from Chile, *** percent of imports from China, and *** percent of imports from Mexico in 2023.²² All firms that reported purchase cost data for the bulk pricing products reported that these imports were repackaged and sold as case-packed products, although *** reported selling the products directly in bulk as well (without repackaging into cases).²³ Landed duty paid purchase cost data for imports from Chile, China, and Mexico are presented in tables V-10 to V-12 and figures V-8 through V-10, along with U.S. producers' sales prices.²⁴

In 2023, most U.S.-produced bulk-packed glass wine bottles (*** percent) were sold to large wineries; *** percent of U.S.-produced case-packed wine bottles were sold to distributors and *** percent were sold to SME wineries.²⁵ *** of eight self-identified

²² Petitioners raised potential purchase costs data reporting issues for importers ***. Petitioner posthearing brief, Answers to Commission Questions, p. 42; O-I Glass posthearing brief, p. 5, Exhibits 1 and 3. Staff removed the purchase cost data reported by importer *** because the product fell outside of the pricing product definition.

Staff also removed purchase cost data reported by importer *** because the firm did not report any imports of bulk product and could not confirm that the purchase cost data were reported correctly. If the data were included in the analysis, landed duty-paid costs for glass wine bottles imported from subject countries would have been above the sales price for U.S.-produced product in *** instances (*** gross) with price-cost differentials ranging from *** percent. In the remaining *** instances (*** gross), landed duty-paid costs for glass wine bottles from subject countries would have been between *** percent below sales prices for the domestic product.

Importer *** confirmed that it reported product correctly, according to the pricing product definitions. Importer *** confirmed that it reported bulk-packed products appropriately and provided further information: ***.

²³ Pricing products 2 and 7 are for the same glass wine bottle, case-packed and bulk-packed, respectively. *** reported data for both pricing products 2 and 7, and staff believe it is possible that there may be overlap between the reported price and purchase cost data. *** accounted for *** percent of reported data for product 2 and *** percent of reported data for product 7.

²⁴ LDP import value does not include any potential additional costs that a purchaser may incur by importing rather than purchasing from another importer or U.S. producer. Price-cost differences are based on LDP import values whereas margins of underselling/overselling are based on importer sales prices.

²⁵ For these detailed breakouts, see table D-1.

distributors/purchasers reported purchasing domestic glass wine bottles and importing glass wine bottles from subject sources; 4 of 27 wineries (***) reported importing glass wine bottles themselves. One importer *** provided purchase cost data, and accounted for *** percent of the quantities reported for imports from ***.

Importers reporting import purchase cost data were asked to provide additional information regarding the costs and benefits of directly importing glass wine bottles.

Seven of 10 importers reported that they incurred additional costs beyond landed duty-paid costs by importing glass wine bottles directly rather than purchasing from a U.S. producer or U.S. importer. Of these, five importers estimated the total additional cost incurred; estimates ranged from 3.0 to 20.0 percent compared to the landed-duty paid value. Firms were also asked to identify specific additional costs they incurred as a result of importing glass wine bottles.

Reported costs include:

- Boxes for glass (20.0 percent)²⁶
- Costs related to longer transit times (6.0 percent)
- Drayage, warehousing and related capital costs (3.0-5.6 percent)
- Personnel costs (1.0-3.1 percent)
- Inventory carrying costs (1.7 percent)
- Palletization (1.3 percent)
- Insurance, charges at port, brokerage fees, and internal customs compliance (0.04-1.0 percent)

Firms were also asked to describe how these additional costs incurred by importing glass wine bottles directly compares with additional costs incurred when purchasing from a U.S. producer or U.S. importer. Four importers stated that their purchases from domestic producers are limited, three of which explained that U.S. supply is limited. Importer *** reported that it is rarely feasible to purchase from U.S. producers at all, irrespective of price or cost, and that it did not include the additional cost for repackaging glass wine bottles in bulk into case-packed bottles, which is very high. Importer *** stated that while it is not able to estimate the cost difference, it is aware that the domestic industry's prices are lower than Chinese or Mexican glass wine bottles, and importer *** reported that it would incur similar costs when purchasing from domestic producers, but U.S. capacity is limited, lead times are extended, and availability is a challenge.

²⁶ Petitioners argue that this is an inappropriate cost to include as an additional cost. Petitioners' postehearing brief, Answers to Commission Questions, p. 38.

Two of 10 importers reported that they compare costs of importing to the cost of purchasing from both U.S. producers and importers in determining whether to import glass wine bottles, 3 importers compare costs to purchasing from a U.S. importer, and 5 importers do not compare costs of purchasing from either U.S. producers or importers.

Ten importers identified benefits from importing glass wine bottles directly instead of purchasing from U.S. producers or importers, including availability of supply (6 firms), smaller minimum order requirements (5 firms), better quality and service (5 firms), the ability to order in cases (3 firms), flexibility in carton packaging, decorations, etchings, and molds (3 firms), supply diversification (2 firms), and price (1 firm).

Firms were also asked whether the import cost (both excluding and including additional costs) of glass wine bottles they imported are lower than the price of purchasing glass wine bottles from a U.S. producer or importer.

Five importers estimated that they saved between *** percent of the purchase price by importing glass wine bottles rather than purchasing from a U.S. importer, and one importer estimated saving *** percent compared to purchasing the product from a U.S. producer.²⁷

²⁷ Four firms reported that they based their estimates on previous company transactions, one reported basing its estimates on market research, and one reported that while it does not purchase from U.S. producers, it based its responses on its experience in the market and communications with its customers.

Table V-10

Glass wine bottles: Import landed duty-paid purchase costs and domestic prices, quantities of product 6, and price-cost differentials, by quarter

Price and LDP value in dollars per gross, quantity in gross, margin and price-cost differential in percent.

Period	U.S. price	U.S. quantity	Chile purchase cost	Chile quantity	Chile differential	China purchase cost	China quantity	China differential
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico purchase cost	Mexico quantity	Mexico differential	Subject purchase cost	Subject quantity	Subject differential
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 6: 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed.

Table V-11

Glass wine bottles: Import landed duty-paid purchase costs and domestic prices, quantities of product 7, and price-cost differentials, by quarter

Price and LDP value in dollars per gross, quantity in gross, margin and price-cost differential in percent.

Period	U.S. price	U.S. quantity	Chile unit LDP value	Chile quantity	Chile differential	China unit LDP value	China quantity	China differential
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico purchase cost	Mexico quantity	Mexico differential	Subject purchase cost	Subject quantity	Subject differential
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 7: 750 mL, Burgundy style wine bottle, weighing-13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Table V-12

Glass wine bottles: Import landed duty-paid purchase costs and domestic prices, quantities of product 8, and price-cost differentials, by quarter

Price and LDP value in dollars per gross, quantity in gross, margin and price-cost differential in percent.

Period	U.S. price	U.S. quantity	Chile purchase cost	Chile quantity	Chile differential	China purchase cost	China quantity	China differential
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

Period	U.S. price	U.S. quantity	Mexico purchase cost	Mexico quantity	Mexico differential	Subject purchase cost	Subject quantity	Subject differential
2021 Q1	***	***	***	***	***	***	***	***
2021 Q2	***	***	***	***	***	***	***	***
2021 Q3	***	***	***	***	***	***	***	***
2021 Q4	***	***	***	***	***	***	***	***
2022 Q1	***	***	***	***	***	***	***	***
2022 Q2	***	***	***	***	***	***	***	***
2022 Q3	***	***	***	***	***	***	***	***
2022 Q4	***	***	***	***	***	***	***	***
2023 Q1	***	***	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***	***	***

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

Note: Product 8: 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Figure V-8
Glass wine bottles: U.S. producer prices and import purchase costs, and quantities, of product 6, by quarter

U.S. price and import purchase cost of product 6

* * * * *

Volume of product 6

* * * * *

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

Note: Product 6: 750 mL, Claret style (also referred to as Bordeaux) wine bottle, weighing 16.0 to 17.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed.

Figure V-9
Glass wine bottles: U.S. producer prices and import purchase costs, and quantities, of product 7, by quarter

U.S. price and import purchase cost of product 7

* * * * *

Volume of product 7

* * * * *

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

Note: Product 7: 750 mL, Burgundy style wine bottle, weighing 13.5 to 14.5 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Figure V-10

Glass wine bottles: U.S. producer prices and import purchase costs, and quantities, of product 8, by quarter

U.S. price and import purchase cost of product 8

* * * * *

Volume of product 8

* * * * *

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

Note: Product 8: 750 mL, Tapered (also referred to as Reverse Tapered) Claret style (also referred to as Bordeaux) wine bottle, weighing 22.0 to 24.0 ounces, all colors, without embossing, frosting, coating, or other decoration, bulk packed

Price and purchase cost trends

In general, prices increased during January 2021 to March 2024. Table V-13 summarizes the price and cost trends, by country and by product. As shown in the table, domestic price increases ranged from *** to *** percent during January 2021 to March 2024 while import price increases ranged from *** percent.²⁸ Landed duty-paid cost increases ranged from *** percent.

Petitioners argue that increased prices of subject imports in 2022 were likely due to increased ocean freight costs.²⁹

²⁸ Prices for U.S.-produced product 5 decreased by *** percent. Prices for imports of products 1 and 2 from *** decreased by *** percent, respectively, and landed duty paid values decreased for products 6 and 7 from *** by *** percent and *** percent, respectively.

²⁹ Petitioners' posthearing brief, Answers to Commission Questions, p. 41.

Table V-13
Glass wine bottles: Summary of price and cost data, by product and source

Prices and unit LDP values in dollars per gross; quantity in gross; change in percent

Product	Source	Number of quarters	Quantity	Low price	High price	First quarter price	Last quarter price	Change over period
Product 1	United States	***	***	***	***	***	***	***
Product 1	Chile price	***	***	***	***	***	***	***
Product 1	China price	***	***	***	***	***	***	***
Product 1	Mexico price	***	***	***	***	***	***	***
Product 2	United States	***	***	***	***	***	***	***
Product 2	Chile price	***	***	***	***	***	***	***
Product 2	China price	***	***	***	***	***	***	***
Product 2	Mexico price	***	***	***	***	***	***	***
Product 3	United States	***	***	***	***	***	***	***
Product 3	Chile price	***	***	***	***	***	***	***
Product 3	China price	***	***	***	***	***	***	***
Product 3	Mexico price	***	***	***	***	***	***	***
Product 4	United States	***	***	***	***	***	***	***
Product 4	Chile price	***	***	***	***	***	***	***
Product 4	China price	***	***	***	***	***	***	***
Product 4	Mexico price	***	***	***	***	***	***	***
Product 5	United States	***	***	***	***	***	***	***
Product 5	Chile price	***	***	***	***	***	***	***
Product 5	China price	***	***	***	***	***	***	***
Product 5	Mexico price	***	***	***	***	***	***	***
Product 6	United States	***	***	***	***	***	***	***
Product 6	Chile cost	***	***	***	***	***	***	***
Product 6	China cost	***	***	***	***	***	***	***
Product 6	Mexico cost	***	***	***	***	***	***	***
Product 7	United States	***	***	***	***	***	***	***
Product 7	Chile cost	***	***	***	***	***	***	***
Product 7	China cost	***	***	***	***	***	***	***
Product 7	Mexico cost	***	***	***	***	***	***	***
Product 8	United States	***	***	***	***	***	***	***
Product 8	Chile cost	***	***	***	***	***	***	***
Product 8	China cost	***	***	***	***	***	***	***
Product 8	Mexico cost	***	***	***	***	***	***	***

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Percent change is the change from the first quarter to the last quarter of the data collection period. Products 1 to 5 are price data, whereas Products 6-8 are price for the U.S. and purchase cost from the importing countries. Percentage change from the first quarter in which data were available in 2021 to the last quarter in which data were available in 2024.

Price and purchase cost comparisons

Price comparisons

As shown in table V-14, prices for product imported from subject sources were above those for U.S.-produced product in 134 of 143 instances (1,119,070 gross); margins of overselling ranged from 0.8 to 146.2 percent. In the remaining nine instances (141,020 gross), prices for product from subject sources were between 1.8 and 20.8 percent below prices for the domestic product.

Table V-14
Glass wine bottles: Instances of underselling and overselling and the range and average of margins, by product

Quantity in gross; margin in percent

Products	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	2	***	***	***	***
Product 2	Underselling	5	***	***	***	***
Product 3	Underselling	2	***	***	***	***
Product 4	Underselling	---	---	---	---	---
Product 5	Underselling	---	---	---	---	---
All products	Underselling	9	141,020	7.8	1.8	20.8
Product 1	Overselling	37	***	***	***	***
Product 2	Overselling	34	***	***	***	***
Product 3	Overselling	37	***	***	***	***
Product 4	Overselling	---	---	---	---	---
Product 5	Overselling	26	***	***	***	***
All products	Overselling	134	1,119,070	(43.8)	(0.8)	(146.2)

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Table V-15
Glass wine bottles: Instances of underselling and overselling and the range and average of margins, by source

Quantity in gross; margin in percent

Sources	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
Chile	Underselling	2	***	***	***	***
China	Underselling	---	***	***	***	***
Mexico	Underselling	7	***	***	***	***
All subject sources	Underselling	9	141,020	7.8	1.8	20.8
Chile	Overselling	37	***	***	***	***
China	Overselling	52	***	***	***	***
Mexico	Overselling	45	***	***	***	***
All subject sources	Overselling	134	1,119,070	(43.8)	(0.8)	(146.2)

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Table V-16
Glass wine bottles: Instances of underselling and overselling and the range and average of margins, by period

Quantity in gross; margin in percent

Period	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
2021	Underselling	---	***	***	***	***
2022	Underselling	1	***	***	***	***
2023	Underselling	5	***	***	***	***
Jan-Mar 2024	Underselling	3	***	***	***	***
All periods	Underselling	9	141,020	7.8	1.8	20.8
2021	Overselling	44	***	***	***	***
2022	Overselling	43	***	***	***	***
2023	Overselling	39	***	***	***	***
Jan-Mar 2024	Overselling	8	***	***	***	***
All periods	Overselling	134	1,119,070	(43.8)	(0.8)	(146.2)

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Price-cost comparisons

As shown in table V-17, landed duty-paid costs for glass wine bottles imported from subject countries were above the sales price for U.S.-produced product in 45 of 80 instances (290,760 gross); price-cost differentials ranged from 0.2 to 170.7 percent. In the remaining 35 instances (230,899 gross), landed duty-paid costs for glass wine bottles from subject countries were between 1.3 and 65.8 percent below sales prices for the domestic product.

Table V-17
Glass wine bottles: Instances of lower and higher import purchase costs and the range and average of price-cost differentials, by product

Quantity in gross; price-cost differential in percent

Products	Type	Number of quarters	Quantity	Average differential	Min differential	Max differential
Product 6	Lower than US	14	***	***	***	***
Product 7	Lower than US	12	***	***	***	***
Product 8	Lower than US	9	***	***	***	***
All products	Lower than US	35	230,899	13.1	1.3	65.8
Product 6	Higher than US	14	***	***	***	***
Product 7	Higher than US	10	***	***	***	***
Product 8	Higher than US	21	***	***	***	***
All products	Higher than US	45	290,760	(27.0)	(0.2)	(170.7)

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Table V-18**Glass wine bottles: Instances of lower and higher import purchase costs and the range and average of price-cost differentials, by source**

Quantity in gross; price-cost differential in percent

Source	Type	Number of quarters	Quantity	Average price-cost differential	Min price-cost differential	Max price-cost differential
Chile	Lower than U.S. price	21	***	***	***	***
China	Lower than U.S. price	14	***	***	***	***
Mexico	Lower than U.S. price	---	***	***	***	***
Total	Lower than U.S. price	35	230,899	13.1	1.3	65.8
Chile	Higher than U.S. price	17	***	***	***	***
China	Higher than U.S. price	21	***	***	***	***
Mexico	Higher than U.S. price	7	***	***	***	***
Total	Higher than U.S. price	45	290,760	(27.0)	(0.2)	(170.7)

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Table V-19**Glass wine bottles: Instances of lower and higher import purchase costs and the range and average of price-cost differentials, by period**

Quantity in gross; margin in percent

Period	Type	Number of quarters	Quantity	Average margin	Mn margin	Max margin
2021	Lower than U.S. price	9	***	***	***	***
2022	Lower than U.S. price	3	***	***	***	***
2023	Lower than U.S. price	18	***	***	***	***
Jan-Mar 2024	Lower than U.S. price	5	***	***	***	***
All periods	Lower than U.S. price	35	230,899	13.1	1.3	65.8
2021	Higher than U.S. price	17	***	***	***	***
2022	Higher than U.S. price	20	***	***	***	***
2023	Higher than U.S. price	6	***	***	***	***
Jan-Mar 2024	Higher than U.S. price	2	***	***	***	***
All periods	Higher than U.S. price	45	290,760	(27.0)	(0.2)	(170.7)

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

Note: These data include only quarters in which there is a comparison between the U.S. and subject product.

Lost sales and lost revenue

In the preliminary phase of these investigations, the Commission requested that U.S. producers of glass wine bottles report purchasers with which they experienced instances of lost sales or revenue due to competition from imports of glass wine bottles from Chile, China, and/or Mexico during January 2020 to September 2023. Petitioner Ardagh and U.S. producer *** submitted lost sales and lost revenue allegations. These firms identified *** firms with which they lost sales or revenue. Their allegations consisted of *** lost sales, *** lost revenue, and *** consisting of both types of allegations. *** allegations were against Chile, *** allegations were against China, and *** allegations were against Mexico.

In the final phase of these investigations, of the three responding U.S. producers, three reported that they had to reduce prices, two reported they had to roll back announced price increases, and three firms reported that they had lost sales.

Staff contacted 100 purchasers and received responses from 37 purchasers.³⁰ Responding purchasers reported purchasing or importing *** gross of glass wine bottles during January 2021 to March 2024 (table V-20).³¹

Table V-20
Glass wine bottles: Purchasers' reported purchases and imports, by firm and source

Quantity in gross, Change in shares in percentage points

Firm	Domestic quantity	Subject quantity	All other quantity	Change in domestic share	Change in subject share
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***

Table continued.

³⁰ All four purchasers that submitted lost sales lost revenue survey responses in the preliminary phase submitted purchaser questionnaire responses in the final phase.

³¹ Staff adjusted purchaser *** reported purchases based on correspondence stating that its "****." Staff adjusted purchasers *** reported quantities by assuming these were reported incorrectly as bottles rather than gross.

Of the 37 responding purchasers, 21 reported that, since 2021, they had purchased imported glass wine bottles from subject countries instead of U.S.-produced product (9 from Chile, 14 from China, and 12 from Mexico) (tables V-21 and V-22). Thirteen of these purchasers reported that subject import prices were lower than U.S.-produced product (5 from Chile, 9 from China, and 3 from Mexico), and eight of these purchasers reported that price was a primary reason for the decision to purchase imported product rather than U.S.-produced product (2 from Chile, 5 from China, and 2 from Mexico). Five purchasers estimated the quantity of glass wine bottles purchased instead of domestic product; quantities ranged from *** gross to *** gross. Purchasers identified lack of domestic availability, minimum order quantities, a long-term contract with a Chilean producer, quality, and bottle design/shape as non-price reasons for purchasing imported rather than U.S.-produced product. Purchaser *** reported that it was instructed by a U.S. producer to seek alternative sources.

**Table V-21
Glass wine bottles: Purchasers’ responses to purchasing subject imports instead of domestic product, by firm**

Quantity in gross

Firm	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity	Narrative on reasons for purchasing imports
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***

Table continued.

Table V-22

Glass wine bottles: Purchasers' responses to purchasing subject imports instead of domestic product, by source

Quantity in gross

Source	Count of purchasers reporting subject instead of domestic	Count of purchasers reported that imports were priced lower	Count of purchasers reporting that price was a primary reason for shift	Quantity
Chile	9	5	2	***
China	14	9	5	***
Mexico	12	3	2	***
Subject sources	21	13	8	***

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

Of the 37 responding purchasers, one (***) reported that U.S. producers had reduced prices in order to compete with lower-priced imports from China and Mexico; 17 reported that U.S. producers did not reduce prices to compete, and 14 reported that they did not know. The reported estimated price reductions were *** and ***. In describing the price reductions, *** indicated that, with respect to ***. With respect to ***.

In responding to the lost sales lost revenue survey, some purchasers provided additional information on purchases and market dynamics.

Purchaser *** reported that it needed to purchase imported wine bottles due to a contracted domestic supplier's inability to support all requirements on time.

Purchaser *** reported that it must maintain a diverse supply base with a balance of domestic and imported glass. It added that it experienced domestic glass shortages and supply chain disruptions since 2020 that have reinforced this requirement. In addition, ***.

Purchaser *** reported that each year of the period of investigation had some type of disruption to the supply chain or its shipments, including the shutdowns associated with the COVID-19 pandemic in 2020, high international shipping costs, destocking, and U.S. production plants experiencing shortages due to staffing, furnace issues, and a cyber-attack that left them "unable to effectively ship product for months."

Global Package submitted a posthearing response stating that it is unable to access glass wine bottles from Ardagh or O-I Glass, and added “the responses from TricorBraun and Berlin, as the biggest distributors, do not represent the twenty or more other glass distributors who supply bottles to the Wine and Spirits industries. They both are exclusive with Changyu Shandong, the factory that sells only to large groups who purchase at least \$10 million worth of bottles. The Commission has granted the lowest of all duties specifically to that factory which allows TricorBraun and Berlin even better positioning in the glass bottle market. We have been forced to use other Chinese glass factories that can produce our specialty shaped glass bottles at MOQ quantities (300,000 bottles, 2,083 gross) we can sell, and that O-I is not interested in producing. Our company has 15 various shapes that are unique to our company made at other factories.”³²

³² Global Package posthearing response, p. 1.

Part VI: Financial experience of U.S. producers

Background¹

Three U.S. producers provided usable financial results on their glass wine bottle operations. All U.S. producers reported financial data on a calendar year basis. *** responding U.S. producers provided their financial data on a GAAP basis.^{2 3}

The industry's net sales are comprised of commercial sales and transfers to related firms. During the period examined (January 1, 2021, through March 31, 2024), commercial sales represented *** percent total net sales quantity and transfers to related firms represented the remaining *** percent.⁴

Figure VI-1 presents each responding firm's share of the total reported net sales quantity in 2023.

¹ The following abbreviations are used in the tables and/or text of this section: generally accepted accounting principles ("GAAP"), fiscal year ("FY"), net sales ("NS"), cost of goods sold ("COGS"), selling, general, and administrative expenses ("SG&A expenses"), average unit values ("AUVs"), research and development expenses ("R&D expenses"), and return on assets ("ROA").

² ***. U.S. producer questionnaire response section III-2A.2

³ Staff conducted a verification of ***'s financial data. No changes were identified as a result of the verification process.

⁴ Transfers to related firms were reported by ***. ***. *** U.S. producer questionnaire responses, section II-14, II-15b.

Figure VI-1
Glass wine bottles: U.S. producers' share of net sales quantity in 2023, by firm

* * * * *

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

Operations on glass wine bottles

Table VI-1 presents aggregated data on U.S. producers' total operations in relation to glass wine bottles, while table VI-2 presents corresponding changes in AUVs. Table VI-3 presents financial results for the merchant market, and table VI-4 presents the corresponding changes in AUVs for the merchant market.⁵ Table VI-5 presents selected company-specific financial data for the total market.

⁵ ***.

Table VI-1
Glass wine bottles: U.S. producers' results of total market operations, by item and period

Quantity in gross; value in 1,000 dollars; ratios in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Commercial sales	Quantity	***	***	***	***	***
Transfers to related firms	Quantity	***	***	***	***	***
Total net sales	Quantity	***	***	***	***	***
Commercial sales	Value	***	***	***	***	***
Transfers to related firms	Value	***	***	***	***	***
Total net sales	Value	***	***	***	***	***
COGS: Raw materials	Value	***	***	***	***	***
COGS: Direct labor	Value	***	***	***	***	***
COGS: Other factory	Value	***	***	***	***	***
COGS: Energy costs	Value	***	***	***	***	***
COGS: Total	Value	***	***	***	***	***
Gross profit or (loss)	Value	***	***	***	***	***
SG&A expenses	Value	***	***	***	***	***
Operating income or (loss)	Value	***	***	***	***	***
Other expense / (income), net	Value	***	***	***	***	***
Net income or (loss)	Value	***	***	***	***	***
Depreciation/amortization	Value	***	***	***	***	***
Cash flow	Value	***	***	***	***	***
COGS: Raw materials	Ratio to NS	***	***	***	***	***
COGS: Direct labor	Ratio to NS	***	***	***	***	***
COGS: Other factory	Ratio to NS	***	***	***	***	***
COGS: Energy costs	Ratio to NS	***	***	***	***	***
COGS: Total	Ratio to NS	***	***	***	***	***
Gross profit	Ratio to NS	***	***	***	***	***
SG&A expense	Ratio to NS	***	***	***	***	***
Operating income or (loss)	Ratio to NS	***	***	***	***	***
Net income or (loss)	Ratio to NS	***	***	***	***	***

Table continued.

Table VI-1 Continued
Glass wine bottles: U.S. producers' results of total market operations, by item and period

Shares in percent; unit values in dollars per gross; count in number of firms reporting

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
COGS: Raw materials	Share	***	***	***	***	***
COGS: Direct labor	Share	***	***	***	***	***
COGS: Other factory	Share	***	***	***	***	***
COGS: Energy costs	Share	***	***	***	***	***
COGS: Total	Share	***	***	***	***	***
Commercial sales	Unit value	***	***	***	***	***
Transfers to related firms	Unit value	***	***	***	***	***
Total net sales	Unit value	***	***	***	***	***
COGS: Raw materials	Unit value	***	***	***	***	***
COGS: Direct labor	Unit value	***	***	***	***	***
COGS: Other factory	Unit value	***	***	***	***	***
COGS: Energy costs	Unit value	***	***	***	***	***
COGS: Total	Unit value	***	***	***	***	***
Gross profit or (loss)	Unit value	***	***	***	***	***
SG&A expenses	Unit value	***	***	***	***	***
Operating income or (loss)	Unit value	***	***	***	***	***
Net income or (loss)	Unit value	***	***	***	***	***
Operating losses	Count	***	***	***	***	***
Net losses	Count	***	***	***	***	***
Data	Count	***	***	***	***	***

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

Table VI-2
Glass wine bottles: Changes in AUVs between comparison periods for the total market

Changes in percent

Item	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Commercial sales	▲ ***	▲ ***	▲ ***	▼ ***
Transfers to related firms	▲ ***	▲ ***	▲ ***	▲ ***
Total net sales	▲ ***	▲ ***	▲ ***	▲ ***
COGS: Raw materials	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Direct labor	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Other factory	▲ ***	▲ ***	▲ ***	▲ ***
COGS: Energy costs	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Total	▲ ***	▲ ***	▲ ***	▲ ***

Table continued.

Table VI-2 Continued
Glass wine bottles: Changes in AUVs between comparison periods for the total market

Changes in dollars per gross

Item	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Commercial sales	▲ ***	▲ ***	▲ ***	▼ ***
Transfers to related firms	▲ ***	▲ ***	▲ ***	▲ ***
Total net sales	▲ ***	▲ ***	▲ ***	▲ ***
COGS: Raw materials	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Direct labor	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Other factory	▲ ***	▲ ***	▲ ***	▲ ***
COGS: Energy costs	▲ ***	▲ ***	▲ ***	▼ ***
COGS: Total	▲ ***	▲ ***	▲ ***	▲ ***
Gross profit or (loss)	▼ ***	▼ ***	▲ ***	▲ ***
SG&A expense	▲ ***	▼ ***	▲ ***	▼ ***
Operating income or (loss)	▼ ***	▼ ***	▲ ***	▲ ***
Net income or (loss)	▼ ***	▼ ***	▲ ***	▲ ***

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

Note: Period changes preceded by a “▲” represent an increase, while period changes preceded by a “▼” represent a decrease.

Table VI-3
Glass wine bottles: U.S. producers' results of merchant market operations, by item and period

Quantity in gross; value in 1,000 dollars; ratios in percent

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Merchant market sales	Quantity	***	***	***	***	***
Merchant market sales	Value	***	***	***	***	***
COGS: Raw materials	Value	***	***	***	***	***
COGS: Direct labor	Value	***	***	***	***	***
COGS: Other factory	Value	***	***	***	***	***
COGS: Energy costs	Value	***	***	***	***	***
COGS: Total	Value	***	***	***	***	***
Gross profit or (loss)	Value	***	***	***	***	***
SG&A expenses	Value	***	***	***	***	***
Operating income or (loss)	Value	***	***	***	***	***
Other expense / (income), net	Value	***	***	***	***	***
Net income or (loss)	Value	***	***	***	***	***
Depreciation/amortization	Value	***	***	***	***	***
Cash flow	Value	***	***	***	***	***
COGS: Raw materials	Ratio to NS	***	***	***	***	***
COGS: Direct labor	Ratio to NS	***	***	***	***	***
COGS: Other factory	Ratio to NS	***	***	***	***	***
COGS: Energy costs	Ratio to NS	***	***	***	***	***
COGS: Total	Ratio to NS	***	***	***	***	***
Gross profit	Ratio to NS	***	***	***	***	***
SG&A expense	Ratio to NS	***	***	***	***	***
Operating income or (loss)	Ratio to NS	***	***	***	***	***
Net income or (loss)	Ratio to NS	***	***	***	***	***

Table continued.

Table VI-3 Continued
Glass wine bottles: U.S. producers' results of merchant market operations, by item and period

Shares in percent; unit values in dollars per gross; count in number of firms reporting

Item	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
COGS: Raw materials	Share	***	***	***	***	***
COGS: Direct labor	Share	***	***	***	***	***
COGS: Other factory	Share	***	***	***	***	***
COGS: Energy costs	Share	***	***	***	***	***
COGS: Total	Share	***	***	***	***	***
Merchant market sales	Unit value	***	***	***	***	***
COGS: Raw materials	Unit value	***	***	***	***	***
COGS: Direct labor	Unit value	***	***	***	***	***
COGS: Other factory	Unit value	***	***	***	***	***
COGS: Energy costs	Unit value	***	***	***	***	***
COGS: Total	Unit value	***	***	***	***	***
Gross profit or (loss)	Unit value	***	***	***	***	***
SG&A expenses	Unit value	***	***	***	***	***
Operating income or (loss)	Unit value	***	***	***	***	***
Net income or (loss)	Unit value	***	***	***	***	***
Operating losses	Count	***	***	***	***	***
Net losses	Count	***	***	***	***	***
Data	Count	***	***	***	***	***

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

Note: Shares represent the share of COGS. Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Note: ***.

Table VI-4
Glass wine bottles: Changes in merchant market AUVs between comparison periods

Changes in percent

Item	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Merchant market sales	▲***	▲***	▲***	▼***
COGS: Raw materials	▲***	▲***	▲***	▼***
COGS: Direct labor	▲***	▲***	▲***	▼***
COGS: Other factory	▲***	▲***	▲***	▲***
COGS: Energy costs	▲***	▲***	▼***	▼***
COGS: Total	▲***	▲***	▲***	▼***

Table continued.

Table VI-4 Continued
Glass wine bottles: Changes in merchant market AUVs between comparison periods

Changes in dollars per gross

Item	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Merchant market sales	▲***	▲***	▲***	▼***
COGS: Raw materials	▲***	▲***	▲***	▼***
COGS: Direct labor	▲***	▲***	▲***	▼***
COGS: Other factory	▲***	▲***	▲***	▲***
COGS: Energy costs	▲***	▲***	▼***	▼***
COGS: Total	▲***	▲***	▲***	▼***
Gross profit or (loss)	▼***	▼***	▼***	▼***
SG&A expense	▲***	▼***	▲***	▼***
Operating income or (loss)	▼***	▼***	▼***	▼***
Net income or (loss)	▼***	▲***	▼***	▼***

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

Note: Percentages and unit values shown as “0.0” or “0.00” represent values greater than zero, but less than “0.05” or “0.005,” respectively. Period changes preceded by a “▲” represent an increase, while period changes preceded by a “▼” represent a decrease.

Table VI-5
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net sales quantity

Quantity in gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net sales value

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

COGS

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Gross profit or (loss)

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
SG&A expenses

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Operating income or (loss)

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Net income or (loss)

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
COGS to net sales ratio

Ratios in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Gross profit or (loss) to net sales ratio

Ratios in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
SG&A expenses to net sales ratio

Ratios in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Operating income or (loss) to net sales ratio

Ratios in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Net income or (loss) to net sales ratio

Ratios in percent

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued

Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit net sales value

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued

Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit raw material costs

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued

Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit direct labor costs

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued

Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit other factory costs

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Unit energy costs

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Unit COGS

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Unit gross profit or (loss)

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Unit SG&A expenses

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Unit operating income or (loss)

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

Table continued.

Table VI-5 Continued
Glass wine bottles: U.S. producers' sales, costs/expenses, and profitability, by firm and period
Unit net income or (loss)

Unit values in dollars per gross

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

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

Net sales

Total Market

As shown in table VI-1, net sales quantity decreased irregularly from 2021 to 2023 and was lower in January-March 2024 (interim 2024) compared to January-March 2023 (interim 2023). Net sales values increased irregularly from 2021 to 2023 and were lower in interim 2024 compared to interim 2023.⁶ On a company specific basis, *** reported overall declines in net sales quantity, and ***'s net sales quantity increased irregularly from 2021 to 2023. *** reported a higher net sales quantity in interim 2024 and ***'s net sales quantity was lower in interim 2024. ***'s net sales value decreased irregularly from 2021 to 2023 and *** reported an overall increase in net sales value during the same period. *** firms reported a lower net sales value in interim 2024 compared to interim 2023.

⁶ Net sales quantity increased by *** percent between 2021 and 2022 and decreased by *** percent between 2022 to 2023 for an overall decrease of *** percent between 2021 to 2023. Net sales value increased by *** percent between 2021 and 2022 and decreased by *** percent between 2022 and 2023 for an overall increase of *** percent between 2021 and 2023.

The industry's net sales AUV increased from \$*** per gross in 2021 to \$*** per gross in 2023, reflecting the larger increase in net sales value compared to the decrease in net sales quantity. Net sales AUV was slightly higher in interim 2024 at \$*** per gross compared to \$*** per gross in interim 2023, which is attributed to the larger decrease in net sales quantity compared to net sales value between the two interim periods. On a company specific basis, all U.S. producers' net sales AUVs increased from 2021 to 2023 and *** had higher net sales AUV in interim 2024 compared to interim 2023.

Merchant Market

The trends for net sales quantity and net sales value followed the trends in the total market. Merchant market net sales quantity decreased irregularly from 2021 to 2023 and was lower in interim 2024 compared to interim 2023 and merchant market net sales value increased irregularly from 2021 to 2023 and was lower in interim 2024 compared to interim 2023. On a company-specific basis, *** reported an overall decrease in net sales quantity from 2021 to 2023, and *** reported a higher net sales quantity in interim 2024 compared to interim 2023. *** reported an overall increase in net sales value from 2021 to 2023 while *** reported an irregular decrease in net sales value during the same period. *** U.S. producers reported lower net sales values in interim 2024 compared to interim 2023.

Cost of goods sold and gross profit or loss

Total Market

Raw materials, direct labor, other factory costs and energy costs accounted for ***, ***, *** and *** percent of total market COGS, respectively, in 2023. Total raw material costs increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, raw materials increased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. *** U.S. producers reported an overall increase in raw material costs on a per-gross basis from 2021 to 2023. *** reported lower per-gross raw material costs in interim 2024 compared to interim 2023. Table VI-6 presents raw materials, by type.

Table VI-6
Glass wine bottles: U.S. producers' raw material costs for total market operations in 2023

Value in 1,000 dollars; unit values in dollars per gross; share of value in percent

Item	Value	Unit value	Share of value
Cullet	***	***	***
Silica	***	***	***
Soda ash	***	***	***
Limestone	***	***	***
Other material inputs	***	***	***
All raw materials	***	***	100.0

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

Direct labor costs increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, direct labor unit costs increased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. *** U.S. producers reported an overall increase in direct labor unit costs from 2021 to 2023; *** reported a higher direct labor cost AUV in interim 2024 compared to interim 2023.

Other factory costs increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, other factory costs increased from \$*** in 2021 to \$*** in 2023 and were higher in interim 2024 at \$*** compared to interim 2023 at \$***. *** U.S. producers reported an increase in per-gross other factory costs from 2021 to 2023 and

*** reported a decrease in per-gross other factory costs between 2022 and 2023.^{7 8 9} *** U.S. producers had higher per-gross other factory costs in interim 2024 compared to interim 2023.

Energy costs increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, energy costs increased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. *** U.S. producers reported an overall increase in per-gross energy costs from 2021 to 2023 and two of the three reported a decrease in per-gross energy costs between 2022 and 2023. *** reported lower per-gross energy costs in interim 2024 compared to interim 2023.¹⁰

Total COGS increased irregularly by *** percent from \$*** in 2021 to \$*** in 2023 and was lower in interim 2024 at \$*** compared to interim 2023 at \$***. The increase in total COGS was larger than the increase in net sales value, which resulted in gross profit decreasing from \$*** in 2021 to \$*** in 2023. The decrease in total COGS during the interim periods was smaller than the decrease in

⁷ ***. *** U.S. producer questionnaire, sections III-9f and III-9g. In response to questions from staff, ***. Email from ***.

⁸ ***. *** U.S. producer questionnaire responses, section III-10.

⁹ ***. *** U.S. producer questionnaire response, sections III-9j and III-10.

¹⁰ In response to questions from staff, ***. ***.

net sales value, resulting in gross profit being lower in interim 2024 at \$*** than in interim 2023 at \$***. The total COGS to net sales ratio increased irregularly from *** percent in 2021 to *** percent in 2023 and was lower in interim 2024 at *** percent compared to interim 2023 at *** percent. The gross profit margin decreased from *** percent in 2021 to *** percent in 2023 and was higher in interim 2024 at *** percent compared to interim 2023 at *** percent. As shown in table VI-5, ***.

Merchant Market

Raw materials, direct labor, other factory costs, and energy costs accounted for ***, ***, ***, and *** percent of merchant market COGS, respectively, in 2023. Total raw material costs increased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, merchant market raw material costs increased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***.

Merchant market direct labor costs increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, direct labor costs increased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***.

Other factory costs for the merchant market increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, other factory costs increased from \$*** in 2021 to \$*** in 2023 and were higher in interim 2024 at \$*** compared to interim 2023 at \$***.^{11 12}

Energy costs for the merchant market increased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. On a per-gross basis, energy costs increased irregularly from \$*** in 2021 to \$*** in 2023 and were *** in interim 2024 at \$*** and in interim 2023 at \$***.

¹¹ ***.

¹² ***. *** U.S. producer questionnaire response, section III-10.

Merchant market COGS increased by *** percent from \$*** in 2021 to \$*** in 2023. The increase in COGS was larger than the increase in net sales value for the same period, resulting in gross profit decreasing overall from \$*** in 2021 to \$*** in 2023. COGS was *** percent lower in interim 2024 at \$*** compared to interim 2023 at \$***. The decrease in net sales value for the same period was larger than the decrease in COGS resulting in merchant market gross profit being lower in interim 2024 at \$*** compared to interim 2023 at \$***. Merchant market COGS as a ratio to net sales increased from *** percent in 2021 to *** percent in 2023 and was higher in interim 2024 at *** percent compared to *** percent in interim 2023. The gross profit margin decreased from *** percent in 2021 to *** percent in 2023 and was lower in interim 2024 at *** percent compared to interim 2023 at *** percent. ***.

SG&A expenses and operating income or loss

Total Market

Total market SG&A expenses decreased irregularly from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. The SG&A expense ratio (SG&A expenses as a share of sales) decreased from *** percent in 2021 to *** percent in 2023 and was lower in interim 2024 at *** percent compared to interim 2023 at *** percent.

Total market operating income decreased from a loss of \$*** in 2021 to a *** loss of \$*** in 2023. Operating income was higher in interim 2024 at \$*** compared to interim 2023 at \$***. The operating margin (operating income as a ratio to net sales) decreased from negative *** percent in 2021 to negative *** percent in 2023 and was higher in interim 2024 at *** percent compared to interim 2023 at *** percent. *** U.S. producers reported operating losses in all full-year periods, *** reported an operating loss in interim 2023 and *** reported an operating loss in interim 2024.

Merchant Market

Merchant market SG&A expenses decreased from \$*** million in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. The SG&A expense ratio (SG&A expenses as a share of sales) decreased from

*** percent in 2021 to *** percent in 2023 and was lower in interim 2024 at *** percent compared to interim 2023 at *** percent.

Merchant market operating income decreased from a loss of *** in 2021 to *** \$*** in 2023 and was lower in interim 2024 at \$*** compared to \$*** in interim 2023. The operating income margin (operating income as a ratio to net sales) decreased from negative *** percent in 2021 to negative *** percent in 2023 and was lower in interim 2024 at *** percent compared to interim 2023 at *** percent. *** U.S. producers reported operating losses in all full year periods and in interim 2024 and *** reported an operating loss in interim 2023.

All other expenses and net income or loss

Total Market

Classified below the operating income level are interest expenses, other expenses, and other income. As seen in table VI-1, net all other expenses decreased from \$*** in 2021 to \$*** in 2023 and were lower in interim 2024 at \$*** compared to interim 2023 at \$***. ***. Interest expense accounted for the majority of net all other expenses in all full year periods and interim 2023. *** accounted for the majority of interest expense. In interim 2024, other income accounted for the majority of net all other expenses and *** reported other income.

Total market net income increased irregularly from *** of \$*** to *** of \$*** and was higher in interim 2024 at \$*** compared to interim 2023 at \$***.¹³

Merchant Market

The net all other expenses and income for the merchant market decreased from \$*** in 2021 to \$*** in 2023 and was lower in interim 2024 at \$*** compared to interim 2023 at \$***. ***.

¹³ As shown in table VI-3, ***.

Merchant market net income increased irregularly from *** \$*** in 2021 to *** \$*** in 2023 and was lower in interim 2024 at *** \$*** compared to interim 2023 at *** \$***.¹⁴

Variance analysis

A variance analysis for the total market operations of U.S. producers of glass wine bottles is presented in table VI-7.¹⁵ The information for this variance analysis is derived from table VI-1. A variance analysis for the merchant market glass wine bottle operations of U.S. producers is presented in table VI-8. The information for this variance analysis is derived from table VI-3.

The variance analysis for the total market in table VI-7 shows that the decrease in operating income between 2021 and 2023 was primarily attributable to an unfavorable cost/expense variance compared to a smaller favorable price variance. The higher operating income in interim 2024 compared to interim 2023 is primarily attributable to a higher favorable price variance compared to a smaller unfavorable cost/expense variance.

¹⁴ ***.

¹⁵ The Commission's variance analysis is calculated in three parts: Sales variance, cost of sales variance (COGS variance), and SG&A expense variance. Each part consists of a price variance (in the case of the sales variance) or a cost or expense variance (in the case of the COGS and SG&A expense variance), and a volume variance. The sales or cost/expense variance is calculated as the change in unit price or per-unit cost/expense times the new volume, while the volume variance is calculated as the change in volume times the old unit price or per-unit cost/expense. Summarized at the bottom of the table, the price variance is from sales; the cost/expense variance is the sum of those items from COGS and SG&A variances, respectively, and the volume variance is the sum of the volume components of the net sales, COGS, and SG&A expense variances. The overall volume component of the variance analysis is generally small.

Table VI-7
Glass wine bottles: Variance analysis on the total market operations of U.S. producers between comparison periods

Value in 1,000 dollars

Item	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Net sales price variance	***	***	***	***
Net sales volume variance	***	***	***	***
Net sales total variance	***	***	***	***
COGS cost variance	***	***	***	***
COGS volume variance	***	***	***	***
COGS total variance	***	***	***	***
Gross profit variance	***	***	***	***
SG&A cost variance	***	***	***	***
SG&A volume variance	***	***	***	***
SG&A total variance	***	***	***	***
Operating income price variance	***	***	***	***
Operating income cost variance	***	***	***	***
Operating income volume variance	***	***	***	***
Operating income total variance	***	***	***	***

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

Note: These data are derived from the data in table VI-1. Unfavorable variances (which are negative) are shown in parentheses, all others are favorable (positive).

The merchant market variance analysis in table VI-8 shows the decrease in operating income between 2021 and 2023 was primarily attributable to a higher unfavorable cost/expense variance compared to a smaller favorable price variance. The lower operating income in interim 2024 compared to interim 2023 is primarily due to a higher unfavorable price variance compared to a smaller favorable cost/expense variance.

Table VI-8
Glass wine bottles: Variance analysis of merchant market operations of U.S. producers between comparison periods

Value in 1,000 dollars

Item	2021-23	2021-22	2022-23	Jan-Mar 2023-24
Net sales price variance	***	***	***	***
Net sales volume variance	***	***	***	***
Net sales total variance	***	***	***	***
COGS cost variance	***	***	***	***
COGS volume variance	***	***	***	***
COGS total variance	***	***	***	***
Gross profit variance	***	***	***	***
SG&A cost variance	***	***	***	***
SG&A volume variance	***	***	***	***
SG&A total variance	***	***	***	***
Operating income price variance	***	***	***	***
Operating income cost variance	***	***	***	***
Operating income volume variance	***	***	***	***
Operating income total variance	***	***	***	***

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

Note: These data are derived from the data in table VI-3. Unfavorable variances (which are negative) are shown in parentheses, all others are favorable (positive).

Capital expenditures and research and development expenses

Table VI-9 presents capital expenditures, by firm, and table VI-11 presents R&D expenses, by firm. Tables VI-10 and VI-12 present the firms' narrative explanations of the nature, focus, and significance of their capital expenditures and R&D expenses, respectively.

Capital expenditures irregularly increased from 2021 to 2023 and were lower in interim 2024 compared to interim 2023. ***. As seen in table VI-10, ***.

R&D expenses were reported by *** and moved within a relatively narrow range for both the full year and interim periods. ***.¹⁶

Table VI-9
Glass wine bottles: U.S. producers' capital expenditures, by firm and period

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

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

Table VI-10
Glass wine bottles: U.S. producers' narrative descriptions of their capital expenditures, by firm

Firm	Narrative on capital expenditures
Ardagh	***
Gallo	***
O-I Glass	***

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

¹⁶ In response to questions from staff, *** ***.

Table VI-11
Glass wine bottles: U.S. producers' R&D expenses, by firm and period

Value in 1,000 dollars

Firm	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Ardagh	***	***	***	***	***
Gallo	***	***	***	***	***
O-I Glass	***	***	***	***	***
All firms	***	***	***	***	***

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

Table VI-12
Glass wine bottles: U.S. producers' narrative descriptions of their R&D expenses, by firm

Firm	Narrative on R&D expenses
Ardagh	***
Gallo	***
O-I Glass	***

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

Assets and return on assets

Table VI-13 presents data on the U.S. producers' total assets while table VI-14 presents their operating ROA.¹⁷ Table VI-15 presents U.S. producers' narrative responses explaining their major asset categories and any significant changes in asset levels over time.

Assets increased from \$*** in 2021 to \$*** in 2023. *** accounted for the largest share of the increase, and as shown in table VI-15, ***. The industry's ROA decreased irregularly from negative *** percent in 2021 to negative *** percent in 2023. ***.

¹⁷ The operating ROA is calculated as operating income divided by total assets. With respect to a firm's overall operations, the total asset value reflects an aggregation of a number of assets which are generally not product specific. Thus, high-level allocations are generally required in order to report a total asset value on a product-specific basis.

Table VI-13
Glass wine bottles: U.S. producers' total net assets, by firm and period

Value in 1,000 dollars

Firm	2021	2022	2023
Ardagh	***	***	***
Gallo	***	***	***
O-I Glass	***	***	***
All firms	***	***	***

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

Table VI-14
Glass wine bottles: U.S. producers' ROA, by firm and period

Ratio in percent

Firm	2021	2022	2023
Ardagh	***	***	***
Gallo	***	***	***
O-I Glass	***	***	***
All firms	***	***	***

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

Table VI-15
Glass wine bottles: U.S. producers' narrative descriptions of their total net assets, by firm

Firm	Narrative on assets
Ardagh	***
Gallo	***
O-I Glass	***

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

Capital and investment

The Commission requested U.S. producers of glass wine bottles to describe any actual or potential negative effects of imports of glass wine bottles from Chile, China, and Mexico on their firms' growth, investment, ability to raise capital, development and production efforts, or the scale of capital investments. Table VI-16 presents the number of firms reporting an impact in each category and table VI-17 provides the U.S. producers' narrative responses.

Table VI-16**Glass wine bottles: Count of firms indicating actual and anticipated negative effects of imports from subject sources on investment, growth, and development since January 1, 2021, by effect**

Number of firms reporting

Effect	Category	Count
Cancellation, postponement, or rejection of expansion projects	Investment	***
Denial or rejection of investment proposal	Investment	***
Reduction in the size of capital investments	Investment	***
Return on specific investments negatively impacted	Investment	***
Other investment effects	Investment	***
Any negative effects on investment	Investment	***
Rejection of bank loans	Growth	***
Lowering of credit rating	Growth	***
Problem related to the issue of stocks or bonds	Growth	***
Ability to service debt	Growth	***
Other growth and development effects	Growth	***
Any negative effects on growth and development	Growth	***
Anticipated negative effects of imports	Future	***

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

Table VI-17

Glass wine bottles: U.S. producers' narratives relating to actual and anticipated negative effects of imports on investment, growth, and development, since January 1, 2021, by firm and effect

Item	Firm name and narrative on impact of imports
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

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

Part VII: Threat considerations and information on nonsubject countries

Section 771(7)(F)(i) of the Act (19 U.S.C. § 1677(7)(F)(i)) provides that—

In determining whether an industry in the United States is threatened with material injury by reason of imports (or sales for importation) of the subject merchandise, the Commission shall consider, among other relevant economic factors¹--

- (I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement), and whether imports of the subject merchandise are likely to increase,*
- (II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,*
- (III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,*
- (IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices, and are likely to increase demand for further imports,*
- (V) inventories of the subject merchandise,*

¹ Section 771(7)(F)(ii) of the Act (19 U.S.C. § 1677(7)(F)(ii)) provides that “The Commission shall consider {these factors} . . . as a whole in making a determination of whether further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted under this title. The presence or absence of any factor which the Commission is required to consider . . . shall not necessarily give decisive guidance with respect to the determination. Such a determination may not be made on the basis of mere conjecture or supposition.”

- (VI) *the potential for product-shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products,*
- (VII) *in any investigation under this title which involves imports of both a raw agricultural product (within the meaning of paragraph (4)(E)(iv)) and any product processed from such raw agricultural product, the likelihood that there will be increased imports, by reason of product shifting, if there is an affirmative determination by the Commission under section 705(b)(1) or 735(b)(1) with respect to either the raw agricultural product or the processed agricultural product (but not both),*
- (VIII) *the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and*
- (IX) *any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).²*

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. Also presented in this section of the report is information obtained for consideration by the Commission on nonsubject countries.

² Section 771(7)(F)(iii) of the Act (19 U.S.C. § 1677(7)(F)(iii)) further provides that, in antidumping investigations, ". . . the Commission shall consider whether dumping in the markets of foreign countries (as evidenced by dumping findings or antidumping remedies in other WTO member markets against the same class or kind of merchandise manufactured or exported by the same party as under investigation) suggests a threat of material injury to the domestic industry."

Subject countries

The Commission issued foreign producers' or exporters' questionnaires to 3 firms believed to produce and/or export glass wine bottles in or from Chile, 33 firms believed to produce and/or export glass wine bottles in or from China, and 9 firms believed to produce and/or export glass wine bottles in or from Mexico.³ Usable responses to the Commission's questionnaire were received from all three firms in Chile, two firms in China, and four firms in Mexico.⁴

Table VII-1 presents the number of producers/exporters in each subject country that responded to the Commission's questionnaire, their exports to the United States as a share of U.S. imports by each subject country in 2023, and their estimated share of total production of glass wine bottles in each subject country during 2023.

Table VII-1
Glass wine bottles: Number of responding producers/exporters, approximate shares of subject country production, and exports to the United States as a share of U.S. imports from subject country, by country, 2023

Country	Number of responding firms	Approximate share of production (percent)	Exports as a share of U.S. imports from subject country (percent) by questionnaire data
Chile	3	***	***
China	2	***	***
Mexico	4	***	***

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

Note: "Approximate share of production" reflects the responding firms' estimates of their production as a share of total country production of glass wine bottles in 2023. Since not all firms have perfect knowledge of the industry in their home market, different firms might use different denominators in estimating their firm's share of the total requested.

Note: The three responses from producers in Chile are believed to represent all known production in Chile; however, *** was unable to provide an estimate as to the share its production represented as a share of total production of glass wine bottles in Chile in 2023.

Note: "Exports as a share of U.S. imports" reflects a comparison of export data reported by firms in response to the Commission's foreign producer/exporter questionnaire with questionnaire data.

³ These firms were identified through a review of information submitted in the petition and presented in third-party sources.

⁴ Additionally, five firms submitted responses certifying that their firm had not produced or exported glass wine bottles in or from Chile, China, or Mexico since January 1, 2021: ***.

Table VII-2 presents information on the glass wine bottles operations of the responding producers and exporters in Chile, China, and Mexico. Table VII-3 presents information on the glass wine bottles operations of the responding producers and exporters by subject foreign industry. No firms reported any resale exports during the period of investigation.

Table VII-2
Glass wine bottles: Summary data for subject producers and countries, 2023

Producer (subject foreign industry)	Production (gross)	Share of reported production (percent)	Exports to the United States (gross)	Share of reported exports to the United States (percent)	Total shipments (gross)	Share of firm's total shipments exported to the United States (percent)
Cristalerías de Chile (Chile)	***	***	***	***	***	***
Cristalerías Toro (Chile)	***	***	***	***	***	***
Verallia Chile (Chile)	***	***	***	***	***	***
O-I (Zhaoqing) Glass (China)	***	***	***	***	***	***
Shandong Changyu (China)	***	***	***	***	***	***
Fevisa (Mexico)	***	***	***	***	***	***
Owens America (Mexico)	***	***	***	***	***	***
Pavisa Luxe (Mexico)	***	***	***	***	***	***
Saverglass (Mexico)	***	***	***	***	***	***
All individual producers	10,463,694	100.0	2,797,931	100.0	10,032,384	***

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Table VII-3
Glass wine bottles: Summary data for subject foreign producers, by source, 2023

Subject foreign industry	Production (gross)	Share of reported production (percent)	Exports to the United States (gross)	Share of reported exports to the United States (percent)	Total shipments (gross)	Share of country's total shipments exported to the United States (percent)
Chile	***	***	***	***	***	***
China	***	***	***	***	***	***
Mexico	***	***	***	***	***	***
All reporting foreign producers	10,463,694	100.0	2,797,931	100.0	10,032,384	***

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

Changes in operations

Table VII-4 presents events in the subject countries' industries since January 1, 2021.

Table VII-4
Glass wine bottles: Important industry events in subject countries since January 1, 2021

Item	Firm	Event
Plant Expansion	Cristalerías Toro	In February 2021, the firm opened a new furnace at its plant in Maipu, Chile, allowing for an additional production capacity of 300 tons of glass bottles per day. The new furnace sources 100 percent renewable energy and produces bottles with more than 60 percent recycled glass.
Plant Expansion	Cristal Chile	In November 2021, the firm announced plans to build a third glass bottle and container manufacturing facility in Chile to complement existing plants in Llay Llay and Padre Hurtado. Expansion at the third facility along with modernizations at its existing plants would allow the firm to increase capacity by 50 percent relative to 2019 levels.
Plant Expansion	Vidrio Formas	In the second half of 2022, the firm finalized the second stage of its plant expansion in Lerma, Mexico. The first stage, completed in July 2021, involved installation of a batch plant and a furnace with two manufacturing lines. The second stage added two more manufacturing lines, increasing production capacity from 160 tons/day to 320 tons/day.
Plant Expansion	Saverglass	In 2023, the firm expanded production capacity at its Acatlan de Juarez plant near Guadalajara. Construction began in October 2021 with a \$116 million investment, creating an estimated 400 jobs. The new furnace increases production capacity by 200,000 tons of glass, or 200 million bottles, in extra-white, Antique green, and dark yellow colors.
Acquisition	Vidrio Formas	In July 2023, Portugal-based glass producer BA Glass announced the acquisition of Mexico-based glass container manufacturer Vidrio Formas.
Acquisition	Saverglass	In December 2023, Australian-based glass bottle manufacturer Orora completed its acquisition of Saverglass, which manufactures glass wine bottles among other glass containers in Mexico. The deal was worth approximately \$1.4 billion.

Sources: Glass Online, "Cristalerías Toro ignites new furnace at its Maipú plant," February 18, 2021, <https://www.glassonline.com/cristalerias-toro-ignites-new-furnace-at-its-plant/>, accessed January 16, 2024; Morris, Greg, "Cristalerías de Chile plots construction of third glass production facility," November 2, 2021, <https://www.glass-international.com/news/cristalerias-de-chile-plots-construction-of-third-glass-production-facility>, accessed January 16, 2024; Morris, Greg, "Vidrio Formas completes glass capacity expansion," November 21, 2022, <https://www.glass-international.com/news/vidrio-formas-completes-glass-capacity-expansion>, accessed January 16, 2024; Saverglass, "Saverglass to Expand Its Production Capacity," June 22, 2022, <https://www.prweb.com/releases/saverglass-to-expand-its-production-capacity-to-serve-the-high-end-liquor-markets-of-the-american-continent-856271826.html>, accessed January 16, 2024; Morris, Greg, "BA Glass to acquire Mexican manufacturer," July 14, 2023, <https://www.glass-international.com/news/ba-glass-to-acquire-mexican-manufacturer>, accessed January 16, 2024; Baker McKenzie, "Baker McKenzie assists Orora," December 4, 2023, <https://www.bakermckenzie.com/en/newsroom/2023/12/orora-acquires-saverglass>, accessed January 16, 2024.

Subject producers were asked to report any change in the character of their operations or organization relating to the production of glass wine bottles since 2021. Seven of the eight producers indicated in their questionnaires that they had experienced such changes. Table VII-5 presents counts of reported changes in operations by type and country, and table VII-6 presents the narratives for the changes as reported by the producers. As shown in the tables, ***.

Table VII-5
Glass wine bottles: Count of reported changes in operations since January 1, 2021, by country

Count in number of firms reporting

Item	Chile	China	Mexico	Subject producers
Plant openings	***	***	***	1
Plant closings	***	***	***	0
Prolonged shutdowns	***	***	***	4
Production curtailments	***	***	***	5
Relocations	***	***	***	0
Expansions	***	***	***	5
Acquisitions	***	***	***	0
Consolidations	***	***	***	0
Weather-related or force majeure events	***	***	***	3
Other	***	***	***	0
Any change	***	***	***	8

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

Table VII-6**Glass wine bottles: Reported changes in operations in the subject countries since January 1, 2021, by firm**

Item	Firm name and accompanying narrative response on changes in operations
Plant openings	***
Prolonged shutdowns	***
Production curtailments	***
Expansions	***
Expansions	***

Table continued.

Table VII-6 Continued

Glass wine bottles: Reported changes in operations in the subject countries since January 1, 2021, by firm

Item	Firm name and accompanying narrative response on changes in operations
Expansions	***
Expansions	***
Expansions	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***
Weather-related or force majeure events	***

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

Two firms reported anticipating operational changes as shown in table VII-7.

Table VII-7

Glass wine bottles: Reported anticipated changes in operations in the subject countries, by firm

Firm	Narrative response regarding changes in operations
***	***
***	***

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

Foreign producers/exporters were asked whether the COVID-19 pandemic or any government actions taken to contain the spread of the COVID-19 virus resulted in changes to the firm’s supply chain arrangements, production, or shipments (including exports to the United States) relating to glass wine bottles and to describe any such changes. Table VII-8 presents narrative responses on the impact of COVID-19 in response to this question.

Table VII-8
Glass wine bottles: Firms' narratives on the impact of COVID-19

Firm	Narrative response
***	***
***	***
***	***
***	***
***	***
***	***

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

Operations on glass wine bottles

Subject producers' production, capacity, and capacity utilization by subject country

Table VII-9 presents information on subject producers' production, capacity, and capacity utilization by subject country.

During 2021-23, practical wine glass bottle capacity in Chile decreased irregularly by *** percent (from approximately *** gross in 2021 to *** gross in 2023) and was *** percent lower in interim 2024 than in interim 2023 (approximately *** in interim 2023 and *** gross in interim 2024). The producers in Chile projected that capacity would increase *** percent in 2024 as compared to 2023 (from *** to ***) and increase an additional *** percent in 2025 as compared to 2024 (from *** gross to *** gross). Production in Chile decreased irregularly by *** percent from 2021-23 (from approximately *** gross in 2021 to *** gross in 2023). Production in Chile was also *** percent lower in interim 2024 compared to interim 2023. The producers projected that glass wine bottles production would increase *** percent in 2024 compared to 2023 (to approximately *** gross) and an additional *** percent in 2025 as compared to 2024 (to approximately *** gross). Capacity utilization of the producers in Chile decreased *** percentage points from 2021-23 (**% percent in 2021 to **% percent in 2023). Capacity utilization was also *** percentage points lower in interim 2024 as compared to interim 2023 (**% in interim 2023 as compared to **% percent in interim 2024). The capacity utilization of the producers in Chile was projected to be **% percent in 2024 and **% percent in 2025.

During 2021-23, practical wine glass bottle capacity in China decreased irregularly by *** percent (from approximately *** gross in 2021 to *** gross in 2023) but was *** percent higher in interim 2024 than in interim 2023 (approximately *** gross compared to *** gross). The producers in China projected that capacity would decrease *** percent in 2024 as compared to 2023 and be *** in 2025 as compared to 2024 (to approximately *** gross in both 2024 and 2025). Production in China decreased irregularly by *** percent from 2021-23 (from *** gross to *** gross). Production in China was 50.1 percent higher in interim 2024 as compared to interim 2023 (approximately *** gross compared to *** gross). The producers projected that glass wine bottles production would decrease *** percent in 2024 as compared to 2023 (to approximately *** gross) and decrease an additional *** percent in 2025 as compared to 2024 (to approximately *** gross). Capacity utilization of the producers in China decreased less than *** percentage points from 2021-23

(approximately *** percent in both 2021 and 2023). Capacity utilization was also *** in interim 2024 as compared to interim 2023 (approximately *** percent in *** interim periods). The capacity utilization of the producers in China was projected to be *** percent in 2024 and *** percent in 2025.

During 2021-23, reported practical wine glass bottle capacity in Mexico increased *** percent (from approximately *** gross in 2021 to *** gross in 2023) and was *** percent higher in interim 2024 than in interim 2023 (approximately *** gross in interim 2024 compared to *** gross in interim 2023). The producers in Mexico projected that practical capacity would decrease *** percent in 2024 as compared to 2023 (to approximately *** gross) but would increase *** percent in 2025 as compared to 2024 (to approximately *** gross). Production in Mexico decreased irregularly by *** percent from 2021-23 (from slightly greater than *** gross in 2021 to slightly less than *** gross in 2023). Production in Mexico was *** percent higher in interim 2024 as compared to interim 2023 (approximately *** gross in interim 2024 compared to *** gross in interim 2023). The producers projected that glass wine bottles production would increase *** percent in 2024 as compared to 2023 (to approximately *** gross) and an additional *** percent in 2025 as compared to 2024 (to *** gross). Capacity utilization of the producers in Mexico decreased *** percentage points from 2021-23 (*** percent in 2023 as compared to *** percent in 2021). Capacity utilization was also *** percentage points lower in interim 2024 as compared to interim 2023 (*** percent in interim 2024 as compared to *** percent in interim 2023). The capacity utilization of the producers in Mexico was projected to be *** percent in 2024 and *** percent in 2025.

Resultingly, practical capacity for glass wine bottles from all subject sources decreased 1.6 percent from 2021-23 (from approximately 12.4 million gross in 2021 to 12.2 million gross in 2023) but was 20.8 percent higher in interim 2024 than interim 2023 (approximately 3.5 million gross in interim 2024 compared to 2.9 million gross in interim 2023). Production of glass wine bottles from all subject sources decreased 12.4 percent from 2021-23 (from approximately 11.9 million gross in 2021 to 10.5 million gross in 2023) but was 11.5 percent higher in interim 2024 than interim 2023 (3.0 million gross in interim 2024 compared to 2.7 million gross in interim 2023). Practical glass wine bottles capacity utilization decreased from 96.0 percent in 2021 to 85.5 percent in 2023 and was 85.4 percent in interim 2024 as compared to 92.6 percent in interim 2023.

Table VII-9**Glass wine bottles: Subject foreign industries' output: Practical capacity, by subject foreign industry and period****Practical capacity**

Capacity in gross

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	12,438,231	12,385,888	12,239,640

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Practical capacity, by subject foreign industry and period****Practical capacity**

Capacity in gross

Subject foreign industry	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	2,872,041	3,470,684	12,453,285	12,907,211

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Production, by subject foreign industry and period****Production**

Production in gross

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	11,944,454	11,708,148	10,463,694

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Production, by subject foreign industry and period****Production**

Production in gross

Subject foreign industry	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	2,658,201	2,963,782	11,060,535	11,497,098

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Capacity utilization ratio, by subject foreign industry and period****Capacity utilization**

Capacity utilization in percent

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	96.0	94.5	85.5

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Capacity utilization ratio, by subject foreign industry and period****Capacity utilization**

Capacity utilization in percent

Subject foreign industry	Jan-Sep 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	92.6	85.4	88.8	89.1

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Share of production, by subject foreign industry and period****Share of production**

Share in percent

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	100.0	100.0	100.0

Table continued.

Table VII-9 Continued**Glass wine bottles: Subject foreign industries' output: Share of production, by subject foreign industry and period****Share of production**

Share in percent

Subject foreign industry	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	100.0	100.0	100.0	100.0

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

Note: Capacity utilization ratio represents the ratio of the subject producer's production to its production capacity.

Subject producers' exports to the United States and total exports

Table VII-10 presents information on subject producers' exports of glass wine bottles by subject country.

During 2021-23, exports to the United States by foreign producers in Chile decreased irregularly by *** percent (from approximately *** gross in 2021 to *** gross in 2023). Exports to the United States from Chile were *** percent higher in interim 2024 than in interim 2023 (*** gross in interim 2024 compared to *** gross in interim 2023). The producers in Chile projected exports to the United States in 2024 would be *** lower than in 2023 (approximately *** gross) and *** percent lower in 2025 than in 2024 (approximately *** gross). Chile's total exports decreased irregularly by *** percent from 2021-23 (from approximately *** gross in 2021 to *** gross in 2023). Total exports from Chile were *** percent lower in interim 2024 than in interim 2023 (*** gross in interim 2024 compared to *** gross in interim 2023). The producers in Chile projected total exports in 2024 would be *** percent lower than in 2023 (approximately *** gross) and *** percent lower in 2025 than in 2024 (approximately *** gross).

During 2021-23, exports to the United States by foreign producers in China decreased irregularly by *** percent (from approximately *** gross in 2021 to *** gross in 2023). Exports to the United States from China were *** percent higher in interim 2024 than in interim 2023 (*** gross in interim 2024 compared to *** gross in interim 2023). The producers in China projected exports to the United States in 2024 would be *** percent higher than in 2023 (*** gross) but *** percent lower in 2025 than in 2024 (***). China's total exports decreased irregularly by *** percent from 2021-23 (from approximately *** gross in 2021 to *** gross in 2023). Total exports from China were *** percent higher in interim 2024 than in interim 2023 (*** gross in interim 2024 compared to *** gross in interim 2023). The producers in China projected total exports in 2024 would be *** percent higher than in 2023 (approximately *** gross) and *** percent lower in 2025 than in 2024 (approximately *** gross).

During 2021-23, exports to the United States by foreign producers in Mexico decreased by *** percent (from approximately *** gross in 2021 to *** gross in 2023). Exports to the United States from Mexico were *** percent higher in interim 2024 than in interim 2023 (*** gross in interim 2024 compared to *** gross in interim 2023). The producers in Mexico projected exports to the United States in 2024 would be *** higher than in 2023 (approximately *** gross) and *** percent higher in

2025 than in 2024 (approximately *** gross). Mexico's total exports decreased by *** percent from 2021-23 (from approximately *** gross in 2021 to *** gross in 2023). Total exports from Mexico were *** percent higher in interim 2024 than in interim 2023 (*** gross in interim 2024 compared to *** gross in interim 2023). The producers in Mexico projected total exports in 2024 would be *** percent higher than in 2023 (approximately *** gross) and *** percent higher in 2025 than in 2024 (approximately *** gross).

Resultingly, subject producers' exports to the United States decreased by 23.6 percent from 2021-23 (from approximately 3.7 million gross in 2021 to 2.8 million gross in 2023). They were 32.0 percent higher in interim 2024 than in interim 2023 (approximately 1.0 million gross in interim 2024 compared to 762.0 thousand gross in interim 2023) and were projected to increase by 17.5 percent in 2024 before increasing by an additional 2.5 percent in 2025 to approximately 3.4 million gross.

Exports to the United States reported by responding producers in Mexico accounted for the largest share of exports in all periods. In 2023, Chile accounted for *** percent of exports to the United States, China accounted for *** percent of exports to the United States, and Mexico accounted for *** percent of exports to the United States.

Table VII-10**Glass wine bottles: Subject foreign industries' exports: Exports to the United States, by subject foreign industry and period****Exports to the United States**

Quantity in gross

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	3,661,571	3,366,952	2,797,931

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Exports to the United States, by subject foreign industry and period****Exports to the United States**

Quantity in gross

Subject foreign industry	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	762,049	1,006,265	3,288,411	3,371,205

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Share of total shipments exported to the United States, by subject foreign industry and period****Share of total shipments exported to the United States**

Share in percent

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	30.6	29.8	27.9

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Share of total shipments exported to the United States, by subject foreign industry and period****Share of total shipments exported to the United States**

Share in percent

Subject foreign industry	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	34.7	37.7	29.5	29.2

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Total exports, by subject foreign industry and period****Total exports**

Quantity in gross

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	5,243,269	4,696,861	4,327,891

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Total exports, by subject foreign industry and period****Total exports**

Quantity in gross

Subject foreign industry	Jan-Sep 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	996,772	1,264,433	4,738,103	4,818,477

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Share of total shipments exported, by subject foreign industry and period****Share of total shipments exported**

Share in percent

Subject foreign industry	2021	2022	2023
Chile	***	***	***
China	***	***	***
Mexico	***	***	***
All subject foreign industries	43.8	41.6	43.1

Table continued.

Table VII-10 Continued**Glass wine bottles: Subject foreign industries' exports: Share of total shipments exported, by subject foreign industry and period****Share of total shipments exported**

Share in percent

Subject foreign industry	Jan-Sep 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Chile	***	***	***	***
China	***	***	***	***
Mexico	***	***	***	***
All subject foreign industries	45.4	47.4	42.6	41.8

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

Data on subject foreign industries

Table VII-11 presents information on the glass wine bottles operations of the responding producers/exporters.

As previously noted, practical capacity for glass wine bottles from all subject sources decreased 1.6 percent from 2021-23 (from approximately 12.4 million gross in 2021 to 12.2 million gross in 2023) but was 20.8 percent higher in interim 2024 than interim 2023 (approximately 3.5 million gross in interim 2024 compared to 2.9 million gross in interim 2023). Production of glass wine bottles from all subject sources decreased 12.4 percent from 2021-23 (from approximately 11.9 million gross in 2021 to 10.5 million gross in 2023) but was 11.5 percent higher in interim 2024 than interim 2023 (3.0 million gross in interim 2024 compared to 2.7 million gross in interim 2023). Practical glass wine bottles capacity utilization decreased from 96.0 percent in 2021 to 85.5 percent in 2023 and was 85.4 percent in interim 2024 as compared to 92.6 percent in interim 2023.

Virtually all reported home market shipments reported by subject producers were commercial shipments, and they accounted for between *** and *** percent of all shipments during 2021-23 and the interim periods. The subject foreign producers' projections indicate the share of commercial home market shipments as a share of total shipments would increase to *** percent in 2024 and *** percent in 2025.

As also previously noted, subject producers' exports to the United States decreased by 23.6 percent from 2021-23 (from approximately 3.7 million gross in 2021 to 2.8 million gross in 2023). They were 32.0 percent higher in interim 2024 than in interim 2023 (approximately 1.0 million gross in interim 2024 compared to 762.0 thousand gross in interim 2023) and were projected to increase by 17.5 percent in 2024 before increasing by an additional 2.5 percent in 2025 to approximately 3.4 million gross.

Exports to all other markets decreased irregularly by 3.3 percent during 2021-23 (from approximately 1.6 million gross in 2021 to 1.5 million gross in 2023). They were 10.0 percent higher in interim 2024 than in interim 2023 (approximately 258.2 thousand gross in interim 2024 compared to 234.7 thousand gross in interim 2023) and were projected to decrease by 5.2 percent in 2024 and decrease an additional 0.2 percent in 2025 (to approximately 1.4 million gross in both periods).

Table VII-11
Glass wine bottles: Data on subject foreign industries, by item and period

Quantity in gross

Item	2021	2022	2023
Capacity	12,438,231	12,385,888	12,239,640
Production	11,944,454	11,708,148	10,463,694
End-of-period inventories	1,904,273	2,227,487	2,535,002
Internal consumption	***	***	***
Commercial home market shipments	***	***	***
Home market shipments	6,737,945	6,598,293	5,704,493
Exports to the United States	3,661,571	3,366,952	2,797,931
Exports to all other markets	1,581,698	1,329,909	1,529,960
Export shipments	5,243,269	4,696,861	4,327,891
Total shipments	11,981,214	11,295,154	10,032,384

Table continued.

Table VII-11 Continued
Glass wine bottles: Data on subject foreign industries, by item and period

Quantity in gross

Item	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Capacity	2,872,041	3,470,684	12,453,285	12,907,211
Production	2,658,201	2,963,782	11,060,535	11,497,098
End-of-period inventories	2,674,329	2,780,151	2,315,087	2,170,092
Internal consumption	***	***	***	***
Commercial home market shipments	***	***	***	***
Home market shipments	1,196,903	1,404,931	6,395,486	6,721,066
Exports to the United States	762,049	1,006,265	3,288,411	3,371,205
Exports to all other markets	234,723	258,168	1,449,692	1,447,272
Export shipments	996,772	1,264,433	4,738,103	4,818,477
Total shipments	2,193,675	2,669,364	11,133,589	11,539,543

Table continued.

Table VII-11 Continued
Glass wine bottles: Data on subject foreign industries, by item and period

Shares and ratios in percent

Item	2021	2022	2023
Capacity utilization ratio	96.0	94.5	85.5
Inventory ratio to production	15.9	19.0	24.2
Inventory ratio to total shipments	15.9	19.7	25.3
Internal consumption share	***	***	***
Commercial home market shipments share	***	***	***
Home market shipments share	56.2	58.4	56.9
Exports to the United States share	30.6	29.8	27.9
Exports to all other markets share	13.2	11.8	15.3
Export shipments share	43.8	41.6	43.1
Total shipments share	100.0	100.0	100.0

Table continued.

Table VII-11 Continued
Glass wine bottles: Data on subject foreign industries, by item and period

Shares and ratios in percent

Item	Jan-Mar 2023	Jan-Mar 2024	Projection 2024	Projection 2025
Capacity utilization ratio	92.6	85.4	88.8	89.1
Inventory ratio to production	25.2	23.5	20.9	18.9
Inventory ratio to total shipments	30.5	26.0	20.8	18.8
Internal consumption share	***	***	***	***
Commercial home market shipments share	***	***	***	***
Home market shipments share	54.6	52.6	57.4	58.2
Exports to the United States share	34.7	37.7	29.5	29.2
Exports to all other markets share	10.7	9.7	13.0	12.5
Export shipments share	45.4	47.4	42.6	41.8
Total shipments share	100.0	100.0	100.0	100.0

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

Installed and overall capacity and alternative products

Table VII-12 presents data on subject producers' installed capacity, practical overall capacity, and practical glass wine bottles capacity and production on the same equipment. Installed or "theoretical" overall capacity measures the level of production firms could have attained based solely on existing capital investments and not considering other constraints such as availability of material inputs, labor force, and normal downtime. The two practical capacity measures take into consideration both existing capital investment as well as non-capital investment constraints. Practical overall capacity measures firms' capacity to produce glass wine bottles as well as any other products produced using the same equipment/machinery, whereas practical glass wine bottles capacity measures only the practical capacity of firms to produce glass wine bottles based on firms' actual product mixes over the period.

As previously discussed, practical capacity allocated to glass wine bottles decreased 1.6 percent from 2021-23 but was 20.8 percent higher in interim 2024 than interim 2023. Production of glass wine bottles decreased 12.4 percent from 2021-23 but was 11.5 percent higher in interim 2024 than interim 2023. Practical glass wine bottles capacity utilization decreased from 96.0 percent in 2021 to 85.5 percent in 2023 and was 85.4 percent in interim 2024 as compared to 92.6 percent in interim 2023.

Between 2021 and 2023, six subject producers reported an increase in installed overall capacity, one firm reported a decrease, and two firms reported no change. Reported installed overall capacity increased 8.2 percent from 2021-23, and it was 1.7 percent higher in interim 2024 than in interim 2023. Total production increased 0.6 percent from 2021-23 (approximately 51.4 million gross in 2021 as compared to 51.7 million gross in 2023) but was 9.9 percent lower in interim 2024 as compared to interim 2023 (approximately 13.4 million gross in interim 2023 as compared to 12.0 million gross in interim 2024). Installed overall capacity utilization decreased irregularly from 81.6 percent in 2021 to 75.8 percent in 2023 (a decrease of 5.7 percentage points). Installed overall capacity utilization was 9.2 percentage points lower in interim 2024 than in interim 2023 (71.7 percent in interim 2024 as compared to 80.9 percent in interim 2023).

Between 2021 and 2023, six subject producers reported an increase in practical overall capacity and three firms reported a decrease. Reported practical overall capacity increased irregularly by 6.5 percent from 2021-23 (approximately 58.4 million gross in 2023 as compared to 54.8 million gross in 2021), and it was 1.1 percent higher in interim 2024 than in interim 2023 (approximately 14.4 million gross in interim 2024 as compared to 14.3 million gross in interim 2023). Practical overall capacity utilization decreased irregularly from 93.8 percent in 2021 to 88.6 percent in 2023 (a decrease of 5.2 percentage points). Installed overall capacity utilization

was 10.2 percentage points lower in interim 2024 than in interim 2023 (83.8 percent in interim 2024 as compared to 94.0 percent in interim 2023).

Table VII-12

Glass wine bottles: Producers' in subject foreign industries installed and practical capacity and production on the same equipment as subject production, by period

Quantity in gross

Item	Measure	2021	2022	2023	Jan-Sep 2023	Jan-Mar 2024
Installed overall	Capacity	63,029,571	62,953,107	68,212,851	16,496,434	16,780,662
Installed overall	Production	51,402,438	52,593,695	51,710,381	13,352,558	12,031,494
Installed overall	Utilization	81.6	83.5	75.8	80.9	71.7
Practical overall	Capacity	54,808,708	54,757,067	58,386,515	14,209,119	14,364,688
Practical overall	Production	51,402,438	52,593,695	51,710,381	13,352,558	12,031,494
Practical overall	Utilization	93.8	96.0	88.6	94.0	83.8
Practical glass wine bottles	Capacity	12,438,231	12,385,888	12,239,640	2,872,041	3,470,684
Practical glass wine bottles	Production	11,944,454	11,708,148	10,463,694	2,658,201	2,963,782
Practical glass wine bottles	Utilization	96.0	94.5	85.5	92.6	85.4

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

As shown in table VII-13, responding firms in all three countries produced other products on the same equipment and machinery used to produce glass wine bottles. Glass wine bottles accounted for between 20.2 percent and 24.6 percent of subject producers' overall production across all periods and their share of production declined during 2021-23 but was higher in interim 2024 compared to interim 2023. The predominant share of overall production was accounted for glass bottles other than wine – between 71.0 percent and 76.6 percent across all periods. Other wine bottles (wine bottles with capacities greater than 760 ml or less than 740 ml) accounted for 1.9 percent to 3.9 percent of overall production across all periods.

All nine responding subject producers reported that they use the blow and blow production method to manufacture glass wine bottles. For additional information on manufacturing processes see Part I.

Table VII-13

Glass wine bottles: Producers' in subject foreign industries overall production on the same equipment as subject production, by product type and period

Quantity in gross; share in percent

Product type	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Glass wine bottles	Quantity	11,944,454	11,708,148	10,463,694	2,658,201	2,963,782
>740 ml or <760 ml wine bottles	Quantity	1,989,270	1,536,817	1,235,594	249,785	348,785
Non-wine bottles	Quantity	36,651,167	38,552,578	39,187,998	10,223,853	8,539,172
Other products	Quantity	817,547	796,152	823,095	220,719	179,755
All out-of-scope products	Quantity	39,457,984	40,885,547	41,246,687	10,694,357	9,067,712
All products	Quantity	51,402,438	52,593,695	51,710,381	13,352,558	12,031,494
Glass wine bottles	Share	23.2	22.3	20.2	19.9	24.6
>740 ml or <760 ml wine bottles	Share	3.9	2.9	2.4	1.9	2.9
Non-wine bottles	Share	71.3	73.3	75.8	76.6	71.0
Other products	Share	1.6	1.5	1.6	1.7	1.5
All out-of-scope products	Share	76.8	77.7	79.8	80.1	75.4
All products	Share	100.0	100.0	100.0	100.0	100.0

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

Constraints on capacity

Tables VII-14 and VII-15 presents subject producers' reported production and capacity constraints since January 1, 2021. Three firms in Chile reported production bottlenecks and one firm in Mexico reported production bottlenecks; one firm in Mexico reported existing labor force constraints; one firm in Chile reported supply of material input constraints; one firm in Chile and two firms in Mexico reported fuel or energy constraints; two firms in Chile reported storage capacity constraints; one firm in Chile reported logistics/transportation constraints; and one firm in Chile, one firm in China, and three firms in Mexico reported constraints categorized as "other."

Table VII-14
Glass wine bottles: Production constraints by subject foreign industry

Count in number of firms reporting

Item	Chile	China	Mexico	All subject foreign industries
Production bottlenecks	3	0	1	4
Existing labor force	0	0	1	1
Supply of material inputs	1	0	0	1
Fuel or energy	1	0	2	3
Storage capacity	2	0	0	2
Logistics/transportation	0	0	1	1
Other	1	1	3	5

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

Table VII-15**Glass wine bottles: Subject producers' reported capacity constraints since January 1, 2021**

Item	Firm name (subject foreign industry) and narrative response on constraints to practical overall capacity
Production bottlenecks	***
Existing labor force	***
Supply of material inputs	***
Fuel or energy	***
Fuel or energy	***
Fuel or energy	***
Storage capacity	***
Storage capacity	***
Logistics/ transportation	***
Other constraints	***

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

Exports

Table VII-16 presents Global Trade Atlas (“GTA”) data for exports of “carboys, bottles, flasks, jars, pots, vials, and other glass containers used for the conveyance or packing of goods,” a category which includes glass wine bottles as well as out-of-scope merchandise, by subject exporter and period.

Table VII-16

Carboys, bottles, flasks, jars, pots, vials, and other glass containers used for the conveyance or packing of goods: Global exports from subject exporters: Exports to the United States, by exporter and period

Quantity in thousands of kilograms

Exporter	Measure	2021	2022	2023
Chile	Quantity	53,092	55,718	31,543
China	Quantity	346,758	309,185	311,895
Mexico	Quantity	543,957	494,003	827,896
Subject exporters	Quantity	943,807	858,905	1,171,333

Table continued.

Table VII-16 Continued

Carboys, bottles, flasks, jars, pots, vials, and other glass containers used for the conveyance or packing of goods: Global exports from subject exporters: Exports to all destination markets, by exporter and period

Quantity in thousands of kilograms

Exporter	Measure	2021	2022	2023
Chile	Quantity	131,837	138,251	112,356
China	Quantity	1,649,409	1,805,415	1,906,561
Mexico	Quantity	593,118	538,132	853,476
Subject exporters	Quantity	2,374,364	2,481,797	2,872,394

Table continued.

Table VII-16 Continued

Carboys, bottles, flasks, jars, pots, vials, and other glass containers used for the conveyance or packing of goods: Global exports from subject exporters: Share of exports exported to the United States, by exporter and period

Shares in percent

Exporter	Measure	2021	2022	2023
Chile	Share	40.3	40.3	28.1
China	Share	21.0	17.1	16.4
Mexico	Share	91.7	91.8	97.0
Subject exporters	Share	39.7	34.6	40.8

Source: Official exports statistics from Chile Customs - Servicio Nacional de Aduana, China Customs, and Mexico’s INEGI under HS subheading 7010.90 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed July 18, 2024.

Note: Chile reported data in net kilograms (KN), which was treated as kilograms.

U.S. inventories of imported merchandise

Table VII-17 presents data on U.S. importers' reported inventories of glass wine bottles. U.S. importers' inventories of imports from Chile decreased irregularly by *** percent from 2021-23 and were *** percent lower in interim 2024 compared to interim 2023. U.S. importers' inventories of imports from China also decreased irregularly by *** percent during 2021-23 and were *** percent lower in interim 2024 compared to interim 2023. U.S. importers' inventories of imports from Mexico increased by *** percent from 2021-23 and were *** percent higher in interim 2024 than in interim 2023. Overall, U.S. importers' inventories of imports from subject sources decreased irregularly by 9.3 percent from 2021-23, and U.S. importers' inventories of imports from subject sources were 20.0 percent lower in interim 2024 compared to interim 2023.

U.S. importers' inventories of imports from nonsubject sources increased irregularly by 44.0 percent from 2021-23 and were 36.9 percent lower in interim 2024 compared to interim 2023. U.S. importers' inventories of imports from all sources decreased irregularly by 1.5 percent from 2021-23 and were 23.7 percent lower in interim 2024 compared to interim 2023.

The ratio of U.S. importers' inventories to U. S. shipments of imports varied by source during 2021-23 and the interim period - it ranged from *** to *** percent for Chile, *** percent to *** percent for China, *** percent to *** percent for Mexico, *** percent to *** percent for nonsubject sources, and *** to *** percent for all import sources.

Table VII-17**Glass wine bottles: U.S. importers' inventories and their ratio to select items, by source and period**

Quantity in gross; ratio in percent

Measure	Source	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Inventories quantity	Chile	***	***	***	***	***
Ratio to imports	Chile	***	***	***	***	***
Ratio to U.S. shipments of imports	Chile	***	***	***	***	***
Ratio to total shipments of imports	Chile	***	***	***	***	***
Inventories quantity	China	***	***	***	***	***
Ratio to imports	China	***	***	***	***	***
Ratio to U.S. shipments of imports	China	***	***	***	***	***
Ratio to total shipments of imports	China	***	***	***	***	***
Inventories quantity	Mexico	***	***	***	***	***
Ratio to imports	Mexico	***	***	***	***	***
Ratio to U.S. shipments of imports	Mexico	***	***	***	***	***
Ratio to total shipments of imports	Mexico	***	***	***	***	***
Inventories quantity	Subject	1,310,583	1,588,722	1,192,321	1,620,700	1,296,993
Ratio to imports	Subject	36.0	44.7	41.2	49.1	37.9
Ratio to U.S. shipments of imports	Subject	35.2	49.2	39.5	51.8	44.4
Ratio to total shipments of imports	Subject	***	***	***	***	***
Inventories quantity	Nonsubject	224,101	405,165	322,626	454,746	287,117
Ratio to imports	Nonsubject	30.0	35.6	45.0	55.5	40.8
Ratio to U.S. shipments of imports	Nonsubject	27.0	44.9	35.8	53.6	39.9
Ratio to total shipments of imports	Nonsubject	***	***	***	***	***
Inventories quantity	All	1,534,684	1,993,887	1,514,947	2,075,446	1,584,110
Ratio to imports	All	34.9	42.5	41.9	50.4	38.4
Ratio to U.S. shipments of imports	All	33.7	48.2	38.6	52.2	43.5
Ratio to total shipments of imports	All	***	***	***	***	***

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

U.S. importers' outstanding orders

The Commission requested importers to indicate whether they imported or arranged for the importation of glass wine bottles from Chile, China, or Mexico after March 31, 2024. Of the 20 responding U.S. importers, 16 importers reported such arranged imports. Their reported data is presented in table VII-18. As shown, responding importers collectively reported approximately *** gross in arranged imports between April 2024 and March 2025, *** percent of which are from subject sources

Table VII-18

Glass wine bottles: U.S. importers' arranged imports, by source and period

Quantity in gross

Source	Apr-Jun 2024	Jul-Sep 2024	Oct-Dec 2024	Jan-Mar 2025	Total
Chile	***	***	***	***	***
China	***	***	***	***	***
Mexico	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

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

Third-country trade actions

Based on available information, glass wine bottles from subject countries have not been subject to other antidumping or countervailing duty investigations outside the United States.

Information on nonsubject countries

The global industry for glass wine bottles faced several major supply and demand pressures from 2021-2023. The COVID-19 pandemic led to a marked demand increase for wine as alcohol consumption increased and consumers shifted expenditures from dining out to grocery store purchases.⁵ In the same period, supply chain disruptions related to the pandemic increased prices for energy inputs and raw material inputs to glass production, such as soda ash.⁶

Increasing sustainability-minded consumer sentiment in the wine industry is also contributing to demand shifts toward lighter-weight wine bottles, which carry less embodied carbon emissions.⁷ Global glass bottle producers are also innovating to reduce the emission intensity of glass furnaces. Recent initiatives include circular systems to capture heat, investment in electric furnaces, use of biofuel in furnaces, behind-the-meter storage systems, and large-scale electric melting.⁸

Table VII-19 presents global export data for carboys, bottles, flasks, jars, pots, vials, and other containers, of glass, a category that includes glass wine bottles and out-of-scope products. Subject country China was the largest exporter in 2023 and accounted for 19.9 percent of total global exports by value. Second-leading exporter Germany accounted for 13.0 percent of global exports by value. Subject country Mexico is the fifth largest global exporter, capturing 4.1 percent of global export value in 2022. In total, the three subject countries in this investigation—Chile, China, and Mexico—accounted for 24.5 percent of global export value in 2022.

The third largest exporter, Italy, accounted for 8.7 percent of global export value in 2022. Several global glass wine bottle producers are currently involved in an Italian antitrust

⁵ McIntyre, Dave, “The wine industry didn’t just weather the pandemic,” October 20, 2022, <https://www.washingtonpost.com/food/2022/10/20/wine-industry-grew-during-pandemic/>, accessed January 17, 2024; Render, Jacinta, “National shortage of glass bottles,” October 20, 2021, <https://www.wbir.com/article/money/consumer/national-shortage-of-glass-bottles-affecting-wine-supply/51-3507d378-1395-459f-8367-810fdc810d2d>, accessed January 17, 2024.

⁶ Globe Newswire, “Global Flat Glass Markets,” January 17, 2023, <https://finance.yahoo.com/news/global-flat-glass-markets-2022-103800126.html>, accessed January 17, 2024.

⁷ Barth, Jill, “Consumers Should Be Concerned About Glass Bottles,” August 2, 2023, <https://www.forbes.com/sites/jillbarth/2023/08/02/these-winemakers-say-consumers-should-be-concerned-about-glass-bottles/?sh=7a5c0223438f>, accessed January 17, 2024.

⁸ Andrews, Betsy, “The Shrinking Footprint of Glass Wine Bottles,” July 18, 2022, <https://daily.seventy.com/the-shrinking-carbon-footprint-of-glass-wine-bottles/>, accessed January 17, 2024.

probe following complaints raised by Italian winemakers about suspected coordinated pricing of wine bottles among local and global bottle producers in Italy.⁹ In November 2023, Italy's antitrust authority, the AGCM, initiated an investigation into the existence of a possible anti-competition agreement and anticompetitive conduct in the production and commercialization of glass wine bottles manufactured from 2022 onward.¹⁰ The companies under investigation include Italian bottle manufacturers Zignago Vetro and Bormioli Luigi, Italian subsidiaries of Verallia, Vetropak, and Berlin Packaging, and O-I Europe.¹¹

⁹ Packaging Gateway, "AGCM launches inquiry into glass wine bottle manufacturers," November 13, 2023, <https://www.packaging-gateway.com/news/agcm-probe-glass-bottle-manufacturers/?cf-view>, accessed January 25, 2024.

¹⁰ Jenns, Claire, "Packaging companies respond to AGCM wine bottle investigation," November 14, 2023, <https://www.packaging-gateway.com/news/packaging-companies-respond-agcm-wine-bottle-investigation/>, accessed January 16, 2024.

¹¹ Packaging Gateway, "AGCM launches inquiry into glass wine bottle manufacturers," November 13, 2023, <https://www.packaging-gateway.com/news/agcm-probe-glass-bottle-manufacturers/?cf-view>, accessed January 25, 2024.

Table VII-19**Carboys, bottles, flasks, jars, pots, vials, and other glass containers used for the conveyance or packing of goods: Global exports, by reporting country and by period**

Value in 1,000 dollars; Share in percent

Exporting country	Measure	2021	2022	2023
United States	Value	436,136	501,141	389,834
Chile	Value	75,402	90,346	70,334
China	Value	2,404,335	3,042,072	3,009,933
Mexico	Value	594,247	636,888	613,101
Subject exporters	Value	3,073,983	3,769,307	3,693,368
Germany	Value	1,446,645	1,650,164	1,963,216
Italy	Value	1,117,282	1,244,874	1,314,661
France	Value	830,323	901,397	925,716
Portugal	Value	439,335	527,041	636,304
Poland	Value	437,670	511,221	631,081
Spain	Value	481,490	486,324	573,435
India	Value	292,719	345,676	387,850
Netherlands	Value	325,118	326,164	369,545
All other exporters	Value	4,360,655	4,396,314	4,219,623
All reporting exporters	Value	13,241,356	14,659,621	15,104,633
United States	Share	3.3	3.4	2.6
Chile	Share	0.6	0.6	0.5
China	Share	18.2	20.8	19.9
Mexico	Share	4.5	4.3	4.1
Subject exporters	Share	23.2	25.7	24.5
Germany	Share	10.9	11.3	13.0
Italy	Share	8.4	8.5	8.7
France	Share	6.3	6.1	6.1
Portugal	Share	3.3	3.6	4.2
Poland	Share	3.3	3.5	4.2
Spain	Share	3.6	3.3	3.8
India	Share	2.2	2.4	2.6
Netherlands	Share	2.5	2.2	2.4
All other exporters	Share	32.9	30.0	27.9
All reporting exporters	Share	100.0	100.0	100.0

Source: Official exports statistics under HS subheading 7010.90 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed July 18, 2024.

Note: United States is shown at the top followed by the countries under investigation, all remaining top exporting countries in descending order of 2023 data.

APPENDIX A
FEDERAL REGISTER NOTICES

The Commission makes available notices relevant to its investigations and reviews on its website, www.usitc.gov. In addition, the following tabulation presents, in chronological order, Federal Register notices issued by the Commission and Commerce during the current proceeding.

Citation	Title	Link
89 FR 809, January 5, 2024	<i>Glass Wine Bottles From Chile, China, and Mexico; Institution of Antidumping and Countervailing Duty Investigations and Scheduling of Preliminary Phase Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2024-01-05/pdf/2024-00034.pdf
89 FR 4905, January 25, 2024	<i>Certain Glass Wine Bottles From the People's Republic of China: Initiation of Countervailing Duty Investigation</i>	https://www.govinfo.gov/content/pkg/FR-2024-01-25/pdf/2024-01397.pdf
89 FR 4911, January 25, 2024	<i>Certain Glass Wine Bottles From Chile, the People's Republic of China, and Mexico: Initiation of Less-Than-Fair-Value Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2024-01-25/pdf/2024-01398.pdf
89 FR 12380, February 16, 2024	<i>Glass Wine Bottles From Chile, China, and Mexico: Determinations</i>	https://www.govinfo.gov/content/pkg/FR-2024-02-16/pdf/2024-03227.pdf
89 FR 47533, June 3, 2024	<i>Certain Glass Wine Bottles From the People's Republic of China: Preliminary Affirmative Countervailing Duty Determination and Preliminary Affirmative Determination of Critical Circumstances</i>	https://www.govinfo.gov/content/pkg/FR-2024-06-03/pdf/2024-12114.pdf
89 FR 49901, June 12, 2024	<i>Glass Wine Bottles From Chile, China, and Mexico; Scheduling of the Final Phase of Countervailing Duty and Antidumping Duty Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2024-06-12/pdf/2024-12814.pdf
89 FR 63445, August 5, 2024	<i>Glass Wine Bottles From Chile, China, and Mexico; Revised Schedule for the Subject Investigations</i>	https://www.govinfo.gov/content/pkg/FR-2024-08-05/pdf/2024-17200.pdf
89 FR 65325, August 9, 2024	<i>Certain Glass Wine Bottles From Chile: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2024-08-09/pdf/2024-17753.pdf

Citation	Title	Link
89 FR 65317, August 9, 2024	<i>Certain Glass Wine Bottles From Mexico: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Negative Determination of Critical Circumstances, Postponement of Final Determination, and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2024-08-09/pdf/2024-17755.pdf
89 FR 65331, August 9, 2024	<i>Certain Glass Wine Bottles From the People's Republic of China: Preliminary Affirmative Determination of Sales at Less Than Fair Value, Preliminary Affirmative Determination of Critical Circumstances, in Part, and Postponement of Final Determination and Extension of Provisional Measures</i>	https://www.govinfo.gov/content/pkg/FR-2024-08-09/pdf/2024-17754.pdf
89 FR 68395, August 26, 2024	<i>Certain Glass Wine Bottles From the People's Republic of China: Final Affirmative Countervailing Duty Determination and Final Affirmative Determination of Critical Circumstances</i>	https://www.govinfo.gov/content/pkg/FR-2024-08-26/pdf/2024-19069.pdf

APPENDIX B

LIST OF HEARING WITNESSES

CALENDAR OF PUBLIC HEARING

Those listed below appeared in the United States International Trade Commission's hearing:

Subject: Glass Wine Bottles from Chile, China, and Mexico
Inv. Nos.: 701-TA-703 and 731-TA-1661-1663 (Final)
Date and Time: August 14, 2024 - 9:30 a.m.

Sessions were held in connection with these investigations in the Main Hearing Room (Room 101), 500 E Street, SW, Washington, DC.

OPENING REMARKS:

In Support of Imposition (**Daniel B. Pickard**, Buchanan Ingersoll & Rooney PC)
In Opposition to Imposition (**Daniel R. Wilson**, Husch Blackwell, LLP)

In Support of the Imposition of the Antidumping and Countervailing Duty Orders:

Buchanan Ingersoll & Rooney PC
Washington, DC
on behalf of

U.S. Glass Producers Coalition

William Walton, President and Chief Executive Officer,
Ardagh Glass Packaging – North America

Janice Anderson, Chief Financial Officer,
Ardagh Glass Packaging – North America

Brian Brandstatter, Chief Commercial Officer,
Ardagh Glass Packaging – North America

David Humes, Vice President, Sales – Wine,
Ardagh Glass Packaging – North America

Joshua Markus, Vice President and General Counsel,
North America, Ardagh

Derrick Smith, USW Seattle Local #50

**In Support of the Imposition of the
Antidumping and Countervailing Duty Orders (continued):**

Dr. Seth T. Kaplan, Economist, International Economics Research

Travis Pope, Project Manager, Capital Trade, Inc.

Daniel B. Pickard)
) – OF COUNSEL
Claire M. Webster)

Kelley Drye & Warren LLP
Washington, DC
on behalf of

O-I Glass, Inc.

Timothy Connors, Managing Director O-I Americas North, O-I Glass, Inc.

Michael T. Kerwin, Senior Trade Analyst, Georgetown Economic Services,
LLC

Paul C. Rosenthal)
) – OF COUNSEL
Grace W. Kim)

**In Opposition to the Imposition of the
Antidumping and Countervailing Duty Orders:**

Hogan Lovells US LLP
Washington, DC
on behalf of

Berlin Packaging L.L.C. (“Berlin Packaging”)

Rick Brandt, Chief Executive Officer, Americas, Berlin Packaging

Joseph Azevedo, Regional Vice President – West Coast, Berlin Packaging

Jared R. Wessel)
Michael G. Jacobson) – OF COUNSEL
Lyric E. Galvin)

**In Opposition to the Imposition of the
Antidumping and Countervailing Duty Orders (continued):**

Fox Rothschild LLP
Washington, DC
on behalf of

Encore Glass, Inc. (“Encore”)

Roberto Guzman, President of Operations, Encore Glass

Kenny Kirk, President of Accounting and Finance, Encore Glass

Lizbeth R. Levinson)
Brittney Powell) – OF COUNSEL
Alexander D. Keyser)

Husch Blackwell, LLP
Washington, DC
on behalf of

TricorBraun, Inc. (“TricorBraun”)

Brett Binkowski, President, TricorBraun North America

Matt Fumagalli, Senior Vice President, North America Operations & Logistics

Kathy Brooks, Senior Vice President, TricorBraun Winepak

Susan Bergethon, Senior Vice President, General Counsel

Jennifer Lutz, Partner, ION Economics

Cara Groden, Senior Economic Consultant, ION Economics

Jeffrey S. Neeley)
Daniel R. Wilson) – OF COUNSEL
Stephen W. Brophy)

**In Opposition to the Imposition of the
Antidumping and Countervailing Duty Orders (continued):**

Blank Rome LLP
Washington, DC
on behalf of

Fevisa Industrial S.A. de C.V.
Fevisa Comercial S.A. de C.V.
(collectively, “Fevisa”)

Juan Rafael Silva García (remote witness), Director General,
Fevisa Industrial S.A. de C.V.

Eric S. Parnes (remote witness)) – OF COUNSEL

REBUTTAL/CLOSING REMARKS:

In Support of Imposition (**Daniel B. Pickard**, Buchanan Ingersoll & Rooney PC
and **Paul C. Rosenthal**, Kelley Drye & Warren LLP)
In Opposition to Imposition (**Michael G. Jacobson**, Hogan Lovells US LLP)

APPENDIX C
SUMMARY DATA

Table C-1:

Glass wine bottles: Summary data concerning the U.S. total market..... C-3

Table C-2:

Glass wine bottles: Summary data concerning the U.S. merchant market..... C-5

Total market

Table C-1

Glass wine bottles: Summary data concerning the U.S. total market, by item and period

Quantity=gross; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per gross; Period changes=percent--exceptions noted

Item	Reported data					Period changes			
	Calendar year			Jan-Mar		Comparison years			Jan-Mar
	2021	2022	2023	2023	2024	2021-23	2021-22	2022-23	2023-24
U.S. total market consumption quantity:									
Amount.....	15,533,445	15,332,734	13,597,314	3,575,932	3,109,560	▼(12.5)	▼(1.3)	▼(11.3)	▼(13.0)
Producers' share (fn1).....	70.7	73.0	71.2	72.2	70.7	▲0.5	▲2.4	▼(1.9)	▼(1.5)
Importers' share (fn1):									
Chile.....	***	***	***	***	***	▼***	▼***	▼***	▼***
China.....	***	***	***	***	***	▼***	▼***	▲***	▲***
Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Subject sources.....	24.0	21.1	22.2	21.9	23.5	▼(1.8)	▼(2.9)	▲1.1	▲1.6
Nonsubject sources.....	5.3	5.9	6.6	5.9	5.8	▲1.3	▲0.5	▲0.7	▼(0.2)
All import sources.....	29.3	27.0	28.8	27.8	29.3	▼(0.5)	▼(2.4)	▲1.9	▲1.5
U.S. total market consumption value:									
Amount.....	1,090,086	1,216,647	1,170,147	308,137	261,642	▲7.3	▲11.6	▼(3.8)	▼(15.1)
Producers' share (fn1).....	57.6	58.5	56.6	58.0	58.6	▼(1.0)	▲0.9	▼(1.9)	▲0.6
Importers' share (fn1):									
Chile.....	***	***	***	***	***	▼***	▼***	▼***	▼***
China.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Subject sources.....	33.9	31.4	32.0	31.3	32.0	▼(1.9)	▼(2.4)	▲0.6	▲0.7
Nonsubject sources.....	8.5	10.1	11.4	10.7	9.4	▲2.8	▲1.6	▲1.3	▼(1.3)
All import sources.....	42.4	41.5	43.4	42.0	41.4	▲1.0	▼(0.9)	▲1.9	▼(0.6)
U.S. importers' U.S. shipments of imports from:									
Chile:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Ending inventory quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
China:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Ending inventory quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Mexico:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Subject sources:									
Quantity.....	3,726,299	3,231,320	3,021,512	782,517	730,831	▼(18.9)	▼(13.3)	▼(6.5)	▼(6.6)
Value.....	369,235	382,302	374,605	96,393	83,757	▲1.5	▲3.5	▼(2.0)	▼(13.1)
Unit value.....	\$99.09	\$118.31	\$123.98	\$123.18	\$114.61	▲25.1	▲19.4	▲4.8	▼(7.0)
Ending inventory quantity.....	1,310,583	1,588,722	1,192,321	1,620,700	1,296,993	▼(9.0)	▲21.2	▼(25.0)	▼(20.0)
Nonsubject sources:									
Quantity.....	830,619	903,279	900,752	212,118	179,757	▲8.4	▲8.7	▼(0.3)	▼(15.3)
Value.....	93,088	123,092	133,225	33,041	24,528	▲43.1	▲32.2	▲8.2	▼(25.8)
Unit value.....	\$112.07	\$136.27	\$147.90	\$155.77	\$136.45	▲32.0	▲21.6	▲8.5	▼(12.4)
Ending inventory quantity.....	224,101	405,165	322,626	454,746	287,117	▲44.0	▲80.8	▼(20.4)	▼(36.9)
All import sources:									
Quantity.....	4,556,918	4,134,599	3,922,264	994,635	910,588	▼(13.9)	▼(9.3)	▼(5.1)	▼(8.5)
Value.....	462,323	505,394	507,830	129,434	108,285	▲9.8	▲9.3	▲0.5	▼(16.3)
Unit value.....	\$101.46	\$122.24	\$129.47	\$130.13	\$118.92	▲27.6	▲20.5	▲5.9	▼(8.6)
Ending inventory quantity.....	1,534,684	1,993,887	1,514,947	2,075,446	1,584,110	▼(1.3)	▲29.9	▼(24.0)	▼(23.7)

Table continued.

Table C-1 Continued

Glass wine bottles: Summary data concerning the U.S. total market, by item and period

Quantity=gross; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per gross; Period changes=percent--exceptions noted

Item	Reported data					Period changes			
	Calendar year			Jan-Mar		Comparison years			Jan-Mar
	2021	2022	2023	2023	2024	2021-23	2021-22	2022-23	2023-24
U.S. producers':									
Practical capacity quantity.....	13,476,253	13,882,913	12,251,619	3,342,651	2,959,793	▼(9.1)	▲3.0	▼(11.8)	▼(11.5)
Production quantity.....	11,941,827	12,170,888	10,241,212	2,795,770	2,581,045	▼(14.2)	▲1.9	▼(15.9)	▼(7.7)
Capacity utilization (fn1).....	88.6	87.7	83.6	83.6	87.2	▼(5.0)	▼(0.9)	▼(4.1)	▲3.6
U.S. shipments:									
Quantity.....	10,976,527	11,198,135	9,675,050	2,581,297	2,198,972	▼(11.9)	▲2.0	▼(13.6)	▼(14.8)
Value.....	627,763	711,253	662,317	178,703	153,357	▲5.5	▲13.3	▼(6.9)	▼(14.2)
Unit value.....	\$57.19	\$63.52	\$68.46	\$69.23	\$69.74	▲19.7	▲11.1	▲7.8	▲0.7
Export shipments:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Ending inventory quantity.....	3,216,052	3,867,612	4,199,925	4,016,496	4,619,436	▲30.6	▲20.3	▲8.6	▲15.0
Inventories/total shipments (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Production workers.....	2,131	2,137	2,066	2,020	1,842	▼(3.1)	▲0.3	▼(3.3)	▼(8.8)
Hours worked (1,000s).....	4,152	4,204	3,936	1,044	891	▼(5.2)	▲1.3	▼(6.4)	▼(14.7)
Wages paid (\$1,000).....	149,285	156,181	157,082	41,076	36,231	▲5.2	▲4.6	▲0.6	▼(11.8)
Hourly wages (dollars per hour).....	\$35.95	\$37.15	\$39.91	\$39.34	\$40.66	▲11.0	▲3.3	▲7.4	▲3.4
Productivity (gross per hour).....	2.9	2.9	2.6	2.7	2.9	▼(9.5)	▲0.7	▼(10.1)	▲8.2
Unit labor costs.....	\$12.50	\$12.83	\$15.34	\$14.69	\$14.04	▲22.7	▲2.7	▲19.5	▼(4.5)
Net sales:									
Quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▼***	▼***
Gross profit or (loss) (fn2).....	***	***	***	***	***	▼***	▼***	▲***	▼***
SG&A expenses.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Operating income or (loss) (fn2).....	***	***	***	***	***	▼***	▼***	▲***	▲***
Net income or (loss) (fn2).....	***	***	***	***	***	▼***	▼***	▲***	▲***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▼***	▲***	▼***
Unit operating income or (loss) (fn2).....	***	***	***	***	***	▼***	▼***	▲***	▲***
Unit net income or (loss) (fn2).....	***	***	***	***	***	▼***	▼***	▲***	▲***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▼***	▼***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▲***	▲***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▲***	▲***
Capital expenditures.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Research and development expenses...	***	***	***	***	***	▼***	▼***	▼***	***
Total assets.....	***	***	***	***	***	▲***	▲***	▲***	***

Source: Compiled from data submitted in response to Commission questionnaires. 508-compliant tables for these data are contained in parts III, IV, VI, and VII of this report.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

Merchant market

Table C-2

Glass wine bottles: Summary data concerning the U.S. merchant market, by item and period

Quantity=gross; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per gross; Period changes=percent--exceptions noted

Item	Reported data					Period changes			
	Calendar year			Jan-Mar		Comparison years			Jan-March
	2021	2022	2023	2023	2024	2021-23	2021-22	2022-23	2023-24
U.S. merchant market consumption quantity:									
Amount.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Producers' share (fn1).....	***	***	***	***	***	▲***	▲***	▼***	▼***
Importers' share (fn1):									
Chile.....	***	***	***	***	***	▼***	▼***	▼***	▼***
China.....	***	***	***	***	***	▼***	▼***	▲***	▲***
Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Subject sources.....	***	***	***	***	***	▼***	▼***	▲***	▲***
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▲***	▼***
All import sources.....	***	***	***	***	***	▼***	▼***	▲***	▲***
U.S. merchant market consumption value:									
Amount.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Producers' share (fn1).....	***	***	***	***	***	▼***	▲***	▼***	▼***
Importers' share (fn1):									
Chile.....	***	***	***	***	***	▼***	▼***	▼***	▼***
China.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Mexico.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Subject sources.....	***	***	***	***	***	▼***	▼***	▲***	▲***
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▲***	▼***
All import sources.....	***	***	***	***	***	▲***	▼***	▲***	▲***
U.S. importers' U.S. shipments of imports from:									
Chile:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Value.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Ending inventory quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
China:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Ending inventory quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Mexico:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Subject sources:									
Quantity.....	3,726,299	3,231,320	3,021,512	782,517	730,831	▼(18.9)	▼(13.3)	▼(6.5)	▼(6.6)
Value.....	369,235	382,302	374,605	96,393	83,757	▲1.5	▲3.5	▼(2.0)	▼(13.1)
Unit value.....	\$99.09	\$118.31	\$123.98	\$123.18	\$114.61	▲25.1	▲19.4	▲4.8	▼(7.0)
Ending inventory quantity.....	1,310,583	1,588,722	1,192,321	1,620,700	1,296,993	▼(9.0)	▲21.2	▼(25.0)	▼(20.0)
Nonsubject sources:									
Quantity.....	830,619	903,279	900,752	212,118	179,757	▲8.4	▲8.7	▼(0.3)	▼(15.3)
Value.....	93,088	123,092	133,225	33,041	24,528	▲43.1	▲32.2	▲8.2	▼(25.8)
Unit value.....	\$112.07	\$136.27	\$147.90	\$155.77	\$136.45	▲32.0	▲21.6	▲8.5	▼(12.4)
Ending inventory quantity.....	224,101	405,165	322,626	454,746	287,117	▲44.0	▲80.8	▼(20.4)	▼(36.9)
All import sources:									
Quantity.....	4,556,918	4,134,599	3,922,264	994,635	910,588	▼(13.9)	▼(9.3)	▼(5.1)	▼(8.5)
Value.....	462,323	505,394	507,830	129,434	108,285	▲9.8	▲9.3	▲0.5	▼(16.3)
Unit value.....	\$101.46	\$122.24	\$129.47	\$130.13	\$118.92	▲27.6	▲20.5	▲5.9	▼(8.6)
Ending inventory quantity.....	1,534,684	1,993,887	1,514,947	2,075,446	1,584,110	▼(1.3)	▲29.9	▼(24.0)	▼(23.7)

Table continued.

Table C-2 Continued

Glass wine bottles: Summary data concerning the U.S. merchant market, by item and period

Quantity=gross; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per gross; Period changes=percent--exceptions noted

Item	Reported data					Period changes			
	Calendar year			Jan-Mar		Comparison years			Jan-March
	2021	2022	2023	2023	2024	2021-23	2021-22	2022-23	2023-24
U.S. producers':									
Commercial U.S. shipments (fn2):									
Quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Commercial sales (fn2):									
Quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Value.....	***	***	***	***	***	▲***	▲***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Cost of goods sold (COGS).....	***	***	***	***	***	▲***	▲***	▼***	▼***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
SG&A expenses.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▲***	▼***	▼***
Unit COGS.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▼***	▲***	▼***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▲***	▼***	▼***
COGS/sales (fn1).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Operating income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss)/sales (fn1).....	***	***	***	***	***	▼***	▲***	▼***	▼***

Source: Compiled from data submitted in response to Commission questionnaires. 508-compliant tables for these data are contained in parts III, IV, VI, and VII of this report.

Note.--Shares and ratios shown as "0.0" percent represent non-zero values less than "0.05" percent (if positive) and greater than "(0.05)" percent (if negative). Zeroes, null values, and undefined calculations are suppressed and shown as "--". Period changes preceded by a "▲" represent an increase, while period changes preceded by a "▼" represent a decrease.

fn1.--Reported data are in percent and period changes are in percentage points.

fn2.--U.S. producers' commercial U.S. shipments/sales reflect U.S. producers' commercial U.S. shipments/sales plus U.S. producer ***'s transfers to related firms. U.S. producer ***'s transfers to related firms are treated as part of the merchant market since those transfers were reported as being diverted back to the merchant market by the related firm and being sold as is, i.e. as empty wine bottles, by that company.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

APPENDIX D

U.S. SHIPMENTS BY CUSTOMER TYPE, PACKAGING TYPE, AND PERIOD

Table D-1: Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type	D-4
Table D-2: Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type	D-10
Table D-3: Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type	D-16
Table D-4: Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type ...	D-22
Table D-5: Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type	D-28
Table D-6: Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type	D-34
Table D-7: Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type	D-40

Figure D-1: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
bulk product to distributors, by source and period..... D-46

Figure D-2: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
case-packed product to distributors, by source and period..... D-47

Figure D-3: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
bulk-packed product to large wineries, by source and period..... D-48

Figure D-4: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
case-packed product to large wineries, by source and period..... D-49

Figure D-5: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
bulk product to small or medium wineries, by source and period..... D-50

Figure D-6: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
case product to small or medium wineries, by source and period..... D-51

Figure D-7: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
bulk product to other end users, by source and period..... D-52

Figure D-8: Glass wine bottles:
Average unit values of U.S. producers' and U.S. importers' U.S. shipments of
case-packed product to other end users, by source and period..... D-53

Table D-1**Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-1 Continued**Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-1 Continued**Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	---	---	---
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	---	---	---

Table continued.

Table D-1 Continued**Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	---	---
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	---	---

Table continued.

Table D-1 Continued**Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-1 Continued**Glass wine bottles: U.S. producers' U.S. shipments by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table D-2
Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-2 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-2 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0	100.0
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-2 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-2 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-2 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table D-3
Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-3 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-3 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0	100.0
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-3 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-3 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-3 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from China by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table D-4
Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-4 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-4 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0	100.0
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-4 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-4 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-4 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table D-5**Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-5 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-5 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0	100.0
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-5 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-5 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-5 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table D-6
Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-6 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-6 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0	100.0
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-6 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	100.0	100.0

Table D-6 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-6 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table D-7**Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Distributors	Bulk	Quantity	***	***	***
Distributors	Case	Quantity	***	***	***
Distributors	All packaging types	Quantity	***	***	***
Distributors	Bulk	Value	***	***	***
Distributors	Case	Value	***	***	***
Distributors	All packaging types	Value	***	***	***
Distributors	Bulk	Unit value	***	***	***
Distributors	Case	Unit value	***	***	***
Distributors	All packaging types	Unit value	***	***	***
Distributors	Bulk	Share of quantity	***	***	***
Distributors	Case	Share of quantity	***	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0	100.0
Distributors	Bulk	Share of value	***	***	***
Distributors	Case	Share of value	***	***	***
Distributors	All packaging types	Share of value	100.0	100.0	100.0
Large wineries	Bulk	Quantity	***	***	***
Large wineries	Case	Quantity	***	***	***
Large wineries	All packaging types	Quantity	***	***	***
Large wineries	Bulk	Value	***	***	***
Large wineries	Case	Value	***	***	***
Large wineries	All packaging types	Value	***	***	***
Large wineries	Bulk	Unit value	***	***	***
Large wineries	Case	Unit value	***	***	***
Large wineries	All packaging types	Unit value	***	***	***
Large wineries	Bulk	Share of quantity	***	***	***
Large wineries	Case	Share of quantity	***	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Large wineries	Bulk	Share of value	***	***	***
Large wineries	Case	Share of value	***	***	***
Large wineries	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-7 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Distributors	Bulk	Quantity	***	***
Distributors	Case	Quantity	***	***
Distributors	All packaging types	Quantity	***	***
Distributors	Bulk	Value	***	***
Distributors	Case	Value	***	***
Distributors	All packaging types	Value	***	***
Distributors	Bulk	Unit value	***	***
Distributors	Case	Unit value	***	***
Distributors	All packaging types	Unit value	***	***
Distributors	Bulk	Share of quantity	***	***
Distributors	Case	Share of quantity	***	***
Distributors	All packaging types	Share of quantity	100.0	100.0
Distributors	Bulk	Share of value	***	***
Distributors	Case	Share of value	***	***
Distributors	All packaging types	Share of value	100.0	100.0
Large wineries	Bulk	Quantity	***	***
Large wineries	Case	Quantity	***	***
Large wineries	All packaging types	Quantity	***	***
Large wineries	Bulk	Value	***	***
Large wineries	Case	Value	***	***
Large wineries	All packaging types	Value	***	***
Large wineries	Bulk	Unit value	***	***
Large wineries	Case	Unit value	***	***
Large wineries	All packaging types	Unit value	***	***
Large wineries	Bulk	Share of quantity	***	***
Large wineries	Case	Share of quantity	***	***
Large wineries	All packaging types	Share of quantity	100.0	100.0
Large wineries	Bulk	Share of value	***	***
Large wineries	Case	Share of value	***	***
Large wineries	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-7 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
Small or medium wineries	Bulk	Quantity	***	***	***
Small or medium wineries	Case	Quantity	***	***	***
Small or medium wineries	All packaging types	Quantity	***	***	***
Small or medium wineries	Bulk	Value	***	***	***
Small or medium wineries	Case	Value	***	***	***
Small or medium wineries	All packaging types	Value	***	***	***
Small or medium wineries	Bulk	Unit value	***	***	***
Small or medium wineries	Case	Unit value	***	***	***
Small or medium wineries	All packaging types	Unit value	***	***	***
Small or medium wineries	Bulk	Share of quantity	***	***	***
Small or medium wineries	Case	Share of quantity	***	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***	***
Small or medium wineries	Case	Share of value	***	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0	100.0
Other end users	Bulk	Quantity	***	***	***
Other end users	Case	Quantity	***	***	***
Other end users	All packaging types	Quantity	***	***	***
Other end users	Bulk	Value	***	***	***
Other end users	Case	Value	***	***	***
Other end users	All packaging types	Value	***	***	***
Other end users	Bulk	Unit value	***	***	***
Other end users	Case	Unit value	***	***	***
Other end users	All packaging types	Unit value	***	***	***
Other end users	Bulk	Share of quantity	***	***	***
Other end users	Case	Share of quantity	***	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0	100.0
Other end users	Bulk	Share of value	***	***	***
Other end users	Case	Share of value	***	***	***
Other end users	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-7 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type, and period

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
Small or medium wineries	Bulk	Quantity	***	***
Small or medium wineries	Case	Quantity	***	***
Small or medium wineries	All packaging types	Quantity	***	***
Small or medium wineries	Bulk	Value	***	***
Small or medium wineries	Case	Value	***	***
Small or medium wineries	All packaging types	Value	***	***
Small or medium wineries	Bulk	Unit value	***	***
Small or medium wineries	Case	Unit value	***	***
Small or medium wineries	All packaging types	Unit value	***	***
Small or medium wineries	Bulk	Share of quantity	***	***
Small or medium wineries	Case	Share of quantity	***	***
Small or medium wineries	All packaging types	Share of quantity	100.0	100.0
Small or medium wineries	Bulk	Share of value	***	***
Small or medium wineries	Case	Share of value	***	***
Small or medium wineries	All packaging types	Share of value	100.0	100.0
Other end users	Bulk	Quantity	***	***
Other end users	Case	Quantity	***	***
Other end users	All packaging types	Quantity	***	***
Other end users	Bulk	Value	***	***
Other end users	Case	Value	***	***
Other end users	All packaging types	Value	***	***
Other end users	Bulk	Unit value	***	***
Other end users	Case	Unit value	***	***
Other end users	All packaging types	Unit value	***	***
Other end users	Bulk	Share of quantity	***	***
Other end users	Case	Share of quantity	***	***
Other end users	All packaging types	Share of quantity	100.0	100.0
Other end users	Bulk	Share of value	***	***
Other end users	Case	Share of value	***	***
Other end users	All packaging types	Share of value	100.0	100.0

Table continued.

Table D-7 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	2021	2022	2023
All customer types	Bulk	Quantity	***	***	***
All customer types	Case	Quantity	***	***	***
All customer types	All packaging types	Quantity	***	***	***
All customer types	Bulk	Value	***	***	***
All customer types	Case	Value	***	***	***
All customer types	All packaging types	Value	***	***	***
All customer types	Bulk	Unit value	***	***	***
All customer types	Case	Unit value	***	***	***
All customer types	All packaging types	Unit value	***	***	***
All customer types	Bulk	Share of quantity	***	***	***
All customer types	Case	Share of quantity	***	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0	100.0
All customer types	Bulk	Share of value	***	***	***
All customer types	Case	Share of value	***	***	***
All customer types	All packaging types	Share of value	100.0	100.0	100.0

Table continued.

Table D-7 Continued**Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources by customer type, packaging type, and period**

Shares in percent; quantity in gross; value in 1,000 dollars; unit value in dollars per gross

Customer type	Packaging type	Measure	Jan-Mar 2023	Jan-Mar 2024
All customer types	Bulk	Quantity	***	***
All customer types	Case	Quantity	***	***
All customer types	All packaging types	Quantity	***	***
All customer types	Bulk	Value	***	***
All customer types	Case	Value	***	***
All customer types	All packaging types	Value	***	***
All customer types	Bulk	Unit value	***	***
All customer types	Case	Unit value	***	***
All customer types	All packaging types	Unit value	***	***
All customer types	Bulk	Share of quantity	***	***
All customer types	Case	Share of quantity	***	***
All customer types	All packaging types	Share of quantity	100.0	100.0
All customer types	Bulk	Share of value	***	***
All customer types	Case	Share of value	***	***
All customer types	All packaging types	Share of value	100.0	100.0

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Figure D-1

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of bulk product to distributors, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-2

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of case-packed product to distributors, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-3

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of bulk product to large wineries, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-4

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of case-packed product to large wineries, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-5

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of bulk product to small or medium wineries, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-6

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of case-packed product to small or medium wineries, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-7

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of bulk product to other end users, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

Figure D-8

Glass wine bottles: Average unit values of U.S. producers' and U.S. importers' U.S. shipments of case-packed product to other end users, by source and period

* * * * *

Source: Compiled from data submitted in response to Commission questionnaires, as shown in tables D-1, D-2, D-3, D-4, and D-6.

APPENDIX E

U.S. SHIPMENTS BY PRODUCT TYPE AND WEIGHT

Table E-1: Glass wine bottles:
U.S. producers' U.S. shipments in 2023, by product type and weight E-3

Table E-2: Glass wine bottles:
U.S. importers' U.S. shipments of imports from Chile in 2023,
by product type and weight E-6

Table E-3: Glass wine bottles:
U.S. importers' U.S. shipments of imports from China in 2023,
by product type and weight E-9

Table E-4: Glass wine bottles:
U.S. importers' U.S. shipments of imports from Mexico in 2023,
by product type and weight E-12

Table E-5: Glass wine bottles:
U.S. importers' U.S. shipments of imports from subject sources in 2023,
by product type and weight E-15

Table E-6: Glass wine bottles:
U.S. importers' U.S. shipments of imports from nonsubject sources in 2023,
by product type and weight E-18

Table E-7: Glass wine bottles:
U.S. importers' U.S. shipments of imports from all import sources in 2023,
by product type and weight E-21

Table E-1
Glass wine bottles: U.S. producers' U.S. shipments in 2023, by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-1 Continued
Glass wine bottles: U.S. producers' U.S. shipments in 2023, by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-1 Continued**Glass wine bottles: U.S. producers' U.S. shipments in 2023, by product type and weight**

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Table E-2
Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile in 2023, by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-2 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile in 2023, by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-2 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from Chile in 2023, by product type and weight

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table E-3
Glass wine bottles: U.S. importers' U.S. shipments of imports from China in 2023, by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-3 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from China in 2023, by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-3 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from China in 2023, by product type and weight

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table E-4
Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico in 2023, by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-4 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico in 2023, by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-4 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from Mexico in 2023, by product type and weight

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Table E-5
Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources in 2023, by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-5 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources in 2023, by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-5 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from subject sources in 2023, by product type and weight

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as "---".

Table E-6
Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources in 2023,
by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-6 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources in 2023,
by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-6 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from nonsubject sources in 2023,
by product type and weight

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Table E-7
Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources in 2023, by product type and weight

Quantity in gross; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Quantity	***	***	***	***
Burgundy green	Quantity	***	***	***	***
Flint all styles	Quantity	***	***	***	***
All other colors and styles	Quantity	***	***	***	***
All product types	Quantity	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-7 Continued
Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources in 2023, by product type and weight

Value in 1,000 dollars; Shares in percent

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Value	***	***	***	***
Burgundy green	Value	***	***	***	***
Flint all styles	Value	***	***	***	***
All other colors and styles	Value	***	***	***	***
All product types	Value	***	***	***	***
Claret green	Share down	***	***	***	100.0
Burgundy green	Share down	***	***	***	100.0
Flint all styles	Share down	***	***	***	100.0
All other colors and styles	Share down	***	***	***	100.0
All product types	Share down	***	***	***	100.0
Claret green	Share across	***	***	***	***
Burgundy green	Share across	***	***	***	***
Flint all styles	Share across	***	***	***	***
All other colors and styles	Share across	***	***	***	***
All product types	Share across	100.0	100.0	100.0	100.0
Claret green	Share down and across	***	***	***	***
Burgundy green	Share down and across	***	***	***	***
Flint all styles	Share down and across	***	***	***	***
All other colors and styles	Share down and across	***	***	***	***
All product types	Share down and across	***	***	***	100.0

Table continued.

Table E-7 Continued

Glass wine bottles: U.S. importers' U.S. shipments of imports from all import sources in 2023, by product type and weight

Unit value in dollars per gross

Product type	Measure	<=500 grams	501 to 700	>700 grams	All weights
Claret green	Unit value	***	***	***	***
Burgundy green	Unit value	***	***	***	***
Flint all styles	Unit value	***	***	***	***
All other colors and styles	Unit value	***	***	***	***
All product types	Unit value	***	***	***	***
Claret green	Difference in UV from all product types	***	***	***	***
Burgundy green	Difference in UV from all product types	***	***	***	***
Flint all styles	Difference in UV from all product types	***	***	***	***
All other colors and styles	Difference in UV from all product types	***	***	***	***
All product types	Difference in UV from all product types	---	---	---	---

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

APPENDIX F

**APPARENT U.S. CONSUMPTION AND MARKET SHARES BY CHANNELS OF
DISTRIBUTION AND PACKAGING TYPE**

Table F-1: Glass wine bottles:
Market for U.S. shipments to distributors, by source and period..... F-3

Table F-2: Glass wine bottles:
Market for U.S. shipments to large wineries, by source and period..... F-4

Table F-3: Glass wine bottles:
Market for U.S. shipments to small and medium wineries, by source and period..... F-5

Table F-4: Glass wine bottles:
Market for U.S. shipments to other end users, by source and period..... F-6

Table F-5: Glass wine bottles:
Market for bulk shipments..... F-7

Table F-6: Glass wine bottles:
Market for case pack shipments..... F-8

Table F-1
Glass wine bottles: Market for U.S. shipments to distributors, by source and period

Quantity in gross; Shares and ratios in percent; Ratios are to overall apparent consumption quantity

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent.

Table F-2
Glass wine bottles: Market for U.S. shipments to large wineries, by source and period

Quantity in gross; Shares and ratios in percent; Ratios are to overall apparent consumption quantity

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Table F-3

Glass wine bottles: Market for U.S. shipments to small and medium wineries, by source and period

Quantity in gross; Shares and ratios in percent; Ratios are to overall apparent consumption quantity

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Table F-4**Glass wine bottles: Market for U.S. shipments to other end users, by source and period**

Quantity in gross; Shares and ratios in percent; Ratios are to overall apparent consumption quantity

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Note: Shares and ratios shown as "0.0" represent values greater than zero, but less than "0.05" percent. Zeroes, null values, and undefined calculations are suppressed and shown as "--".

Table F-5
Glass wine bottles: Market for bulk shipments, by source and period

Quantity in gross; Shares and ratios in percent; Ratios are to overall apparent consumption quantity

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Table F-6**Glass wine bottles: Market for case pack shipments, by source and period**

Quantity in gross; Shares and ratios in percent; Ratios are to overall apparent consumption quantity

Source	Measure	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
U.S. producers	Quantity	***	***	***	***	***
Chile	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Chile	Share	***	***	***	***	***
China	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Chile	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

APPENDIX G

ADJUSTED OFFICIAL IMPORT STATISTICS METHODOLOGY

FOR NONSUBJECT SOURCES

Table G-1: Glass wine bottles and other, out-of-scope products:
Adjusted official import statistics methodology for nonsubject sources used in prehearing report, by item and period.....G-3

Table G-2: Glass wine bottles and other, out-of-scope products:
Official import statistics for nonsubject sources showing Canada separately, by item and period..... G-4

Table G-3: Products other than glass wine bottles:
Out-of-scope (OOS) imports from nonsubject sources showing Canada separately as identified and reported by U.S. importers of glass wine bottles, by item and period.....G-4

Table G-4: Products other than glass wine bottles:
Imports from nonsubject sources related to certified "No" questionnaire respondents, by item and period..... G-4

Table G-5: Glass wine bottles and other, out-of-scope products:
Adjusted official import statistics less Canada for nonsubject sources, by item and period..... G-5

Table G-6: Glass wine bottles:
Ratio of adjusted nonsubject official import statistics to questionnaire data, including less Canada, by item and period..... G-6

Adjusted official import statistics for U.S. imports from nonsubject sources were presented in the prehearing report for U.S. import and apparent U.S. consumption data, whereas the staff report presents USITC questionnaire response data for nonsubject U.S. import and apparent U.S. consumption data. The following tables present the methodology used in the prehearing report and additional analyses to compare methodologies. In particular, Canada was discussed during the hearing is a potential nonsubject country from which there are minimal U.S. imports of in-scope glass wine bottles. As such, data for Canada is presented separately in tables G-2 through G-6.

**Table G-1
Glass wine bottles and other, out-of-scope products: Adjusted official import statistics methodology for nonsubject sources used in prehearing report, by item and period**

Quantity in gross

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2023
Unadjusted official import statistics for nonsubject sources	4,736,455	5,316,586	3,414,148	932,820	728,313
Questionnaire data for out-of-scope imports from nonsubject sources	***	***	***	***	***
Certified "No" importers identified using proprietary, Census-edited Customs records for nonsubject countries	***	***	***	***	***
Adjusted official import statistics prehearing report	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires to measure U.S. shipments by U.S. producers and importers U.S. shipments of imports from Chile, China, and Mexico, and compiled from official U.S. imports statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting number 7010.90.5019, accessed July 17, 2024 adjusted to remove out-of-scope imports reported in Commission questionnaires responses and using proprietary, Census-edited Customs records using HTS statistical reporting number 7010.90.5019, accessed June 7, 2024 for certified "No" import submissions to report for nonsubject sources. Import data are based on the imports for consumption data series, and value data reflect landed, duty-paid values.

Note: The third line pulling data from proprietary, Census edited import records contained a small error relating to the inclusion in the prehearing report adjustment of an importer for which a certified no questionnaire response was not actually received (i.e., ***) in the prehearing report. This table corrects that small error.

Table G-2
Glass wine bottles and other, out-of-scope products: Official import statistics for nonsubject sources showing Canada separately, by item and period

Quantity in gross

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2023
Unadjusted official stats for nonsubject sources	4,736,455	5,316,586	3,414,148	932,820	728,313
Unadjusted official stats for Canada	1,313,016	1,198,433	760,031	151,012	147,200
Unadjusted official stats for nonsubject minus Canada	3,423,439	4,118,153	2,654,117	781,808	581,113

Source: Compiled from official U.S. imports statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting number 7010.90.5019, accessed July 17, 2024. Import data are based on the imports for consumption data series.

Table G-3
Products other than glass wine bottles: Out-of-scope (OOS) imports from nonsubject sources showing Canada separately as identified and reported by U.S. importers of glass wine bottles, by item and period

Quantity in gross

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Nonsubject sources	***	***	***	***	***
Canada	***	***	***	***	***
Nonsubject minus Canada	***	***	***	***	***

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as “---”.

Table G-4
Products other than glass wine bottles: Imports from nonsubject sources related to certified "No" questionnaire respondents, by item and period

Quantity in gross

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2024
Nonsubject sources	***	***	***	***	***
Canada	***	***	***	***	***
Nonsubject minus Canada	***	***	***	***	***

Source: Compiled from proprietary, Census-edited Customs import records using HTS statistical reporting number 7010.90.5019, accessed June 7, 2024 for firms that submitted a certified "No" U.S. importers' questionnaire responses. Import data are based on the imports for consumption data series.

Note: The majority of certified "No" questionnaire responses received were for U.S. importers from Canada (as shown above).

Table G-5
Glass wine bottles and other, out-of-scope products: Adjusted official import statistics less Canada for nonsubject sources, by item and period

Quantity in gross

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2023
Unadjusted official import statistics from nonsubject sources less Canada	3,423,439	4,118,153	2,654,117	781,808	581,113
Questionnaire data for out-of-scope imports from nonsubject sources less Canada	***	***	***	***	***
Certified "No" Questionnaire data nonsubject less Canada	***	***	***	***	***
Adjusted official import stats prehearing report less Canada	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires to measure U.S. shipments by U.S. producers and importers U.S. shipments of imports from Chile, China, and Mexico, and compiled from official U.S. imports statistics of the U.S. Department of Commerce Census Bureau using HTS statistical reporting number 7010.90.5019, accessed July 17, 2024 adjusted to remove out-of-scope imports reported in Commission questionnaires responses and using proprietary, Census-edited Customs records using HTS statistical reporting number 7010.90.5019, accessed June 7, 2024 for certified "No" import submissions to report for nonsubject sources. Import data are based on the imports for consumption data series, and value data reflect landed, duty-paid values.

Note: While some of additional volumes reflected in adjusted official import statistics in Table G-5 may relate to glass wine bottles, after a review of the remaining U.S. importers and foreign suppliers identified using proprietary, Census-edited Customs import records, staff believes even this further adjusted official import statistic contains primarily out-of-scope products. For example, of the remaining volume in proprietary, Census-edited Customs import records (i.e., excluding certified "yes" and certified "no" USITC questionnaire respondents) from nonsubject sources, the five largest importers appear to be importers of primarily out-of-scope products. Specifically, ***. As a result of this additional market analysis, the most reliable indicate of the volume of glass wine bottle on this record is positive USITC questionnaire responses.

Table G-6

Glass wine bottles: Ratio of adjusted nonsubject official import statistics to questionnaire data, including less Canada, by item and period

Quantity in gross; Ratio in percent

Item	2021	2022	2023	Jan-Mar 2023	Jan-Mar 2023
Questionnaire data nonsubject	***	***	***	***	***
Ratio: Prehearing nonsubject (from Table G-1) to questionnaire data	***	***	***	***	***
Ratio: Further adjusted prehearing nonsubject less Canada (from Table G-5) to questionnaire data	***	***	***	***	***

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

Note: The ratios provided in this table incorporate information from additional sources as noted in the source notes to Tables G-1 and G-5. While some of additional volumes reflected in adjusted official import statistics in Table G-5 may relate to glass wine bottles, after a review of the remaining U.S. importers and foreign suppliers identified using proprietary, Census-edited Customs import records, staff believes even this further adjusted official import statistic contains primarily out-of-scope products. For example, of the remaining volume in proprietary, Census-edited Customs import records (i.e., excluding certified "yes" and certified "no" USITC questionnaire respondents) from nonsubject sources, the five largest importers appear to be importers of primarily out-of-scope products. Specifically, ***. As a result of this additional market analysis, the most reliable indicate of the volume of glass wine bottle on this record is positive USITC questionnaire responses.

