

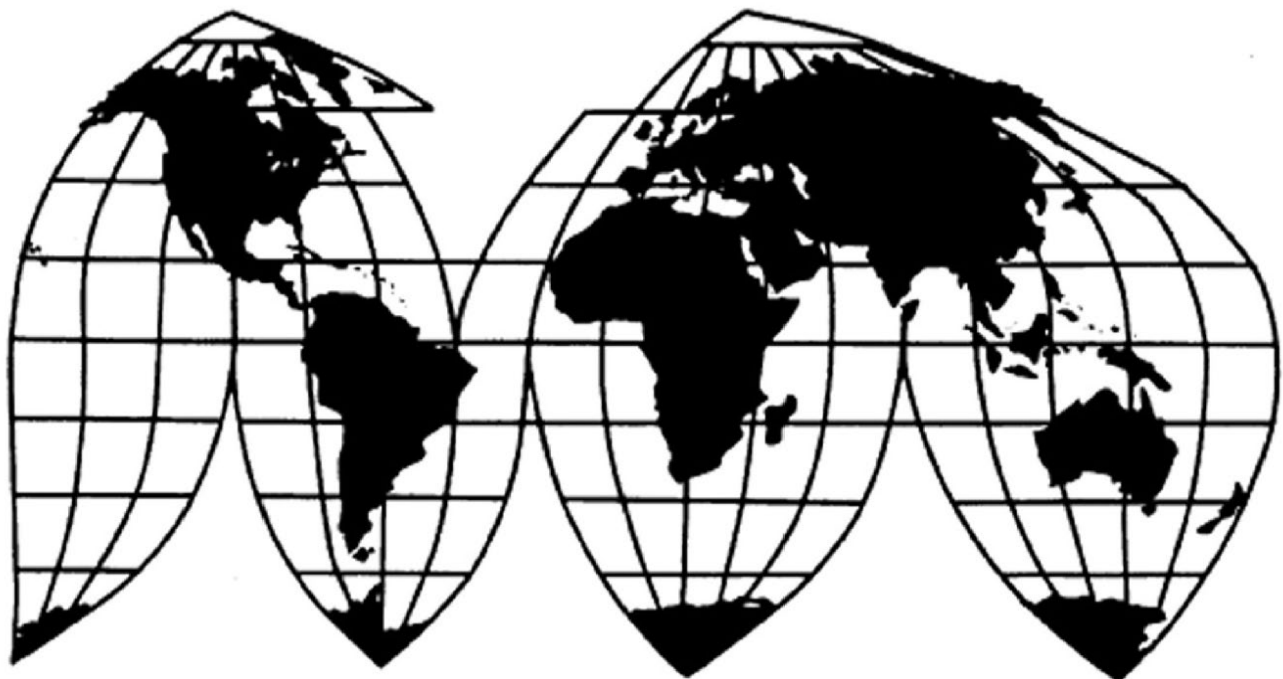
Silicomanganese from India, Kazakhstan, and Venezuela

Investigation Nos. 731-TA-929-931 (Fourth Review)

Publication 5567

December 2024

U.S. International Trade Commission



Washington, DC 20436

U.S. International Trade Commission

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Note: Information that would reveal confidential operations of individual concerns may not be published.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

UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation Nos. 731-TA-929-931 (Fourth Review)

Silicomanganese from India, Kazakhstan, and Venezuela

DETERMINATIONS

On the basis of the record¹ developed in the subject five-year reviews, the United States International Trade Commission (“Commission”) determines, pursuant to the Tariff Act of 1930 (“the Act”), that revocation of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela would be likely to lead to continuation or recurrence of material injury to an industry in the United States within a reasonably foreseeable time.

BACKGROUND

The Commission instituted these reviews on May 1, 2024 (89 FR 35247) and determined on August 5, 2024, that it would conduct expedited reviews (89 FR 77542, September 23, 2024).

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

Information obtained in these reviews

Background

On May 1, 2024, the U.S. International Trade Commission (“Commission”) gave notice, pursuant to section 751(c) of the Tariff Act of 1930, as amended (“the Act”),¹ that it had instituted reviews to determine whether revocation of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela would be likely to lead to continuation or recurrence of material injury.² All interested parties were requested to respond to this notice by submitting certain information requested by the Commission.³ ⁴ Table I-1 presents information relating to the background and schedule of this proceeding:

Table I-1
Silicomanganese: Information relating to the background and schedule of this proceeding

Effective date	Action
May 1, 2024	Notice of initiation by Commerce (89 FR 35073, May 1, 2024)
May 1, 2024	Notice of institution by Commission (89 FR 35247, May 1, 2024)
August 5, 2024	Commission’s vote on adequacy
August 19, 2024	Commerce’s results of its expedited reviews
December 4, 2024	Commission’s determinations and views

¹ 19 U.S.C. 1675(c).

² 89 FR 35247, May 1, 2024. In accordance with section 751(c) of the Act, the U.S. Department of Commerce (“Commerce”) published a notice of initiation of five-year reviews of the subject antidumping duty orders. 89 FR 35247, May 1, 2024. Pertinent Federal Register notices are referenced in app. A, and may be found at the Commission’s website (www.usitc.gov).

³ As part of their response to the notice of institution, interested parties were requested to provide company-specific information. That information is presented in app. B. Summary data compiled in the original investigations and subsequent full reviews are presented in app. C.

⁴ Interested parties were also requested to provide a list of three to five leading purchasers in the U.S. market for the domestic like product and the subject merchandise. Presented in app. D are the responses received from purchaser surveys transmitted to the purchasers identified in this proceeding.

Responses to the Commission’s notice of institution

Individual responses

The Commission received one submission in response to its notice of institution in the subject reviews. It was filed on behalf of Eramet Marietta, Inc (“Eramet”), domestic producer of silicomanganese (referred to herein as “domestic interested party”).

A complete response to the Commission’s notice of institution requires that the responding interested party submit to the Commission all the information listed in the notice. Responding firms are given an opportunity to remedy or explain deficiencies in their responses and to provide clarifying details where appropriate. A summary of the number of responses and estimates of coverage for each is shown in table I-2.

Table I-2
Silicomanganese: Summary of responses to the Commission’s notice of institution

Interested party type	Number	Coverage
U.S. producer	1	***%

Note: The U.S. producer coverage figure presented is the domestic interested party’s estimate of its share of total U.S. production of silicomanganese during 2023. Domestic interested party’s response to the notice of institution, May 31, 2024, p. 19.

Party comments on adequacy

The Commission received party comments on the adequacy of responses to the notice of institution and whether the Commission should conduct expedited or full reviews from the domestic interested party. The domestic interested party requests that the Commission conduct expedited reviews of the antidumping duty orders on silicomanganese.⁵

The original investigations

The original investigation resulted from petitions filed on April 6, 2001 with Commerce and the Commission by Eramet Marietta Inc. (“Eramet”), Marietta, Ohio, and the Paper, Allied-Industrial, Chemical and Energy Workers International Union, Local 5-0639.⁶ On April 2, 2002, Commerce determined that imports of silicomanganese from India, Kazakhstan, and Venezuela were being sold at less than fair value (“LTFV”).⁷ The Commission determined on May 16, 2002

⁵ Domestic interested party’s comments on adequacy, July 9, 2024, p. 2.

⁶ Silicomanganese from India, Kazakhstan, and Venezuela, Inv. Nos. 731-TA- 929-931 (Final), USITC Publication 3505, May 20002 (“Original publication”), p. I-1.

⁷ 67 FR 15531; 67 FR 15533; 67 FR 15535, April 2, 2002.

that the domestic industry was materially injured by reason of LTFV imports of silicomanganese from India, Kazakhstan, and Venezuela.⁸ On May 23, 2002, Commerce issued its antidumping duty orders with final weighted-average dumping margins for imports from India ranging from 15.32 to 20.53 percent, for imports from Kazakhstan of 247.88 percent, and for imports from Venezuela of 24.62 percent.⁹

The first five-year reviews

On July 6, 2007, the Commission determined that it would conduct expedited reviews of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela.¹⁰ On August 2, 2007, Commerce determined that revocation of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela would be likely to lead to continuation or recurrence of dumping.¹¹ On November 28, 2007, the Commission determined that material injury would be likely to continue or recur within a reasonably foreseeable time.¹² Following affirmative determinations in the five-year reviews by Commerce and the Commission, effective November 30, 2007, Commerce issued a continuation of the antidumping duty orders on imports of silicomanganese from India, Kazakhstan, and Venezuela.¹³

The second five-year reviews

On January 4, 2013, the Commission determined that it would conduct full reviews of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela.¹⁴ On February 7, 2013, Commerce determined that revocation of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela would be likely to lead to continuation or recurrence of dumping.¹⁵ On September 18, 2013, the Commission determined that material injury would be likely to continue or recur within a reasonably foreseeable time.¹⁶ Following affirmative determinations in the five-year reviews by Commerce and the Commission,

⁸ 67 FR 35832, May 21, 2002.

⁹ 67 FR 36149, May 23, 2002.

¹⁰ 72 FR 52581, September 14, 2007.

¹¹ 72 FR 42393, August 2, 2007.

¹² 72 FR 67965, December 3, 2007.

¹³ 73 FR 841, January 4, 2008.

¹⁴ 78 FR 4437, January 22, 2013.

¹⁵ 78 FR 9034, February 7, 2013.

¹⁶ 78 FR 58556, September 24, 2013.

effective October 2, 2013, Commerce issued a continuation of the antidumping duty orders on imports of silicomanganese from India, Kazakhstan, and Venezuela.¹⁷

The third five-year reviews

On December 10, 2018, the Commission determined that it would conduct expedited reviews of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela.¹⁸ On December 17, 2018, Commerce determined that revocation of the antidumping duty orders on silicomanganese from India, Kazakhstan, and Venezuela would be likely to lead to continuation or recurrence of dumping.¹⁹ On April 17, 2019, the Commission determined that material injury would be likely to continue or recur within a reasonably foreseeable time.²⁰ Following affirmative determinations in the five-year reviews by Commerce and the Commission, effective June 12, 2019, Commerce issued a continuation of the antidumping duty orders on imports of silicomanganese from India, Kazakhstan, and Venezuela.²¹

Previous and related investigations

The Commission has conducted two previous import relief investigations on silicomanganese or similar merchandise, as presented in table I-3.

Table I-3
Silicomanganese: Previous and related Commission proceedings and current status

Date	Number	Country	ITC original determination	Current status
1993	731-TA-671	Brazil	Affirmative	Order revoked after third review
1993	731-TA-672	China	Affirmative	Ongoing fifth full review
1993	731-TA-673	Ukraine	Affirmative	Ongoing fifth full review
1993	731-TA-674	Venezuela	Negative	---
2015	731-TA-1269	Australia	Negative	---

¹⁷ 78 FR 60846, October 2, 2013.

¹⁸ 84 FR 8544, March 8, 2019.

¹⁹ 83 FR 64525, December 17, 2018.

²⁰ 84 FR 16882, April 23, 2019.

²¹ 84 FR 27243, June 12, 2019.

Source: U.S. International Trade Commission publications and Federal Register notices.

Note: “Date” refers to the year in which the investigation was instituted by the Commission.

Commerce’s five-year reviews

Commerce announced that it would conduct expedited reviews with respect to the orders on imports of silicomanganese from India, Kazakhstan, and Venezuela with the intent of issuing the final results of these reviews based on the facts available not later than August 29, 2024.²² Commerce publishes its Issues and Decision Memoranda and its final results concurrently, accessible upon publication at <https://access.trade.gov/public/FRNoticesListLayout.aspx> and subsequently on the Commission’s Electronic Document Information System (“EDIS”). Issues and Decision Memoranda contain complete and up-to-date information regarding the background and history of the order, including scope rulings, duty absorption, changed circumstances reviews, and anticircumvention, as well as any decisions that may have been pending at the issuance of this report. Any foreign producers/exporters that are not currently subject to the antidumping duty orders on imports of silicomanganese from India, Kazakhstan, and Venezuela are noted in the sections titled “The original investigations” and “U.S. imports,” if applicable.

The product

Commerce’s scope

Commerce has defined the scope as follows:

... all forms, sizes and compositions of silicomanganese except low-carbon silicomanganese, including silicomanganese briquettes, fines and slag. Silicomanganese is a ferroalloy composed principally of manganese, silicon and iron, and normally contains much smaller proportions of minor elements, such as carbon, phosphorous and sulfur. Silicomanganese is sometimes referred to as ferrosilicon manganese. Silicomanganese is used primarily in steel production as a source of both silicon and manganese. Silicomanganese generally contains by weight not less than 4 percent iron, more than 30 percent manganese, more than 8 percent silicon and

²² Letter from Eric Greynolds, Director, AD/CVD Operations, Enforcement and Compliance, U.S. Department of Commerce to Nannette Christ, Director of Investigations, June, 21, 2024.

not more than 3 percent phosphorous. Silicomanganese is properly classifiable under subheading 7202.30.0000 of the Harmonized Tariff Schedule of the United States (HTSUS). Some silicomanganese may also be classified under HTSUS subheading 7202.99.5040.

The low-carbon silicomanganese excluded from this scope is a ferroalloy with the following chemical specifications: minimum 55 percent manganese, minimum 27 percent silicon, minimum 4 percent iron, maximum 0.10 percent phosphorus, maximum 0.10 percent carbon and maximum 0.05 percent sulfur. Lowcarbon silicomanganese is used in the manufacture of stainless steel and special carbon steel grades, such as motor lamination grade steel, requiring a very low carbon content. It is sometimes referred to as ferromanganese-silicon. Low-carbon silicomanganese is classifiable under HTSUS subheading 7202.99.5040.

This scope covers all silicomanganese, regardless of its tariff classification. Although the HTSUS subheadings are provided for convenience and customs purposes, our written description of the scope remains dispositive.²³

U.S. tariff treatment

Silicomanganese is currently provided for in Harmonized Tariff Schedule of the United States (“HTS”) subheading 7202.30.00 (ferrosilicon manganese).²⁴ The general rate of duty is 3.9 percent ad valorem for HTS subheading 7202.30.00.²⁵ Decisions on the tariff classification

²³ 89 FR 49154 (June 11, 2024).

²⁴ USITC, HTS (2024) Revision 3, Publication 5519, June 2024, p. 72-9.

²⁵ Commerce’s scope noted that silicomanganese may also be imported under HTS statistical reporting number 7202.99.5040 (a basket category for other ferroalloys). HTS 7202.99.8040 superseded HTS 7202.99.5040 in July 2003. USITC, HTS (2003) Supplement 1, Publication 3565, July 2003, Change Record, p. 9. Silicomanganese imported from Kazakhstan is eligible to enter the United States at a column 1-special duty rate of “Free,” as Kazakhstan is an eligible beneficiary country for the Generalized System of Preferences (“GSP”) Program. Legal authorization for duty-free treatment under the GSP Program expired on January 1, 2021. As a result, U.S. imports entering the United States that were eligible for duty-free treatment under GSP up to December 31, 2020, are now subject to regular, Normal Trade Relations (MFN) rates of duty. HTS (2024) Revision 3, Publication 5519, June 2024, General Note 4, p. 1; HTS Chapter 72, p. 72-9; Office of the United States Trade Representative (“USTR”), “Generalized
(continued...)

and treatment of imported goods are within the authority of U.S. Customs and Border Protection.

Effective September 24, 2018, silicomanganese originating in China became subject to an additional 10 percent ad valorem duty under section 301 of the Trade Act of 1974.²⁶ On May 10, 2019, this was increased to an additional 25 percent ad valorem duty under Section 301 of the Trade Act of 1974.²⁷

Description and uses²⁸

Silicomanganese,²⁹ a silvery metallic ferroalloy,³⁰ is composed principally of manganese, silicon, and iron. It is produced in a number of different grades and sizes. However, most silicomanganese is manufactured and sold to American Society for Testing and Materials (ASTM) International specification A483, in one of three grades, designated “A,” “B,” and “C” that differ by their silicon and carbon contents.³¹ Most silicomanganese produced and sold in

System of Preferences (GSP) Program Information: 2021 Expiration,” January 2021, <https://ustr.gov/sites/default/files/gsp/GSPExpiration2021.pdf>.

²⁶ Certain products exported from China before May 10, 2019, that entered into the United States before June 15, 2019, were excluded from the duty increase. 83 FR 47974, September 21, 2018; 84 FR 20459, May 9, 2019; 84 FR 26930, June 10, 2019. See also HTS heading 9903.88.03 and U.S. notes 20(e) and 20(f) to Subchapter III of Chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2024) Revision 3, Publication 5519, June 24, pp. 99-III-27–99-III-28, 99-III-46, 99-III-301.

²⁷ 84 FR 20459, May 9, 2019. See also HTS heading 9903.88.03 and U.S. notes 20(e) and 20(f) to Subchapter III of Chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2024) Revision 3, Publication 5519, June 24, pp. 99-III-27–99-III-28, 99-III-46, 99-III-301.

²⁸ Unless otherwise noted, this information is based on Silicomanganese from India, Kazakhstan, and Venezuela, Investigation Nos. 731-TA-929-931, USITC Publication 4881, April 2019 (“Third review publication”), pp. I-8–I-10.

²⁹ Silicomanganese is also known as ferrosilicomanganese, ferro-silico manganese, or ferrosilicon manganese.

³⁰ A ferroalloy is an alloy of iron containing one or more other elements. The iron acts as a carrier to dissolve these other elements into molten iron or steel.

³¹ According to this ASTM standard specification, each of the three grades must contain 65 to 68 percent manganese, a maximum of 0.20 percent phosphorus, and a maximum of 0.04 percent sulfur, by weight. The silicon and carbon contents for each grade are:

Grade A contains 18.5-21.0 percent silicon and a maximum of 1.5 percent carbon.

Grade B contains 16.0-18.5 percent silicon and a maximum of 2.0 percent carbon.

Grade C contains 12.5-16.0 percent silicon and a maximum of 3.0 percent carbon.

Additionally, the content of minor elements arsenic, tin, lead, chromium, nickel, and molybdenum, is limited. A grade of silicomanganese containing a somewhat higher level of manganese—72 percent in contrast to a range of 65 to 68 percent in standard silicomanganese—is produced at Georgian Manganese, in the Republic of Georgia, affiliated with U.S. silicomanganese producer Felman Production
(continued...)

the United States conforms to the specification for grade B. There are also forms of silicomanganese that do not conform to the chemical requirements of the ASTM grades mentioned above.³² Silicomanganese is sold in small pieces of uniform sizes. A typical screening-size range for silicomanganese lumps is from ¼ inch to 3 inches in diameter.³³

Silicomanganese is consumed in bulk form principally by the steel industry as a source of both silicon and manganese,³⁴ although some silicomanganese is used as an alloying agent in the production of iron castings. Manganese, intentionally present in nearly all steels, is used as a desulfurizer and deoxidizer. By removing sulfur, manganese prevents the steel from becoming brittle during the hot-rolling process and enhances the strength and hardness of the steel. Silicon can be used as a deoxidizer to aid in producing steels of uniform chemistry and mechanical properties. In this role, it is not retained within the steel, but forms silicon oxide, which separates out from the molten steel as a component of the slag. When used as an alloying agent, silicon increases the hardness and strength of hot-rolled steel mill products, and enhances the toughness, corrosion resistance, and magnetic and electrical properties of certain steel mill products.

Use of silicomanganese depends upon the steelmaking practices of a given producer. It may be either imparted directly into the steelmaking furnace or added as a chemistry addition or deoxidizer to molten steel at a separate ladle metallurgy station. As a furnace addition, silicomanganese is used in lump sizes and melted along with other steelmaking raw materials. As a ladle addition, it is typically used in smaller sizes. Silicomanganese is principally consumed

LLC. This so-called “high grade” silicomanganese also contains a higher amount of phosphorus (0.20–0.35 percent) than does standard silicomanganese. See: ASTM Designation A483/A483M-10 (reapproved 2015), Standard Specification for Silicomanganese, tables 1 (Chemical Requirements) and table 2 (Supplemental Chemical Requirements). Designation: A 483-04 Standard Specification for Silicomanganese in: Annual Book of ASTM Standards, Section 1 Iron and Steel Products, Volume 01.02 Ferrous Castings; Ferroalloys, 2017, p. 270.

³² There is a low-carbon grade form of silicomanganese containing about 60 percent manganese, 30 percent silicon, and less than 0.10 percent carbon that is used principally to produce stainless steel. This product is not included in the scope or the domestic like product in the original investigations or subsequent reviews.

³³ These dimensions refer to the diameters of the openings in the standard screens or sieves that are used to size silicomanganese. The first number refers to the screen through which the material must pass and the second number refers to the screen on which the material is retained, with smaller particles passing through to be recycled or sold as a smaller size. Silicomanganese crumbles easily and is susceptible to appreciable reduction in size by repeated handling. This generates small lumps and fines (the diameter of small lumps may be one-half that of regular-sized pieces, but there is no specified minimum diameter for fines).

³⁴ Other elements in steel are carbon as the principal hardening element, and phosphorus and sulfur, as impurities that cause brittleness and cracking.

by electric-arc furnace steelmakers in the production of long-rolled products, including bars and structural shapes. Such use may be due to less restrictive specifications for silicon for long-rolled products than for flat-rolled carbon steel mill products, such as sheet and strip.³⁵ Silicomanganese accounts for only a small share of the total production cost for steel mill products. Most steel contains from 0.2 percent to 2 percent manganese, depending on the grade of the steel.

Manufacturing process³⁶

Silicomanganese is produced by smelting together, in a submerged arc electric furnace, sources of silicon, manganese, iron, and a carbonaceous reducing agent, usually coal and coke. The principal sources of manganese are manganese ore and ferromanganese slag (which is a byproduct of ferromanganese production).³⁷ The source of silicon is natural quartz (river gravel) or dross, which is purchased from ferrosilicon producers.³⁸ The raw materials are combined in a “charge” (which may also include wood chips, dolomite, and a fluxing agent) and introduced into a submerged arc electric furnace where an electrical transformer system delivers high-current, low-voltage electricity to the charge through carbon electrodes. The charge is heated to a temperature of 1,300 to 1,400 degrees Celsius. Impurities from the ore or other manganese sources are released and form slag which floats on top of the molten silicomanganese and rises to the top of the furnace.

Following smelting, the molten silicomanganese and slag are removed (“tapped”) from the furnace. Impurities that rose to the top are poured off into a series of cascading slag pots until the remaining manganese product has been separated from the slag.³⁹ The molten

³⁵ The use of silicomanganese adds less carbon to the steel than an equivalent “basket” of standard ferrosilicon and high-carbon ferromanganese. Eramet, “The Different Alloys: Silicomanganese,” <https://www.eramet.com/en/activities/manganese/manganese-alloys/>, retrieved January 3, 2024.

³⁶ Unless otherwise noted, this information is based on Third review publication, pp. I-10–I-12.

³⁷ Manganese ore is classified as high-grade (greater than 40 percent manganese content) and low-grade (30 to 40 percent manganese content). Manganese ore grades are a function of the deposit from which they are produced. Silicomanganese producers typically purchase different grades of ore and mix them to achieve the desired manganese content level for the furnace. All ore used for silicomanganese production is imported because there is no U.S. production of manganese ore.

³⁸ Silicon dross is a by-product of the silicon industry and contains trapped “metallic” silicon inside of a silica slag. Some silicon (and ferrosilicon) producers sell slag and dross generated at their plants to silicomanganese producers.

³⁹ Eramet Marietta, “Refining, Cooling & Stacking,” 2022, <https://marietta.eramet.com/eramet/activities/production-process/refining-cooling-stacking/>, retrieved January 3, 2024.

silicomanganese is then poured into large molds (called “chills”), where it cools and hardens. Once the alloy has hardened, the chills are emptied, and the alloy is crushed into small pieces and screened to fairly uniform sizes.

Silicomanganese is manufactured in the same or similar facilities as those used to produce high-carbon ferromanganese, although switching from one grade or type of manganese ferroalloy to another involves opportunity costs in terms of lost production, reduced productivity, and possible contamination of the higher-grade product. Generally, little difference appears to exist between silicomanganese production processes in the domestic industry and those used abroad. This reflects the maturity of the industry and may be attributed to the diffusion of process technology, techniques, and equipment on a world-wide basis; the similarity of steelmaking techniques; and the commonality of steel recipes.

The industry in the United States

U.S. producers

During the final phase of the original investigations, the Commission received U.S. producer questionnaires from one firm, Eramet, which accounted for approximately all known production of silicomanganese in the United States during 2000.⁴⁰

During the first five-year reviews, the Commission received U.S. responses to the notice of institution from two firms, Eramet and Felman Production, LLC (“Felman”), which accounted for all known silicomanganese in the United States during 2006.⁴¹

During the second five-year reviews, the Commission received U.S. producer questionnaires from two firms, Eramet and Felman, which accounted for approximately all known percent of production of silicomanganese in the United States during 2012.⁴²

During the third five-year reviews, Eramet was the only domestic interested party to provide a response and it reported one other known and currently operating U.S. producer of silicomanganese, Felman. Eramet, accounted for approximately *** percent of production of silicomanganese in the United States during 2017.⁴³

⁴⁰ Original publication, p. I-2.

⁴¹ Silicomanganese From India, Kazakhstan, and Venezuela, Inv. No. 731-TA-929-931 (Review), USITC Publication 3963, November 2007 (“First review publication”), p. I-3.

⁴² Silicomanganese From India, Kazakhstan, and Venezuela, Inv. No. 731-TA-929-931 (Second Review), USITC Publication 4424, September 2013 (“Second review publication”), p. I-11.

⁴³ Investigation Nos. 731-TA-929-931 (Third Review): Silicomanganese from India, Kazakhstan, and Venezuela, Confidential Report, INV-QQ-138, November 26, 2018 (“Third review confidential report”), pp. I-17, table I-3.

In response to the Commission’s notice of institution in these current reviews, the domestic interested party reported one other known and currently operating U.S. producer of silicomanganese (Felman). Eramet, the one firm providing U.S. industry data in response to the Commission’s notice of institution, accounted for approximately *** percent of production of production in the United States during 2023.⁴⁴

Recent developments

Table I-4 presents events in the U.S. industry since the Commission’s last five-year reviews.⁴⁵

Table I-4
Silicomanganese: Developments in the U.S. industry

Item	Firm	Event
Upgrades	Felman	Domestic silicomanganese producer Felman has three submerged arc electric furnaces with the total capacity to produce about 105,000 metric tons (115,743 short tons) of silicomanganese annually at its plant in Letart, West Virginia. Felman upgraded one of its three furnaces and invested in furnace, mixing, and baghouse automation upgrades. Since August 2018, Felman has only been operating this one upgraded furnace, which in 2020 produced more than 52,800 metric tons (58,202 short tons) of silicomanganese.
Labor agreement	Felman	In July 2022, Felman reached a labor agreement with the United Steelworkers (“USW”) and its affiliated Local Union No. 5171 that represents workers at Felman’s silicomanganese plant in Letart, West Virginia. The previous labor agreement between Felman and the USW was set to expire in September 2023. The new amended agreement included wage increases ranging from 7.5 to 12.1 percent for all union workers at the plant and extended the contract through September 2024.
Sales agreement	Felman	In February 2023, Felman announced that it had signed a five-year agreement to sell silicomanganese to a “multi-billion-dollar publicly traded steel and metal manufacturer based in the United States.” The steel and metal company was not identified in company news releases. Officials at Felman stated that the sales agreement would benefit production workers and the local community, ensuring stable demand and allowing the company to focus on improving plant operations and implementing environmental initiatives.

⁴⁴ Domestic interested party’s response to the notice of institution, May 31, 2024, exhibit 1.

⁴⁵ For recent developments, if any, in tariff treatment, please see “U.S. tariff treatment” section.

Item	Firm	Event
Capital investment	Eramet	Domestic silicomanganese producer Eramet announced a \$40-million investment program designed to improve air quality and energy efficiency and reduce CO ₂ emissions at its manganese alloy plant in Marietta, Ohio. In 2023, Eramet planned to completely overhaul one of its ferroalloy furnaces at its plant in Marietta to make it more powerful, productive, and less energy intensive.

Sources: Felman Production LLC, "About Felman Production," <https://www.fpiwv.com/about>, retrieved December 8, 2023; PR Newswire, "As West Virginians Struggle with Inflation and Rising Gas Prices, Felman Production Announces a Labor Agreement with the United Steelworkers to Increase Wages at its Letart, WV Production Facility," July 12, 2022, <https://www.prnewswire.com/news-releases/as-west-virginians-struggle-with-inflation-and-rising-gas-prices-felman-production-announces-a-labor-agreement-with-the-united-steelworkers-to-increase-wages-at-its-letart-wv-production-facility-301584889.html>, retrieved December 14, 2023; WVNews, "Felman Production Announces 5-year Deal to Sell Key Steel Production Component," February 8, 2023, https://www.wvnews.com/news/wvnews/felman-production-announces-5-year-deal-to-sell-key-steel-production-component/article_75499ad0-a7c6-11ed-b776-97c6d48b503e.html, retrieved December 8, 2023; Eramet, "Eramet Marietta: A Strategic Location in the United States," 2022, <https://www.eramet.com/en/activities/manganese/>, retrieved December 8, 2023; Amanda Barber, "Mason Co. Manufacturing Plant Increases Employee Wages Amidst Inflation," WOWK-TV, July 14, 2022, <https://www.wowktv.com/news/business/mason-co-manufacturing-plant-increases-employee-wages-amidst-inflation/>, retrieved January 4, 2024.

U.S. producers' trade and financial data

The Commission asked domestic interested parties to provide trade and financial data in their response to the notice of institution in the current five-year reviews.⁴⁶ Table I-5 presents a compilation of the trade and financial data submitted from all responding U.S. producers in the original investigations and subsequent five-year reviews.

⁴⁶ Individual company trade and financial data are presented in app. B.

Table I-5
Silicomanganese: Trade and financial data submitted by U.S. producers, by period

Quantity in short tons; value in 1,000 dollars; unit value in dollars per short tons; ratio in percent

Item	Measure	2000	2006	2012	2017	2023
Capacity	Quantity	***	NA	***	***	***
Production	Quantity	***	***	***	***	***
Capacity utilization	Ratio	***	NA	***	***	***
U.S. shipments	Quantity	***	***	***	***	***
U.S. shipments	Value	***	***	***	***	***
U.S. shipments	Unit value	***	***	***	***	***
Net sales	Value	***	NA	***	***	***
COGS	Value	***	NA	***	***	***
COGS to net sales	Ratio	***	NA	***	***	***
Gross profit or (loss)	Value	***	NA	***	***	***
SG&A expenses	Value	***	NA	***	***	***
Operating income or (loss)	Value	***	NA	***	***	***
Operating income or (loss) to net sales	Ratio	***	NA	***	***	***

Source: For the years 2000-17, data are compiled using data submitted in the Commission’s original investigations, first, second, and third five-year reviews. For the year 2023, data are compiled using data submitted by domestic interested party. Domestic interested party’s response to the notice of institution, May 31, 2024, exh. 1 and domestic interested party’s supplemental response to the notice of institution, June 20, 2024, p. 2, attachment 1.

Note: NA is used to denote the data is not available.

Note: The decrease in net sales from 2017 to 2023 is primarily attributable to a decrease in demand for silicomanganese relative to 2017. According to the *** U.S. apparent consumption for silicomanganese *** percent from 2017 to 2023, while Eramet’s net sales declined by *** percent over the same period. Domestic interested party’s supplemental response to the notice of institution, June 20, 2024, p.2.

Note: For a discussion of data coverage, please see “U.S. producers” section.

Definitions of the domestic like product and domestic industry

The domestic like product is defined as the domestically produced product or products which are like, or in the absence of like, most similar in characteristics and uses with, the subject merchandise. The domestic industry is defined as the U.S. producers as a whole of the domestic like product, or those producers whose collective output of the domestic like product constitutes a major proportion of the total domestic production of the product. Under the

related parties provision, the Commission may exclude a U.S. producer from the domestic industry for purposes of its injury determination if “appropriate circumstances” exist.⁴⁷

In its original determinations, its expedited first five-year review determinations, its full second five-year review determinations, and its expedited third five-year review determinations, the Commission found a single domestic like product consisting of all silicomanganese, except low-carbon silicomanganese, coextensive with Commerce’s scope.

In its original determinations, its expedited first five-year review determinations, its full second five-year review determinations, and its expedited third five-year review determinations, the Commission found a single domestic industry consisting of all domestic producers of silicomanganese, except low-carbon silicomanganese⁴⁸

U.S. importers

During the final phase of the original investigations, the Commission received U.S. importer questionnaires from 12 firms, which accounted for approximately 91.9 percent of total U.S. imports of silicomanganese, *** percent of imports from India, *** percent of imports from Kazakhstan and *** percent of imports from Venezuela during 2000.⁴⁹ Import data presented in the original investigations are based on official Commerce statistics and adjusted using questionnaire responses to exclude U.S. importers’ reported imports of low-carbon silicomanganese.

During the first five-year reviews, the Commission received no adequate responses to the notice of institution from any respondent interested party. Import data presented in the first reviews are based on official Commerce statistics.

During the second five-year reviews, the Commission received U.S. importer questionnaires from 12 firms, which accounted for approximately 90.5 percent of total U.S. imports of silicomanganese during 2017-12.⁵⁰ Import data presented in the first reviews are based on questionnaire responses.

Although the Commission did not receive responses from any respondent interested parties in its third five-year reviews, the domestic interested party provided a list of 24 firms that may currently import silicomanganese from India, Kazakhstan, and Venezuela.⁵¹

⁴⁷ Section 771(4)(B) of the Tariff Act of 1930, 19 U.S.C. § 1677(4)(B).

⁴⁸ 89 FR 35247, May 1, 2024.

⁴⁹ Investigation Nos. 731-TA-929-931 (Final): Silicomanganese from India, Kazakhstan, and Venezuela, Confidential Report, INV-Z-047, April 16, 2002 (“Original confidential report”), p. IV-2, table IV-2.

⁵⁰ There were no subject imports during the period of review. First review publication, p. IV-1.

⁵¹ Third review publication, p. I-17.

Although the Commission did not receive responses from any respondent interested parties in these current reviews, in its response to the Commission’s notice of institution, the domestic interested party provided a list of eight potential U.S. importers of silicomanganese.⁵²

U.S. imports

Table I-6 presents the quantity, value, and unit value of U.S. imports from India, Kazakhstan, and Venezuela as well as the other top sources of U.S. imports (shown in descending order of 2023 imports by quantity).

⁵² Domestic interested party’s response to the notice of institution, May 31, 2024, exh. 1.

Table I-6
Silicomanganese: U.S. imports, by source and period

Quantity in short tons; value in 1,000 dollars; unit value in dollars per short tons

U.S. imports from	Measure	2018	2019	2020	2021	2022	2023
India	Quantity	2,060	294	54	551	37,135	3,580
Kazakhstan	Quantity	-	-	27	-	-	5
Venezuela	Quantity	-	-	-	-	-	-
Subject sources	Quantity	2,060	294	81	551	37,135	3,586
South Africa	Quantity	86,356	87,413	64,485	90,385	98,963	94,557
Australia	Quantity	96,612	74,132	71,800	62,417	69,331	55,525
Georgia	Quantity	128,089	94,738	90,840	96,815	125,612	40,522
All other sources	Quantity	141,007	130,213	69,126	94,979	131,979	89,513
Nonsubject sources	Quantity	452,064	386,497	296,250	344,596	425,886	280,117
All import sources	Quantity	454,125	386,791	296,331	345,147	463,020	283,702
India	Value	2,883	414	60	811	53,619	5,394
Kazakhstan	Value	-	-	23	-	-	20
Venezuela	Value	-	-	-	-	-	-
Subject sources	Value	2,883	414	83	811	53,619	5,414
South Africa	Value	89,071	88,993	57,218	88,947	101,601	96,788
Australia	Value	110,207	83,355	63,481	89,145	160,755	65,759
Georgia	Value	149,014	112,079	92,515	131,767	260,829	47,075
All other sources	Value	169,057	142,935	66,259	147,409	242,723	107,124
Nonsubject sources	Value	517,349	427,362	279,474	457,267	765,908	316,747
All import sources	Value	520,232	427,776	279,557	458,078	819,527	322,161
India	Unit value	1,399	1,407	1,110	1,472	1,444	1,507
Kazakhstan	Unit value	-	-	851	-	-	3,749
Venezuela	Unit value	-	-	-	-	-	-
Subject sources	Unit value	1,399	1,407	1,024	1,472	1,444	1,510
South Africa	Unit value	1,031	1,018	887	984	1,027	1,024
Australia	Unit value	1,141	1,124	884	1,428	2,319	1,184
Georgia	Unit value	1,163	1,183	1,018	1,361	2,076	1,162
All other sources	Unit value	1,199	1,098	959	1,552	1,839	1,197
Nonsubject sources	Unit value	1,144	1,106	943	1,327	1,798	1,131
All import sources	Unit value	1,146	1,106	943	1,327	1,770	1,136

Source: Compiled from official Commerce statistics for HTS statistical reporting number 7202.30.0000, accessed June 14, 2024.

Note: Miners in Georgia went on strike in 2023, protesting recent changes in labor and payment conditions at Georgian Manganese, a producer of silicomanganese and ferromanganese (historically Georgia's leading export products). The strike follows a series of disruptions in the industry as Georgian Manganese halted production and cut pay for employees. Exports fell from around \$51 million in January 2023 to only \$2.5 million in April. The decrease is most apparent in the exports to the United States, which had been the top importer of Georgian ferroalloys in 2021-2022, but which fell below Russia and Turkey in the first four months of 2023. Eurasianet, "Georgian miners strike as company cites global market crisis", <https://eurasianet.org/georgian-miners-strike-as-company-cites-global-market-crisis>.

Note: Because of rounding, figure may not add to total shown.

Cumulation considerations⁵³

In assessing whether imports should be cumulated in five-year reviews, the Commission considers, among other things, whether there is a likelihood of a reasonable overlap of competition among subject imports and the domestic like product. Additional information concerning geographical markets and simultaneous presence in the market is presented below.⁵⁴

There were no reported U.S. imports of silicomanganese from Venezuela during 2018-23. Imports from India were reported in 27 of the 72 months between 2018 and 2023 and imports from Kazakhstan were reported in two of the 72 months between 2018 and 2023. No imports from India were reported in five months of 2023 and imports from Kazakhstan were reported in only one month of 2023.

All imports from Kazakhstan entered through southern borders of entry in 2020 and 2023, which were the only years imports were reported. The majority of imports from India entered through eastern borders of entry during 2018-23, with the exception of 2022 where the majority of imports were entered through southern borders of entry. Imports of silicomanganese from India in 2023 were entered through eastern borders of entry (Baltimore, Maryland and Savannah, Georgia). Imports of silicomanganese from Kazakhstan in 2023 were entered through southern borders of entry (Laredo, Texas).

Apparent U.S. consumption and market shares

Table I-7 presents data on U.S. producers' U.S. shipments, U.S. imports, apparent U.S. consumption, and market shares.

⁵³ Unless otherwise noted, this information is based on official U.S. import statistics for HTS statistical reporting number 7202.30.0000.

⁵⁴ In addition, available information concerning subject country producers and the global market is presented in the next section of this report.

Table I-7
Silicomanganese: Apparent U.S. consumption and market shares, by source and period

Quantity in short tons; value in 1,000 dollars; shares in percent

Source	Measure	2000	2006	2012	2017	2023
U.S. producers	Quantity	***	***	***	***	***
India	Quantity	***	0	0	6,438	3,580
Kazakhstan	Quantity	54,826	0	0	0	5
Venezuela	Quantity	26,565	0	0	0	0
Subject sources	Quantity	***	0	0	6,438	3,586
Nonsubject sources	Quantity	***	440,972	318,239	380,761	280,117
All import sources	Quantity	***	440,972	318,239	387,199	283,702
Apparent U.S. consumption	Quantity	***	***	***	***	***
U.S. producers	Value	***	***	***	***	***
India	Value	***	0	0	9,245	5,394
Kazakhstan	Value	***	0	0	0	20
Venezuela	Value	***	0	0	0	0
Subject sources	Value	***	0	0	9,245	5,414
Nonsubject sources	Value	***	310,157	388,576	411,867	316,747
All import sources	Value	***	310,157	388,576	421,111	322,161
Apparent U.S. consumption	Value	***	***	***	***	***
U.S. producers	Share of quantity	***	***	***	***	***
India	Share of quantity	***	***	***	***	***
Kazakhstan	Share of quantity	***	***	***	***	***
Venezuela	Share of quantity	***	***	***	***	***
Subject sources	Share of quantity	***	***	***	***	***
Nonsubject sources	Share of quantity	***	***	***	***	***
All import sources	Share of quantity	***	***	***	***	***
U.S. producers	Share of value	***	***	***	***	***
India	Share of value	***	***	***	***	***
Kazakhstan	Share of value	***	***	***	***	***
Venezuela	Share of value	***	***	***	***	***
Subject sources	Share of value	***	***	***	***	***
Nonsubject sources	Share of value	***	***	***	***	***
All import sources	Share of value	***	***	***	***	***

Source: For the years 2000-17, data are compiled using data submitted in the Commission's original investigations, first, second, and third five-year reviews. For the year 2023, U.S. producers' U.S. shipments are compiled from the domestic interested party's response to the Commission's notice of institution and U.S. imports are compiled using official Commerce statistics under HTS statistical reporting number 7202.30.0000, accessed June 14, 2024.

Note: Share of quantity is the share of apparent U.S. consumption by quantity in percent; share of value is the share of apparent U.S. consumption by value in percent.

Note: Data for U.S. producers in 2017 and 2023 may be understated due to domestic industry data coverage. In 2006, and 2012, data was based on responses from two domestic producers. Data for 2017 and 2023 is based only on the response of one domestic producer, reportedly accounting for an estimated *** and *** percent of domestic production, respectively. Third five-year review confidential report, p. I-29. For a discussion of data coverage, please see “U.S. producers” and “U.S. importers” sections.

The industry in India

Producers in India

During the final phase of the original investigations, the Commission received foreign producer/exporter questionnaires from four firms, Ispat Alloys Ltd. (“Ispat”), Nava Bharat Ferro Alloys Ltd. (“Nava Bharat”), Universal Ferro & Allied Chemical Ltd. (“Universal”), and Indsil Electrosmelts Ltd. (“Indsil”)⁵⁵ which accounted for *** percent, *** percent, and *** percent of production of silicomanganese in India during 2000 respectively.⁵⁶

During the first five-year reviews, the Commission received a response to the notice of institution from one foreign producer/exporter, Nava Bharat, which accounted for *** percent of Indian silicomanganese production during 2006 and reported it did not export to the United States since the imposition of the orders.⁵⁷

During the second five-year reviews, the Commission received foreign producer/exporter questionnaires from two firms, Nava Bharat and Sarda.⁵⁸

Although the Commission did not receive responses from any respondent interested parties in its third five-year reviews, the domestic interested party provided data regarding capacity, production, exports, etc. of producers of silicomanganese from India in that proceeding.⁵⁹

Although the Commission did not receive responses from any respondent interested parties in these five-year reviews, the domestic interested party provided a list of three possible producers of silicomanganese in India.⁶⁰

⁵⁵ Indsil reported that it ***.

⁵⁶ Investigation Nos. 731-TA-929-931 (Final): Silicomanganese from India, Kazakhstan, and Venezuela Confidential report, INV-Z-047, April 16, 2002 (“Original confidential report”), p. VII-1.

⁵⁷ First review confidential report, p. I-49.

⁵⁸ Second review publication, p. IV-10.

⁵⁹ Third review publication, p. I-23.

⁶⁰ Domestic interested party’s response to the notice of institution, May 31, 2024, exh. 1.

Recent developments

Table I-8 presents events in the Indian industry since the Commission's last five-year reviews.

Table I-8
Silicomanganese: Developments in the Indian industry

Item	Firm	Event
Acquisition	Maithan Alloys Ltd	In the third quarter of 2021, Maithan Alloys Ltd. announced the acquisition of Indian ferroalloy producer Impex Metals & Ferro Alloys (IMFAL). Maithan intended to expand its production capacity of silicomanganese and ferromanganese through this acquisition. IMFAL has the capacity to produce 51,698 short tons per year of ferromanganese and silicomanganese at its plant in Bobbili, Andhra Pradesh.
Expansion	Sandur Manganese and Iron Ore	During the first quarter of 2022, Sandur Manganese and Iron Ore announced plans to increase ferroalloy production capacity at its plant in Bellary, Karnataka. Sandur planned to raise its silicomanganese production capacity to 104,720 short tons per year from about 52,911 short tons per year and also increase its ferromanganese capacity.
Expansion	Ramnik Power and Alloys	In the fourth quarter of 2022, Ramnik Power and Alloys announced plans to nearly triple its total manganese-based ferroalloy production capacity to 51,588 short tons per year at its plant in Madhya Pradesh.
Expansion	Sarda Energy & Minerals Limited (SEML)	SEML is one of the largest producers and exporters of manganese-based ferroalloys in India, with exports to more than 60 countries. During the second quarter of 2022, SEML announced that its wholly owned subsidiary, Sarda Metals & Alloys Limited (SMAL), planned to increase manganese-based ferroalloy production capacity to 275,578 short tons per year from 110,231 short tons per year by adding three furnaces at its plant in Vizianagaram, Andhra Pradesh. During 2022-23, the company successfully completed the installation of the furnaces under the expansion project.
Shutdown (indefinite)	IMFAL	During the second quarter of 2023, IMFAL (owned by Maithan) indefinitely shut down both furnaces at its ferroalloys plant in Bobbili, Andhra Pradesh due to significant increases in Andhra Pradesh's power tariffs.
Power rate reduction	State Government	In late November 2023, the state government of Andhra Pradesh cut electricity rates, providing limited relief to energy-intensive ferroalloy producers in that state. The measures included a reduction of the electricity rates, from one to 0.06 rupees per unit, for the rest of the fiscal year ending March 2024.

Item	Firm	Event
Production curtailment and temporary shutdown	Nava Ltd.	Ferroalloy producer Nava reported that production of silicomanganese was seven percent lower during fiscal year 2024 (ending March 31, 2024) than the previous year owing to the temporary shutdown of furnaces at its Karagprasad, Odisha plant for repairs to the raw material handling system. The company also converted production of one furnace to silicomanganese production from ferromanganese at its plant in Paloncha, Telangana. In its annual report, Nava stated that it is focusing on higher production volumes from its ferroalloy facilities in both Telangana and Odisha, strategically aiming to secure a larger share of the global silicomanganese market.

Source: Maithan Alloys Limited, "Investor Presentation–FY 2023," <https://www.maithanalloys.com/wp-content/uploads/2023/09/FY-2022-2023-Investor-Presentation.pdf>, p. 10; Maithan Alloys Limited, "Maithan Alloys Annual Report 2022-23," <https://www.maithanalloys.com/wp-content/uploads/2023/09/2022-23.pdf>, p. 40; *IMnI Annual Review 2022*, January 11, 2023, pp. 10–12; SARDA, "Chairman's message," <https://www.seml.co.in/cmdmessage.php>, retrieved June 27, 2024; SARDA, "Group companies," <https://www.seml.co.in/groupcompanies.php>, retrieved June 27, 2024; International Manganese Institute (*IMnI Annual Review 2023*), January 4, 2024, pp. 11–12; NAVA Limited, "Annual Report 2021–22," p. 27; NAVA Limited, "Annual Report 2022–23," p. 29.

Exports

Table I-9 presents export data for silicomanganese from India (by export destination in descending order of quantity for 2023). Italy, United Arab Emirates, and Japan were the leading export destinations in 2023, accounting for 11.5 percent, 8.8 percent, and 8.4 percent, respectively, of total exports from India. Overall, exports in 2023 were 6.6 percent less than the level in 2022.

Table I-9
Silicomanganese: Quantity of exports from India, by destination and period

Quantity in short tons

Destination market	2018	2019	2020	2021	2022	2023
Italy	59,950	43,011	67,551	158,806	163,828	146,288
United Arab Emirates	85,920	121,501	109,591	94,391	122,278	112,022
Japan	116,774	108,991	94,788	142,421	147,726	106,707
Egypt	19,797	31,523	47,729	71,030	116,566	99,377
Turkey	11,969	10,792	24,803	53,423	106,560	78,395
Taiwan	65,528	48,698	66,308	75,900	69,836	70,585
Bangladesh	46,910	48,352	48,935	54,466	50,106	52,259
Netherlands	12,814	7,324	8,534	28,857	26,597	51,556
Oman	18,101	4,248	5,697	28,123	40,363	47,819
Malaysia	39,270	69,439	50,648	41,209	54,926	42,150
All other markets	395,302	282,586	240,891	379,340	459,719	461,499
All markets	872,334	776,464	765,476	1,127,967	1,358,502	1,268,658

Source: Global Trade Information Services, Inc., Global Trade Atlas, HS subheading 7202.30, accessed June 14, 2024.

Note: Because of rounding, figures may not add to totals shown.

The industry in Kazakhstan

Producers in Kazakhstan

During the final phase of the original investigations, the Commission received foreign producer/exporter questionnaires from one firm, OJSC Transnational Co. and Aksu Ferroalloy Plant (“Kazchrome”), which accounted for all production of silicomanganese in Kazakhstan and 100 percent of exports of silicomanganese from Kazakhstan to the United States.⁶¹

Although the Commission did not receive responses from any respondent interested parties in its first five-year reviews, the domestic interested parties provided a list of two other silicomanganese producers in Kazakhstan, in addition to Kazchrome, in that proceeding.⁶²

During the second five-year reviews, the Commission received foreign producer/exporter questionnaires from one firm, Kazchrome, which accounted for approximately *** percent of total production in 2012, and approximately *** percent of Kazakhstan’s reported silicomanganese exports to the world.⁶³

⁶¹ Original publication, p. VII-3.

⁶² First review publication, p. I-39.

⁶³ Second review confidential report, pp. I-14, IV-18.

Although the Commission did not receive responses from any respondent interested parties in its third five-year reviews, the domestic interested party provided data regarding capacity, production, exports, etc. of producers of silicomanganese from Kazakhstan in that proceeding.⁶⁴

Although the Commission did not receive responses from any respondent interested parties in these five-year reviews, the domestic interested party provided a list of one possible producer of silicomanganese in Kazakhstan.⁶⁵

Recent developments

Table I-10 presents events in the Kazakh industry since the Commission’s last five-year reviews.

Table I-10
Silicomanganese: Developments in the Kazakh industry

Item	Firm	Event
Expansion	Kazchrome	Kazchrome stated that its Aksu ferroalloys plant is one of the largest ferroalloy production facilities in the world. Producing more than one million metric tons of ferroalloys per year, mostly for export. The plant consists of four “workshops” with 26 submerged-arc electric smelting furnaces which produce ferrochromium, ferrosilicon-chromium, silicomanganese, and ferrosilicon. In July 2019, Kazchrome put a new smelting furnace (No. 64) into operation at the Aksu plant. The commissioning of the furnace marked the completion of the first stage of a large-scale renovation of the plant’s workshop No. 6, its largest smelting unit, and was expected to increase ferroalloy production at the unit by 87 percent by yearend 2024 from that in 2018.
Plant opening/expansion	Asia FerroAlloys LLP	In the third quarter of 2021, Asia FerroAlloys LLP’s Saryarka ferroalloy plant in Karaganda, eastern Kazakhstan, commissioned a new furnace with three other furnaces planned to be put into operation by yearend 2021 with a total ferroalloys production capacity of 62,832 short tons per year. This includes 31,416 short tons per year of silicomanganese. The project was financed by the Development Bank of Kazakhstan JSC.

Source: Kazchrome, “AKSU Ferroalloys Plant,” <https://www.kazchrome.com/en/business-overview/divisions/aksu/>, retrieved June 28, 2024; IMnI Annual Review 2021, January 17, 2022, p. 11; Asia FerroAlloys LLP webpage, https://kdb.kz/en/ajax/project.php?PROJECT_ID=13887&LANG=EN, retrieved June 27, 2024; Asia Ferroalloys LLP, “Another Major Step in the Development of Kazakhstan’s Industry,” August 30, 2021, <https://asiaferroalloys.com/en/another-major-step-in-the-development-of-kazakhstan-s-industry/>.

⁶⁴ Third review publication, p. I-25.

⁶⁵ Domestic interested party’s response to the notice of institution, May 31, 2024, exh. 1.

Exports

Table I-11 presents export data for silicomanganese from Kazakhstan (by export destination in descending order of quantity for 2023). Russia, Germany, and Japan were the leading export destinations in 2023, accounting for 43.5 percent, 13.7 percent, and 12.4 percent, respectively, of total exports from Kazakhstan. Overall, exports in 2023 increased by 52.7 percent from the level in 2022. Exports from Kazakhstan were elevated in 2022 and 2023 primarily owing to a substantial increase in exports to Russia during those years.

Table I-11
Silicomanganese: Quantity of exports from Kazakhstan, by destination and period

Quantity in short tons

Destination market	2018	2019	2020	2021	2022	2023
Russia	0	0	0	0	86,276	74,966
Germany	119	0	0	132	2,605	23,687
Japan	31,987	31,744	15,598	25,240	10,830	21,453
Italy	0	0	0	833	4,601	15,479
Spain	0	0	0	942	536	9,656
Uzbekistan	11,590	2,437	2,358	3,261	4,464	8,780
Czech Republic	0	0	0	0	417	4,467
Netherlands	0	0	0	0	0	3,007
Peru	0	0	0	0	0	1,726
China	0	0	0	0	0	1,726
All other markets	0	747	374	1,954	3,231	7,585
All markets	43,696	34,927	18,329	32,363	112,960	172,531

Source: Global Trade Information Services, Inc., Global Trade Atlas, HS subheading 7202.30, accessed June 14, 2024.

Note: Because of rounding, figures may not add to totals shown.

The industry in Venezuela

Producers in Venezuela

During the final phase of the original investigations, the Commission received foreign producer/exporter questionnaires from one firm, Homos Electricos de Venezuela SA (“Hevensa”), which accounted for *** percent of production of silicomanganese in Venezuela and *** percent of exports from Venezuela to the United States.⁶⁶

Although the Commission did not receive responses from any respondent interested parties in its first five-year reviews, the domestic interested parties provided one additional possible producer of silicomanganese in Venezuela which reportedly started a new furnace for the production of silicomanganese in November 2006.⁶⁷

During the second five-year reviews, the Commission received foreign producer/exporter questionnaires from two firms, which accounted for *** production of silicomanganese in Venezuela.⁶⁸

During the third five-year reviews, the Commission did not receive responses from any respondent interested parties.⁶⁹

Although the Commission did not receive responses from any respondent interested parties in these five-year reviews, the domestic interested party provided a list of two possible producers of silicomanganese in Venezuela.⁷⁰

⁶⁶ Original confidential report, p. VII-6.

⁶⁷ First review publication, p. I-39, I-42.

⁶⁸ Second review confidential report, p. IV-24.

⁶⁹ Third review publication, p. I-27.

⁷⁰ Domestic interested party’s response to the notice of institution, May 31, 2024, exh. 1.

Recent developments

Based on the most recent reports on the manganese market published by the U.S. Geological Survey, there was no silicomanganese production in Venezuela during 2018–22. The last year of silicomanganese production in Venezuela was 2017 when production was 20,580 short tons.⁷¹ Table I-12 presents recent developments in the Venezuelan industry.

Table I-12
Silicomanganese: Developments in the Venezuelan industry

Item	Firm	Event
Plant idling	Ferroglobe	In 2016, Ferroglobe’s wholly owned subsidiary, Ferroatlántica de Venezuela, idled its ferroalloys operations in Puerto Ordaz owing to widespread inflation and difficulties acquiring raw materials. The plant has three furnaces that produced ferromanganese and silicomanganese prior to the idling. Ferroglobe sought to determine the recoverable value of the assets there. Subsequently, Ferroglobe determined that the costs to dispose of the facility exceeded the fair value of the assets, primarily due to political and financial instability in Venezuela. Accordingly, Ferroglobe wrote down the full value of its Venezuelan facilities. The company stated that their inability to generate cash in that market may cause them to default on some obligations in the future, which may result in administrative intervention or other consequences. The company reported that sales were immaterial from 2021–23 and indications were that the plant remained idled as of June 2024.

Source: Ferroglobe’s 2023 Form 20–F, p.18 (as filed); Ferroglobe webpage, “Puerto Ordaz,” <https://www.ferroglobe.com/about-ferroglobe/industrial-footprint/puerto-ordaz>, retrieved June 27, 2024.

⁷¹ U.S. Geological Survey (USGS). Minerals Yearbook: Manganese, 2021 tables-only release, Table 8, February 2, 2023; <https://d9-wret.s3.us-west-2.amazonaws.com/assets/palladium/production/s3fs-public/media/files/myb1-2021-manga-ert.xlsx>; USGS. Minerals Yearbook: Manganese, 2022 tables-only release, Table 7, February 16, 2024; <https://d9-wret.s3.us-west-2.amazonaws.com/assets/palladium/production/s3fs-public/media/files/myb1-2022-manga-ert.xlsx>.

Exports

Table I-13 presents export data for silicomanganese from Venezuela. There have not been any silicomanganese exports from Venezuela since 2021. Turkey was the only export destination in 2021, accounting for all silicomanganese exports that year.

Table I-13
Silicomanganese: Quantity of exports from Venezuela, by destination and period

Quantity in short tons

Destination market	2018	2019	2020	2021	2022	2023
Mexico	387	0	0	0	0	0
Canada	276	6	0	0	0	0
Turkey	0	0	0	4,402	0	0
All other markets	0	0	0	0	0	0
All markets	662	6	0	4,402	0	0

Source: Official global imports statistics from Venezuela (constructed exports) as reported by various national statistical authorities. Global Trade Information Services, Inc., Global Trade Atlas, HS subheading 7202.30, accessed June 14, 2024.

Note: Because of rounding, figures may not add to totals shown.

Third-country trade actions

Two countries have issued antidumping duty orders on ferro-silico-manganese (silicomanganese) from India, which remain in effect. No country has imposed a trade remedy on exports of silicomanganese from Kazakhstan or Venezuela.

On October 18, 2016, Mexico imposed antidumping duties of 40.25 percent on “ferro-silico-manganese” (silicomanganese) imported from India under HS subheadings 7202.30.01 and 9802.00.13. On April 3, 2023, Mexico extended the antidumping duties of 40.25 percent following a review.⁷²

On November 29, 2017, South Korea imposed antidumping duties ranging from 7.48 to 19.06 percent on “ferro-silico-manganese” (silicomanganese) imported from India under HS

⁷² WTO, Committee on Anti-Dumping Practices, Semi-Annual Report Under Article 16.4 of the Agreement, Mexico, Document G/ADP/N/294/MEX/, February 28, 2017; WTO, Committee on Anti-Dumping Practices, Semi-Annual Report Under Article 16.4 of the Agreement, Mexico, Document G/ADP/N/384/MEX, August 28, 2023.

subheading 7202.30. On July 21, 2023, South Korea extended the antidumping duties following a review and modified them to 11.04 percent for all subject imports from India.⁷³

The global market

Table I-14 presents global export data for silicomanganese (by source in descending order of quantity for 2023). India, Ukraine, Malaysia, Norway, Poland, and Kazakhstan were the leading exporters in 2023, accounting for 37.6 percent, 10.8 percent, 9.3 percent, 9.2 percent, 5.3, and 5.1 percent, respectively, of total global exports. The top six exporters accounted for a combined 77.4 percent of global exports in 2023. Subject countries India and Kazakhstan were among the leading exporters of silicomanganese in the world, while Venezuela, in contrast, exported approximately 5,000 short tons during the six-year period of review. Overall silicomanganese exports in 2023 were 12.5 percent lower than the level in 2022.

Table I-14
Silicomanganese: Quantity of global exports by country and period

Quantity in short tons

Exporting country	2018	2019	2020	2021	2022	2023
India	872,334	776,464	765,476	1,127,967	1,358,502	1,268,658
Ukraine	750,877	675,683	501,403	561,144	316,432	365,141
Malaysia	307,596	329,500	303,210	331,220	309,067	313,718
Norway	364,949	317,729	283,306	337,869	350,869	309,592
Poland	32,794	30,005	21,701	34,946	69,600	178,325
Kazakhstan	43,696	34,927	18,329	32,363	112,960	172,531
Georgia	321,703	301,901	276,169	329,694	251,963	171,899
Netherlands	264,377	166,187	132,730	143,738	187,018	136,721
Italy	63,740	70,709	80,727	128,773	159,587	112,946
South Africa	155,618	132,388	121,453	142,439	143,850	95,943
All other exporters	590,827	503,229	522,288	686,938	591,582	244,333
All exporters	3,768,512	3,338,723	3,026,792	3,857,090	3,851,429	3,369,807

Source: Global Trade Information Services, Inc., Global Trade Atlas, HS subheading 7202.30, accessed June 14, 2024.

Note: Because of rounding, figures may not add to totals shown.

⁷³ WTO, Committee on Anti-Dumping Practices, Semi-Annual Report Under Article 16.4 of the Agreement, Republic of Korea, Document G/ADP/N/308/KOR/, December 4, 2018; WTO, Committee on Anti-Dumping Practices, Semi-Annual Report Under Article 16.4 of the Agreement, Republic of Korea, Document G/ADP/N/391/KOR, March 8, 2024.

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 35073, May 1, 2024	Initiation of Five-Year (Sunset) Reviews	https://www.govinfo.gov/content/pkg/FR-2024-05-01/pdf/2024-09424.pdf
89 FR 35247, May 1, 2024	Silicomanganese From India, Kazakhstan, and Venezuela; Institution of Five-Year Reviews	https://www.govinfo.gov/content/pkg/FR-2024-05-01/pdf/2024-09363.pdf

APPENDIX B
COMPANY-SPECIFIC DATA

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APPENDIX C

SUMMARY DATA COMPILED IN PRIOR INVESTIGATIONS

Table C-1
Silicomanganese: Summary data concerning the U.S. market, 1998-2000, January-September 2000, and January-September 2001

* * * * *

Table C-1

Silicomanganese: Summary data concerning the U.S. market, 2010-12, January to March 2012, and January to March 2013

(Quantity=short tons; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per short ton; Period changes=percent--exceptions noted)

	Report data							Period changes							
	Calendar year				January to March			Calendar year				Jan-Mar			
	2007	2008	2009	2010	2011	2012	2012	2013	2007-12	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
U.S. consumption quantity:															
Amount.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Producers' share (1).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Importers' share (1):															
India.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Kazakhstan.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Venezuela.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Subtotal, subject.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
All others sources, nonsubject.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Total imports.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
U.S. consumption value:															
Amount.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Producers' share (1).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Importers' share (1):															
India.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Kazakhstan.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Venezuela.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Subtotal, subject.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
All others sources, nonsubject.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Total imports.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
U.S. importers' U.S. shipments of Imports from:															
India:															
Quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Value.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Unit value.....	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Ending inventory quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Kazakhstan:															
Quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Value.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Unit value.....	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Ending inventory quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Venezuela:															
Quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Value.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Unit value.....	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Ending inventory quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Subtotal, subject sources:															
Quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Value.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Unit value.....	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Ending inventory quantity.....	0	0	0	0	0	0	0	0	(2)	(2)	(2)	(2)	(2)	(2)	(2)
All other sources:															
Quantity.....	445,439	365,423	172,392	274,070	309,964	318,239	93,210	82,999	(28.6)	(18.0)	(52.8)	59.0	13.1	2.7	(11.0)
Value.....	572,547	726,203	176,641	335,694	358,457	388,576	108,443	88,118	(32.1)	26.8	(75.7)	90.0	6.8	8.4	(18.7)
Unit value.....	\$1,285.35	\$1,987.29	\$1,024.65	\$1,224.85	\$1,156.45	\$1,221.02	\$1,163.43	\$1,061.68	(5.0)	54.6	(48.4)	19.5	(5.6)	5.6	(8.7)
Ending inventory quantity.....	102,116	124,093	62,453	82,838	103,256	91,392	86,106	92,366	(10.5)	21.5	(49.7)	32.6	24.6	(11.5)	7.3
Total imports:															
Quantity.....	445,439	365,423	172,392	274,070	309,964	318,239	93,210	82,999	(28.6)	(18.0)	(52.8)	59.0	13.1	2.7	(11.0)
Value.....	572,547	726,203	176,641	335,694	358,457	388,576	108,443	88,118	(32.1)	26.8	(75.7)	90.0	6.8	8.4	(18.7)
Unit value.....	\$1,285.35	\$1,987.29	\$1,024.65	\$1,224.85	\$1,156.45	\$1,221.02	\$1,163.43	\$1,061.68	(5.0)	54.6	(48.4)	19.5	(5.6)	5.6	(8.7)
Ending inventory quantity.....	102,116	124,093	62,453	82,838	103,256	91,392	86,106	92,366	(10.5)	21.5	(49.7)	32.6	24.6	(11.5)	7.3
U.S. producers:															
Average capacity quantity.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Production quantity.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Capacity utilization (1).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
U.S. shipments:															
Quantity.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Export shipments:															
Quantity.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Ending inventory quantity.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Inventories/total shipments (1).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Production workers.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Hours worked (1,000s).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Wages paid (\$1,000).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Productivity (short tons per hour).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit labor costs.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Net Sales:															
Quantity.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Value.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit value.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Cost of goods sold (COGS).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Gross profit of (loss).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
SG&A expenses.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Operating income or (loss).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Capital expenditures.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit COGS.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit SG&A expenses.....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Unit operating income or (loss).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
COGS/sales (1).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Operating income or (loss)/sales (1).....	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***

(1) Report data are in percent and period changes are in percentage points.

(2) Undefined.

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

APPENDIX D

PURCHASER QUESTIONNAIRE RESPONSES

As part of their response to the notice of institution, interested parties were asked to provide a list of three to five leading purchasers in the U.S. market for the domestic like product. A response was received from domestic interested parties, and it provided contact information for the following five firms as top purchasers of silicomanganese: ***. Purchaser questionnaires were sent to these five firms and no firms submitted a response to the Commission's request for information.

