Air Compressors from China, Malaysia, and Vietnam

Investigation Nos. 701-TA-794–796 and 731-TA-1790–1792 (Preliminary)

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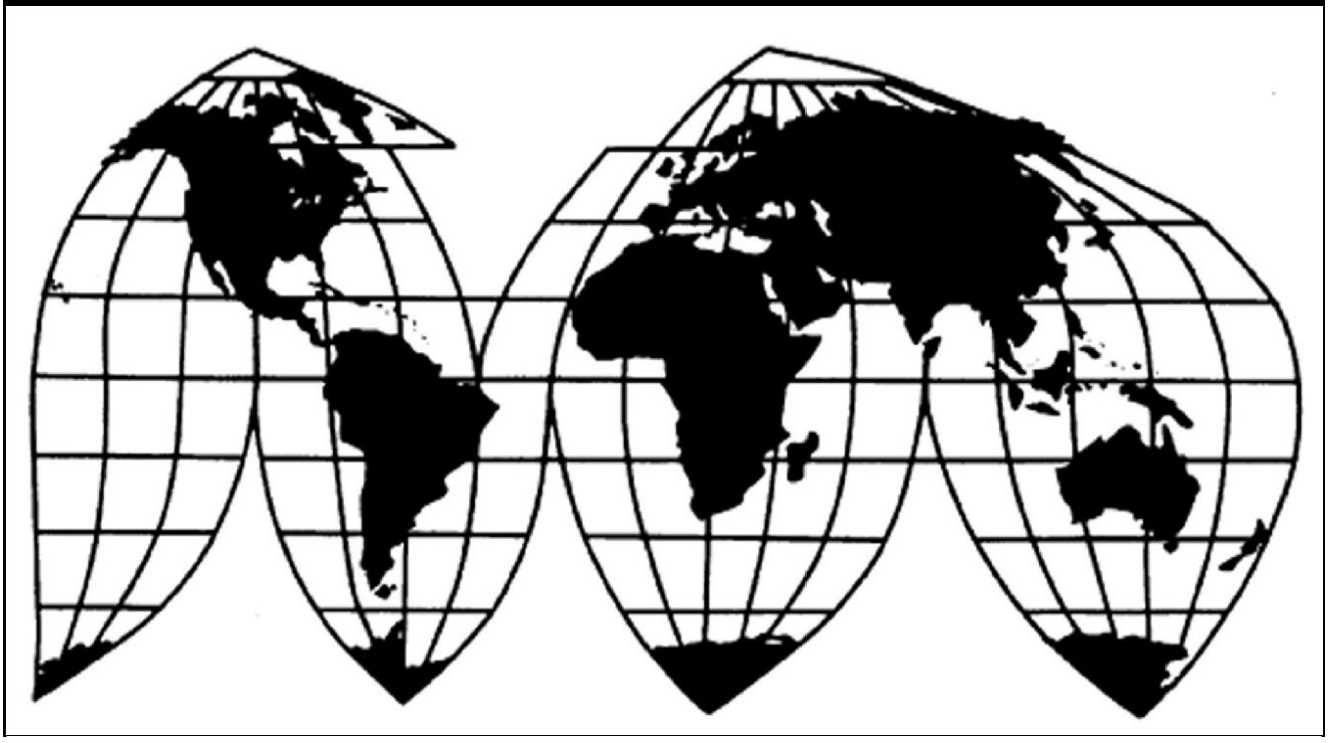
U.S. International Trade Commission



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Note: Information that would reveal confidential operations of individual firms may not be published. Such information is identified by brackets ([ ]) in confidential reports and is deleted and replaced with asterisks (***) in public reports. Zeroes, null values, and undefined calculations are suppressed and shown as em dashes (—) in tables. If using a screen reader, we recommend increasing the verbosity setting.

UNITED STATES INTERNATIONAL TRADE COMMISSION

Investigation Nos. 701-TA-794–796 and 731-TA-1790–1792 (Preliminary)

Air Compressors from China, Malaysia, and Vietnam

DETERMINATIONS

On the basis of the record[1] developed in the subject investigations, the United States International Trade Commission ("Commission") determines, pursuant to the Tariff Act of 1930 ("the Act"), that there is a reasonable indication that an industry in the United States is materially injured by reason of imports of air compressors from China, Malaysia, and Vietnam, provided for in subheading 8414.80.16 of the Harmonized Tariff Schedule of the United States, that are alleged to be sold in the United States at less than fair value ("LTFV") and alleged to be subsidized by the governments of China, Malaysia, and Vietnam.[2]

COMMENCEMENT OF FINAL PHASE INVESTIGATIONS

Pursuant to section 207.18 of the Commission's rules, the Commission also gives notice of the commencement of the final phase of its investigations. The Commission will issue a final phase notice of scheduling, which will be published in the *Federal Register* as provided in § 207.21 of the Commission's rules, upon notice from the U.S. Department of Commerce ("Commerce") of affirmative preliminary determinations in the investigations under §§ 703(b) or 733(b) of the Act, or, if the preliminary determinations are negative, upon notice of affirmative final determinations in those investigations under §§ 705(a) or 735(a) of the Act. Parties that filed entries of appearance in the preliminary phase of the investigations need not enter a separate appearance for the final phase of the investigations. Any other party may file an entry of appearance for the final phase of the investigations after publication of the final phase notice of scheduling. Industrial users, and, if the merchandise under investigation is sold at the retail level, representative consumer organizations have the right to appear as parties in Commission antidumping and countervailing duty investigations. The Secretary will prepare a public service list containing the names and addresses of all persons, or their representatives, who are parties to the investigations. As provided in section 207.20 of the Commission's rules,

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

[2] 91 FR 31406 and 31425 (May 27, 2026).

the Director of the Office of Investigations will circulate draft questionnaires for the final phase of the investigations to parties to the investigations, placing copies on the Commission's Electronic Document Information System (EDIS, https://edis.usitc.gov), for comment.

BACKGROUND

On April 30, 2026, MAT Industries, LLC, Long Grove, Illinois filed petitions with the Commission and Commerce, alleging that an industry in the United States is materially injured or threatened with material injury by reason of subsidized and LTFV imports of air compressors from China, Malaysia, and Vietnam. Accordingly, effective April 30, 2026, the Commission instituted countervailing and antidumping duty investigation Nos. 701-TA-794–796 and 731-TA-1790–1792 (Preliminary).

Notice of the institution of the Commission's investigations and of a public conference 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* of May 5, 2026 (91 FR 24294). The Commission conducted its conference on May 21, 2026. All persons who requested the opportunity were permitted to participate.

Views of the Commission

Based on the record in the preliminary phase of these investigations, we determine that there is a reasonable indication that an industry in the United States is materially injured by reason of imports of certain stationary and portable air compressors ("air compressors") from China, Malaysia, and Vietnam that are allegedly sold in the United States at less than fair value and subsidized by the governments of China, Malaysia, and Vietnam.

I. The Legal Standard for Preliminary Determinations

The legal standard for preliminary antidumping and countervailing duty determinations requires the Commission to determine, based upon the information available at the time of the preliminary determinations, whether there is a reasonable indication that a domestic industry is materially injured or threatened with material injury, or that the establishment of an industry is materially retarded, by reason of the allegedly unfairly traded imports.[1] In applying this standard, the Commission weighs the evidence before it and determines whether "(1) the record as a whole contains clear and convincing evidence that there is no material injury or threat of such injury; and (2) no likelihood exists that contrary evidence will arise in a final investigation."[2]

II. Background

The petitions in these investigations were filed by MAT Industries, LLC ("MAT" or "Petitioner"),[3] a U.S. producer of air compressors. Petitioner appeared at the staff conference

[1] 19 U.S.C. §§ 1671b(a), 1673b(a) (2000); *see also American Lamb Co. v. United States*, 785 F.2d 994, 1001-04 (Fed. Cir. 1986); *Aristech Chem. Corp. v. United States, 2*0 CIT 353, 354-55 (1996). No party argues that the establishment of an industry in the United States is materially retarded by the allegedly unfairly traded imports.

[2] *American Lamb Co*., 785 F.2d at 1001; *see also Texas Crushed Stone Co. v. United States*, 35 F.3d 1535, 1543 (Fed. Cir. 1994).

[3] Petitions for the Imposition of Antidumping and Countervailing Duties, EDIS Doc. 878164 (April 30, 2026) ("Petitions"). U.S. producer MAT also refers to itself as "MIND" to describe its air compressor operations, and to distinguish these operations from other out-of-scope production under common ownership of MAT Holdings, Inc. Confidential Report, Memorandum INV-YY-083 (June 8, 2026) ("CR") at 6.1 n.2; Public Report, *Air Compressors from China, Malaysia, and Vietnam*, Inv. Nos. 701-TA-794-796 and 731-TA-1790-1792 (Preliminary), USITC Pub. 5756 (June 2026) ("PR") at 6.1 n.2. Here, "MAT" or "Petitioner" refers to the firm's in-scope air compressor operations.

with counsel and submitted a postconference brief.[4] No respondents participated in the preliminary phase of these investigations.[5]

Data Coverage. U.S. industry data in the staff report are based on the questionnaire responses of three firms accounting for an estimated *** percent of U.S. production of air compressors in 2025.[6] U.S. import data are based on the questionnaire responses from 20 U.S. importers, accounting for an estimated 60.0 percent of the U.S. imports from subject sources, 2.5 percent of U.S. imports from nonsubject sources, and 45.9 percent of U.S. imports from all sources in 2025.[7] The Commission received responses to its questionnaires from two producers/exporters/resellers of subject merchandise in China, whose exports accounted for *** percent of the imports of subject merchandise from China to the United States and approximately *** percent of production of air compressors in China in 2025.[8] The Commission also received a response to its questionnaires from two producers/exporters/resellers of subject merchandise in Vietnam, whose exports accounted for *** percent of the imports of subject merchandise from Vietnam to the United States in 2025.[9] No responses to the Commission's foreign producer/exporter questionnaire were received from producers/exporters/resellers of air compressors in Malaysia.

III. Domestic Like Product

In determining whether there is a reasonable indication that an industry in the United States is materially injured or threatened with material injury by reason of imports of the subject merchandise, the Commission first defines the "domestic like product" and the "industry."[10] 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

[4] Petitioner's Postconference Brief, EDIS Doc. 883336 (May 27, 2026) ("Pet. Postconference Br.") at 1.

[5] The Commission received a joint entry of appearance and APO application from respondents FNA Compressor, Inc., FNA (Zhejiang) Co. Ltd., and California Air Tools, Inc., however, no respondents participated at the conference or filed a postconference brief. Entry of Appearance for Respondent Interested Parties, EDIS Doc. 882649 (May 19, 2026).

[6] CR/PR at 1.4 & 3.1.

[7] CR/PR at 4.1 & Table 4.1. The share of U.S. imports accounted for in U.S. importers' questionnaire responses is derived from a comparison of reported volumes in the questionnaires to adjusted official U.S. import statistics from Commerce using statistical reporting numbers 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685 (which contain out-of-scope merchandise). *Id.* at Table 4.1 (Note).

[8] CR/PR at 7.3 & Table 7.1.

[9] CR/PR at 7.3 & Table 7.1.

[10] 19 U.S.C. § 1677(4)(A).

those producers whose collective output of a domestic like product constitutes a major proportion of the total domestic production of the product."[11] 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."[12]

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.[13] 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."[14] The Commission then defines the domestic like product in light of the imported articles Commerce has identified.[15] 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 uses" on a case-by-case basis.[16] No single factor is dispositive, and the Commission may consider other factors it deems relevant based on the facts of a particular investigation.[17] The

[11] 19 U.S.C. § 1677(4)(A).

[12] 19 U.S.C. § 1677(10).

[13] 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).

[14] *Cleo Inc. v. United States*, 501 F.3d 1291, 1298 (Fed. Cir. 2007); *see also Hitachi Metals, Ltd. v. United States*, Case No. 19-1289, slip op. at 8-9 (Fed. Cir. Feb. 7, 2020) (the statute requires the Commission to start with Commerce's subject merchandise in reaching its own like product determination).

[15] *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).

[16] *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).

[17] *See*, *e.g.*, S. Rep. No. 96-249 at 90-91 (1979).

Commission looks for clear dividing lines among possible like products and disregards minor variations.[18] The Commission may, where appropriate, include domestic articles in the domestic like product in addition to those described in the scope.

In its notice of initiation, Commerce defined the imported merchandise within the scope of these investigations as follows:

> The merchandise covered by these investigations consists of certain stationary and portable air compressors, whether electric, gas, or battery powered, including electric motor and gasoline engine powered air compressors with either oil free or oil lubricated reciprocating pumps, and with an integrated pressure vessel that ranges in size from 1 to 80 gallons. The compressors may be either direct drive or belt driven.
>
> Direct drive air compressors included in the scope have a motor connected directly to the compressor element. Belt driven air compressors included in the scope have a motor connected to the compressor crankshaft with a belt. Direct drive air compressors are more often portable but can be stationary, while belt driven air compressors are either portable or stationary.
>
> Covered air compressors have a power level designation between 373 watts (0.5 HP) and 22.37 kilowatts (30 HP). Specifically, portable air compressors often range in power from 0.5HP (373 watts) to 15HP (11.19KW). Reciprocating stationary air compressors range in power from 0.5HP (373 watts) to 25HP (18.64KW). However, a portable or stationary air compressor with a different power level, within the range of 373 watts to 22.37 KW, and otherwise meeting the language of the scope, is covered by the scope. The scope includes only certain reciprocating (piston) compressors, which use a piston moving back and forth in a cylinder to compress the air. The scope also includes unfinished compressors exported from the subject countries. Subject merchandise also includes finished and unfinished compressors that are further processed in a third country or in the United States, including, but not limited to, assembly or any other processing that would not otherwise remove the merchandise from the scope of these investigations if performed in the country of manufacture of the in-scope air compressors. The additional parts used to

[18] *See*, *e.g.*, *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.").

complete "unfinished compressors" in a third country are subject to the scope of these investigations.

For the purposes of this scope, "unfinished compressors" are compressors which require additional fabrication such as labeling, and packaging, and kitting operations adding accessories.

Specifically included in the scope are compressors which are imported as part of a package with accessories or other products, or kit. Such accessories include but are not limited to hoses, fittings, tool kits, oils, nail guns, pneumatic paint sprayers, air ratchet wrenches, air grease guns, air drills, air hammers, air sanders, air inflators, and air impact drivers. If such accessories or other products are imported separately from the air compressor, such products are not subject to the scope of these investigations.

Specifically excluded from the scope are AC, DC, and battery powered inflators without an integrated air tank or air reservoir that have an output of 1 CFM or less.

The scope excludes rotary compressors. Types of rotary compressors excluded from the scope are rotary screw, rotary vane, and scroll compressors. The scope also excludes dynamic compressors. Types of dynamic compressors excluded from the scope are centrifugal compressors and axial compressors, where rotating impellers or blades compress air.

The in-scope stationary air compressors are classified under subheadings 8414.80.1615, 8414.80.1625, and 8414.80.1635 of the Harmonized Tariff Schedule of the United States (HTSUS). The in-scope portable air compressors are classified under subheading 8414.80.1685 of the HTSUS. Although the HTSUS subheadings are provided for convenience and customs purposes, the written description of the covered merchandise is dispositive.[19]

[19] *Stationary and Portable Air Compressors from the People's Republic of China, Malaysia, and the Socialist Republic of Vietnam: Initiation of Less-Than-Fair-Value Investigations*, 91 Fed. Reg. 31,406 (Dep't of Commerce May 27, 2026) ("*AD Initiation Notice*"); *Stationary and Portable Air Compressors from the People's Republic of China, Malaysia, and the Socialist Republic of Vietnam: Initiation of Countervailing Duty Investigations*, 91 Fed. Reg. 31,425 (Dep't of Commerce May 27, 2026) ("*CVD Initiation Notice*").

Air compressors are machines that convert power from an electric, gas, or diesel engine into potential energy that is stored in pressurized air within a pressure vessel.[20] There are four main types of air compressors: reciprocating, rotary screw, axial, and centrifugal.[21] However, only reciprocating air compressors, which use the back-and-forth motion of reciprocating compressor pistons to increase air pressure, are covered under the scope of these investigations.[22] Air compressors are made primarily from steel and aluminum and can either be stationary or portable and may be direct-driven or belt-driven.[23]

The scope encompasses air compressors with a power level designation between 0.5 HP (0.373 kW) to 30 HP (22.39 kW).[24] Stationary air compressors, which typically have a power range of 0.5HP to 25HP (0.37kW to 16.64 kW), are heavier assemblies that are built in place and are usually hard-wired to building power and floor-mounted in a building or mounted to a service vehicle or trailer.[25] Portable air compressors, which typically have a power range of 0.5HP to 15HP, are compact and designed for transportability and have a flow rate under 0.57 cubic meters per minute.[26]

Direct drive air compressors have a motor that is directly connected on the drive shaft to the compressor element and are more often portable.[27] Belt-driven air compressors have a motor that is connected to the compressor crank shaft with a belt, can be either stationary or portable, and are often used in high-pressure applications or when pressure requirements change frequently.[28]

A. Petitioner's Arguments

Petitioner argues that the Commission should define a single domestic like product consisting of air compressors coextensive with the scope.[29] It contends that all domestically produced air compressors within the scope have similar physical characteristics and uses, channels of distribution, common manufacturing facilities, production processes, and employees, customer and producer perceptions, are broadly interchangeable, and are sold at three broad price tiers that reflect performance differences, but that nonetheless overlap

[20] CR/PR at 1.11.
[21] CR/PR at 1.11.
[22] CR/PR at 1.11.
[23] CR/PR at 1.11.
[24] CR/PR at 1.6; Pet. Postconference Br. at 2.
[25] CR/PR at 1.11; Pet. Postconference Br. at 2.
[26] CR/PR at 1.11; Pet. Postconference Br. at 2.
[27] CR/PR at 1.12.
[28] CR/PR at 1.12.
[29] Pet. Postconference Br. at 2-13; Petitions, volume I at 7-16, 33.

meaningfully.[30] While it characterizes air compressors as having common core components constructed from the same mix of materials and other shared characteristics, Petitioner acknowledges that stationary and portable air compressors differ in transportability and that this affects the type of work sites that stationary and portable air compressors are commonly used.[31]

B. Analysis

Based on the current record, we define a single domestic like product consisting of all domestically produced air compressors coextensive with Commerce's scope for purposes of the preliminary phase of these investigations.

Physical Characteristics and Uses. The record indicates that all air compressors[32] share the same core components (a compressor pump; a motor, engine, or battery; intake and exhaust valves; an air storage tank; a cooling system; a pressure system; a safety valve; and a control panel) and are constructed primarily of steel and aluminum (consisting of approximately 75 percent steel, ten percent aluminum, ten percent rubber and plastics, and five percent copper by weight).[33] Although different models of air compressors vary in terms of power, power source, and pressure vessel capacity, and stationary and portable air compressors differ in terms of transportability, all domestically produced air compressors rely on the same reciprocating technology, which allows them to compress air, and are used in the same six sectors (construction, commercial business, farming, light manufacturing, medical facilities, and distribution).[34] The record also indicates that the design and manufacturing of air compressors is governed by common standards in the American Society of Mechanical Engineers ("ASME") Boiler and Pressure Vessel Code.[35]

Manufacturing Facilities, Production Processes, and Employees. The record indicates that all types of air compressors meeting the scope definition share the same manufacturing facilities and production employees.[36] Additionally, all domestically produced air compressors

[30] Pet. Postconference Br. at 2-6.

[31] Pet. Postconference Br. at 3-4.

[32] In our analysis, we use the term "air compressors" to refer to air compressors coextensive with the scope: reciprocating air compressors with the power level designations and other characteristics defined by the scope. *See* CR/PR at 1.6-1.7. Where we discuss other types of air compressors not covered by the scope, we refer to those products using other terms.

[33] CR/PR at 1.11; Pet. Postconference Br. at 2.

[34] CR/PR at 1.13; Pet. Postconference Br. at 2-3.

[35] CR/PR at 2.1; *see also* Pet. Postconference Br. at Exh. 1 pp. 23-24.

[36] CR/PR at 1.13; Pet. Postconference Br. at 4.

meeting the scope definition are manufactured using the same general production process.[37] Petitioner contends that its production processes are very efficient for changing from one air compressor product to another and that it often will produce ten to 15 different models on the same line on the same day.[38]

Channels of Distribution. U.S. producers sell all types of air compressors through the same channels of distribution, primarily to retail/rental companies, with smaller quantities also sold to distributors.[39]

Interchangeability. The record indicates that although air compressors are broadly interchangeable in their general use of providing power from pressurized air, there may be limits in such interchangeability between individual models depending on the specific requirements of end users regarding power and portability. Petitioner acknowledges that air compressor products in different quality segments (e.g., personal use versus professional use) may focus on certain applications and have very different run times, and that as a result an end user would not typically substitute an air compressor at the bottom of the range for the top. Nonetheless, it contends that there is generally high interchangeability among products closer in quality across the range of in-scope products, and that end users choose their air compressor products based on how they want their needs met.[40] Petitioner also acknowledges that the portable and stationary compressor market segments focus on specific applications and are typically used in different settings,[41] but it contends that there is no clear dividing line between

[37] CR/PR at 1.13-1.14; Petition, volume I at 8-10. The production process for air compressors includes sourcing raw materials, making the pressure vessel from steel, welding forged fittings to the pressure vessel, conducting burst and leak tests on the completed pressure vessels, and then assembling the air compressor by attaching brackets to the pressure vessel and installing wheels and rubber feet (where appropriate for portable units), the air compressor pump, and the air compressor motor onto those brackets. The final stage of the manufacturing process involves adding plumbing, control components, and additional hardware to the final compressor. *Id*.

[38] Pet. Postconference Br. at 4.

[39] CR/PR at Table 2.4; Pet. Postconference Br. at 5-6.

[40] Pet. Postconference Br. at 3-4; Conference Tr. at 93 (Hite) ("…{A} consumer grade product can perform the task, it's interchangeable, but you're going to use, consume its life at a faster rate than you would a professional grade product"). As an illustration of this point, Petitioner contends that a "4-gallon air compressor will perform the same work as an 8 or 10 or 20 … but it may not perform it as well" and thus, though "in terms of end use, it will cover the customer's needs, it's a matter of user choice on what they prefer and how they want their needs met." Conference Tr. at 48 (Hite). Further, Petitioner contends that although air compressors of shorter and longer run times can perform the same tasks, depending on end user mindset/preferences, one user might decide to "purchase at the low end of the market and replace {their air compressor} more often" and another might decide instead to "purchase {at the higher end} once and it lasts {them} a decade." Conference Tr. at 47-48 (Hite).

[41] Petitions, volume I at 14.

these various types of air compressors given their shared purpose and that they can be used interchangeably in many applications.[42]

Producer and Customer Perceptions. According to Petitioner, customers and producers perceive all air compressors meeting the scope definition to be a single product category given that they are sold side by side at retailers, appear alongside one another within the same category and filter set, and that the Bureau of Industry and Security ("BIS") treats all air compressors as a single product class.[43]

Price. Petitioner contends that all air compressors are sold in three broad price tiers—opening price point, mid-range, and upper end—that reflect performance differences and overlap meaningfully with no clear dividing lines.[44] Petitioner further contends that portable air compressors are sold at prices of approximately $129 to $1,500, and stationary air compressors at approximately $500 to $15,000, with overlap in the mid-range tier.[45] The pricing data indicate that quarterly prices for domestically produced in-scope air compressors overlapped with respect to two products, but otherwise showed different ranges of prices between different models and sizes of air compressors during the 2023 to 2025 period of investigation ("POI").[46]

Conclusion. For the purposes of the preliminary phase of these investigations, the Commission defines a single domestic like product consisting of all domestically produced air compressors coextensive with Commerce's scope. The record indicates that all air compressors are made primarily of the same raw materials, generally have the same physical characteristics, and can be used interchangeably to perform many of the same tasks. Additionally, all air compressors are made through the same production process, are produced in the same facilities by the same employees, are used in the same range of end uses, are sold to retailers and distributors, and are perceived to be a single product category by market participants. While individual models differ in specific characteristics such as product run time, power, and

[42] Pet. Postconference Br. at 3-4; Petitions, volume I at 15.

[43] Pet. Postconference Br. at 5-6; Petitions, volume I at 15. Petitioner contends that BIS approved a U.S. producer request that finished air compressors classified under HTSUS 8414.80.16 be included as a derivative product subject to Section 232 steel and aluminum tariffs, thus treating all air compressors as a single product class. *Id.*

[44] Pet. Postconference Br. at 6.

[45] Pet. Postconference Br. at 6.

[46] CR/PR at Table 5.14. During the POI, domestic prices for product 2 (a consumer grade portable product), which ranged between $*** and $***, and product 4 (a professional grade portable product), which ranged between $*** and $***, exhibited overlap. For other products, pricing product 1 (a consumer grade portable product) was priced between $*** and $***, pricing product 3 (a professional grade stationary product) was priced between $*** and $***, and pricing product 5 (a professional grade portable product) was priced between $*** and $***. *Id.*

transportability, such differences exist along a continuum in which there is overlap between many different models. Similarly, the record indicates that prices for air compressors exist along a continuum, or within three broad ranges described by Petitioner, but that there is overlap in prices between models with similar specifications.

For these reasons, and in the absence of argument to the contrary, we define a single domestic like product consisting of all domestically produced air compressors coextensive with the scope.[47]

IV. 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."[48] 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.

[47] Petitioner also contends that the Commission should not expand the domestic like product definition to include two out-of-scope products: rotary and dynamic air compressors ("RDACs") or inflators. It specifically claims that domestically produced RDACs, inflators, and air compressors do not have similar physical characteristics and uses, channels of distribution, common manufacturing facilities, production processes, and employees, customer, and producer perceptions, are not interchangeable, and are sold at markedly different price ranges with no overlap. Pet. Postconference Br. at 6-10, 10-13. In addition, Petitioner claims that there is no domestic production of inflators. *Id.* at 11-12; *Id.* at Exh. 1 p. 5; Conference Tr. at 104; 105 (DiPietro, Hite). The Commission cannot define the domestic like product as a product not produced in the United States given our obligation under the statute to determine which U.S.-made products are like or most similar to the imports under investigation. *See, e.g., Certain Lined Paper School Supplies from China, India, and Indonesia,* Inv. Nos. 701-TA-442 and 731-TA-1095-1097 (Preliminary), USITC Pub. 3811 (Oct. 2005) at 12 n.50; *Ferrovanadium from China and South Africa,* Inv. Nos. 731-TA-986-987 (Preliminary), USITC Pub. 3484 (Jan. 2002) at 6 & n.26. Based on the limited information in these preliminary phase investigations, there is no indication that the domestic like product definition should include RDACs or inflators. In any final phase of these investigations, parties wishing to raise domestic like product issues should identify those issues in their comments on the draft questionnaires so that the Commission can identify new information that may need to be collected. 19 C.F.R. § 207.20(b).

[48] 19 U.S.C. § 1677(4)(A).

These investigations raise related party issues.[49] 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.[50] Exclusion of such a producer is within the Commission's discretion based upon the facts presented in each investigation.[51]

U.S. producer *** is subject to possible exclusion under the related parties provision because it is related to a foreign producer and exporter of subject merchandise, ***, and it also

[49] Petitioner claims that some U.S. producers do not fabricate pressure vessels or other major components in-house but rather source these components from other firms and assemble completed air compressors. It argues these firms should nonetheless be considered part of the domestic industry because these firms perform substantial domestic operations such as welding, powder coating, painting, pressure testing, pump assembly, finishing, engineering, and performance testing that qualify them as domestic producers of the domestic like product. CR at 3.1 n.1; Pet. Postconference Br. at Exh. 1 pp. 4-8; Conference Tr. at 34-35 (Hite). The record of these preliminary phase investigations contains limited information about the production activities of the firms Petitioner has claimed are assemblers of air compressors. Therefore, for the purposes of these preliminary phase investigations, we consider that all responding U.S. producers engage in sufficient production-related activities. We, however, intend to investigate this issue further in any final phase of these investigations.

[50] *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).

[51] 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);

(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.

imported subject merchandise.[52] U.S. producer *** is subject to possible exclusion under the related parties provision because it imported subject merchandise.[53] [54]

A. Petitioner's Arguments

Petitioner argues that the Commission should define a single domestic industry consisting of all U.S. firms that produce air compressors as described in the scope.[55] At the staff conference, Petitioner contended that it does not anticipate there being any arguments that any domestic producers should be excluded pursuant to the related party provision.[56]

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[52] CR/PR at 3.2 & Tables 3.2, 3.13, & 7.2; Petitions, volume I at 6-7, n.13. ***. CR/PR at 3.2 & Table 3.2.

[53] CR/PR at Table 3.14.

[54] U.S. producer *** did not itself import subject merchandise and is not related to any exporter or U.S. importer of subject merchandise, but it purchased imports of subject merchandise during the POI. CR/PR at Table 3.16. A domestic producer may be subject to the related parties provision if it controls a purchaser of large volumes of subject imports. *See* SAA at 858. The Commission has found such control to exist, for example, where the domestic producer's purchases were responsible for a predominant proportion of an importer's subject imports and the importer's subject imports were substantial. *See, e.g., Iron Construction Castings from Brazil, Canada, and China,* Inv. Nos. 701-TA-248, 731-TA-262-263, 265 (Fourth Review), USITC Pub. 4655 (Dec. 2016) at 11; *Chlorinated Isocyanurates from China and Spain,* Inv. Nos. 731-TA-1082-1083 (Second Review), USITC Pub. 4646 (Nov. 2016) at 12. *** purchased *** units of subject merchandise from *** imported by *** in 2023 and *** units in 2025. CR/PR at Table 3.16. The ratio of its purchases of U.S. imports from *** imported by *** relative to ***'s U.S. imports from *** was *** percent in 2023 and *** percent in 2025. *Id*. The ratio of ***'s U.S. imports from *** relative to overall U.S. imports from *** was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id*. Given the low volume and ratio of these purchases relative to *** imports of subject merchandise, we find *** did not control *** through its purchases, and that the firm is therefore not a related party for purposes of these preliminary determinations.

Commissioner Kearns believes that the Commission inappropriately limits the discretion Congress gave to it by focusing on whether *** accounted for a predominant share of *** subject imports, as other factors may be informative of the firm's related party status. Thus, when a U.S. producer is purchasing subject imports, his view is that it is better to begin by determining whether exclusion of the firm would be appropriate in the first place, assuming the party were found to be related. Commissioner Kearns finds that appropriate circumstances do not exist to exclude *** from the domestic industry because *** share of total U.S. production (ranging from *** percent to *** percent during the POI) and ratio of subject imports to domestic production (ranging from *** percent to *** percent during the POI) are too small for its inclusion in the domestic industry to skew industry data in a way that would mask injury to the industry. CR/PR at Tables 3.7 & 3.16.

[55] Petitions, volume I at 16-17.

[56] Conference Tr. at 42-43 (Lutz).

B. Analysis

. *** was the ***of the three responding U.S. producers in 2025, accounting for *** percent of U.S. production of air compressors in this period. It *** the petitions.[57] It imported *** units of subject merchandise in 2023, *** units in 2024, and *** units in 2025.[58] The ratio of its subject imports to its domestic production was *** percent in 2023, *** percent in 2024, and *** percent in 2025.[59] *** reported that it imported "."[60] It reported capital expenditures of $*** in 2023, $*** in 2024, and $*** in 2025.[61] ***'s financial performance was *** than the financial performance reported by responding domestic producers as a whole.[62]

Given that *** is *** domestic producer, with a low ratio of subject imports to domestic production throughout the POI, and that it had increasing capital expenditures and ***, its primary interest appears to be in domestic production rather than in importation.[63] There is also no indication on the record that it was shielded from subject import competition by virtue of its imports or *** or that its domestic production operations benefitted from its subject imports such that its inclusion in the domestic industry would skew industry data in a way that would mask injury. Indeed, *** asserts that it imported subject merchandise out of necessity as a means of remaining competitive with subject imports in the U.S. market.[64] In light of these considerations, and in the absence of any contrary argument, we find that appropriate circumstances do not exist to exclude *** from the domestic industry.

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[57] CR/PR at Table 3.1.

[58] CR/PR at Table 3.13; ***'s Importer Questionnaire, EDIS Doc. *** at 13, 19.

[59] CR/PR at Table 3.13.

[60] CR/PR at Table 3.15.

[61] CR/PR at Table 6.5.

[62] The ratio of operating income to net sales reported by responding domestic producers as a whole was *** percent in 2023, *** percent in 2024, and *** percent in 2025. CR/PR at Table 6.3. By comparison, ***'s ratio of operating income to net sales was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.*

The ratio of net income to net sales reported by responding domestic producers as a whole was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.* By comparison, ***'s ratio of net income to net sales was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.*

[63] In Commissioner Kearns' view, ***'s low ratio of subject imports to domestic production more importantly indicates that its inclusion in the domestic industry would not skew industry data in a way that would mask injury to the industry.

[64] According to ***, it imported air compressors from *** that ***.

. *** was the *** of the three responding U.S. producers in 2025, accounting for *** percent of air compressors production in this period.[65] It *** the petitions.[66] It imported *** units of subject merchandise in 2023, *** units in 2024, and *** units in 2025.[67] The ratio of its subject imports to its domestic production was *** in 2023, *** in 2024, and *** in 2025.[68] *** indicated that it imported to achieve "."[69] *** reported capital expenditures of $*** in 2023, $*** in 2024, and $*** in 2025.[70] Its financial performance was *** than the financial performance reported by responding domestic producers as a whole, leading up to its *** from the industry in 2025.[71]

***'s ratio of subject imports to domestic production was low in 2023 and 2024, it reported *** imports by the end of POI, and it had *** leading up to it ***.[72] Given this, there is no indication that ***'s domestic production operations benefitted from its subject imports, or were otherwise shielded from subject import competition, such that its inclusion in the domestic industry would skew industry data in a way that would mask injury. In light of these considerations, 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 as all domestic producers of air compressors.

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[65] CR/PR at Table 3.1.

[66] CR/PR at Table 3.1.

[67] CR/PR at Table 3.14; ***'s U.S. Importer Questionnaire, EDIS Doc. *** at 13. *** also purchased *** units of subject merchandise from *** imported by *** in 2024 and *** units in 2025. *Id.* at 3.15. *** indicated that it purchased imports from *** that it "***." *Id.* at Table 3.18.

[68] CR/PR at Table 3.14. *** also purchased *** units of subject merchandise from *** imported by *** in 2024 and *** units in 2025. *Id.* at Table 3.15. *** indicated that it purchased imports from *** that it "***." *Id.* at Table 3.18.

[69] CR/PR at Table 3.15.

[70] CR/PR at Table 6.5.

[71] The ratio of operating income to net sales reported by responding domestic producers as a whole was *** percent in 2023, *** percent in 2024, and *** percent in 2025. CR/PR at Table 6.3. By comparison, ***'s ratio of operating income to net sales was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.*

The ratio of net income to net sales reported by responding domestic producers as a whole was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.* By comparison, ***'s ratio of net income to net sales was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.*

[72] CR/PR at Table 6.3.

V. 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.[73]

Based on the Commission's questionnaire data, during the 12-month period preceding filing of the petition (April 2025 to March 2026), subject imports from China accounted for *** percent of total imports, subject imports from Malaysia accounted for *** percent of such imports, and subject imports from Vietnam accounted for *** percent of such imports.[74] As subject imports from each country are clearly above negligible levels, the Commission finds that imports of air compressors from China, Malaysia, and Vietnam subject to the antidumping and countervailing duty investigations are not negligible.

VI. Cumulation

For purposes of evaluating the volume and effects for a determination of reasonable indication 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.[75]

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[73] 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)).

[74] CR/PR at Table 4.5.

[75] *See Certain Cast-Iron Pipe Fittings from Brazil, the Republic of Korea, and Taiwan*, Inv. Nos. 731-TA-278-80 (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).

While no single factor is necessarily determinative, and the list of factors is not exhaustive, these factors are intended to provide the Commission with a framework for determining whether the subject imports compete with each other and with the domestic like product.[76] Only a "reasonable overlap" of competition is required.[77]

A. Petitioner's Arguments

Petitioner argues that the Commission should cumulatively assess imports from all subject countries. It notes that the petitions for all subject countries were filed on the same day and contends that a reasonable overlap in competition exists between air compressors produced in the subject countries and among air compressors from both subject countries and the domestic like product.[78] According to Petitioner, subject imports from China, Malaysia, and Vietnam should be cumulated for purposes of present material injury because they are fungible with the domestic like product and each other, are sold in the same geographic markets, share common channels of distribution, and Chinese and Vietnamese subject imports were present in the U.S. market in every month during the POI, while subject imports from all three subject countries were present in the U.S. market in every month from July 2025 to March 2026.[79]

B. Analysis

The Commission considers subject imports from China, Malaysia, and Vietnam on a cumulated basis because the statutory criteria for cumulation appear to be satisfied. As an initial matter, Petitioner filed the instant antidumping and countervailing duty petitions with respect to all three subject countries on the same day, April 30, 2026.[80] As discussed below, the record also supports finding a reasonable overlap of competition between and among subject imports from China, Malaysia, and Vietnam and the domestic like product.

Fungibility. All U.S. producers reported that that subject imports from each subject country are always or frequently interchangeable with each other as well as with domestically

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[76] *See*, *e.g.*, *Wieland Werke, AG v. United States*, 718 F. Supp. 50 (Ct. Int'l Trade 1989).

[77] 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*, 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.").

[78] Pet. Postconference Br. at 14.

[79] Pet. Postconference Br. at 15-20.

[80] CR/PR at 1.1. None of the statutory exceptions to cumulation applies.

produced air compressors.[81] U.S. importers' responses were more mixed. Half of responding importers reported that the domestic like product is always or frequently interchangeable with subject imports from Malaysia, and the other half reported that they are sometimes interchangeable. A majority of responding importers reported that the domestic like product is always or frequently interchangeable with subject imports from Vietnam, and the remainder reported that they are sometimes interchangeable. A small majority of U.S. importers reported that subject imports from China are sometimes or never interchangeable with each other and with the domestic like product, but 15 of 17 importers reported that they are at least sometimes interchangeable.[82] For comparisons between subject sources, a majority of responding importers reported that imports from all subject sources are always or frequently interchangeable with each other, with the remainder reporting that they were sometimes interchangeable.[83]

Domestic producers' and U.S. importers' pricing data for sales of subject imports, as well as U.S. importers' import purchase cost data provided to the Commission, indicate an overlap between and among subject imports and the domestic like product.[84] Domestic producers reported sales of domestically produced products 1 through 5. U.S. importers reported sales of imports and/or imports from China, Malaysia, and Vietnam for products 1 and 2; sales of imports from China for product 4; and sales of imports and/or imports from China and Malaysia for product 5.[85] Additionally, six of nine purchasers responding to the Commission's Lost Sales/Lost Revenue survey reported buying subject imports from China, Malaysia, and Vietnam instead of U.S.-produced product, again indicating fungibility between the domestic like product and subject imports from each of these sources.[86]

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[81] CR/PR at Table 2.10.

[82] CR/PR at Table 2.11. Importer *** reported that air compressors from the United States and China are completely different quality. *Id.* at 2.11.

For domestically produced air compressors and subject imports from China, six importers rated the products as always interchangeable, two importers rated the products as frequently interchangeable, seven importers rated the products as sometimes interchangeable, and two importers rated the products as never interchangeable. CR/PR at Table 2.11.

[83] CR/PR at Table 2.11.

[84] The Commission received pricing data accounting for *** percent of U.S. commercial shipments of imports from China, *** percent of U.S. commercial shipments of imports from Vietnam, and *** percent of U.S. producers' U.S. commercial shipments in 2025. CR/PR at 5.5. The Commission also received import purchase cost data accounting for *** percent of imports from China, *** percent of imports from Malaysia, and *** percent of imports from Vietnam in 2025. *Id.* at 5.16.

[85] CR/PR at Tables 5.14-5.15.

[86] CR/PR at 5.36, Table 5.26.

In 2025, domestically produced air compressors and imports from each subject source overlapped by product type. The vast majority of U.S. shipments of air compressors from the domestic producers, as well as subject imports from China, Malaysia, and Vietnam, in 2025 were portable models, with a majority of U.S. and Malaysian shipments being pancake models and a majority of Chinese and Vietnamese shipments being other portable models.[87] U.S. shipments of domestically produced air compressors and imports of air compressors from each of the subject sources consisted of both branded label and private/white label in 2025.[88] In 2025, the vast majority of U.S. shipments from U.S. producers and all subject sources were electric and/or battery powered.[89] In 2025, U.S. producers' and U.S. importers' U.S. shipments from each subject source were predominantly of air compressors with a tank size less than 6 gallons, which accounted for the majority of their total shipments in that period.[90]

Channels of Distribution. Throughout the POI, air compressors from all sources were mainly sold to retailers/rental companies.[91] According to Petitioner, subject imports from all three countries and the domestic like product compete through common channels of distribution and a majority of air compressors are sold to retailers in the United States.[92]

Geographic Overlap. Domestic producers and U.S. importers reported shipping the domestic like product to all regions in the United States during the POI.[93]

Simultaneous Presence in Market. According to the quarterly pricing data of the preliminary phase of these investigations, domestically produced air compressors were present

[87] CR/PR at Table 4.7. Domestic producers and importers of subject merchandise from each subject country reported U.S. shipments of each type of air compressor in 2025, except that U.S. importers of subject merchandise from Vietnam reported *** U.S. shipments of stationary air compressors. *Id.*

[88] CR/PR at Table 4.6. The majority of the domestic industry's U.S. shipments were branded label; the majority of U.S. shipments of subject imports from China and Vietnam were private/white label; and U.S. shipments of subject imports from Malaysia were almost evenly divided between branded label and private/white label. *Id.*

[89] CR/PR at Table 4.8. There were *** U.S. shipments of gas and/or diesel powered air compressors from Malaysia and Vietnam in 2025. *Id.* U.S. shipments of gas and/or diesel powered air compressors from U.S. producers and China accounted for *** and *** percent, respectively, of shipments from those sources. *Id.*

[90] CR/PR at Table 4.9.

[91] CR/PR at Table 2.4. U.S. shipments from Malaysia and Vietnam were sold exclusively to retailers/rental companies and U.S. shipments from China were sold nearly exclusively to retailers/rental companies with a very small share being sold to distributors. *Id.* U.S. producers sold between *** and *** percent of their U.S. shipments to retailers/rental companies during the POI, with most of the remainder sold to distributors. *Id.*

[92] Pet. Postconference Br. at 18-19.

[93] CR/PR at Table 2.5.

in the U.S. market for every quarter from 2023 to 2025.[94] Importers' purchase cost data show subject imports from China and Vietnam in every quarter of the POI and subject imports from Malaysia in the last two quarters of the POI.[95] According to official U.S. import statistics (which include out-of-scope merchandise), during the 36-month POI subject imports from China and Vietnam were present in the U.S. market in all months, and subject imports from Malaysia were present in the U.S. market in February 2023 and July 2025 through December 2025.[96]

Conclusion. As explained above, the data indicate that subject imports from each subject country are generally fungible with the domestic like product and each other, that subject imports from each subject country and the domestic like product are sold in similar channels of distribution and in similar geographic markets, and have been simultaneously present in the U.S. market during the POI.

Accordingly, because there appears to be a reasonable overlap of competition between and among the domestic like product and subject imports from China, Malaysia, and Vietnam, we cumulate subject imports from these sources for purposes of our present material injury analysis.

VII. Reasonable Indication of Material Injury by Reason of Subject Imports

A. Legal Standard

In the preliminary phase of antidumping and countervailing duty investigations, the Commission determines whether there is a reasonable indication that an industry in the United States is materially injured or threatened with material injury by reason of the imports under investigation.[97] 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.[98] The statute defines "material injury" as "harm which is not inconsequential, immaterial, or unimportant."[99] In assessing whether there is a reasonable indication that the domestic industry is materially injured by reason of subject imports, we consider all relevant

[94] CR/PR at Tables 5.5-5.9.

[95] CR/PR at Tables 5.10-5.13.

[96] CR/PR at Table 4.11.

[97] 19 U.S.C. §§ 1671b(a), 1673b(a).

[98] 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).

[99] 19 U.S.C. § 1677(7)(A).

economic factors that bear on the state of the industry in the United States.[100] 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."[101]

Although the statute requires the Commission to determine whether there is a reasonable indication that the domestic industry is "materially injured or threatened with material injury by reason of" unfairly traded imports,[102] 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.[103] 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.[104]

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 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

[100] 19 U.S.C. § 1677(7)(C)(iii).

[101] 19 U.S.C. § 1677(7)(C)(iii).

[102] 19 U.S.C. §§ 1671b(a), 1673b(a).

[103] *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).

[104] 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).

injury threshold.[105] In performing its examination, however, the Commission need not isolate the injury caused by other factors from injury caused by unfairly traded imports.[106] 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.[107] It is clear that the existence of injury caused by other factors does not compel a negative determination.[108]

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" as long as "the injury to the domestic industry can reasonably be attributed to the subject

[105] 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.

[106] 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.").

[107] S. Rep. 96-249 at 74-75; H.R. Rep. 96-317 at 47.

[108] *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.").

imports."[109] 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." [110] The Federal Circuit has examined and affirmed various Commission methodologies and has disavowed "rigid adherence to a specific formula."[111]

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.[112] Congress has delegated this factual finding to the Commission because of the agency's institutional expertise in resolving injury issues.[113]

B. Conditions of Competition and the Business Cycle

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

1. Demand Conditions

U.S. demand for air compressors is tied to downstream applications in construction, home improvement, repair, farming, automotive, light manufacturing, and similar activities.[114] The majority of U.S. producers (two of three) reported that U.S. demand for air compressors

[109] *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 comporting with the Court's guidance in *Mittal*.

[110] *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.

[111] *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.").

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

[113] *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.").

[114] Pet. Postconference Br. at 21; *see also* CR/PR at 2.8.

fluctuated downwards during the POI, while a plurality of importers (nine of 21) reported that U.S. demand had remained constant.[115]

All U.S. producers and seven of 19 responding importers indicated that the market was subject to business cycles.[116] Firms generally reported that demand is seasonally tied to home renovation and construction activities, with stronger demand also during the holiday season.[117] Substitutes for air compressors include battery-powered cordless power tools, which are typically used by lower volume users such as DIY users who have more intermittent production needs.[118]

Apparent U.S. consumption, by quantity, increased irregularly from 2023 to 2025. Apparent U.S. consumption of air compressors increased from *** units in 2023 to *** units in 2024 and then declined to *** units in 2025, for an overall increase of *** percent.[119]

2. Supply Conditions

The domestic industry was the second-largest supplier of air compressors to the U.S. market throughout the POI.[120] Its share of apparent consumption decreased by *** percentage points from 2023 to 2025, decreasing each year from *** percent in 2023 to *** percent in 2024 and to *** percent in 2025.[121] None of the responding U.S. producers reported that they experienced supply constraints.[122] The domestic industry's practical capacity for air

[115] CR/PR at Table 2.8.

[116] CR/PR at 2.8.

[117] CR/PR at 2.8. U.S. producer *** reported that demand driven by the home renovation market spikes in late spring and during the holiday season and demand in industrial construction follows the start of the construction season. *Id.* Similarly, importer *** reported that holidays have an impact on the demand for air compressors and importer *** reported that air compressors sales are related to housing construction season. *Id.* In addition, importer *** reported that business cycles are impacted by its promotional activity and importer *** reported that air compressors follow the cycle of the U.S. economy and that when DIY purchasers have less disposable income, they are unable to purchase air compressors. *Id.*

[118] CR/PR at 2.8-2.9.

[119] CR/PR at Tables 4.12 & C.1. Apparent U.S. consumption is likely understated in the preliminary staff report due to the use of questionnaire responses for the domestic industry and all import sources. The responding U.S. producers account for an estimated *** percent of total domestic production of air compressors in 2025, and U.S. importer questionnaire responses, as a share of adjusted official import statistics (which include out-of-scope merchandise), accounted for only 60.0 percent of subject imports and 2.5 percent of nonsubject imports in 2025. *Id.* at 3.1 and Table 4.1.

[120] CR/PR at Tables 4.6-4.9, 4.12.

[121] CR/PR at Tables 4.12 & C.1.

[122] CR/PR at Table 2.7.

compressors and capacity utilization rate decreased over the POI.[123] In 2025, SBD ceased domestic production of air compressors in favor of a licensing agreement with ***.[124] MAT acquired assets from SBD's air compressor operations in 2025 after SBD ceased production.[125]

Cumulated subject imports were the largest source of supply to the U.S. market during the POI. Their share of apparent U.S. consumption increased by *** percentage points over the POI, increasing from *** percent in 2023 to *** percent in 2024 and to *** percent in 2025.[126] Four out of 20 responding U.S. importers reported supply constraints since January 1, 2023.[127]

Nonsubject imports were the smallest source of supply to the U.S. market during the POI.[128] Their share of apparent U.S. consumption in the U.S. market increased from *** percent in 2023 to *** percent in 2024 and 2025.[129] The largest source of nonsubject imports was Taiwan.[130]

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[123] CR/PR at Table 3.5. The domestic industry's practical capacity declined from *** units in 2023 to *** units in 2024 and *** units in 2025, for an overall decrease of *** percent. *Id.* The industry's practical capacity utilization rate declined from *** percent in 2023 to *** percent in 2024 and *** percent in 2025, for an overall decline of *** percent. *Id.* The industry's excess practical capacity was equivalent to approximately *** percent of apparent U.S. consumption in 2023, approximately *** percent in 2024, and approximately *** percent in 2025. *Calculated from id.* at Tables 3.5 & C.1. U.S. producers *** reported existing labor force and supply of material inputs as practical capacity constraints during the POI. *Id.* at Table 3.6.

[124] CR/PR at Tables 3.3, 3.6 & 6.11.

[125] CR/PR at Tables 3.3, 3.4; Pet. Postconference Br. at 24.

[126] CR/PR at Tables 4.12 & C.1.

[127] CR/PR at 2.7 & Table 2.7. Importer *** reported supply constraints in each year. *Id.* Importers *** reported supply constraints during 2025, with *** reporting that their supply constraints were due to increases in tariff rates which led them to hold off on importing air compressors until the tariff rates were decreased and *** reporting that *** had stopped shipping air compressors for approximately three months and then slowly resumed shipments but did not ship consistently until March 2026. *Id.* Importer *** reported supply constraints in 2025 and 2026 due to constant political and economic changes that pushed investment and capital expenditure spending in different directions. *Id.* It further reported that the domestic industry lacked the ability to supply sufficient quantities of air compressors during the period of supply constraint. *Id.*

[128] CR/PR at Tables 4.12 & C.1. In calculating apparent U.S. consumption, we have relied on questionnaire data for nonsubject imports. However, as noted above, estimated questionnaire coverage of nonsubject imports is low (only an estimated 2.5 percent). CR/PR at Table 4.1. Additionally, we note that without the adjustments we made to estimate this coverage based on official import statistics, official import statistics indicate that imports from nonsubject sources accounted for 20.3 percent of total unadjusted imports (which contain out-of-scope merchandise) by quantity in 2025. *Derived from* Commerce Census Import Statistics, EDIS Doc. 884716 (June 10, 2026). These estimates suggest nonsubject imports are understated in the data relied upon to measure imports and market shares in the preliminary phase of these investigations. We will seek broader nonsubject import coverage in any final phase of these investigations.

[129] CR/PR at Tables 4.12 & C.1.

[130] CR/PR at 1.3.

3. Substitutability and Other Conditions

Based on the record in the preliminary phase of these investigations, we find there to be at least a moderate degree of substitutability between the domestic like product and cumulated subject imports. Responding domestic producers reported that the domestic like product and subject imports from China, Malaysia, and Vietnam are always or frequently interchangeable,[131] and U.S. importers' responses were more mixed with at least half of importers reporting that the domestic like product and subject imports from Malaysia and Vietnam were always or frequently interchangeable and eight of 17 importers reporting that the domestic like product and subject imports from China were always or frequently interchangeable.[132] As noted below, all U.S. producers and most importers reported that there are at least sometimes significant differences other than price between the domestic like product and subject imports.[133] U.S. shipment data show that both domestic producers and subject importers made shipments with overlapping product characteristics, including branded/private label, stationary/portable, power type, and tank size,[134] and subject importers and domestic producers reported sales and/or imports of both consumer grade and professional grade air compressors.[135] On the other hand, factors that may limit the degree of substitutability between domestically produced air compressors and air compressors imported from subject sources include differences in air compressor quality (generally measured by usable life or hours of runtime), which may limit the substitutability of air compressors designed for personal and professional use, and the role that branding plays in the market.[136] In any final phase of these investigations we intend to further investigate the degree to which domestically produced air compressors and subject imports differ with respect to quality (including professional versus personal use) and branding, and the extent to which these factors may affect the degree of substitutability between the domestic product and subject imports.

We also find, based on the record in the preliminary phase of these investigations, that price is an important factor in air compressor purchasing decisions, among other factors. Price/cost was cited by purchasers most frequently as a top three factor influencing air

[131] CR/PR at Table 2.10.

[132] CR/PR at Table 2.11. Of the remaining 9 importers, seven reported that the domestic like product and subject imports from China were sometimes interchangeable and two reported that they were never interchangeable. *Id.*

[133] CR/PR at Tables 2.12-2.13.

[134] CR/PR at Tables 4.6-4.9.

[135] CR/PR at Tables 5.14-5.15.

[136] CR/PR at 2.9.

compressor purchasing decisions.[137] Quality was the most frequently cited first-most important factor, followed by price/cost.[138] The majority of domestic producers reported that factors other than price are always or frequently significant when comparing U.S.-produced air compressors to imports from all subject sources;[139] 12 of 17 importers reported that such factors were only sometimes or never significant when comparing U.S.-produced air compressors to imports from China; seven of 11 importers indicated such factors were only sometimes or never significant when comparing U.S.-produced air compressors to imports from Malaysia, and importers were evenly split when comparing U.S.-produced air compressors to imports from Vietnam.[140]

Petitioner acknowledges that, to an extent, brand name can create perceptions of price and can drive a certain element of loyalty, but contends that within the product categories, brands cover the complete range of entry-level to higher-end and that ultimately the purchasing decision comes down to price.[141] Petitioner also states that brand names are licensed and so can be produced by multiple sources, both domestic and imported.[142] U.S. shipment data indicate that domestically produced air compressors are concentrated in the branded market with lesser shipments in the private label market, but that their shipments in the branded market decreased.[143] In contrast, U.S. shipments of subject imports were concentrated in the private label market, but with substantial and increasing shipments in the branded market.[144]

Both U.S. producers and subject importers primarily sell their commercial shipments from inventory. Domestic producers reported that *** percent of their U.S. commercial shipments were sold from inventory with lead times averaging *** days, and *** percent of its

[137] CR/PR at Table 2.9.

[138] CR/PR at Table 2.9. Other reported important factors include performance, availability, features, brand recognition, consistent lead time and delivery, and vendor loyalty/long-term relationships. *Id.*

[139] CR/PR at Table 2.12. U.S. producer *** reported that performance range, size, and the end use of a specific air compressor impact interchangeability. *Id.* at 2.12. U.S. producer *** reported that it sells its product on quality and service, not price. *Id.*

[140] CR/PR at Table 2.13.

[141] Pet. Postconference Br. at 26-27; Conference Tr. at 45-46 (Hite).

[142] Pet. Postconference Br. at 26-27.

[143] CR/PR at Tables 4.14 & 4.15. U.S. producers' U.S. shipments in the branded market declined from *** units in 2023 to *** units in 2024 and declined further to *** units in 2025. Their shipments in the private label market were *** units in 2023, *** units in 2024, and *** units in 2025. *Id.*

[144] CR/PR at Tables 4.14 & 4.15. U.S. shipments of cumulated subject imports in the branded market increased from *** units in 2023 to *** units in 2024 and to *** units in 2025; their shipments in the private label market were *** units in 2023, *** units in 2024, and *** units in 2025. *Id.*

U.S. commercial shipments were produced to order.[145] Importers reported that *** percent of their commercial shipments were from U.S. inventories, with lead times averaging *** days and the remaining *** percent were produced to order, with lead times averaging *** days.[146]

U.S. producers reported setting prices using contracts and set price lists. Responding importers reported setting prices using transaction-by-transaction negotiations, contracts, price lists, and other methods.[147] In 2025, the domestic industry reported selling a majority of its air compressors under *** (*** percent), with smaller shares sold under *** (*** percent) and on the spot market (*** percent).[148] U.S. importers made most of their sales under long-term contracts (*** percent), with smaller shares of shipments sold on the spot market (*** percent) and under short-term contracts (*** percent).[149] Petitioner contends that the air compressor market is structured around retailer and distributor line reviews, in which retailers and distributors routinely (every one to three years) establish product specifications and determine their sources of supply.[150]

Raw material costs accounted for a majority of the domestic industry's cost of goods sold ("COGS") throughout the POI.[151] The main raw materials used in the production of air compressors are steel and to a much lesser extent aluminum.[152] The U.S. prices for steel and aluminum fluctuated throughout the POI, ending at higher prices than at the beginning of the POI.[153] On a per unit basis, the domestic industry's raw material costs increased irregularly from 2023 to 2025,[154] while raw materials as a share of total COGS decreased irregularly during that time,[155] and the ratio of raw material costs to net sales also decreased irregularly from 2023 to 2025.[156]

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[145] CR/PR at 2.10.

[146] CR/PR at 2.10.

[147] CR/PR at 5.3 & Table 5.3.

[148] CR/PR at 5.3 and Table 5.4.

[149] CR/PR at 5.3 and Table 5.4.

[150] Pet. Postconference Br. at 26.

[151] CR/PR at Table 6.1.

[152] CR/PR at 5.1. Petitioner reported that air compressors consist of approximately 75 percent steel, 10 percent aluminum, 10 percent rubber and plastics and 5 percent copper by weight. *Id.* at 5.1 n.1.

[153] CR/PR at 5.1 & Figure 5.1.

[154] CR/PR at Table 6.1. On a per unit basis, unit raw material costs decreased from $*** per unit in 2023 to $*** per unit in 2024 then increased to $*** per unit in 2025. *Id*.

[155] CR/PR at Table 6.1. As a share of total COGS, raw materials decreased from *** percent in 2023 to *** percent in 2024 and then increased to *** percent in 2025. *Id.*

[156] CR/PR at Table 6.1. The ratio of raw material costs to net sales decreased from *** percent in 2023 to *** percent in 2024 and then increased to *** percent in 2025. *Id.*

Effective September 24, 2018, air compressors originating in China were subject to an additional 10 percent *ad valorem* duty under section 301 of the Trade Act of 1974, as amended ("section 301").[157] Effective May 10, 2019, the section 301 duty for air compressors increased to 25 percent.[158] *** U.S. producers reported that section 301 tariffs had an impact on the air compressors market during the POI, while 14 of 17 importers also reported that these measures had an impact.[159] Effective August 18, 2025, air compressors originating in China, Malaysia, and Vietnam became subject to an additional 50 percent *ad valorem* duty under section 232 of the Trade Expansion Act of 1962, as amended, applied to the declared value of the steel content of the imported article.[160] Effective April 6, 2026, the additional section 232 duty on air compressors originating in China, Malaysia, and Vietnam changed to 25 percent, applied to the full customs value of the imported article, provided the weight of the steel is at least 15 percent of the weight of the imported article.[161] *** domestic producers reported that section 232 tariffs had an impact on the air compressors market during the POI, while 14 of 18 importers also reported that these measures had an impact.[162] Beginning in February 2025, imports of subject merchandise were subject to varying levels of additional tariffs under the International Emergency Economic Powers Act ("IEEPA").[163] It was announced on February 20, 2026, that tariffs initiated under IEEPA were no longer in effect.[164] Imports of air compressors

[157] CR/PR at 1.9.

[158] CR/PR at 1.9.

[159] CR/PR at 2.1 & Table 2.1. U.S. producers and importers generally reported that section 301 tariffs increased prices and decreased demand for imported air compressors, with some importers also reporting that the section 301 tariffs prevented U.S. consumers from replacing older equipment or transitioning to battery powered tools, prompted sourcing from sources other than China, made the air compressor market unstable, increased the prices of components even when they did not come from China, and caused supply instabilities and profitability deterioration. *Id.* at 2.1-2.2.

[160] CR/PR at 1.8 n.16.

[161] CR/PR at 1.8 n.16.

[162] CR/PR at 2.2 & Table 2.2. Importers generally reported that section 232 duties increased the price of air compressors, with one importer, ***, reporting that section 232 tariffs have been crippling domestic compressor companies and manufacturers. *Id.* Petitioner asserts that the imposition of section 232 duties during the POI increased the cost of inputs used to manufacture domestic air compressors. Pet. Postconference Br. at 29. U.S. producer *** reported that section 232 tariffs originally had little impact on imported air compressors, but it expects a retail price adjustment of between 5.0 and 10.0 percent that is not yet evident in the market. CR/PR at 2.2.

[163] CR/PR at 1.10. U.S. producers and importers were asked if tariff announcements and tariff changes since January 1, 2025 impacted the air compressors market in the United States, including any effects on price, supply, demand, and/or raw material costs. The majority of U.S. producers and importers reported that new or modified tariffs had an impact on the U.S. market. *Id.* at 2.2-2.3 & Table 2.3.

[164] CR/PR at 1.10.

are not subject to tariffs initiated in February 2026 under section 122 of the Trade Act of 1974.[165]

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."[166]

The volume of cumulated subject imports steadily increased by 18.3 percent during the POI, increasing from 2.3 million units in 2023 to 2.7 million units in 2024 and 2.8 million units in 2025.[167] Their share of the U.S. market increased overall by *** percentage points, from *** percent of apparent U.S. consumption in 2023 to *** percent in 2024 and *** percent in 2025.[168] Cumulated subject imports as a ratio to domestic production increased by *** percentage points during the POI, from *** percent in 2023 to *** percent in 2024 and *** percent in 2025.[169]

We find that the volume of cumulated subject imports, as well as the increase in that volume, is significant in absolute terms and relative to apparent U.S. consumption and production.

D. Price Effects of the Subject Imports

Section 771(7)(C)(ii) of the Tariff Act provides that, in evaluating the price effects of 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.[170]

[165] CR/PR at 1.9.
[166] 19 U.S.C. § 1677(7)(C)(i).
[167] CR/PR at Tables 4.3.
[168] CR/PR at Tables 4.12, C.1.
[169] CR/PR at Table 4.3.
[170] 19 U.S.C. § 1677(7)(C)(ii).

As discussed above in Section VII.B.3, the record indicates that there is at least a moderate degree of substitutability between subject imports and the domestic like product, and that price is an important factor in purchasing decisions for air compressors, among other factors.

The Commission collected quarterly quantity and f.o.b. pricing data on sales of five air compressor products shipped to unrelated U.S. customers during January 2023 to December 2025.[171] Two U.S. producers and six U.S. importers provided usable pricing data, although not all firms reported pricing data for all products for all quarters.[172] Pricing data reported by these firms accounted for approximately *** percent of U.S. producers' U.S. commercial shipments of air compressors, *** percent of U.S. commercial shipments of subject imports from China and *** percent of U.S. commercial shipments of subject imports from Vietnam in 2025.[173] No U.S. importers reported pricing data from Malaysia.[174]

Subject imports undersold the domestic like product in 41 of 44 quarterly comparisons (93.2 percent of comparisons), with underselling margins ranging between *** and *** percent, and averaging *** percent.[175] They oversold the domestic like product in the remaining three quarterly comparisons (or 6.8 percent of the quarterly comparisons), with overselling margins ranging between *** and *** percent and averaging *** percent.[176] The

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[171] CR/PR at 5.4. The five pricing products are:

Product 1.—Consumer grade portable "pancake" reciprocating pump, oil free air compressor 6 gallons in size with a pressure rating of 150psi to 175psi.

Product 2.-- Consumer grade portable "vertical" reciprocating pump, oil free air compressor 26 to 27 gallons in size with a pressure rating of 150psi to 200psi.

Product 3.—Professional grade stationary "truck mount" reciprocating pump, oil lubricated air compressor 25 to 35 gallons in size with a pressure rating of 175psi.

Product 4.—Professional grade portable "vertical" reciprocating pump, oil lubricated air compressor 29 or 30 gallons in size with a pressure rating of 150psi to 175psi.

Product 5.—Professional grade portable "wheelbarrow" reciprocating pump, oil lubricated air compressor 8 or 9 gallons in size with a pressure rating of 135psi to 175psi.

Two importers reported data exhibiting significant changes in price and purchase cost between quarters, and these firms indicated that these fluctuations reflected product mix to some degree. *** reported a sharp decrease in prices because it phased out a high value model in favor of a budget model, while *** reported that individual pricing product definitions encompassed multiple models with a range of prices. CR/PR at 5.26 n.10 & n.11. In any final phase of these investigations, parties wishing to propose new pricing product definitions should do so in their comments on the draft questionnaires. 19 C.F.R. § 207.20(b).

[172] CR/PR at 5.5.

[173] CR/PR at 5.5.

[174] CR/PR at 5.5 n.4.

[175] CR/PR at Table 5.19.

[176] CR/PR at Table 5.19.

volume of subject imports in the quarters with underselling was *** units, representing *** percent of total reported subject import sales of the pricing products; by comparison, the volume of subject imports in the quarters with overselling was *** units, representing just *** percent of total reported subject import sales of the pricing products.[177]

The Commission also collected purchase cost data from firms that imported subject merchandise for their own internal use or retail sale. Four firms provided data for products 1, 2, 4, and 5.[178] Purchase cost data reported by these firms accounted for *** percent of imports from China, *** percent of imports from Malaysia, and *** percent of imports from Vietnam in 2025.[179]

The purchase cost data show that landed duty-paid costs for cumulated subject imports were below the sales prices of the domestic like product in all 69 instances, covering *** units of subject imports at price-cost differentials ranging from *** to *** percent and averaging *** percent.[180]

We recognize that import purchase cost data may not reflect the total cost of importing and therefore requested that importers provide additional information regarding the costs and benefits of importing air compressors themselves. Two of four importers reported that they incurred additional costs beyond the landed duty-paid costs associated with importing air compressors. Both of these importers estimated that the total additional costs incurred ranged from 1.0 to 25.0 percent, and included freight and transportation costs, warehouse costs, and tariffs.[181] Given that the subject import purchase costs were, on average, *** percent below domestic sales prices, these firms' total costs were generally below domestic prices.[182]

[177] CR/PR at Table 5.19.

[178] CR/PR at 5.16.

[179] CR/PR at 5.16.

[180] CR/PR at Table 5.23.

[181] CR/PR at 5.16.

[182] In determining whether to import air compressors, three of eight importers reported that they compare costs of importing to the cost of purchasing from a U.S. producer, three reported comparing costs to purchasing from a U.S. importer, and two reported not comparing costs to either U.S. producers or importers. CR/PR at 5.16. Although firms reported that importing generally entails higher transportation and logistics-related costs than purchasing domestically, five importers identified benefits from importing air compressors themselves, including manufacturing capacity and quality, cost, availability, innovation, access to brands, and reliability of supply. *Id.* Two importers reported that the import costs of air compressors were lower than the price of purchasing from a U.S. producer or importer excluding additional costs and one reported that the import costs were lower including additional costs. *Id.* at 5.16-5.17. One importer estimated that it saved *** percent of the purchase price by importing air compressors rather than purchasing from a U.S. producer and saving *** percent compared to purchasing air compressors from a U.S. importer. *Id.* at 5.17.

We have also considered purchasers' responses to the Lost Sales/Lost Revenue survey. The Commission received responses from nine purchasers, accounting for *** units of air compressors, representing *** percent of total apparent U.S. consumption during the POI.[183] Six responding purchasers reported purchasing/importing subject imports instead of purchasing domestically produced air compressors, with all six of these purchasers also reporting that subject import prices were lower than domestic prices.[184] One of these six purchasers reported that price was a primary reason for its decision to purchase *** units of subject imports instead of the domestic like product.[185] This volume is equivalent to *** percent of responding purchasers' purchases/imports of subject imports and *** percent of the domestic industry's U.S. shipments during the POI.[186]

Based on the foregoing, including the at least moderate degree of substitutability between the domestic like product and subject imports, the importance of price in purchasing decisions for air compressors, and the near universal subject import underselling in the pricing and purchase cost data, we find that subject imports significantly undersold the domestic like product during the POI. In addition, we find that significant underselling by subject imports was a significant contributor to cumulated subject imports gaining market share at the expense of

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[183] *Derived from* CR/PR at Tables 5.25 & C.1.

[184] CR/PR at Table 5.26.

[185] CR/PR at Table 5.26. Notably, *** purchasers *** when explaining why they purchased lower-priced subject imports instead of the domestic product, *id.,* and Petitioner has argued that its branded products were displaced at large home improvement retailers by private label products sourced from subject imports. Pet. Postconference Br. at 16. The record indicates that the private/white label market grew during the POI while the branded market declined over the same period, though the decline in the branded market was *** attributable to declines in the domestic industry's U.S. shipments. CR/PR at Tables 4.14 & 4.15. In any final phase of these investigations, we intend to further examine competition within and between branded and private label products.

[186] *Calculated from* CR/PR at Tables 4.12, 5.25, 5.26. Non-price reasons for buying subject imports cited by other purchasers include strategic partnerships/long-term vendor relationships, customer service, distribution network, innovation, reliability of supply, product consistency, lead time, fill rate, brands only being produced by certain companies that are licensed to do it, and no comparable products being offered domestically. *Id.* at 5.36, Table 5.26.

Petitioner disputes the claim that some products are not produced domestically, contending that it can produce all types of air compressors. Pet. Postconference Br. at Exh. 1 pp. 13-14. While purchaser *** reported ***, Petitioner provided evidence that ***. *Id.*; Petitions at 39-40. Petitioner also provided examples where it lost sales to imports due to their lower prices during product line reviews with other customers, including *** and ***. Petitions at 40-42, Exh. I-1. Petitioner also claims to maintain a *** percent on-time and in-full shipment history with its customers. Pet. Postconference Br. at Exh. 1 p. 14.

In any final phase of these investigations, we intend to investigate the extend that non-price factors resulted in subject imports gaining sales and market share during the POI, as well as any potential attenuated competition between subject imports and the domestic like product.

the domestic industry during the POI, which lost *** percentage points of market share to cumulated subject imports overall between 2023 and 2025.[187]

The market share shift occurred in the market for branded air compressors, as the domestic industry's share of shipments of branded air compressors declined from *** percent in 2023 to *** percent in 2025 and cumulated subject imports' share of shipments of branded air compressors increased from *** percent in 2023 to *** percent in 2025.[188] The domestic industry's share of private label shipments was anemic throughout the POI, declining from *** percent in 2023 to *** percent in 2025, as cumulated subject imports dominated the market for private label air compressors, accounting for *** percent of private label shipments.[189]

We have also considered whether subject imports depressed domestic prices or prevented price increases for domestically produced air compressors that otherwise would have occurred to a significant degree. Both domestic and subject import prices increased over the POI. Increases in prices for the domestic industry's sales of the pricing products ranged from *** to *** percent, while increases in corresponding prices for subject imports from China ranged from *** to *** percent.[190]

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[187] CR/PR at Table C.1. We note that SBD's decision to cease production in favor of licensing impacted the decline in the domestic industry's market share over the POI. *See id.* at Table 4.12. As noted above, MAT acquired production assets from SBD following SBD's cessation of domestic production in 2025. *Id.* at Tables 3.3, 3.4; Pet. Postconference Br. at 24. Moreover, the domestic industry's practical capacity utilization declined from *** percent in 2023 to *** percent in 2025, and its unused practical capacity grew from *** units in 2023 to *** units in 2025. *See* CR/PR at Table 3.5. We will explore further the reasons for domestic industry's market share decline in any final phase of these investigations and the role of subject imports in SBD's decision to cease production.

[188] CR/PR at Table 4.14.

[189] CR/PR at Table 4.15.

[190] CR/PR at Table 5.14. Importers did not provide sufficient pricing data from Malaysia and Vietnam to determine price trends. *Id.* at 5.26 n.9.

U.S. producers' prices increased by *** percent over the POI for product 1, *** percent for product 2, *** percent for product 3, *** percent for product 4, and declined by *** percent for product 5. *Id*. at Table 5.14. The price of subject imports from China increased by *** percent over the POI for product 1, *** percent for product 2, and *** percent for product 5; although some pricing data were reported for products 3 and 4 from China, no percent changes in price over the POI were reported because pricing data were not reported for these pricing products for both the first and last quarters of the POI. *Id.* Although some pricing data were reported for product 2 from Vietnam, no percent change in price over the POI was reported because pricing data were not reported for this pricing product for both the first and last quarters of the POI. *Id.* As noted above, price trends may have been impacted by differences in product mix within the pricing product definitions.

When asked whether U.S. producers had reduced prices to compete with imports of air compressors from subject sources, one of nine responding purchasers indicated that U.S. producers had reduced prices in order to compete with lower-priced imports from China and reported a *** percent reduction; five reported that they did not know if this had occurred.[191]

The domestic industry's net sales average unit value ("AUV") increased by $*** per unit – a *** percent increase – during the POI, at the same time that its unit costs increased by $*** per unit, a *** percent increase.[192] As a result, the industry's COGS-to-net-sales ratio decreased slightly by *** percentage points between 2023 and 2025, from *** percent in 2023 to *** percent in 2024 and 2025.[193]

In sum, based on the record in the preliminary phase of these investigations, we find that cumulated subject imports significantly undersold the domestic like product, causing subject imports to gain market share at the expense of the domestic industry. Thus, we find that subject imports had significant price effects.

E. Impact of the Subject Imports

Section 771(7)(C)(iii) of the Tariff Act provides that the Commission, in examining the impact of the subject imports on the domestic industry, "shall evaluate all relevant economic factors which have a bearing on the state of the industry." 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 debt, research and development, and factors affecting domestic prices. 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."[194]

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[191] CR/PR at Table 5.27.

[192] CR/PR at Table 6.2. Specifically, the industry's net sales AUV increased over the POI from $*** per unit in 2023 and 2024 to $*** per unit in 2025. *Id.* at Tables 6.1 & C.1. Its per-unit COGS increased irregularly over the POI, declining from $*** in 2023 to $*** in 2024, but then increasing to $*** in 2025. *Id.*

[193] CR/PR at Table C.1. We note that while the aggregate domestic industry's COGS-to-net-sales ratio declined during the POI, the COGS-to-net-sales ratios for each domestic producer increased irregularly. *See* CR/PR at Table 6.3. Thus, the decline in the aggregate COGS-to-net-sales ratio was driven by the changing composition of the domestic industry, as ***, which had a *** COGS-to-net-sales ratio, accounted for a growing portion of the industry's net sales, while ***, which had a *** COGS-to-net-sales ratio, accounted for a declining portion. *Id.* We will examine further whether subject imports suppressed the domestic industry's prices in any final phase of these investigations.

[194] 19 U.S.C. § 1677(7)(C)(iii). This provision was amended by the Trade Preferences Extension Act of 2015, Pub. L. 114-27.

The domestic industry's output and employment indicators deteriorated over the POI, while its financial indicators were mixed.

The domestic industry's practical air compressor capacity decreased overall by *** units during the POI (*** percent), decreasing from *** units in 2023 to *** units in 2024 and *** units in 2025.[195] Its production decreased overall by *** units during the POI (*** percent), decreasing from *** units in 2023 to *** units in 2024 and *** units in 2025.[196] Accordingly, its practical capacity utilization decreased from *** percent in 2023 to *** percent in 2024 and *** percent in 2025, an overall decrease of *** percentage points.[197] The domestic industry's U.S. shipments decreased from *** units in 2023 to *** units in 2024 and *** units in 2025, a net decrease of *** units (*** percent).[198] Its share of apparent U.S. consumption decreased from *** percent in 2023 to *** percent in 2024 and *** percent in 2025, an overall decrease of *** percentage points.[199] The domestic industry's ending inventories increased from *** units in 2023 to *** units in 2024, and then decreased to *** units in 2025, an overall increase of *** units (*** percent).[200]

The domestic industry's employment indicators also generally worsened overall during the POI. The domestic industry reported *** production related workers ("PRWs") in 2023, decreasing to *** in 2024 and *** in 2025, an overall decrease of *** PRWs.[201] Total hours worked decreased from *** hours in 2023 to *** hours in 2024 and *** hours in 2025, an overall decrease of *** hours.[202] The domestic industry's productivity decreased by *** units per thousand hours over the POI, decreasing from *** units per thousand hours in 2023 to *** units per thousand hours in 2024 and *** units per thousand hours in 2025.[203] Its unit labor costs increased overall by $*** per unit, rising from $*** per unit in 2023 to $*** per unit in 2024 and $*** per unit in 2025.[204]

[195] CR/PR at Tables 3.5, C.1.
[196] CR/PR at Tables 3.5, C.1.
[197] CR/PR at Tables 3.5, C.1.
[198] CR/PR at Table C.1.
[199] CR/PR at Table C.1.
[200] CR/PR at Table C.1. Ending inventories increased as a share of the industry's total shipments from *** percent in 2023 to *** percent in 2025. *Id.*
[201] CR/PR at Table C.1.
[202] CR/PR at Table C.1.
[203] CR/PR at Table C.1.
[204] CR/PR at Table C.1.

The domestic industry's profits declined over the POI, although its margins improved slightly. The domestic industry's total net sales value decreased from $*** in 2023 to $*** in 2024 and $*** in 2025, a level *** percent lower than in 2023.[205] Its total COGS decreased from $*** in 2023 to $*** in 2024 and $*** in 2025, an overall decline of *** percent.[206] As a result of net sales values falling by more than total COGS, the domestic industry's gross profit decreased from $*** in 2023 to $*** in 2024 and $*** in 2025, a level that was *** percent lower than in 2023.[207] Its operating income rose from $*** in 2023 to $*** in 2024, and then fell to $*** in 2025, which was *** percent lower than in 2023.[208] Its net income rose from $*** in 2023 to $*** in 2024, and then fell to $*** in 2025, which was *** percent lower than in 2023.[209] Its operating margin increased from *** percent in 2023 to *** percent in 2024, and then decreased to *** percent in 2025, which was *** percentage points higher than in 2023.[210] Its net margin increased from *** percent in 2023 to *** percent in 2024, and then decreased to *** percent in 2025, which was *** percentage points higher than in 2023.[211] The domestic industry's capital expenditures increased from $*** in 2023 to $*** in 2024 and $*** in 2025.[212] Its research and development expenses decreased from $*** in 2023 to $*** in 2024, and then increased to $*** in 2025.[213]

Based on the record of the preliminary phase of these investigations, we find that a significant and increasing volume of cumulated subject imports that were nearly always lower-priced than the domestic like product gained market share at the expense of the domestic industry during the POI. As a result, the domestic industry had fewer sales in the U.S. market than it would have otherwise had. Consequently, the domestic industry's capacity, capacity utilization, production, and profitability measures would have been better but for the adverse effects caused by subject imports.[214] We find for the purposes of these preliminary investigations that subject imports had a significant impact on the domestic industry.

[205] CR/PR at Table C.1.
[206] CR/PR at Table C.1.
[207] CR/PR at Table C.1.
[208] CR/PR at Table C.1.
[209] CR/PR at Table C.1.
[210] CR/PR at Table C.1.
[211] CR/PR at Table C.1.
[212] CR/PR at Table C.1.
[213] CR/PR at Table C.1.
[214] As noted above, we intend to further investigate the implications of SBD's decision to cease production in favor of a licensing agreement with *** on the domestic industry's market share loss and therefore its performance during the POI.

We have also considered other factors that may have had an adverse impact on the domestic industry during the POI to ensure that we are not attributing injury from such other factors to subject imports. Neither increasing apparent U.S. consumption nor a marginal increase in nonsubject import volume can explain the domestic industry's market share loss to subject imports during the POI.[215]

In sum, based on the record in the preliminary phase of these investigations, we find that cumulated subject imports had a significant impact on the domestic industry.

VIII. Conclusion

For the reasons stated above, we determine that there is a reasonable indication that an industry in the United States is materially injured by reason of subject imports of air compressors from China, Malaysia, and Vietnam that are allegedly sold in the United States at less than fair value and subsidized by the governments of China, Malaysia, and Vietnam.

[215] CR/PR at Table C.1. The record indicates that nonsubject imports were primarily air compressor models with larger sizes than subject imports and the domestic like product. *Id.* at Table 4.9.

Part 1: Introduction

Background

These investigations result from petitions filed on April 30, 2026, with the U.S. Department of Commerce ("Commerce") and the U.S. International Trade Commission ("USITC" or "Commission"), by MAT Industries, LLC, Long Grove, Illinois ("MAT," "MIND," or "Petitioner"), alleging that an industry in the United States is materially injured and threatened with material injury by reason of subsidized and less-than-fair-value ("LTFV") imports of certain stationary and portable air compressors ("air compressors")[1] from China, Malaysia, and Vietnam. Table 1.1 presents information relating to the background of these investigations.[2] [3]

Table 1.1 Air compressors: Information relating to the background and schedule of this proceeding

Effective date	Action
April 30, 2026	Petitions filed with Commerce and the Commission; institution of the Commission investigations (91 FR 24294, May 5, 2026)
May 20, 2026	Commerce's notice of initiation (91 FR 31406 and 31425, May 27, 2026)
May 21, 2026	Commission's conference
June 12, 2026	Commission's vote
June 15, 2026	Commission's determinations
June 23, 2026	Commission's views

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

[1] See the section entitled "The subject merchandise" in Part 1 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] A list of witnesses appearing at the staff conference is presented in appendix B of this report.

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 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.

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

Organization of report

Part 1 of this report presents information on the subject merchandise, alleged subsidy rates and dumping margins, and domestic like product. Part 2 of this report presents information on conditions of competition and other relevant economic factors. Part 3 presents information on the condition of the U.S. industry, including data on capacity, production, shipments, inventories, and employment. Parts 4 and 5 present the volume of subject imports and pricing of domestic and imported products, respectively. Part 6 presents information on the financial experience of U.S. producers. Part 7 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.

Market summary

Air compressors are machines that use a reciprocating piston-driven pump to draw in atmospheric air and compress it into a pressurized air storage vessel for use across construction, commercial, farming, light manufacturing, medical, and distribution applications.[6] The leading U.S. producers of air compressors are petitioner MAT, Stanley Black and Decker ("Black and Decker" or "SBD"), and Ingersoll Rand Inc. ("Ingersoll"),[7] while leading producers of air compressors outside the United States include Alton Industries, with operations in China and Malaysia, and Hybest, with operations in China and Vietnam.[8] The leading U.S. importer of air compressors from China and Vietnam is ***, while the leading importer of air compressors from Malaysia is ***. The leading importer of product from nonsubject countries (primarily Taiwan) is ***.[9] U.S. purchasers of air compressors are retailers, distributors, and contractors, as well as businesses that use compressed air to operate tools and equipment; leading purchasers include ***.

[6] Petitions, pp. 9 to 12.
[7] Petitions, exh. I-1.
[8] Petitions, p. 41 to 42 and exh. I-1.
[9] For more information on U.S. importers of air compressors, see Part 4 of this report.

Apparent U.S. consumption of air compressors totaled approximately *** units ($***) in 2025. U.S. producers' adjusted U.S. shipments of air compressors totaled *** units ($***) in 2025, and accounted for *** percent of apparent U.S. consumption by quantity and *** percent by value. U.S. importers' U.S. shipments of air compressors from subject sources totaled 2.7 million units ($273.5 million) in 2025 and accounted for *** percent of apparent U.S. consumption by quantity and *** percent by value. U.S. importers' U.S. shipments of air compressors from nonsubject sources totaled 47,490 units ($99.0 million) in 2025 and accounted for *** percent of apparent U.S. consumption by quantity and *** percent by value.

Summary data and data sources

A summary of data collected in these investigations is presented in appendix C, table C.1. The Commission's questionnaires collected data for the years 2023 to 2025. Except as noted, U.S. industry data are based on questionnaire responses of three firms. U.S. imports are based on the questionnaire responses of 20 firms. Data on U.S. purchasers are based on the questionnaire responses of nine firms. Foreign industry data are based on the foreign producer/exporter questionnaire responses of four firms.

Previous and related investigations

Air compressors have not been the subject of any prior antidumping and countervailing duty investigations in the United States.[10]

[10] On August 1, 2025, Commerce approved a request by U.S. producer Ingersoll to include finished air compressors classified under HTSUS 8414.80.16 in the Section 232 steel and aluminum tariffs. Petitions, p. 15 and exh. I-25.

Nature and extent of alleged subsidies and sales at LTFV

Alleged subsidies

On May 27, 2026, Commerce published a notice in the Federal Register of the initiation of its countervailing duty investigation on air compressors from China, Malaysia, and Vietnam.[11]

Alleged sales at LTFV

On May 27, 2026, Commerce published a notice in the Federal Register of the initiation of its antidumping duty investigations on air compressors from China, Malaysia, and Vietnam.[12] Commerce has initiated antidumping duty investigations based on the following estimated dumping margins:

1) China (Malaysia surrogate)—93.97 to 211.15 percent;
2) China (Mexico surrogate)—56.68 to 201.41 percent;
3) China (Türkiye surrogate)—94.81 to 187.45 percent;
4) Malaysia—73.14 to 116.17 percent;
5) Vietnam (El Salvador surrogate)—52.53 to 106.22 percent;
6) Vietnam (Indonesia surrogate)—25.85 to 132.31 percent; and
7) Vietnam (Tunisia surrogate)—22.06 to 140.39 percent.[13]

[11] For further information on the alleged subsidy programs see Commerce's notice of initiation and related countervailing duty Initiation checklists. 91 FR 31425, May 27, 2026.

[12] 91 FR 31406, May 27, 2026.

[13] 91 FR 31406, May 27, 2026. Commerce treats China and Vietnam as non-market economies and does not use their home-market prices or reported costs to determine normal value; instead, Commerce values the factors of production using data from economically comparable market-economy surrogate countries.

The subject merchandise

Commerce's scope

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

> The merchandise covered by these investigations consists of certain stationary and portable air compressors, whether electric, gas, or battery powered, including electric motor and gasoline engine powered air compressors with either oil free or oil lubricated reciprocating pumps, and with an integrated pressure vessel that ranges in size from 1 to 80 gallons. The compressors may be either direct drive or belt driven.
>
> Direct drive air compressors included in the scope have a motor connected directly to the compressor element. Belt driven air compressors included in the scope have a motor connected to the compressor crankshaft with a belt. Direct drive air compressors are more often portable but can be stationary, while belt driven air compressors are either portable or stationary.
>
> Covered air compressors have a power level designation between 373 watts (0.5 HP) and 22.37 kilowatts (30 HP). Specifically, portable air compressors often range in power from 0.5 HP (373 watts) to 15 HP (11.19 KW). Reciprocating stationary air compressors range in power from 0.5 HP (373 watts) to 25 HP (18.64 KW). However, a portable or stationary air compressor with a different power level, within the range of 373 watts to 22.37 KW, and otherwise meeting the language of the scope, is covered by the scope. The scope includes only certain reciprocating (piston) compressors, which use a piston moving back and forth in a cylinder to compress the air. The scope also includes unfinished compressors exported from the subject countries. Subject merchandise also includes finished and unfinished compressors that are further processed in a third country or in the United States, including, but not limited to, assembly or any other processing that would not otherwise remove the merchandise from the scope of these investigations if performed in the country of manufacture of the in-scope air compressors. The additional parts used to complete "unfinished compressors" in a third country are subject to the scope of these investigations.
>
> For the purposes of this scope, "unfinished compressors" are compressors which require additional fabrication such as labeling, and packaging, and kitting operations adding accessories.

Specifically included in the scope are compressors which are imported as part of a package with accessories or other products, or kit. Such accessories include but are not limited to hoses, fittings, tool kits, oils, nail guns, pneumatic paint sprayers, air ratchet wrenches, air grease guns, air drills, air hammers, air sanders, air inflators, and air impact drivers. If such accessories or other products are imported separately from the air compressor, such products are not subject to the scope of these investigations.

Specifically excluded from the scope are AC, DC, and battery powered inflators. The excluded inflators do not have an integrated air tank or air reservoir. The excluded inflators have an output of 1 CFM or less.

The scope excludes rotary compressors. Types of rotary compressors excluded from the scope are rotary screw, rotary vane, and scroll compressors. The scope also excludes dynamic compressors. Types of dynamic compressors excluded from the scope are centrifugal compressors and axial compressors, where rotating impellers or blades compress air.[14]

[14] 91 FR 31406 and 31425, May 27, 2026.

Tariff treatment

Air compressors are currently imported under Harmonized Tariff Schedule of the United States ("HTS") statistical reporting numbers 8414.80.1615, 8414.80.1625, 8414.80.1635 and 8414.80.1685. The general rate of duty is "free" for HTS subheading 8414.80.16.[15] Decisions on the tariff classification and treatment of imported goods are within the authority of U.S. Customs and Border Protection.

Below is a summary of additional tariffs applied to air compressors from subject countries. Table 1.2 provides a summary of additional tariffs in place as of May 29, 2026. Historical information is summarized beneath the table.

Table 1.2 Air compressors: Additional tariffs on imports originating in China, Malaysia, and Vietnam as of May 29, 2026.

Duty rates in percent ad valorem

Additional tariff	China	Malaysia	Vietnam
Section 232	25	25	25
Section 301	25	NA	NA
Section 122	NA	NA	NA
Total additional ad valorem rate	50	25	25

Source: Federal Register notices and other sources cited in this section (Tariff treatment).

Note: For the purposes of this table, "not applicable" is shown as "NA." This applies when the subject product from that subject country is not subject to the tariff for any reason.

Note: Duty rates in the table reflect the duty rates as of the writing of this report. See the text below for historical changes to the additional tariffs.

Section 232 tariffs

Air compressors originating in China, Malaysia, and Vietnam are subject to an additional 25 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended.[16]

[15] USITC, HTS (2026) Revision 9, USITC Publication 5747, May 2026, p. 84.25.

[16] Effective August 18, 2025, air compressors originating in China, Malaysia, and Vietnam became subject to an additional 50 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended, applied to the declared value of the steel content of the imported article. Effective April 6, 2026, the additional section 232 duty on air compressors originating in China, Malaysia, and Vietnam changed to 25 percent, applied to the full customs value of the imported article, provided the weight of the steel is at least 15 percent of the weight of the imported article. 90 FR 9817, February 18, (continued...)

Section 301 tariffs

Effective September 24, 2018, air compressors 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 air compressors increased to 25 percent.[17]

Section 122 tariffs

Air compressors originating in China, Malaysia, and Vietnam are not subject to tariffs initiated in February 2026 under section 122 of the Trade Act of 1974.[18]

2025; 90 FR 40326, August 19, 2025; 91 FR 18201, April 9, 2026. See also HTS heading 9903.82.09 and U.S. note 16(vi) and 16(vii) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 9, USITC Publication 5747, May 2026, pp. 99.3.64 to 99.3.70 and 99.3.422.

[17] 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(f), and 20(g) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 9, USITC Publication 5747, May 2026, pp. 99.3.96 to 99.3.119, and 99.3.425. 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).

[18] Section 122 authorizes the President to impose a temporary import surcharge for a period not exceeding 150 days unless such period is extended by an Act of the Congress. Articles subject to section 232 tariffs, including air compressors are not subject to the tariffs initiated under section 122. From February 24, 2026, to April 5, 2026, air compressors where subject to an additional 10 percent ad valorem duty under section 122 of the Trade Act of 1974. The section 122 duty applied to only the non-aluminum or non-steel content of air compressors; the section 122 duty did not apply to the aluminum or steel content of the products because that content was subject to section 232 tariffs. Effective April 6, 2026, the full value of air compressors was subject to section 232 tariffs, and therefore the full value of the product is not subject to section 122 tariffs. 91 FR 9339, February 25, 2026. See also HTS heading 9903.03.06 and U.S. note 2(aa)(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 9, Publication 5747, May 2026, pp. 99.3.58 to 99.3.59, and 99.3.404.

Tariffs initiated under the International Emergency Economic Powers Act ("IEEPA")[19]

Effective February 20, 2026, all tariffs initiated under IEEPA were terminated. Below is a history of the IEEPA tariffs relevant to air compressors originating in China, Malaysia, and Vietnam that were in effect until February 20, 2026.[20]

Country specific IEEPA tariffs

Effective February 4, 2025, air compressors originating in China were subject to an additional 10 percent ad valorem duty under IEEPA, and on March 4, 2025, that additional duty increased to 20 percent ad valorem. However, effective November 10, 2025, that additional duty was reduced back to 10 percent. As noted previously, effective February 20, 2026, tariffs initiated under IEEPA and the associated duties imposed under IEEPA were terminated.[21]

Tariffs initiated in April 2025 under IEEPA

Air compressors originating in China, Malaysia, and Vietnam were not subject to tariffs initiated in April 2025 under IEEPA. However, the non-steel/aluminum content of air compressors were subject to the tariffs initiated in April 2025 under IEEPA. As noted previously, effective February 20, 2026, tariffs initiated under IEEPA and the associated duties imposed under IEEPA were terminated.[22]

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[19] Multiple tariffs were enacted under the authority of the International Emergency Economic Powers Act ("IEEPA"), including tariffs that applied to countries that may not be subject in this proceeding. Tariffs specific to Canada, China, and Mexico were initiated in February 2025. Tariffs initiated in April 2025 under IEEPA were applied globally. Tariffs specific to Brazil were initiated in July 2025. Tariffs specific to India were initiated in August 2025 and terminated effective February 7, 2026. Tariffs under IEEPA were amended over time. All tariffs initiated under IEEPA were terminated effective February 20, 2026. 91 FR 9437, February 25, 2026.

[20] 91 FR 9437, February 25, 2026.

[21] 90 FR 9121, February 7, 2025; 90 FR 11426, March 6, 2025; 90 FR 11463, March 7, 2025; 90 FR 50725, November 7, 2025; 91 FR 9437, February 25, 2026. See also HTS heading 9903.01.20 and U.S. note 2(s) and HTS heading 9903.01.24 and U.S. note 2(u) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 9, Publication 5747, May 2026, pp. 99.3.3 and 99.3.367.

[22] Articles of steel, derivative articles of steel, articles of aluminum, and derivative articles of aluminum subject to section 232 tariffs were generally not subject to tariffs initiated in April 2025 under IEEPA. However, in some cases, the non-aluminum and non-steel content of those articles was subject to tariffs initiated in April 2025 under IEEPA. 90 FR 15041, April 7, 2025; 91 FR 9437, February 25, 2026. See also HTS headings 9903.01.25 and 9903.01.33 and U.S. note 2(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 9, Publication 5747, May 2026, pp. 99.3.4 and 99.3.368.

The product

Description and applications

Air compressors are machines that convert power from an electric, gas, or diesel engine into potential energy that is stored in pressurized air within a pressure vessel. This is achieved by the air compressor drawing in air, compressing it to increase the air pressure, and allowing it to be used in a controlled manner. Air compressors include the following components: (1) a compressor pump, (2) a motor, engine or battery, (3) an intake and exhaust valves, (4) an air storage tank, (5) a cooling system, (6) a pressure system, (7) a safety valve, and (8) a control panel.[23] There are four main types of air compressors: (1) reciprocal, (2) rotary screw, (3) axial, and (4) centrifugal. However, only reciprocal air compressors are covered under the scope of this investigation.[24] Air compressors can either be stationary or portable and may be direct driven, or belt driven.

Reciprocal air compressors use the back-and-forth motion of reciprocating compressor pistons to increase air pressure. These pistons are driven by a crankshaft and housed in a cylinder which facilitates the compression process. As the piston moves downwards it creates a low-pressure area which opens the intake valve allowing air to flow into the cylinder. When the piston changes direction and moves upwards it compresses the air trapped inside. This compression increases the air pressure, forces the intake valve shut and opens the discharge valve which readies the air to be discharged into the system.[25]

Stationary air compressors, as shown in figure 1.1, are heavier assemblies that are built in place with motor and tank, usually hard-wired to building power, and are made primarily of steel and aluminum.[26] Stationary air compressors can also be mounted to a service vehicle or a trailer. Reciprocating stationary air compressors typically range from 0.5HP (0.37kW) to 25HP (16.64 kW). Portable air compressors, as shown in figure 1.1, are either wheeled-portable or hand-carry and are available in many configurations, are designed to meet specific applications, and are made primarily of steel and aluminum.[27] These air compressors are smaller and lighter for frequent transport and relocation. Portable air compressors are more often described by flow rate, rather than power, and have a flow rate of under 0.57 cubic meters per minute.[28]

[23] Petitions, pp. 10 and 20.
[24] Eusebio, "4 Types of Air Compressors", June 15, 2022. Petitions, pp. 18 to 19 and 23 to 24.
[25] Samcoenterprises, "The Anatomy of a Reciprocating Compressor", June 4, 2024.
[26] Petitions, p. 9.
[27] Petitions, p. 9.
[28] Petitions, p. 22.

Figure 1.1: Stationary air compressors (left) and portable air compressors (right)

Source: DeWalt, "Vertical Stationary Electric Air Compressor (80 Gal)", https://www.dewalt.com/en-us/product/dxcmla4708065/vertical-stationary-electric-air-compressor-80-gal, retrieved May 21, 2026. DeWalt, "Portable Verticle Electric Air Compressor (25 Gal)", https://www.dewalt.com/en-us/product/dxcm251/oil-lubed-belt-drive-portable-vertical-electric-air-compressor-200-psi-25-gal, May 21, 2026.

Direct drive air compressors, as shown in figure 1.2, have a motor which is directly connected on the drive shaft to the compressor element. Direct drive air compressors are more often portable but can be stationary. These compressors have fewer parts which make them more compact, efficient, and easier maintain for continuous applications. Belt driven air compressors, as shown in figure 1.2, have a motor which is connected to the compressor crank shaft with a belt. These compressors are more often used in high pressure applications or when pressure requirements change frequently because they have an adjustable pulley system which allows the user to change the speed of the motor easily.[29] Belt-driven air compressor can be stationary or portable.

[29] Petitions, pp. 20 to 21.

Figure 1.2: Direct driven air compressors (left) and belt driven air compressors (right)

Source: Harborfrieght, "8-17 Gallon Air Compressors", https://www.harborfreight.com/8-gallon-150-psi-oil-free-horizontal-shopauto-air-compressor-64294.html, retrieved May 21, 2026. Harborfreight, "20-30 Gallon Air Compressors", https://www.harborfreight.com/21-gallon-175-psi-oil-free-vertical-shopauto-air-compressor-64858.html, retrieved May 21, 2026.

Air compressors are mainly used in six major sectors and end-use applications: construction, commercial business, farming, light manufacturing, medical facilities, and distribution.

Manufacturing processes

The manufacturing process for all types of air compressors shares the same manufacturing facilities and fundamental manufacturing processes.[30] The process begins with sourcing raw materials which include hot rolled coil steel and steel sheet, cast iron, aluminum casting, fittings, molded plastics, switches, valves, and electrical components. Steel is formed to make tank heads and rolled to form cylinders which establish the primary structure of the pressure vessel. Forged fittings are welded to the tank head and cylinders then tank heads are welded to the cylinder to complete the pressure vessel shell. The completed pressure vessel undergoes a burst and leak test before being painted using a powder paint process.[31]

[30] Petitions, p. 13.

[31] Sayiair, "The Manufacturing Process of Air Compressors", accessed June 26, 2026. https://sayiair.com/the-manufacturing-process-of-air-compressors/. Petitions, pp. 13 to 14 and 25.

The completed vessel then moves into final assembly where brackets for wheels, the air compressor motor, and the air compressor pump are attached to the pressure vessel. Wheels and rubber feet are installed first, then the air compressor pump, and finally the air compressor motor. Plumbing, control components, and additional hardware are then added to the final compressor. Once completed, the air compressor undergoes a final integrity test before being labeled, packaged, and shipped.[32] [33]

Domestic like product issues

No issues with respect to domestic like product have been raised in these investigations. The petitioner proposes the Commission should define the domestic like product as a single product consisting of air compressors coextensive with the scope of the investigations.[34] [35]

[32] Petitions, p. 13 to 14 and 25.

[33] Air compressors can be shipped with certain accessories such as hoses, fittings, tool kits, oils, nail guns, pneumatic paint sprayers, air ratchet wrenches, air grease guns, air drills, air hammers, air sanders, air inflators, or air impact drivers.

[34] Petitions, pp. 7 to 33; and Petitioner's postconference brief, May 27, 2026, pp. 1 to 13.

[35] No respondent party participated in the conference or provided a postconference brief.

Part 2: Conditions of competition in the U.S. market

U.S. market characteristics

Air compressors come in two categories, stationary air compressors and portable air compressors.[1] Stationary air compressors are heavier assemblies that are usually hard-wired to a power source.[2] Portable air compressors are available in many configurations for use in various applications and are usually electric but in some cases are driven by gas engines.[3] The American Society of Mechanical Engineers ("ASME") Boiler and Pressure Vessel Code ("BPVC") govern the design and manufacturing of air compressors.[4] Air compressors are made primarily from steel and to a lesser degree aluminum. Air compressors also have rubber, plastic, and copper components.[5] Air compressors are used in six major sectors and end-use applications: construction, commercial business, farming, light manufacturing, medical facilities, and distribution.[6]

The majority of U.S. producers indicated that the market for air compressors is subject to distinctive conditions of competition. U.S. producer *** reported that residential construction and remodeling drives air compressor sales. The majority of importers reported that the air compressor market was not subject to distinctive conditions of competition. However, importer *** reported that there is increased competition from equivalent battery powered tools.

Apparent U.S. consumption of air compressors increased in terms of quantity and value during January 2023 to December 2025.

Impact of section 301 tariffs

U.S. producers and importers were asked to report the impact of section 301 tariffs on the overall demand, supply, prices, or raw material costs (table 2.1). *** responding U.S. producers and the majority of importers reported that section 301 tariffs had impacted the U.S. market for air compressors. U.S. producers and importers generally reported that section 301 tariffs increased prices and decreased demand for imported air compressors. Additionally, importer *** reported that due to section 301 tariffs, U.S. consumers have not

[1] Petitions, p. 9.
[2] Petitions, p. 9.
[3] Petitions, p. 9.
[4] Petitions, p. 10.
[5] Petitions, pp. 8-9.
[6] Petitions, p. 11.

replaced older equipment or have transitioned to battery powered tools. Importer *** reported that section 301 tariffs had prompted it to source air compressors from sources other than China. Importer *** reported that section 301 tariffs made every market unstable and that component prices skyrocketed which caused decreased profits, despite components not coming from China. Importer *** reported that section 301 tariffs caused supply instabilities and profitability deterioration.

Table 2.1 Air compressors: Count of firms' responses regarding the impact of the 301 tariffs on Chinese origin products

Firm type	No	Yes	Don't know
U.S. producers	0	3	0
Importers	0	14	3

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

Impact of section 232 tariffs

U.S. producers and importers were asked to report the impact of section 232 tariffs on the overall demand, supply, prices, or raw material costs (tables 2.2). The majority of responding U.S. producers and importers reported that section 232 tariffs had impacted the U.S. market for air compressors. Importers generally reported that section 232 duties increased the price of air compressors. However, U.S. producer *** reported that section 232 tariffs originally had little impact on imported air compressors, but it expects a retail price adjustment of between 5.0 and 10.0 percent that is not yet evident in the market. Furthermore, importer *** reported that section 232 tariffs caused pauses in replenishment orders that have continued to the present. Importer *** reported that section 232 tariffs have been crippling American compressor companies and manufacturers.

Table 2.2 Air compressors: Count of firms' responses regarding the impact of the 232 tariffs on steel and aluminum imports

Firm type	No	Yes	Don't know
U.S. producers	0	2	1
Importers	0	14	4

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

Impact of tariffs associated with Presidential actions

U.S. producers and importers were asked to report the impact of tariffs or proposed tariffs stemming from recent executive orders on the overall demand, supply, prices, or costs of air compressors. The majority of U.S. producers and importers reported that tariffs stemming

from executive orders since January 1, 2025 had an impact on the U.S. air compressor market. U.S. producers and importers generally reported that these tariffs associated with Presidential actions increased the price of air compressors, with importer *** reporting that it observed an immediate drop in sales. Importer *** reported that tariffs associated with Presidential actions had introduced uncertainty into the U.S. market, impacting purchasers' ability to make decisions and incentivizing them to transition to battery operated tools.

Table 2.3 Air compressors: Impact of any new or modified tariffs since January 1, 2025, by firm type

Firm type	No	Yes	Don't know
U.S. producers	0	2	1
Importers	1	14	4

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

Channels of distribution

U.S. producers and importers sold mainly to retailers/rental companies, as shown in table 2.4.

Table 2.4 Air compressors: Share of U.S. shipments by source, channel of distribution, and period

Shares in percent

Source	Channel	2023	2024	2025
United States	Distributors	***	***	***
United States	Retailers / rental companies	***	***	***
United States	Other firms	***	***	***
China	Distributors	***	***	***
China	Retailers / rental companies	***	***	***
China	Other firms	***	***	***
Malaysia	Distributors	***	***	***
Malaysia	Retailers / rental companies	***	***	***
Malaysia	Other firms	***	***	***
Vietnam	Distributors	***	***	***
Vietnam	Retailers / rental companies	***	***	***
Vietnam	Other firms	***	***	***
Subject	Distributors	***	***	***
Subject	Retailers / rental companies	***	***	***
Subject	Other firms	***	***	***
Nonsubject	Distributors	***	***	***
Nonsubject	Retailers / rental companies	***	***	***
Nonsubject	Other firms	***	***	***
All imports	Distributors	***	***	***
All imports	Retailers / rental companies	***	***	***
All imports	Other firms	***	***	***

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

Geographic distribution

U.S. producers and importers reported selling air compressors to all regions of the United States (table 2.5). 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 *** percent of sales within 100 miles of their U.S. point of shipment, *** percent between 101 and 1,000 miles, and *** percent over 1,000 miles.

Table 2.5 Air compressors: Count of U.S. producers' and U.S. importers' geographic markets

Region	U.S. producers	China	Malaysia	Vietnam	Subject sources
Northeast	3	14	4	5	15
Midwest	3	14	4	5	15
Southeast	3	15	4	5	16
Central Southwest	3	14	5	5	16
Mountain	3	14	4	5	15
Pacific Coast	3	14	4	5	15
Other	3	11	3	3	12
All regions (except Other)	3	14	4	5	15
Reporting firms	3	15	5	5	17

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 2.6 provides a summary of the supply factors regarding air compressors from U.S. producers and from subject countries.

Table 2.6 Air compressors: Supply factors that affect the ability to increase shipments to the U.S. market, by country

Quantity in units; ratio and share in percent

Factor	Measure	United States	China	Malaysia	Vietnam
Capacity 2023	Quantity	***	***	***	***
Capacity 2025	Quantity	***	***	***	***
Capacity utilization 2023	Ratio	***	***	***	***
Capacity utilization 2025	Ratio	***	***	***	***
Inventories to total shipments 2023	Ratio	***	***	***	***
Inventories to total shipments 2025	Ratio	***	***	***	***
Home market shipments 2025	Share	***	***	***	***
Non-US export market shipments 2025	Share	***	***	***	***
Ability to shift production (firms reporting “yes”)	Count	***	***	***	***

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

Note: Responding U.S. producers accounted for the majority of U.S. production of air compressors in 2025. Responding foreign producer/exporter firms accounted for less than half of U.S. imports of air compressors from China, Malaysia, and Vietnam during 2025. 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 Parts 3 and 7.

Domestic production

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

U.S. producers decreased production and production capacity from 2023 to 2025. Production decreased more than production capacity leading to a decrease in capacity utilization. U.S. producers’ inventories approximately doubled from 2023 to 2025. U.S.

producers reported selling the vast majority of shipments in the U.S. market. Other products that producers reportedly can produce on the same equipment as air compressors are pressure vessels for the heavy-duty truck market, pressure washers, generators and custom fabricated products. U.S. producer *** reported that demand for other products determines the need to shift capacity from one product to another.

Subject imports from China

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

Chinese producers decreased production and production capacity from 2023 to 2025. Production capacity decreased more than production leading to an increase in capacity utilization. Inventories decreased slightly over the period but remained at approximately *** of commercial shipments throughout the period. Chinese producers reported selling over *** of shipment to non-U.S. markets in 2025. Chinese producers reported that they are able to produce pumps on the same equipment as air compressors.

Subject imports from Malaysia

Malaysian foreign producers did not provide a foreign producer questionnaire.

Subject imports from Vietnam

Based on available information, producers of air compressors from Vietnam have the ability to respond to changes in demand with large changes in the quantity of shipments of air compressors to the U.S. market. The main contributing factors to this degree of responsiveness of supply are availability of a large quantity of unused capacity and the ability to shift production to or from alternate products. Factors mitigating the responsiveness of supply include *** inventories in 2025 and *** reported shipments to non-U.S. markets.

Vietnamese producers decreased production capacity and sharply decreased production leading to a sharp decrease in capacity utilization from 2023 to 2025. Vietnamese producers reported *** inventories in 2025. Vietnamese producers reported that *** commercial shipments were sold in the U.S. market. Vietnamese producers reported that they can produce

direct current tools, such as drills and saws, on the same equipment used to produce air compressors.

Imports from nonsubject sources

Nonsubject imports accounted for 87.1 percent of total U.S. imports in 2025.[7]

Supply constraints

None of the responding U.S. producers reported that they had experienced supply constraints; while four importers reported that they had experienced supply constraints since January 1, 2023. Importer *** reported supply constraints in each year. Importers *** reported that they experienced supply constraints during 2025 (table 2.7). Importer *** reported that these supply constraints were due to increases in tariff rates which led them to hold off on importing air compressors until the tariff rates were decreased. Importer *** reported that Alton had stopped shipping air compressors for approximately 3 months and then slowly resumed shipments but did not ship consistently until March 2026. Importer *** reported supply constraints in 2025 and 2026 due to constant political and economic changes that pushed investment and capital expenditure spending in different directions. It further reported that the domestic industry lacked the ability to supply sufficient quantities of air compressors during the period of supply constraint.

Table 2.7 Air compressors: Count of firms' responses regarding timing of supply constraints, by firm type and source

Count in number of firms reporting

Reporting firm	2023	2024	2025	2026
Producers	0	0	0	0
Importers	1	1	4	2

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

U.S. demand

Based on available information, the overall demand for air compressors is likely to experience small changes in response to changes in price. The main contributing factor is the limited range of substitute products which are only viable substitutes for air compressors in a portion of the market.

[7] The share of nonsubject imports is based on the value of imports entering the U.S. Department of Commerce Census Bureau statistical reporting numbers 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685. These statistical reporting numbers contain out-of-scope products.

Business cycles

All U.S. producers and seven of 19 responding importers indicated that the market was subject to business cycles. Specifically, U.S. producer *** reported that there are different segments of the market that are subject to varied business cycles and gave examples of demand driven by the home renovation market sector which spikes in late spring and during the holiday season, while demand in industrial construction follows the start of construction season. Importer *** reported that the holidays have an impact on the demand for air compressors. Importer *** reported that business cycles are impacted by its promotional activities. Importer *** reported that air compressors sales are related to housing construction season. Importer *** reported that air compressors follow the cycle of the U.S. economy and that when DIY purchasers have less disposable income, they are unable to purchase air compressors.

Demand trends

The majority of U.S. producers reported that U.S. demand for air compressors fluctuated downward since January 1, 2023; while a plurality of importers reported that U.S. demand had remained constant (table 2.8). The majority of U.S. producers and importers reported that foreign demand for air compressors remained constant since January 1, 2023.

Table 2.8 Air compressors: Count of firms' responses regarding overall domestic and foreign demand, by firm type

Market	Firm type	Steadily Increase	Fluctuate upward	No change	Fluctuate downward	Steadily decrease
Domestic demand	U.S. producers	1	0	0	2	0
Domestic demand	Importers	3	1	9	5	3
Foreign demand	U.S. producers	0	0	2	1	0
Foreign demand	Importers	1	1	8	3	1

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

Substitute products

Substitutes for air compressors are limited to battery powered cordless power tools.[8] These primarily serve as substitutes for air compressors for lower volume users such as a DYI

[8] Cordless power tools do not replace the air compressor but are tools that perform the same tasks using a different power source than tools powered by air compressors. Staff conference transcript, p. 50 (Hite).

user, as battery powered tools serve more intermittent production needs and are not generally substitutes for higher volume continuous users.[9]

Substitutability issues

This section assesses the degree to which U.S.-produced air compressors and imports of air compressors from subject countries can be substituted for one another by examining the importance of certain purchasing factors and the comparability of air compressors from domestic and imported sources based on those factors. Based on available data, staff believes that there is a moderate degree of substitutability between domestically produced air compressors and air compressors imported from subject sources.[10] Air compressors are generally interchangeable on a continuum, as air compressors of similar specifications can complete the same task.[11] However, the air compressor market is divided into two distinct segments: a lower-end personal use segment and a higher-end professional use segment. There are differences in the air compressors that each of these market segments demand, namely in the quality of air compressor. The quality of air compressors is largely determined by the useable life of the air compressor or the hours of run-time. Air compressors produced for the personal use segment of the market have lower run-times (100 to 250 hours) while air compressors produced for the professional segment range from a minimum of 500 hours of run time for construction contractors to upwards of 10,000 hours.[12] The life of an air compressor is determined by the quality of the parts used to build the air compressor, namely the compression motor and the thickness of the air tank. These differences limit the substitutability of air compressors designed for personal and professional use and may limit the substitutability of air compressors from different sources. Furthermore, brand plays some role in this market which further reduces the substitutability of air compressors.[13]

[9] Staff conference transcript, p. 50 (Hite).

[10] The degree of substitution between domestic and imported air compressors depends upon the extent of product differentiation between the domestic and imported products and reflects how easily purchasers can switch from domestically produced air compressors to the air compressors 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.).

[11] Staff conference transcript pp. 48-49 (Lutz).

[12] Staff conference transcript p. 53 (Hite).

[13] Staff conference transcript p. 46 (Hite).

Factors affecting purchasing decisions

Most important purchase factors

Purchasers responding to lost sales lost revenue allegations[14] were asked to identify the main purchasing factors their firm considered in their purchasing decisions for air compressors. The most often cited top three factors firms consider in their purchasing decisions for air compressors were price/cost (7 firms), quality (6 firms), and performance (2 firms) as shown in table 2.9. Quality was the most frequently cited first-most important factor (4 firms), followed by price/cost (2 firms); quality and performance were the most frequently reported second-most important factor (1 firm each); and price/cost was the most frequently reported third-most important factor (5 firms).

Table 2.9 Air compressors: Count of ranking of factors used in purchasing decisions as reported by purchasers, by factor

Factor	First	Second	Third	Total
Price / Cost	2	0	5	7
Quality	4	1	1	6
Performance	1	1	0	2
All other factors	1	6	2	NA

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

Note: Other factors include availability, capacity, features, ability to manufacture amounts needed, retail customer recognition of brands, consistent lead time and delivery, profitability, and vendor loyaltiy/long-term relationships.

Lead times

Air compressors are primarily sold from inventory. U.S. producers reported that *** percent of their commercial shipments came from inventories, with lead times averaging *** days, and the remaining *** percent were produced to order with lead times averaging *** days. Importers reported that *** percent of their commercial shipments came from U.S. inventories with lead times averaging *** days. The remaining *** percent were produced to order with lead times averaging *** days.

Comparison of U.S.-produced and imported air compressors

In order to determine whether U.S.-produced air compressors can generally be used in the same applications as imports from China, Malaysia, and Vietnam; U.S. producers and importers were asked whether the products can always, frequently, sometimes, or never be

[14] This information is compiled from responses by purchasers identified by Petitioners' the lost sales lost revenue allegations. See Part 5 for additional information.

used interchangeably. As shown in tables 2.10 and 2.11, the majority of U.S. producers reported that air compressors from the United States, subject, and nonsubject countries were always or frequently interchangeable. U.S. producer *** reported that air compressors from the United States and nonsubject countries are only sometimes interchangeable because air compressors from nonsubject countries may be targeted towards applications in specialized niches.

Importer responses on the interchangeability between air compressors produced in the United States, subject, and nonsubject countries were mixed. Importers *** reported that Chinese air compressors imported into the U.S. market are built for the U.S. market. They further reported that different markets have different electrical power demands and this limited the interchangeability of air compressors produced for different countries. Importer *** reported that air compressors from the United States and China are of completely different quality.

Table 2.10 Air compressors: Count of U.S. producers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. China	2	1	0	0
United States vs. Malaysia	2	1	0	0
United States vs. Vietnam	2	1	0	0
China vs. Malaysia	2	1	0	0
China vs. Vietnam	2	1	0	0
Malaysia vs. Vietnam	2	1	0	0
United States vs. Other	1	1	1	0
China vs. Other	1	1	0	0
Malaysia vs. Other	1	1	0	0
Vietnam vs. Other	1	1	0	0

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

Table 2.11 Air compressors: Count of importers reporting the interchangeability between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. China	6	2	7	2
United States vs. Malaysia	4	2	6	0
United States vs. Vietnam	4	2	5	0
China vs. Malaysia	4	5	3	0
China vs. Vietnam	4	4	3	0
Malaysia vs. Vietnam	4	4	3	0
United States vs. Other	3	1	6	0
China vs. Other	3	0	7	0
Malaysia vs. Other	3	0	5	0
Vietnam vs. Other	3	0	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 air compressors from the United States, subject, or nonsubject countries. As seen in tables 2.12 and 2.13, U.S. producers' responses on the differences other than price between air compressors produced in the United States, subject, and nonsubject countries were mixed. U.S. producer *** reported that performance range, size, and the end use of a specific air compressor impact interchangeability. U.S. producer *** reported that it sells its product on quality and service, not price.

At least half of importers reported that there are sometimes or never differences other than price between air compressors from the United States, subject countries, and nonsubject countries. Importers *** reported that product availability, technology, and product range are differences other than price between air compressors from different sources. These importers gave the example of traditional oil lubricated pumps for stationary and gas-powered belt driven air compressors which are not built in the United States. Furthermore, importer *** reported that sometimes customers prefer air compressors marked with "made in North America". Importer *** reported that Southeast Asia (SEA) factories are vertically integrated, and therefore have better control over the manufacturing process, the ability to address quality concerns quickly, better quality control parameters, system optimization, parallel development, uniform standards, and robust traceability. It further reported that SEA suppliers assemble their air compressors using induction motors on their compressors that are known to be superior in terms of efficiency, reliability, and longevity (more than double the run time of universal motors), and run quieter and safer than universal motors which often often spark at the brushes. It also reported that U.S. producers have focused on producing stationary, high-output industrial systems while SEA suppliers filled the market gap for specialized, portable, and quiet

units with oil free pump manufacturing which require minimal maintenance and don't leak oil during transportation. Importer *** reported that not all segments of the market purchase the cheapest product because some customers require quality, reliability, support, and availability. Importer *** reported that smaller compressors are generally used by personal use consumers and are not offered in the United States.

Table 2.12 Air compressors: 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

Country pair	Always	Frequently	Sometimes	Never
United States vs. China	1	1	1	0
United States vs. Malaysia	1	1	1	0
United States vs. Vietnam	1	1	1	0
China vs. Malaysia	1	1	1	0
China vs. Vietnam	1	1	1	0
Malaysia vs. Vietnam	1	1	1	0
United States vs. Other	1	1	1	0
China vs. Other	1	1	0	0
Malaysia vs. Other	1	1	0	0
Vietnam vs. Other	1	1	0	0

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

Table 2.13 Air compressors: Count of importers reporting the significance of differences between product produced in the United States and in other countries, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. China	2	3	10	2
United States vs. Malaysia	2	2	6	1
United States vs. Vietnam	2	3	5	0
China vs. Malaysia	2	1	5	3
China vs. Vietnam	2	1	5	2
Malaysia vs. Vietnam	2	1	5	2
United States vs. Other	2	3	5	0
China vs. Other	2	1	4	0
Malaysia vs. Other	2	0	3	0
Vietnam vs. Other	2	0	3	0

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

Part 3: 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 1 of this report and information on the volume and pricing of imports of the subject merchandise is presented in Part 4 and Part 5. Information on the other factors specified is presented in this section and/or Part 6.

U.S. producers

The Commission issued a U.S. producer questionnaire to 22 firms that were identified in the petitions and through industry research.[1] Three U.S. producers, accounting for an estimated *** percent of U.S. production of air compressors in 2025, provided usable data on their domestic operations.[2] [3] [4] Table 3.1 lists U.S. producers of air compressors, their production locations, positions on the petitions, and shares of total production in 2025.

[1] Petitioner, MAT, is an integrated U.S. producer of air compressors. MAT operates two domestic facilities with vertically integrated manufacturing processes, including tank fabrication, assembly, testing, and packaging. In the petitions, MAT also identified other U.S. producers—both integrated producers and producer-assemblers—that engage in substantial domestic production activities. Petitioner explains that even where U.S. producers do not fabricate pressure vessels or other major components in-house, these firms nonetheless perform significant domestic operations such as assembly, finishing, engineering, and testing, and therefore should be considered U.S. producers for purposes of the Commission's domestic industry analysis. Conference transcript, pp. 35 to 36.

[2] The coverage share is calculated by comparing the three firms' reported 2025 production (*** units) with total U.S. production in 2025 (*** units), as estimated by the petitioner. Petitions, exh. I-3.

[3] ***, which assembles air compressors in the United States, provided a U.S. importer questionnaire but was unable to submit a U.S. producer questionnaire in time for this report. However, the firm reported that it produced *** air compressor units in 2025, representing approximately *** percent of total U.S. production that year.

[4] Two firms which submitted U.S. importer questionnaires, ***, reported purchasing in-scope air compressors from U.S. producers and subsequently shipping these U.S.-origin units to a third country (***) for additional value-added work before reimporting the same in-scope air compressors back into the United States. Because the reimported units were originally manufactured in the United States, staff removed these firms' importer questionnaire data from the importer dataset to avoid classifying U.S.-origin products as imports. However, staff used the firms' reported data to adjust U.S. producers' U.S. shipments for purposes of calculating apparent U.S. consumption. For further information, see the reimported merchandise section in Part 3 and the apparent U.S. consumption section in Part 4 of this report.

Table 3.1 Air compressors: U.S. producers, their position on the petition, location of production, and share of reported production, 2025

Shares in percent

Firm	Position on petitions	Production location(s)	Share of production
MAT	Petitioner	Jackson, TN Springfield, MN	***
MITM	***	Peosta, IA	***
SBD	***	Jackson, TN	***
All firms	Various	Various	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 3.2 presents information on U.S. producers' ownership, related and/or affiliated firms. As indicated in table 3.2, MAT reported that it is ***. MAT also reported a relationship with ***. MITM reported that ***. SBD reported ***.

In addition, as discussed in greater detail below, *** and *** directly imported air compressors from subject sources, and *** and *** purchased air compressors from subject sources through U.S. importers.

Table 3.2 Air compressors: 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.

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 3.3 presents public events in the U.S. industry since January 1, 2023.

Table 3.3 Air compressors: Important industry events since 2023

Item	Firm	Event
Expansion	JWF Industries	In October 2024, JWF Industries completed a $150 million expansion of its manufacturing facility in Cramer Pike, PA.
Expansion	CASTAIR	In May 2025, CASTAIR announced an expansion of its production plant in Spicer, Minnesota.
Expansion	MAT	In June 2025, the Tennessee Department of Economic and Community Development and MAT announced a $9 million investment to expand MAT's manufacturing plant in Jackson, Tennessee.
Expansion	Kaishan Compressor USA	In September 2025, Kaishan Compressor USA completed an $11 million expansion of its manufacturing plant in Loxley, Alabama." This facility primarily manufacturers out-of-scope air compressors.
Closure	Ingersoll Rand	In October 2025, Ingersoll Rand announced the closure of its Princeton, Illinois manufacturing plant.
Acquisition	MAT Holdings, Inc. / Stanley Black and Decker	In 2025, Stanley Black & Decker idled its air compressor production facility in Jackson, Tennessee before selling all assets related to the air compressor business at distressed values to MAT.

Source: WJAC, "JWF celebrates expansion of Cramer Pike facility", October 31, 2024. https://wjactv.com/news/local/jwf-celebrates-facility-expansion-with-ribbon-cutting. CASTAIR, "Castair New Facility Expansion Update", May 21, 2025. https://castair.net/videos/. TNECD, "MAT Industries, LLC to Expand", June 3, 2025. https://www.tn.gov/ecd/news/2025/6/3/governor-lee--commissioner-mcwhorter-announce-mat-industries--llc-to-expand-in-madison-county.html. Chavez, "Kaishan Compressor USA Marks $11 million expansion", September 9, 2025. https://gulfcoastmedia.com/stories/kaishan-compressor-usa-marks-11-million-expansion-of-loxley-facility,284835#//. Jacksonspring, "Ingersoll Rand's Illinois Plant Closure", October 28, 2025. https://jacksonspring.com/what-ingersoll-rands-illinois-plant-closure-signals-for-u-s-manufacturing/. Conference transcript, p.14 (Patton).

Producers in the United States were asked to report any change in the character of their operations or organization relating to the production of air compressors since January 1, 2023. Two of three producers indicated in their questionnaires that they had experienced such changes. Table 3.4 presents the changes identified by these producers.

Table 3.4 Air compressors: U.S. producers' reported changes in operations, since January 1, 2023

Item	Firm name and narrative response on changes in operations
Acquisitions	***
Other	***

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

U.S. production, capacity, and capacity utilization

Table 3.5 presents U.S. producers' installed and practical capacity and production on the same equipment. Reported data show that installed capacity, practical capacity, and production all declined from 2023 to 2025, accompanied by lower utilization rates in the same period. Installed capacity decreased by *** percent from 2023 to 2025, while installed production declined by *** percent in the same period. Practical capacity also decreased, and utilization dropped from *** percent in 2023 to *** percent in 2025. These trends reflect lower production volumes and broader industry changes, including SBD's exit from domestic air-compressor manufacturing in 2025.

Table 3.5 Air compressors: U.S. producers' installed and practical capacity, production, and utilization on the same equipment as subject production, by period

Capacity and production in units; Utilization in percent

Item	Measure	2023	2024	2025
Installed overall	Capacity	***	***	***
Installed overall	Production	***	***	***
Installed overall	Utilization	***	***	***
Practical overall	Capacity	***	***	***
Practical overall	Production	***	***	***
Practical overall	Utilization	***	***	***
Practical Air compressors	Capacity	***	***	***
Practical Air compressors	Production	***	***	***
Practical Air compressors	Utilization	***	***	***

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 3.6 presents U.S. producers' reported narratives regarding practical capacity constraints. U.S. producers reported existing labor force and supply of material inputs as constraints.

Table 3.6 Air compressors: U.S. producers' reported constraints to practical overall capacity, since January 1, 2023

Item	Firm name and narrative response on constraints to practical overall capacity
Existing labor force	***
Existing labor force	***
Supply of material inputs	***
Other constraints	***

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

Table 3.7 and figure 3.1 present U.S. producers' production, capacity, and capacity utilization. Practical capacity declined in each year examined, decreasing by *** percent from 2023 to 2025, while production also decreased steadily, declining by *** percent over the same period. As a result, industry-wide capacity utilization dropped from *** percent in 2023 to *** percent in 2025. During 2023 to 2025, MAT's share of domestic production increased and SBD's share decreased, as MAT acquired SBD's air compressor assets ahead of its exit in 2025; while MITM's share remained comparatively stable in each period examined.

Table 3.7 Air compressors: U.S. producers' output, by firm and period

Practical capacity

Capacity in units

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 3.7 (Continued) Air compressors: U.S. producers' output, by firm and period

Production

Production in units

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 3.7 (Continued) Air compressors: U.S. producers' output, by firm and period

Capacity utilization

Capacity utilization ratios in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 3.7 (Continued) Air compressors: U.S. producers' output, by firm and period

Share of production

Share of production in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	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.

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 3.1 Air compressors: U.S. producers' capacity, production, and capacity utilization, by period

* * * * * * *

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

Alternative products

Two of three U.S. producers, *** and ***, reported production of other products on the same equipment used to produce air compressors. These firms reported production of out-of-scope *** on the same equipment. As shown in table 3.8, air compressors accounted for the majority of output throughout the period, although the share of air compressors declined each year, falling from *** percent in 2023 to *** percent in 2025, while the share of other products increased from *** percent to *** percent.

Table 3.8 Air compressors: U.S. producers' overall production on the same equipment as in-scope production, by product type and period

Quantity in units; share in percent

Product type	Measure	2023	2024	2025
Air compressors	Quantity	***	***	***
Other products	Quantity	***	***	***
All products	Quantity	***	***	***
Air compressors	Share	***	***	***
Other products	Share	***	***	***
All products	Share	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. producers' U.S. shipments and exports

Table 3.9 presents U.S. producers' U.S. shipments,[5] export shipments,[6] and total shipments. Overall, U.S. producers' U.S. shipments exports declined from 2023 to 2024 and into 2025, resulting in a decrease in total shipments over the period. U.S. producers' share of exports, in quantity, irregularly decreased from *** percent in 2023 to *** percent in 2025, while the share of their U.S. shipments irregularly increased from *** percent to *** percent, reflecting the decline in exports relative to U.S. shipments.

The unit value of U.S. producers' U.S. shipments was relatively stable in 2023 and 2024, before increasing from $*** per unit in 2024 to $*** per unit in 2025. The unit value for U.S. producers' exports increased in each period, from $*** per unit in 2023 to $*** per unit in 2025.

Table 3.9 Air compressors: U.S. producers' total shipments, by destination and period

Quantity in units; value in 1,000 dollars; unit values in dollars per unit; shares in percent

Item	Measure	2023	2024	2025
U.S. shipments	Quantity	***	***	***
Export shipments	Quantity	***	***	***
Total shipments	Quantity	***	***	***
U.S. shipments	Value	***	***	***
Export shipments	Value	***	***	***
Total shipments	Value	***	***	***
U.S. shipments	Unit value	***	***	***
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
U.S. shipments	Share of value	***	***	***
Export shipments	Share of value	***	***	***
Total shipments	Share of value	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 "—".

[5] U.S. producers reported *** internal consumption and transfers to related firms during the period of investigation.

[6] U.S. producers reported exports to Australia, Canada, the Caribbean, Central America, Europe, Mexico, and South America.

Reimported merchandise

As discussed earlier, in this proceeding two importers reported purchasing in-scope air compressors from U.S. producers,[7] shipping those air compressors to a third country party (***) for additional added value work, and then reentering the in-scope air compressors back into the United States. Table 3.10 presents U.S. importers' export shipments of domestically produced air compressors that were re-imported into the United States and table 3.11 presents quantity and value adjustments made to apparent U.S. consumption based on U.S. importers' U.S.-origin re-imports.

Table 3.10 Air compressors: U.S. importers' export shipments that were re-imported, by period

Quantity in units; Value in 1,000 dollars; Unit values in dollars per unit

Item	Measure	2023	2024	2025
Export shipments re-imported	Quantity	***	***	***
Export shipments re-imported	Value	***	***	***
Export shipments re-imported	Unit value	***	***	***

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 "—". Two importers *** reimported U.S.-origin air compressors after assembling them in a nonsubject source. Their data were added as an adjustment to apparent U.S. consumption.

Table 3.11 Air compressors: Adjusted U.S. shipments for use in apparent consumption, by period

Quantity in units; Value in 1,000 dollars

Item	Measure	2023	2024	2025
U.S. producers' U.S. shipments	Quantity	***	***	***
Reimported U.S.-origin air compressors	Quantity	***	***	***
Adjusted U.S. producers' U.S. shipments	Quantity	***	***	***
U.S. producers' U.S. shipments	Value	***	***	***
Reimported U.S.-origin air compressors	Value	***	***	***
Adjusted U.S. producers' U.S. shipments	Value	***	***	***

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 "—". Two importers *** reimported U.S.-origin air compressors after assembling them in a nonsubject source. Their data were added as an adjustment to apparent U.S. consumption.

[7] One importer reported purchasing air compressors from *** and the second importer reported purchasing from ***. The Commission did not receive a U.S. producer questionnaire from any of these identified firms.

U.S. producers' inventories

Table 3.12 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' inventories increased from 2023 to 2024 as shipments declined more than production, before declining from 2024 to 2025 as producers further reduced production and SBD exited domestic manufacturing, reducing the volume of inventory.[8]

Table 3.12 Air compressors: U.S. producers' inventories and their ratio to select items, by period

Quantity in units; ratios in percent

Item	2023	2024	2025
End-of-period inventory quantity	***	***	***
Inventory ratio to U.S. production	***	***	***
Inventory ratio to U.S. shipments	***	***	***
Inventory ratio to total shipments	***	***	***

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 "—".

[8] During 2023 to 2025, SBD and MITM' inventories ***. MAT explained that its inventories ***.

U.S. producers' imports from subject sources

As previously noted, and detailed below, two U.S. producers, *** and ***, directly imported air compressors from subject countries. U.S. producers' imports of air compressors are presented in tables 3.13 and 3.14. Table 3.15 presents U.S. producers' reasons for importing air compressors from subject sources.

Table 3.13 Air compressors: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in units; ratios in percent

Item	Measure	2023	2024	2025
U.S. production	Quantity	***	***	***
Imports from ***	Quantity	***	***	***
Imports from ***	Quantity	***	***	***
Imports from subject sources	Quantity	***	***	***
Imports from *** to U.S. production	Ratio	***	***	***
Imports from *** to U.S. production	Ratio	***	***	***
Imports from subject sources to U.S. production	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 3.14 Air compressors: *'s U.S. production, U.S. imports from ***, and ratio of subject imports to production, by period**

Quantity in units; ratios in percent

Item	Measure	2023	2024	2025
U.S. production	Quantity	***	***	***
Imports from ***	Quantity	***	***	***
Imports from *** to U.S. production	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 3.15 Air compressors: U.S. producers' reasons for imports, by firm

Item	Narrative response on reasons for importing
***'s reason for importing	***
***'s reason for importing	***

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

U.S. producers' purchases of imports from subject sources

Two U.S. producers, *** and ***, reported purchasing air compressors imported from subject sources. Tables 3.16 and 3.17 present U.S. producers' purchase data and table 3.18 presents their reasoning for the purchases.

Table 3.16 Air compressors: *'s purchases of imports from ***, by source, importer of record, and period**

Quantity in units; ratios in percent

Item	Measure	2023	2024	2025
***'s U.S. production	Quantity	***	***	***
***'s purchases of U.S. imports from *** imported by ***	Quantity	***	***	***
***'s U.S. imports from ***	Quantity	***	***	***
Ratio 1: ***'s purchases of U.S. imports from *** imported by *** relative to ***'s U.S. imports from ***	Ratio	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***
Ratio 2: ***'s U.S. imports from *** relative to overall U.S. imports from ***	Ratio	***	***	***
Ratio 3: ***'s U.S. imports from *** relative to ***'s U.S. production	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 3.17 Air compressors: *'s purchases of imports from ***, by source, importer of record, and period**

Quantity in units; ratios in percent

Item	Measure	2023	2024	2025
***'s U.S. production	Quantity	***	***	***
***'s purchases of U.S. imports from *** imported by *** (see note)	Quantity	***	***	***
***'s U.S. imports from ***	Quantity	***	***	***
Ratio 1: ***'s purchases of U.S. imports from *** imported by *** relative to ***'s U.S. imports from ***	Ratio	***	***	***
Alternate ratio 1: ***'s purchases of U.S. imports from *** imported by *** relative to overall U.S. imports from ***	Ratio	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***
Ratio 2: ***'s U.S. imports from *** relative to overall U.S. imports from ***	Ratio	***	***	***
Ratio 3: ***'s U.S. imports from *** relative to ***'s U.S. production	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 "—". *** did not submit a U.S. importer questionnaire, nor are they listed as an importer of record in proprietary, Census-edited Customs import records for the primary HTS numbers 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685. An alternative comparison (ratio 1) of ***'s purchases of subject imports to overall imports from *** is presented above.

Table 3.18 Air compressors: U.S. producers' reasons for purchasing, by firm

Item	Narrative response on reasons for purchasing
***'s reason for purchasing	***
***'s reason for purchasing	***

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

U.S. employment, wages, and productivity

Table 3.19 shows U.S. producers' employment-related data. The number of production and related workers (PRWs) declined from 2023 to 2025, accompanied by a decline in total hours worked and hours worked per PRW in the same period.[9] Despite these decreases, average hourly wages increased from 2023 to 2025, while productivity declined sharply in the same period, reflecting lower production relative to labor input. As a result, unit labor costs increased between 2023 and 2025, consistent with declining production and the broader contraction in domestic manufacturing activity during the period.

Table 3.19 Air compressors: U.S. producers' employment related information, by item and period

Item	2023	2024	2025
Production and related workers (PRWs) (number)	***	***	***
Total hours worked (1,000 hours)	***	***	***
Hours worked per PRW (hours)	***	***	***
Wages paid ($1,000)	***	***	***
Hourly wages (dollars per hour)	***	***	***
Productivity (units per 1,000 hours)	***	***	***
Unit labor costs (dollars per unit)	***	***	***

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

[9] The declined in the number of PRWs for *** was only partially offset by the increase for ***.

Part 4: U.S. imports, apparent U.S. consumption, and market shares

U.S. importers

The Commission issued importer questionnaires to 85 firms believed to be importers of air compressors, as well as to all U.S. producers of air compressors.[1] Usable questionnaire responses were received from 20 companies.[2] The Commission also received a questionnaire response from 19 firms that certified that they had not imported air compressors from any country at any time since January 1, 2023.

Based on official Commerce statistics for imports of air compressors,[3] responding firms accounted for 45.9 percent of U.S. imports of air compressors from all sources during 2025 (table 4.1). For purposes of the preliminary phase of these investigations, U.S. import data and related information are based on questionnaire responses and official Commerce statistics. Table 4.2 lists all responding U.S. importers of air compressors from subject and nonsubject sources, their headquarter locations, and their shares of U.S. imports, in 2025.

[1] The Commission issued questionnaires to those firms identified in the petitions; staff research; and proprietary, Census-edited Customs' import records.

[2] As discussed in Part 3 of the report, two responding U.S. importers, ***, purchased in-scope air compressors from U.S. producers and shipped these U.S.-origin units to a third country (***) for further processing before reimporting them into the United States. Because these units were originally manufactured domestically, their questionnaire data were removed from the importer dataset to avoid classifying U.S.-origin products as imports. However, their reported shipments were used to adjust U.S. producers' U.S. shipments for purposes of calculating apparent U.S. consumption.

[3] Air compressors are primarily imported under HTS statistical reporting numbers 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685. However, these HTS numbers contain out-scope merchandise.

Table 4.1 Air compressors: U.S. imports questionnaire data coverage in 2025, by source

Coverage ratio in percent

Source	Coverage
China	***
Malaysia	***
Vietnam	***
Subject sources	60.0
Nonsubject sources	2.5
All import sources	45.9

Source: Compiled from data submitted in response to Commission questionnaires and official U.S. import statistics from the U.S. Department of Commerce Census Bureau using HTS statistical reporting numbers 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685, accessed May 11, 2026, adjusted to remove certified no responses from proprietary Census-edited Customs records; add questionnaire-reported imports under other HTS numbers; remove questionnaire-reported out-of-scope imports under the primary HTS numbers.

Note: The coverage ratio calculations are derived by taking the quantity of imports as reported in U.S. importers' questionnaire responses and dividing those figures by quantity imports as reported in adjusted official U.S. import statistics of the U.S. Department of Commerce Census Bureau.

Table 4.2 Air compressors: U.S. importers, their headquarters, and share of total imports within a given source by firm, 2025

Shares in percent

Firm	Headquarters	China	Malaysia	Vietnam
Ace Hardware	Oak Brook, IL	***	***	***
Alton Industry	West Chicago, IL	***	***	***
Bendix	Avon, OH	***	***	***
California Air Tools	San Diego, CA	***	***	***
Castair	Spicer, MN	***	***	***
Costco	Issaquah, WA	***	***	***
EnerMech	Houston, TX	***	***	***
FNA Compressors	Fort Mill, SC	***	***	***
Harbor Freight Tools	Calabasas, CA	***	***	***
Home Depot	Atlanta, GA	***	***	***
International Motors	Lisle, IL	***	***	***
Koki Holdings	Braselton, GA	***	***	***
LG Sourcing (Lowe's)	Mooresville, NC	***	***	***
MAT	Long Grove, IL	***	***	***
Northern Tool	Burnsville, MN	***	***	***
Quincy Compressor	Bay Minette, AL	***	***	***
Schulz of America	Acworth, GA	***	***	***
Stanley Black & Decker	New Britain, CT	***	***	***
Volvo Group	Greensboro, NC	***	***	***
Walmart	Bentonville, AR	***	***	***
All firms	Various	100.0	100.0	100.0

Table continued.

Table 4.2 (Continued) Air compressors: U.S. importers, their headquarters, and share of total imports within a given source by firm, 2025

Shares in percent

Firm	Headquarters	Subject sources	Nonsubject sources	All import sources
Ace Hardware	Oak Brook, IL	***	***	***
Alton Industry	West Chicago, IL	***	***	***
Bendix	Avon, OH	***	***	***
California Air Tools	San Diego, CA	***	***	***
Castair	Spicer, MN	***	***	***
Costco	Issaquah, WA	***	***	***
EnerMech	Houston, TX	***	***	***
FNA Compressors	Fort Mill, SC	***	***	***
Harbor Freight Tools	Calabasas, CA	***	***	***
Home Depot	Atlanta, GA	***	***	***
International Motors	Lisle, IL	***	***	***
Koki Holdings	Braselton, GA	***	***	***
LG Sourcing (Lowe's)	Mooresville, NC	***	***	***
MAT	Long Grove, IL	***	***	***
Northern Tool	Burnsville, MN	***	***	***
Quincy Compressor	Bay Minette, AL	***	***	***
Schulz of America	Acworth, GA	***	***	***
Stanley Black & Decker	New Britain, CT	***	***	***
Volvo Group	Greensboro, NC	***	***	***
Walmart	Bentonville, AR	***	***	***
All firms	Various	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

Tables 4.3 and 4.4 and figure 4.1 present data on U.S. imports of air compressors from subject, nonsubject, and all other sources. U.S. imports from subject sources increased overall from 2023 to 2025, although year-to-year trends varied by country. Imports from China increased between 2023 and 2024 before declining in 2025, while imports from Vietnam decreased in 2024 and subsequently increased in 2025.[4] *** imports from Malaysia in 2023 or 2024; in 2025, however, Malaysia accounted for *** percent of subject imports.[5] Consequently, the total quantity of imports from all subject sources increased in each year examined. Imports from nonsubject sources remained comparatively small, increasing modestly in 2024 and declining in 2025.

Import values generally mirrored these quantity patterns. The value of subject imports increased in each year, while the value of nonsubject imports increased from 2023 to 2024 and declined slightly in 2025. Unit values for subject imports increased in each year examined, and unit values for nonsubject imports, which were comparatively higher throughout, also increased year to year.

Market shares shifted over the period, with China's share increasing in 2024 before falling in 2025, Vietnam's share declining in 2024 and increasing again in 2025, and Malaysia gaining share in 2025. Despite these shifts, imports from subject sources consistently accounted for more than *** percent of total import quantity throughout the period.

The ratio of subject imports to U.S. producers' production exceeded *** percent in each year examined.

[4] ***'s imports from China decreased from 2023 to 2025; while it's imports from Vietnam were *** in 2023 and 2024, and were the majority of imports in 2025.

[5] The vast majority of imports from Malaysia ***.

Table 4.3 Air compressors: U.S. imports, by source and period

Quantity in units; value in 1,000 dollars; unit values in dollars per unit; share and ratio in percent; ratio represents the ratio to U.S. production

Source	Measure	2023	2024	2025
China	Quantity	***	***	***
Malaysia	Quantity	***	***	***
Vietnam	Quantity	***	***	***
Subject sources	Quantity	2,354,278	2,733,546	2,786,182
Nonsubject sources	Quantity	41,979	48,585	37,094
All import sources	Quantity	2,396,257	2,782,131	2,823,276
China	Value	***	***	***
Malaysia	Value	***	***	***
Vietnam	Value	***	***	***
Subject sources	Value	187,812	228,954	248,203
Nonsubject sources	Value	21,203	30,349	27,378
All import sources	Value	209,015	259,303	275,581
China	Unit value	***	***	***
Malaysia	Unit value	***	***	***
Vietnam	Unit value	***	***	***
Subject sources	Unit value	80	84	89
Nonsubject sources	Unit value	505	625	738
All import sources	Unit value	87	93	98
China	Share of quantity	***	***	***
Malaysia	Share of quantity	***	***	***
Vietnam	Share of quantity	***	***	***
Subject sources	Share of quantity	98.2	98.3	98.7
Nonsubject sources	Share of quantity	1.8	1.7	1.3
All import sources	Share of quantity	100.0	100.0	100.0
China	Share of value	***	***	***
Malaysia	Share of value	***	***	***
Vietnam	Share of value	***	***	***
Subject sources	Share of value	89.9	88.3	90.1
Nonsubject sources	Share of value	10.1	11.7	9.9
All import sources	Share of value	100.0	100.0	100.0
China	Ratio	***	***	***
Malaysia	Ratio	***	***	***
Vietnam	Ratio	***	***	***
Subject sources	Ratio	***	***	***
Nonsubject sources	Ratio	***	***	***
All import 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 4.4 Air compressors: Changes in U.S. imports, by source and period

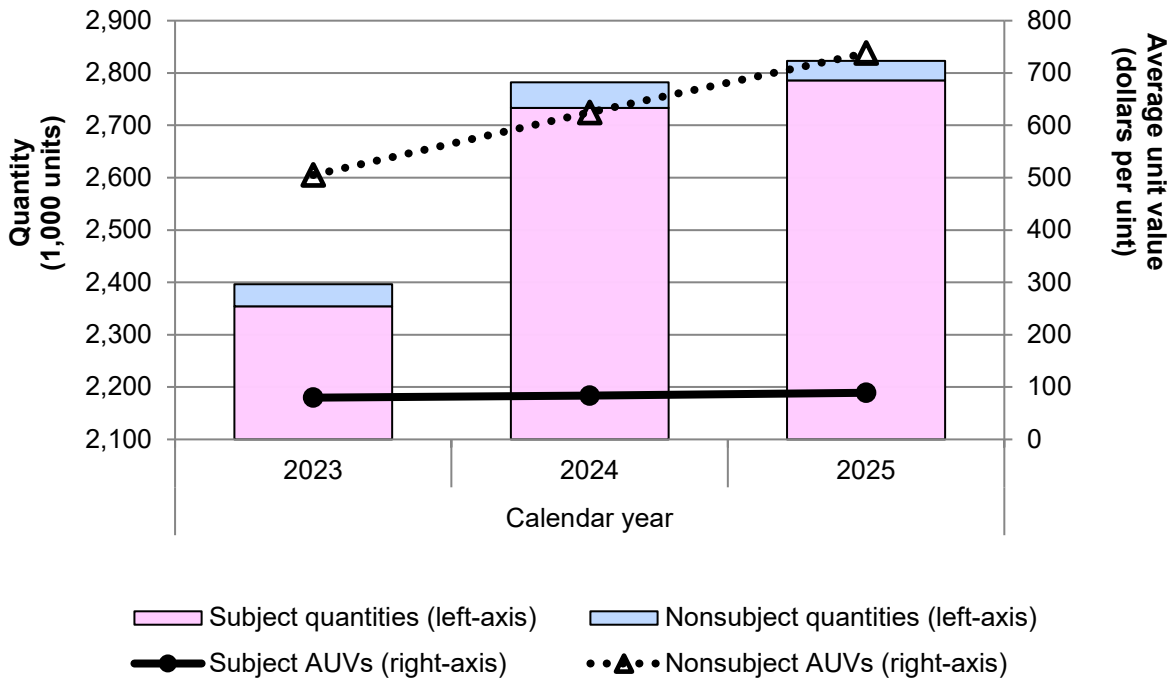
Changes (Δ) in percent (%) or percentage point (ppt)

Source	Measure	2023 to 2025	2023 to 2024	2024 to 2025
China	%Δ Quantity	▼***	▲***	▼***
Malaysia	%Δ Quantity	▲***	***	▲***
Vietnam	%Δ Quantity	▲***	▼***	▲***
Subject sources	%Δ Quantity	▲18.3	▲16.1	▲1.9
Nonsubject sources	%Δ Quantity	▼(11.6)	▲15.7	▼(23.7)
All import sources	%Δ Quantity	▲17.8	▲16.1	▲1.5
China	%Δ Value	▼***	▲***	▼***
Malaysia	%Δ Value	▲***	***	▲***
Vietnam	%Δ Value	▲***	▼***	▲***
Subject sources	%Δ Value	▲32.2	▲21.9	▲8.4
Nonsubject sources	%Δ Value	▲29.1	▲43.1	▼(9.8)
All import sources	%Δ Value	▲31.8	▲24.1	▲6.3
China	%Δ Unit value	▲***	▲***	▲***
Malaysia	%Δ Unit value	▲***	***	▲***
Vietnam	%Δ Unit value	▲***	▼***	▲***
Subject sources	%Δ Unit value	▲11.7	▲5.0	▲6.4
Nonsubject sources	%Δ Unit value	▲46.1	▲23.7	▲18.2
All import sources	%Δ Unit value	▲11.9	▲6.9	▲4.7
China	ppt Δ Quantity	▼***	▲***	▼***
Malaysia	ppt Δ Quantity	▲***	***	▲***
Vietnam	ppt Δ Quantity	▲***	▼***	▲***
Subject sources	ppt Δ Quantity	▲0.4	▲0.0	▲0.4
Nonsubject sources	ppt Δ Quantity	▼(0.4)	▼(0.0)	▼(0.4)
All import sources	ppt Δ Quantity	—	—	—
China	ppt Δ Value	▼***	▲***	▼***
Malaysia	ppt Δ Value	▲***	***	▲***
Vietnam	ppt Δ Value	▲***	▼***	▲***
Subject sources	ppt Δ Value	▲0.2	▼(1.6)	▲1.8
Nonsubject sources	ppt Δ Value	▼(0.2)	▲1.6	▼(1.8)
All import sources	ppt Δ Value	—	—	—
China	ppt Δ Ratio	▲***	▲***	▼***
Malaysia	ppt Δ Ratio	▲***	***	▲***
Vietnam	ppt Δ Ratio	▲***	▼***	▲***
Subject sources	ppt Δ Ratio	▲***	▲***	▲***
Nonsubject sources	ppt Δ Ratio	▲***	▲***	▲***
All import sources	ppt Δ Ratio	▲***	▲***	▲***

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

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.

Figure 4.1 Air compressors: U.S. import quantities and average unit values, by source and period



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

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]

Table 4.5 presents U.S. imports in the twelve-month period preceding filing of the petitions (April 2025 through March 2026). The share of imports from China, Malaysia, and Vietnam were individually not less than 3 percent during the twelve-month period.

Table 4.5 Air compressors: U.S. imports in the twelve month period preceding the filing of the petition, April 2025 through March 2026

Quantity in units; share of quantity in percent

Source of imports	Quantity	Share of quantity
China	***	***
Malaysia	***	***
Vietnam	***	***
All other sources	***	***
All import sources	***	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 "—".

[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)).

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 appears in Part 2. Additional information concerning fungibility, geographical markets, and simultaneous presence in the market is presented below.

Fungibility

U.S. shipments of air compressors by label type

In this proceeding, U.S. producers and U.S. importers were asked to report their 2025 U.S. shipments of air compressors by two label types: branded versus private/white. Table 4.6 and figure 4.2 present U.S. producers' and U.S. importers' U.S. shipments of these air compressor subsets. In 2025, U.S. producers' U.S. shipments were predominantly of branded air compressors, which accounted for the majority of their total shipments in that period. U.S. importers' U.S. shipments of air compressors from subject sources were predominantly of private/white label merchandise, while nonsubject source imports were predominantly of branded.

Table 4.6 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and label type, 2025

Quantity in units; share across and down in percent

Source	Measure	Branded label	Private/white label	All labels
U.S. producers	Quantity	***	***	***
China	Quantity	***	***	***
Malaysia	Quantity	***	***	***
Vietnam	Quantity	***	***	***
Subject sources	Quantity	***	***	2,730,650
Nonsubject sources	Quantity	***	***	47,490
All import sources	Quantity	***	***	2,778,140
All sources	Quantity	***	***	***
U.S. producers	Share across	***	***	100.0
China	Share across	***	***	100.0
Malaysia	Share across	***	***	100.0
Vietnam	Share across	***	***	100.0
Subject sources	Share across	***	***	100.0
Nonsubject sources	Share across	***	***	100.0
All import sources	Share across	***	***	100.0
All sources	Share across	***	***	100.0
U.S. producers	Share down	***	***	***
China	Share down	***	***	***
Malaysia	Share down	***	***	***
Vietnam	Share down	***	***	***
Subject sources	Share down	***	***	***
Nonsubject sources	Share down	***	***	***
All import sources	Share down	***	***	***
All sources	Share down	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 "—".

Figure 4.2 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and label type, 2025

* * * * * * *

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

U.S. shipments of air compressors by model type

In this proceeding, U.S. producers and U.S. importers were asked to report their 2025 U.S. shipments of air compressors by several model types, namely stationary versus portable.[8] Table 4.7 and figure 4.3 present U.S. producers' and U.S. importers' U.S. shipments of these air compressor subsets. U.S. producers and U.S. importers (except for imports from Vietnam) shipped both stationary and portable air compressors. In 2025, U.S. producers' U.S. shipments were predominantly of portable air compressors, which accounted for the majority of their total shipments in that period. U.S. importers' U.S. shipments of air compressors from subject sources were also predominantly of portables, while nonsubject source imports, by contrast, were predominantly of stationary air compressors.

[8] For additional information on U.S. shipments of these air compressor subsets, see appendix D.

Table 4.7 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and model, 2025

Quantity in units; share across and down in percent

Source	Measure	Stationary	Portable: pancake	Portable: other	Portable: all	All models
U.S. producers	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Malaysia	Quantity	***	***	***	***	***
Vietnam	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	2,730,650
Nonsubject sources	Quantity	***	***	***	***	47,490
All import sources	Quantity	***	***	***	***	2,778,140
All sources	Quantity	***	***	***	***	***
U.S. producers	Share across	***	***	***	***	100.0
China	Share across	***	***	***	***	100.0
Malaysia	Share across	***	***	***	***	100.0
Vietnam	Share across	***	***	***	***	100.0
Subject sources	Share across	***	***	***	***	100.0
Nonsubject sources	Share across	***	***	***	***	100.0
All import sources	Share across	***	***	***	***	100.0
All sources	Share across	***	***	***	***	100.0
U.S. producers	Share down	***	***	***	***	***
China	Share down	***	***	***	***	***
Malaysia	Share down	***	***	***	***	***
Vietnam	Share down	***	***	***	***	***
Subject sources	Share down	***	***	***	***	***
Nonsubject sources	Share down	***	***	***	***	***
All import sources	Share down	***	***	***	***	***
All sources	Share down	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 "—".

Figure 4.3 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and model, 2025

* * * * * * *

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

U.S. shipments of air compressors by power type

In this proceeding, U.S. producers and U.S. importers were asked to report their 2025 U.S. shipments of air compressors by two power types: gas/diesel and electric/battery.[9] Table 4.8 and figure 4.4 present U.S. producers' and U.S. importers' U.S. shipments of these air compressor subsets. U.S. producers and U.S. importers (except for imports from Malaysia and Vietnam) ship both gas/diesel and electric/battery air compressors. In 2025, U.S. producers' U.S. shipments and U.S. importers' U.S. shipments of air compressors from subject and nonsubject sources were predominantly of electric and/or battery-powered air compressors.

[9] For additional information on U.S. shipments of these air compressor subsets, see appendix D.

Table 4.8 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and power, 2025

Quantity in units; share across and down in percent

Source	Measure	Gas and/or diesel powered	Electric and/or battery powered	All power sources
U.S. producers	Quantity	***	***	***
China	Quantity	***	***	***
Malaysia	Quantity	***	***	***
Vietnam	Quantity	***	***	***
Subject sources	Quantity	***	***	2,730,650
Nonsubject sources	Quantity	***	***	47,490
All import sources	Quantity	***	***	2,778,140
All sources	Quantity	***	***	***
U.S. producers	Share across	***	***	100.0
China	Share across	***	***	100.0
Malaysia	Share across	***	***	100.0
Vietnam	Share across	***	***	100.0
Subject sources	Share across	***	***	100.0
Nonsubject sources	Share across	***	***	100.0
All import sources	Share across	***	***	100.0
All sources	Share across	***	***	100.0
U.S. producers	Share down	***	***	***
China	Share down	***	***	***
Malaysia	Share down	***	***	***
Vietnam	Share down	***	***	***
Subject sources	Share down	***	***	***
Nonsubject sources	Share down	***	***	***
All import sources	Share down	***	***	***
All sources	Share down	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 "—".

Figure 4.4 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and power, 2025

* * * * * * *

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

U.S. shipments of air compressors by tank type

In this proceeding, U.S. producers and U.S. importers were asked to report their 2025 U.S. shipments of air compressors by different tank sizes.[10] Table 4.9 and figure 4.5 present U.S. producers' and U.S. importers' U.S. shipments of these air compressor subsets. Both U.S. producers and U.S. importers ship all types of air compressors sizes. In 2025, U.S. producers' U.S. shipments were predominantly of air compressors with a tank size less than 6 gallons, which accounted for the majority of their total shipments in that period. U.S. importers' U.S. shipments of air compressors from subject sources were also predominantly of air compressors with a tank size less than 6 gallons, while nonsubject source imports, by contrast, were predominantly of air compressors with a tank size of more than 20 gallons.

[10] For additional information on U.S. shipments of these air compressor subsets, see appendix D.

Table 4.9 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and tank size, 2025

Quantity in units; share across and down in percent

Source	Measure	Less than 6 gallons	Between 6 to 10 gallons	Between 10 to 20 gallons	More than 20 gallons	All sizes
U.S. producers	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
Malaysia	Quantity	***	***	***	***	***
Vietnam	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	2,730,650
Nonsubject sources	Quantity	***	***	***	***	47,490
All import sources	Quantity	***	***	***	***	2,778,140
All sources	Quantity	***	***	***	***	***
U.S. producers	Share across	***	***	***	***	100.0
China	Share across	***	***	***	***	100.0
Malaysia	Share across	***	***	***	***	100.0
Vietnam	Share across	***	***	***	***	100.0
Subject sources	Share across	***	***	***	***	100.0
Nonsubject sources	Share across	***	***	***	***	100.0
All import sources	Share across	***	***	***	***	100.0
All sources	Share across	***	***	***	***	100.0
U.S. producers	Share down	***	***	***	***	***
China	Share down	***	***	***	***	***
Malaysia	Share down	***	***	***	***	***
Vietnam	Share down	***	***	***	***	***
Subject sources	Share down	***	***	***	***	***
Nonsubject sources	Share down	***	***	***	***	***
All import sources	Share down	***	***	***	***	***
All sources	Share down	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 "—". Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Figure 4.5 Air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and tank size, 2025

* * * * * * *

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

Geographical markets

Table 4.10 presents data on U.S. imports by source and border of entry in 2025. U.S. imports of air compressors from China, Malaysia, and Vietnam entered through all four borders of entry (i.e., East, North, South, and West) in 2025. Imports from China entered predominantly through the Northern and Western borders of entry. Imports from Malaysia entered predominantly through the Eastern and Western borders of entry. Imports from Vietnam entered predominantly through the Eastern and Northern borders of entry.

Table 4.10 Certain stationary and portable air compressors: U.S. imports, by source and border of entry, 2025

Quantity in units; share across and down in percent

Source	Measure	East	North	South	West	All borders
China	Quantity	1,405,494	1,831,421	489,585	1,779,749	5,506,249
Malaysia	Quantity	442,111	3,614	132,219	421,158	999,102
Vietnam	Quantity	1,281,504	1,034,833	304,097	877,000	3,497,434
Subject sources	Quantity	3,129,109	2,869,868	925,901	3,077,907	10,002,785
Nonsubject sources	Quantity	465,334	549,985	1,171,861	357,735	2,544,915
All import sources	Quantity	3,594,443	3,419,853	2,097,762	3,435,642	12,547,700
China	Share across	25.5	33.3	8.9	32.3	100.0
Malaysia	Share across	44.3	0.4	13.2	42.2	100.0
Vietnam	Share across	36.6	29.6	8.7	25.1	100.0
Subject sources	Share across	31.3	28.7	9.3	30.8	100.0
Nonsubject sources	Share across	18.3	21.6	46.0	14.1	100.0
All import sources	Share across	28.6	27.3	16.7	27.4	100.0
China	Share down	39.1	53.6	23.3	51.8	43.9
Malaysia	Share down	12.3	0.1	6.3	12.3	8.0
Vietnam	Share down	35.7	30.3	14.5	25.5	27.9
Subject sources	Share down	87.1	83.9	44.1	89.6	79.7
Nonsubject sources	Share down	12.9	16.1	55.9	10.4	20.3
All import sources	Share down	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(s) 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685, accessed May 11, 2026. Imports are based on the imports for consumption data series.

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 "—". These data include out-of-scope air compressors such as portable air compressors with wattage outside of the scope language.

Presence in the market

Table 4.11 and figures 4.6 and 4.7 present data on monthly U.S. imports of air compressors from January 2023 to March 2026. Imports from China and Vietnam have been present in all 39 months, while imports from Malaysia were only present in 10 months (one month in 2023, six months in 2025, and three months in 2026).

Table 4.11 Certain stationary and portable air compressors: U.S. imports, by month and source

Quantity in units

Year	Month	China	Malaysia	Vietnam
2023	January	653,849	—	167,502
2023	February	639,152	12	91,453
2023	March	512,594	—	47,442
2023	April	797,098	—	15,677
2023	May	660,788	—	52,076
2023	June	655,815	—	77,854
2023	July	654,262	—	153,522
2023	August	712,939	—	154,006
2023	September	634,994	—	223,749
2023	October	753,855	—	96,412
2023	November	746,515	—	126,607
2023	December	665,804	—	76,172
2024	January	844,636	—	106,306
2024	February	718,712	—	84,324
2024	March	533,472	—	76,611
2024	April	645,307	—	113,320
2024	May	653,097	—	192,772
2024	June	615,692	—	120,714
2024	July	722,884	—	232,059
2024	August	915,105	—	275,380
2024	September	770,436	—	297,290
2024	October	823,398	—	194,724
2024	November	718,706	—	79,442
2024	December	627,702	—	195,225
2025	January	652,916	—	219,343
2025	February	627,645	—	153,279
2025	March	533,568	—	206,623
2025	April	632,046	—	162,281
2025	May	327,571	—	126,304
2025	June	218,974	—	168,247
2025	July	374,314	2,175	190,787
2025	August	357,112	36,653	326,548
2025	September	525,345	134,953	595,748
2025	October	431,329	475,126	493,338
2025	November	334,830	170,565	385,515
2025	December	490,599	179,630	469,421
2026	January	1,188,568	239,375	1,427,943
2026	February	985,191	346,714	1,331,905
2026	March	1,028,064	356,972	1,385,036

Table continued

Table 4.11 (Continued) Certain stationary and portable air compressors: U.S. imports, by month and source

Quantity in units

Year	Month	Subject sources	Nonsubject sources	All import sources
2023	January	821,351	100,269	921,620
2023	February	730,617	73,911	804,528
2023	March	560,036	102,135	662,171
2023	April	812,775	103,338	916,113
2023	May	712,864	116,328	829,192
2023	June	733,669	76,482	810,151
2023	July	807,784	87,925	895,709
2023	August	866,945	124,392	991,337
2023	September	858,743	98,290	957,033
2023	October	850,267	74,669	924,936
2023	November	873,122	90,704	963,826
2023	December	741,976	70,708	812,684
2024	January	950,942	129,655	1,080,597
2024	February	803,036	110,515	913,551
2024	March	610,083	85,044	695,127
2024	April	758,627	107,241	865,868
2024	May	845,869	94,039	939,908
2024	June	736,406	130,475	866,881
2024	July	954,943	117,526	1,072,469
2024	August	1,190,485	162,705	1,353,190
2024	September	1,067,726	142,956	1,210,682
2024	October	1,018,122	62,631	1,080,753
2024	November	798,148	73,276	871,424
2024	December	822,927	127,001	949,928
2025	January	872,259	134,639	1,006,898
2025	February	780,924	160,469	941,393
2025	March	740,191	183,309	923,500
2025	April	794,327	147,643	941,970
2025	May	453,875	188,363	642,238
2025	June	387,221	160,815	548,036
2025	July	567,276	196,965	764,241
2025	August	720,313	224,102	944,415
2025	September	1,256,046	359,259	1,615,305
2025	October	1,399,793	333,021	1,732,814
2025	November	890,910	189,997	1,080,907
2025	December	1,139,650	266,333	1,405,983
2026	January	1,188,568	239,375	1,427,943
2026	February	985,191	346,714	1,331,905
2026	March	1,028,064	356,972	1,385,036

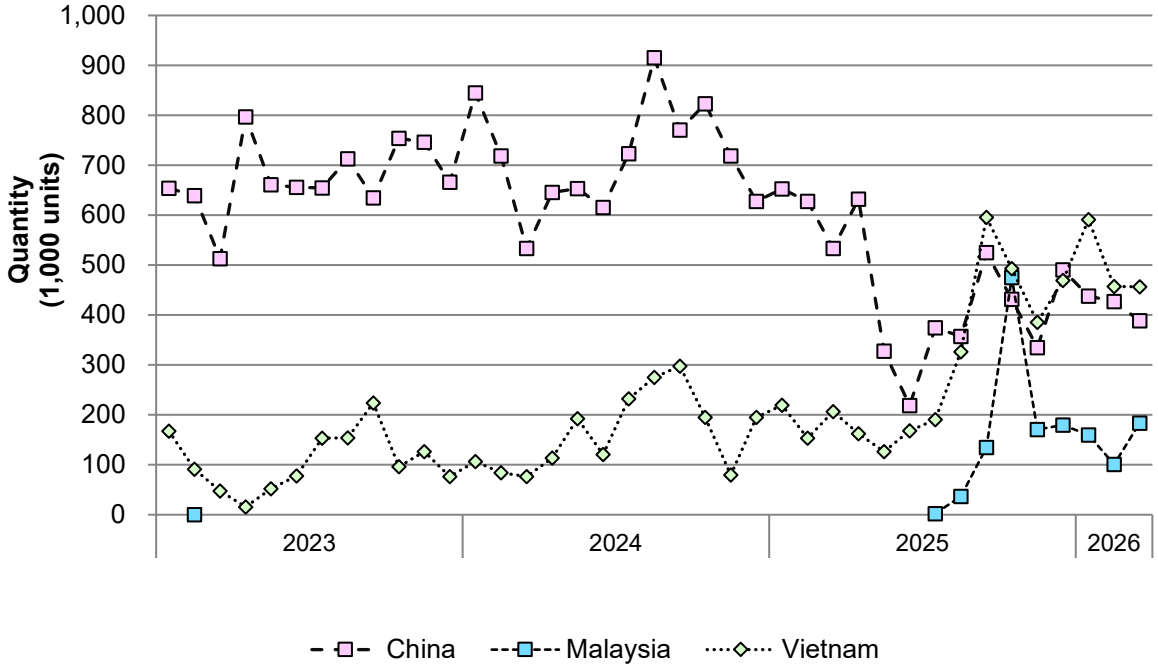
Table continued

Table 4.11 (Continued) Certain stationary and portable air compressors: U.S. imports, by month and source

Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number(s) 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685, accessed May 11, 2026. Imports are based on the imports for consumption data series.

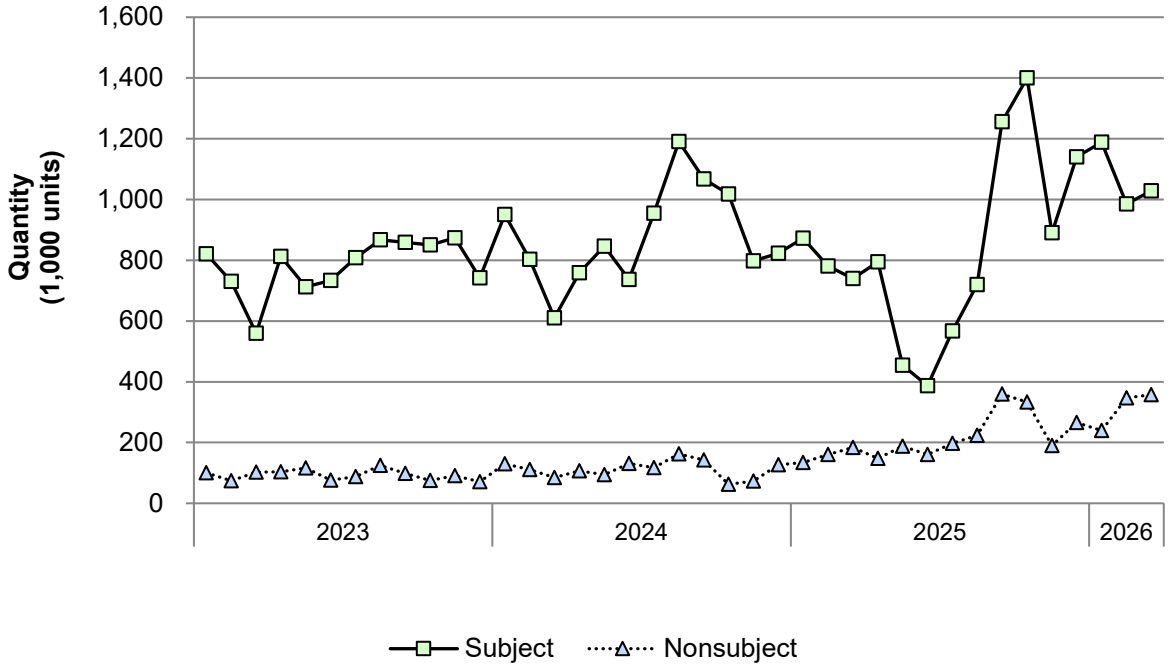
Note: Zeroes, null values, and undefined calculations are suppressed and shown as "—". These data include out-of-scope air compressors such as portable air compressors with wattage outside of the scope language.

Figure 4.6 Certain stationary and portable air compressors: U.S. imports from individual subject sources, by source and month



Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number(s) 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685, accessed May 11, 2026. Imports are based on the imports for consumption data series. These data include out-of-scope air compressors such as portable air compressors with wattage outside of the scope language.

Figure 4.7 Certain stationary and portable air compressors: 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) 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685, accessed May 11, 2026. Imports are based on the imports for consumption data series. These data include out-of-scope air compressors such as portable air compressors with wattage outside of the scope language.

Apparent U.S. consumption and market shares

Quantity

Table 4.12 and figure 4.8 present data on apparent U.S. consumption and U.S. market shares by quantity for air compressors. Apparent U.S. consumption of air compressors increased irregularly from 2023 to 2025, increasing by *** percent overall, from *** units in 2023 to *** units in 2025. U.S. producers' shipments, inclusive of U.S. re-imports, declined over the period, reducing their share of consumption from *** percent in 2023 to *** percent in 2024 and *** percent in 2025. The increase in apparent U.S. consumption was driven predominantly by imports, particularly from subject sources, which accounted for more than *** percent of the U.S. market in each year. Nonsubject imports remained comparatively small, representing about *** percent of apparent U.S. consumption throughout the period. As a result, total imports maintained a dominant share of the U.S. market, exceeding *** percent in every year examined.

Table 4.12 Air compressors: Apparent U.S. consumption and market shares based on quantity data, by source and period

Quantity in units; shares in percent

Source	Measure	2023	2024	2025
U.S. producer: MAT	Quantity	***	***	***
U.S. producer: MITM	Quantity	***	***	***
U.S. producer: SBD	Quantity	***	***	***
Reimported U.S.-origin air compressors	Quantity	***	***	***
Adjusted U.S. producers' U.S. shipments	Quantity	***	***	***
China	Quantity	***	***	***
Malaysia	Quantity	***	***	***
Vietnam	Quantity	***	***	***
Subject sources	Quantity	2,359,873	2,704,497	2,730,650
Nonsubject sources	Quantity	44,430	50,312	47,490
All import sources	Quantity	2,404,303	2,754,809	2,778,140
All sources	Quantity	***	***	***
U.S. producer: MAT	Share	***	***	***
U.S. producer: MITM	Share	***	***	***
U.S. producer: SBD	Share	***	***	***
Reimported U.S.-origin air compressors	Share	***	***	***
Adjusted U.S. producers' U.S. shipments	Share	***	***	***
China	Share	***	***	***
Malaysia	Share	***	***	***
Vietnam	Share	***	***	***
Subject sources	Share	***	***	***
Nonsubject sources	Share	***	***	***
All import sources	Share	***	***	***
All sources	Share	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 "—". Two importers *** reimported U.S.-origin air compressors after assembling them in a nonsubject source. Their data were added as an adjustment to apparent U.S. consumption.

Figure 4.8 Air compressors: Apparent U.S. consumption based on quantity data, by source and period

* * * * * * *

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

Value

Table 4.13 and figure 4.9 present data on apparent U.S. consumption and U.S. market shares by value for air compressors. Apparent U.S. consumption of air compressors by value irregularly increased from 2023 to 2025, increasing by *** percent overall, from $*** in 2023 to $*** in 2025. The value of U.S. producers' shipments, inclusive of U.S. re-imports, irregularly declined from 2023 to 2025, reducing their share of apparent consumption from *** percent in 2023 to *** percent in 2025. Imports accounted for the majority of apparent U.S. consumption throughout the period, with the value of subject-source imports increasing each year and representing between *** and *** percent of apparent U.S. consumption. Nonsubject import value also increased over the period, though their share remained between *** and *** percent. Overall, total imports consistently supplied more than *** percent of apparent U.S. consumption by value in each year examined.

Table 4.13 Air compressors: Apparent U.S. consumption and market shares based on value data, by source and period

Value in 1,000 dollars; shares in percent

Source	Measure	2023	2024	2025
U.S. producer: MAT	Value	***	***	***
U.S. producer: MITM	Value	***	***	***
U.S. producer: SBD	Value	***	***	***
Reimported U.S.-origin air compressors	Value	***	***	***
Adjusted U.S. producers' U.S. shipments	Value	***	***	***
China	Value	***	***	***
Malaysia	Value	***	***	***
Vietnam	Value	***	***	***
Subject sources	Value	221,776	243,030	273,539
Nonsubject sources	Value	89,746	92,340	99,047
All import sources	Value	311,522	335,370	372,586
All sources	Value	***	***	***
U.S. producer: MAT	Share	***	***	***
U.S. producer: MITM	Share	***	***	***
U.S. producer: SBD	Share	***	***	***
Reimported U.S.-origin air compressors	Share	***	***	***
Adjusted U.S. producers' U.S. shipments	Share	***	***	***
China	Share	***	***	***
Malaysia	Share	***	***	***
Vietnam	Share	***	***	***
Subject sources	Share	***	***	***
Nonsubject sources	Share	***	***	***
All import sources	Share	***	***	***
All sources	Share	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 "—". Two importers *** reimported U.S.-origin air compressors after assembling them in a nonsubject source. Their data were added as an adjustment to apparent U.S. consumption.

Figure 4.9 Air compressors: Apparent U.S. consumption based on value data, by source and period

* * * * * * *

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

Mini markets

In addition to the overall market data presented above, the Commission collected information on two distinct segments of the U.S. air compressor market: branded air compressors and private-label (white-label) air compressors. Table 4.14 presents U.S. producers' and U.S. importer' U.S. shipments of braded air compressors and table 4.15 present U.S. shipments information on private-label air compressors.

Table 4.14 Branded air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and period

Quantity in units; shares and ratios in percent

Source	Measure	2023	2024	2025
U.S. producers	Quantity	***	***	***
China	Quantity	***	***	***
Malaysia	Quantity	***	***	***
Vietnam	Quantity	***	***	***
Subject sources	Quantity	***	***	***
Nonsubject sources	Quantity	***	***	***
All import sources	Quantity	***	***	***
All sources	Quantity	***	***	***
U.S. producers	Share	***	***	***
China	Share	***	***	***
Malaysia	Share	***	***	***
Vietnam	Share	***	***	***
Subject sources	Share	***	***	***
Nonsubject sources	Share	***	***	***
All import sources	Share	***	***	***
All sources	Share	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***
China	Ratio	***	***	***
Malaysia	Ratio	***	***	***
Vietnam	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 "—". Ratios are to total apparent consumption quantity.

Table 4.15 Private/white label air compressors: U.S. producers' and U.S. importers' U.S. shipments, by source and period

Quantity in units; Shares and ratios in percent

Source	Measure	2023	2024	2025
U.S. producers	Quantity	***	***	***
China	Quantity	***	***	***
Malaysia	Quantity	***	***	***
Vietnam	Quantity	***	***	***
Subject sources	Quantity	***	***	***
Nonsubject sources	Quantity	***	***	***
All import sources	Quantity	***	***	***
All sources	Quantity	***	***	***
U.S. producers	Share	***	***	***
China	Share	***	***	***
Malaysia	Share	***	***	***
Vietnam	Share	***	***	***
Subject sources	Share	***	***	***
Nonsubject sources	Share	***	***	***
All import sources	Share	***	***	***
All sources	Share	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***
China	Ratio	***	***	***
Malaysia	Ratio	***	***	***
Vietnam	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 "—". Ratios are to total apparent consumption quantity.

Part 5: Pricing data

Factors affecting prices

Raw material costs

The primary raw material inputs for air compressors are steel and to a much lesser extent aluminum.[1] The prices of both aluminum and steel fluctuated throughout the period but were higher in December 2025 than in January 2023 (figure 5.1 and tables 5.1 and 5.2).

Raw materials, as a share of U.S. producers' cost of goods sold (COGS), declined from *** percent in 2023 to *** percent in 2025.

Figure 5.1 Raw material prices for aluminum P1020A and hot rolled steel, by year

* * * * * * *

Source: ***, accessed May 12, 2026. ***, various monthly issues.

[1] Petitioner reported that air compressors consist of approximately 75% steel, 10% aluminum, 10% rubber and plastics and 5% copper by weight. Petitions, p. 9.

Table 5.1 Raw material prices for aluminum P1020A, LME-based, by month

Index in percent, Jan 2023 = 100.0

Month	2023	2024	2025
January	100.0	***	***
February	***	***	***
March	***	***	***
April	***	***	***
May	***	***	***
June	***	***	***
July	***	***	***
August	***	***	***
September	***	***	***
October	***	***	***
November	***	***	***
December	***	***	***

Source: ***, accessed May 12, 2026.

Table 5.2 Raw material prices for hot rolled steel, by month

Index in percent, Jan 2023 = 100.0

Month	2023	2024	2025
January	100.0	***	***
February	***	***	***
March	***	***	***
April	***	***	***
May	***	***	***
June	***	***	***
July	***	***	***
August	***	***	***
September	***	***	***
October	***	***	***
November	***	***	***
December	***	***	***

Source: ***, various monthly issues.

Transportation costs to the U.S. market

Transportation costs for air compressors shipped from subject countries to the United States averaged 4.0 percent for China, 4.0 percent for Malaysia, and 3.8 percent for Vietnam

during 2025. These estimates were derived from official import data and represent the transportation and other charges on imports.[2]

U.S. inland transportation costs

The majority of responding U.S. producers and the majority of importers reported that they typically arrange transportation to their customers. U.S. producers reported that their U.S. inland transportation costs ranged from 3.2 to 5.0 percent while importers reported costs of less than 1.0 percent to 20.0 percent.

Pricing practices

Pricing methods

U.S. producers reported setting prices using contracts and set price lists. Importers reported setting prices using transaction-by-transaction negotiations, contracts, price lists, and other methods (table 5.3). Importers reported that other methods include direct transactions with retail consumers, setting prices based on a margin, setting prices based on U.S. market pricing, and making adjustments from a set price list.

Table 5.3 Air compressors: Count of U.S. producers' and importers' reported price setting methods

Method	U.S. producers	Importers
Transaction-by-transaction	0	6
Contract	3	5
Set price list	3	15
Other	0	4
Responding firms	3	20

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 majority of air compressors under *** and importers reported selling most of their air compressors under long-term contracts (table 5.4).

[2] The estimated transportation costs were obtained by subtracting the customs value from the c.i.f. value of the imports for 2025 and then dividing by the customs value based on the HTS statistical reporting numbers 8414.80.1615, 8414.80.1625, 8414.80.1635, and 8414.80.1685. These HTS statistical reporting number include out-of-scope products.

Table 5.4 Air compressors: U.S. producers' and importers' shares of commercial U.S. shipments by type of sale, 2025

Share in percent

Type of sale	U.S. producers	Subject importers
Long-term contracts	***	***
Annual contracts	***	***
Short-term contracts	***	***
Spot sales	***	***
Total	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 fixing prices, indexing them to raw materials, and not renegotiating prices during short-term contracts. U.S. producers reported that they did not index prices to raw materials but did renegotiate prices for annual contracts.

Both importers that reported using short-term contracts reported that they did not renegotiate prices and did not index prices to raw material costs. One importer reported fixing prices and the other reported fixing prices and quantities for short-term contracts. Of the two importers that reported using annual contracts, one renegotiated prices and one did not. One importer reported fixing prices and one reported that it did not index prices to raw material costs in annual contracts. All three importers who reported using long-term contracts reported that they renegotiated prices. A majority of these importers reported fixing prices and not indexing prices to raw material costs in long-term contracts.

Sales terms and discounts

U.S. producers typically quote prices on a delivered basis while importers typically quote prices on an f.o.b. basis. U.S. producers reported offering quantity and total volume discounts. Additionally, U.S. producer *** reported offering a full array of discounts including COOP, scan back discounts, and new store allowances. Importers reported offering quantity discounts, total volume discounts, pallet quality discounts, loyalty discounts, payment discounts, and retail advertised discounts.

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 air compressors shipped to unrelated U.S. customers during January 2023 to December 2025. Firms that imported these products from

China, Malaysia, and Vietnam for retail sale were requested to provide import purchase cost data.

Product 1.-- Consumer grade portable "pancake" reciprocating pump, oil free air compressor 6 gallons in size with a pressure rating of 150psi to 175psi.

Product 2.-- Consumer grade portable "vertical" reciprocating pump, oil free air compressor 26 to 27 gallons in size with a pressure rating of 150psi to 200psi.

Product 3.-- Professional grade stationary "truck mount" reciprocating pump, oil lubricated air compressor 25 to 35 gallons in size with a pressure rating of 175psi.

Product 4.-- Professional grade portable "vertical" reciprocating pump, oil lubricated air compressor 29 or 30 gallons in size with a pressure rating of 150psi to 175psi.

Product 5.-- Professional grade portable "wheelbarrow" reciprocating pump, oil lubricated air compressor 8 or 9 gallons in size with a pressure rating of 135psi to 175psi.

Price data

Two U.S. producers and six importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all quarters.[3] Pricing data reported by these firms accounted for approximately *** percent of U.S. producers' U.S. shipments of air compressors, *** percent of imports from China, and *** percent of imports from Vietnam in 2025.[4] [5] Price data for products 1-5 are presented in tables 5.5 to 5.9 and figures 5.2 to 5.6.

[3] 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.

[4] No importers reported pricing data from Malaysia.

[5] Pricing coverage is based on imports reported in questionnaires.

Table 5.5 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 1 and margins of underselling/(overselling), by source and quarter

Price in dollars per unit, quantity in units, margin in percent.

Period	U.S. price	U.S. quantity	China price	China quantity	China margin
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia price	Malaysia quantity	Malaysia margin	Vietnam price	Vietnam quantity	Vietnam margin
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 1: Consumer grade portable “pancake” reciprocating pump, oil free air compressor 6 gallons in size with a pressure rating of 150psi to 175psi.

Figure 5.2 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, by source and quarter

Price of product 1

* * * * * * *

Volume of product 1

* * * * * * *

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

Note: Product 1: Consumer grade portable “pancake” reciprocating pump, oil free air compressor 6 gallons in size with a pressure rating of 150psi to 175psi.

Table 5.6 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 2 and margins of underselling/(overselling), by source and quarter

Price in dollars per unit, quantity in units, margin in percent.

Period	U.S. price	U.S. quantity	China price	China quantity	China margin
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia price	Malaysia quantity	Malaysia margin	Vietnam price	Vietnam quantity	Vietnam margin
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 2: Consumer grade portable “vertical” reciprocating pump, oil free air compressor 26 to 27 gallons in size with a pressure rating of 150psi to 200psi.

Figure 5.3 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, by source and quarter

Price of product 2

* * * * * * *

Volume of product 2

* * * * * * *

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

Note: Product 2: Consumer grade portable “vertical” reciprocating pump, oil free air compressor 26 to 27 gallons in size with a pressure rating of 150psi to 200psi.

Table 5.7 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 3 and margins of underselling/(overselling), by source and quarter

Price in dollars per unit, quantity in units, margin in percent.

Period	U.S. price	U.S. quantity	China price	China quantity	China margin
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia price	Malaysia quantity	Malaysia margin	Vietnam price	Vietnam quantity	Vietnam margin
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 3: Professional grade stationary “truck mount” reciprocating pump, oil lubricated air compressor 25 to 35 gallons in size with a pressure rating of 175psi

Figure 5.4 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 3, by source and quarter

Price of product 3

* * * * * * *

Volume of product 3

* * * * * * *

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

Note: Product 3: Professional grade stationary “truck mount” reciprocating pump, oil lubricated air compressor 25 to 35 gallons in size with a pressure rating of 175psi

Table 5.8 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 4 and margins of underselling/(overselling), by source and quarter

Price in dollars per unit, quantity in units, margin in percent.

Period	U.S. price	U.S. quantity	China price	China quantity	China margin
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia price	Malaysia quantity	Malaysia margin	Vietnam price	Vietnam quantity	Vietnam margin
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 4: Professional grade portable “vertical” reciprocating pump, oil lubricated air compressor 29 or 30 gallons in size with a pressure rating of 150psi to 175psi.

Figure 5.5 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 4, by source and quarter

Price of product 4

* * * * * * *

Volume of product 4

* * * * * * *

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

Note: Product 4: Professional grade portable “vertical” reciprocating pump, oil lubricated air compressor 29 or 30 gallons in size with a pressure rating of 150psi to 175psi.

Table 5.9 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 5 and margins of underselling/(overselling), by source and quarter

Price in dollars per unit, quantity in units, margin in percent.

Period	U.S. price	U.S. quantity	China price	China quantity	China margin
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia price	Malaysia quantity	Malaysia margin	Vietnam price	Vietnam quantity	Vietnam margin
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 5: Professional grade portable “wheelbarrow” reciprocating pump, oil lubricated air compressor 8 or 9 gallons in size with a pressure rating of 135psi to 175psi.

Figure 5.6 Air compressors: Weighted-average f.o.b. prices and quantities of domestic and imported product 5, by source and quarter

Price of product 5

* * * * * * *

Volume of product 5

* * * * * * *

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

Note: Product 5: Professional grade portable “wheelbarrow” reciprocating pump, oil lubricated air compressor 8 or 9 gallons in size with a pressure rating of 135psi to 175psi.

Import purchase cost data

Four importers reported usable import purchase cost data for products 1-2 and 4-5.[6] Purchase cost data reported by these firms accounted for *** percent of imports from China, *** percent of imports from Malaysia, and *** percent of imports from Vietnam in 2025. Landed duty-paid purchase cost data for imports from China, Malaysia, and Vietnam are presented in tables 5.10 to 5.13, along with U.S. producers' sales prices.[7]

Importers reporting import purchase cost data were asked to provide additional information regarding the costs and benefits of importing air compressors themselves.

Two of four importers reported that they incurred additional costs beyond landed duty-paid costs by importing air compressors themselves rather than purchasing from a U.S. producer or U.S. importer. Both of these importers estimated the total additional cost incurred. Estimates ranged from 1.0 to 25.0 percent compared to the landed duty-paid value. Firms were also asked to identify specific additional costs they incurred as a result of importing air compressors. Reported costs include freight and transportation costs, warehouse costs, and tariffs.

Firms were also asked to describe how these additional costs incurred by importing air compressors themselves compare with additional costs incurred when purchasing from a U.S. producer or U.S. importer. Purchaser *** reported that these costs are a result of managing a global supply chain and holding enough inventory to support retail sales.

Three of eight importers reported that they compare costs of importing to the cost of purchasing from a U.S. producer in determining whether to import air compressors, three importers compare costs to purchasing from a U.S. importer, and two importers do not compare costs of purchasing from either U.S. producers or importers.

Five importers identified benefits from importing air compressors themselves instead of purchasing from U.S. producers or importers, including manufacturing capacity and quality, cost, availability, innovation, access to brands, and reliability of supply.

Firms were also asked whether the import costs (both excluding and including additional costs) of air compressors they imported are lower than the price of purchasing air compressors from a U.S. producer or importer. Two importers reported that the import costs of air

[6] None of the importers reported purchase cost data for product 3.

[7] 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.

compressors were lower than purchasing from a U.S. producer or importer excluding additional costs and one reported that the import costs were lower including additional costs.

One importer estimated that it saved *** percent of the purchase price by importing air compressors rather than purchasing from a U.S. producer, and saved *** percent compared to purchasing the product from a U.S. importer.[8]

[8] Two firms reported that they based their estimates on previous company transactions.

Table 5.10 Air compressors: Import landed duty-paid purchase costs and domestic prices, quantities of product 1, and price-cost differentials, by quarter

Price and LDP value in dollars per unit, quantity in units, price-cost differential in percent.

Period	U.S. price	U.S. quantity	China LDP unit cost	China quantity	China Price-cost differential
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia LDP unit cost	Malaysia quantity	Malaysia Price-cost differential	Vietnam LDP unit cost	Vietnam quantity	Vietnam Price-cost differential
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 1: Consumer grade portable “pancake” reciprocating pump, oil free air compressor 6 gallons in size with a pressure rating of 150psi to 175psi..

Note: U.S. producer price data is the same as that presented in table 5.5**.**

Figure 5.7 Air compressors: U.S. producer prices and import purchase costs, and quantities, of product 1, by quarter

U.S. price and import purchase cost of product 1

* * * * * * *

Volume of product 1

* * * * * * *

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

Note: Product 1: Consumer grade portable “pancake” reciprocating pump, oil free air compressor 6 gallons in size with a pressure rating of 150psi to 175psi.

Table 5.11 Air compressors: Import landed duty-paid purchase costs and domestic prices, quantities of product 2, and price-cost differentials, by quarter

Price and LDP value in dollars per unit, quantity in units, price-cost differential in percent.

Period	U.S. price	U.S. quantity	China LDP unit cost	China quantity	China Price-cost differential
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia LDP unit cost	Malaysia quantity	Malaysia Price-cost differential	Vietnam LDP unit cost	Vietnam quantity	Vietnam Price-cost differential
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 2: Consumer grade portable “vertical” reciprocating pump, oil free air compressor 26 to 27 gallons in size with a pressure rating of 150psi to 200psi.

Note: U.S. producer price data is the same as that presented in table 5.6**.**

Figure 5.8 Air compressors: U.S. producer prices and import purchase costs, and quantities, of product 2, by quarter

U.S. price and import purchase cost of product 2

* * * * * * *

Volume of product 2

* * * * * * *

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

Note: Product 2: Consumer grade portable “vertical” reciprocating pump, oil free air compressor 26 to 27 gallons in size with a pressure rating of 150psi to 200psi.

Table 5.12 Air compressors: Import landed duty-paid purchase costs and domestic prices, quantities of product 4, and price-cost differentials, by quarter

Price and LDP value in dollars per unit, quantity in units, price-cost differential in percent.

Period	U.S. price	U.S. quantity	China LDP unit cost	China quantity	China Price-cost differential
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia LDP unit cost	Malaysia quantity	Malaysia Price-cost differential	Vietnam LDP unit cost	Vietnam quantity	Vietnam Price-cost differential
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 4: Professional grade portable “vertical” reciprocating pump, oil lubricated air compressor 29 or 30 gallons in size with a pressure rating of 150psi to 175psi.

Note: U.S. producer price data is the same as that presented in table 5.8**.**

Figure 5.9 Air compressors: U.S. producer prices and import purchase costs, and quantities, of product 4, by quarter

U.S. price and import purchase cost of product 4

* * * * * * *

Volume of product 4

* * * * * * *

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

Note: Product 4: Professional grade portable “vertical” reciprocating pump, oil lubricated air compressor 29 or 30 gallons in size with a pressure rating of 150psi to 175psi.

Table 5.13 Air compressors: Import landed duty-paid purchase costs and domestic prices, quantities of product 5, and price-cost differentials, by quarter

Price and LDP value in dollars per unit, quantity in units, price-cost differential in percent.

Period	U.S. price	U.S. quantity	China LDP unit cost	China quantity	China Price-cost differential
2023 Q1	***	***	***	***	***
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

Period	Malaysia LDP unit cost	Malaysia quantity	Malaysia Price-cost differential	Vietnam LDP unit cost	Vietnam quantity	Vietnam Price-cost differential
2023 Q1	***	***	***	***	***	***
2023 Q2	***	***	***	***	***	***
2023 Q3	***	***	***	***	***	***
2023 Q4	***	***	***	***	***	***
2024 Q1	***	***	***	***	***	***
2024 Q2	***	***	***	***	***	***
2024 Q3	***	***	***	***	***	***
2024 Q4	***	***	***	***	***	***
2025 Q1	***	***	***	***	***	***
2025 Q2	***	***	***	***	***	***
2025 Q3	***	***	***	***	***	***
2025 Q4	***	***	***	***	***	***

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

Note: Product 5: Professional grade portable “wheelbarrow” reciprocating pump, oil lubricated air compressor 8 or 9 gallons in size with a pressure rating of 135psi to 175psi.

Note: U.S. producer price data is the same as that presented in table 5.9**.**

Figure 5.10 Air compressors: U.S. producer prices and import purchase costs, and quantities, of product 5, by quarter

U.S. price and import purchase cost of product 5

* * * * * * *

Volume of product 5

* * * * * * *

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

Note: Product 5: Professional grade portable “wheelbarrow” reciprocating pump, oil lubricated air compressor 8 or 9 gallons in size with a pressure rating of 135psi to 175psi.

Price and purchase cost trends

In general, prices increased from January 2023 to December 2025. Table 5.14 summarizes the price trends, by country and by product. As shown in the table, domestic price increases ranged from *** to *** percent during January 2023 to December 2025 (with a decrease in ***), while import price increases of product from China ranged from *** to *** percent.[9] Landed duty-paid cost trends were mixed with increases ranging from *** to *** percent and decreases ranging from *** to *** percent.[10] [11]

[9] Importers did not provide sufficient pricing data from Malaysia and Vietnam to determine price trends.

[10] Importer *** reported that the decrease in its pricing data was due to a change in its product mix where high value versions of the pricing product were phased out leaving the "budget models". Staff correspondence on May 14, 2026.

[11] Importer *** reported that the pricing products incorporate a number of air compressors with a wide price variance ($60 to $160). The changes in the mix of air compressors purchased in a period impacts the LDP unit values of purchase cost data.

Table 5.14 Air compressors: Summary of price data, by product and source, January 2023 through December 2025

Volume in units, price in dollars per unit

Product	Source	Number of quarters	Quantity	Low price	High price	First quarter price	Last quarter price	Change over period
Product 1	United States	12	***	***	***	***	***	***
Product 1	China	12	***	***	***	***	***	***
Product 1	Malaysia	—	***	***	***	***	***	***
Product 1	Vietnam	—	***	***	***	***	***	***
Product 2	United States	12	***	***	***	***	***	***
Product 2	China	12	***	***	***	***	***	***
Product 2	Malaysia	—	***	***	***	***	***	***
Product 2	Vietnam	2	***	***	***	***	***	***
Product 3	United States	12	***	***	***	***	***	***
Product 3	China	—	***	***	***	***	***	***
Product 3	Malaysia	—	***	***	***	***	***	***
Product 3	Vietnam	—	***	***	***	***	***	***
Product 4	United States	12	***	***	***	***	***	***
Product 4	China	6	***	***	***	***	***	***
Product 4	Malaysia	—	***	***	***	***	***	***
Product 4	Vietnam	—	***	***	***	***	***	***
Product 5	United States	12	***	***	***	***	***	***
Product 5	China	12	***	***	***	***	***	***
Product 5	Malaysia	—	***	***	***	***	***	***
Product 5	Vietnam	—	***	***	***	***	***	***

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

Note: Percentage change from the first quarter in which data were available in 2023 to the last quarter in which data were available in 2025.

Table 5.15 Air compressors: Summary of purchase cost data, by product and source, January 2023 through December 2025

Volume in units, cost in dollars per unit

Product	Source	Number of quarters	Quantity	Low unit LDP value	High unit LDP value	First quarter unit LDP value	Last quarter unit LDP value	Change over period
Product 1	China	12	***	***	***	***	***	***
Product 1	Malaysia	2	***	***	***	***	***	***
Product 1	Vietnam	12	***	***	***	***	***	***
Product 2	China	12	***	***	***	***	***	***
Product 2	Malaysia	1	***	***	***	***	***	***
Product 2	Vietnam	4	***	***	***	***	***	***
Product 3	China	—	***	***	***	***	***	***
Product 3	Malaysia	—	***	***	***	***	***	***
Product 3	Vietnam	—	***	***	***	***	***	***
Product 4	China	12	***	***	***	***	***	***
Product 4	Malaysia	—	***	***	***	***	***	***
Product 4	Vietnam	—	***	***	***	***	***	***
Product 5	China	12	***	***	***	***	***	***
Product 5	Malaysia	2	***	***	***	***	***	***
Product 5	Vietnam	—	***	***	***	***	***	***

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

Note: Percentage change from the first quarter in which data were available in 2023 to the last quarter in which data were available in 2025.

Figure 5.11 Air compressors: Indexed U.S. producer prices, by quarter

* * * * * * *

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

Table 5.16 Air compressors: Indexed U.S. producer prices, by quarter

Index in percent, 2023 Q1= 100.0 percent

Period	Product 1	Product 2	Product 3	Product 4	Product 5
2023 Q1	100.0	100.0	100.0	100.0	100.0
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

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. producers only reported pricing data for Product 1 starting in 2025 Q2.

Figure 5.12 Air compressors: Indexed subject U.S. importer prices, by quarter

* * * * * * *

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

Table 5.17 Air compressors: Indexed subject U.S. importer prices, by quarter

Index in percent, 2023 Q1= 100.0 percent

Period	Product 1	Product 2	Product 3	Product 4	Product 5
2023 Q1	100.0	100.0	—	—	100.0
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

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. producers only reported pricing data for Product 1 starting in 2025 Q2.

Figure 5.13 Air compressors: Indexed subject U.S. importer unit LDP values, by quarter

* * * * * * *

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

Table 5.18 Air compressors: Indexed subject U.S. importer unit LDP values, by quarter

Index in percent, 2023 Q1= 100.0 percent

Period	Product 1	Product 2	Product 3	Product 4	Product 5
2023 Q1	100.0	100.0	—	100.0	100.0
2023 Q2	***	***	***	***	***
2023 Q3	***	***	***	***	***
2023 Q4	***	***	***	***	***
2024 Q1	***	***	***	***	***
2024 Q2	***	***	***	***	***
2024 Q3	***	***	***	***	***
2024 Q4	***	***	***	***	***
2025 Q1	***	***	***	***	***
2025 Q2	***	***	***	***	***
2025 Q3	***	***	***	***	***
2025 Q4	***	***	***	***	***

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. producers only reported pricing data for Product 1 starting in 2025 Q2.

Price and purchase cost comparisons

Price comparisons

As shown in table 5.20, prices for product imported from China were below those for U.S.-produced product in 39 of 42 instances (*** units); margins of underselling ranged from *** to *** percent. In the remaining 3 instances (***), prices for product imported from China were between *** and *** percent above prices for the domestic product. Prices for product imported from Vietnam were below those for U.S.-produced product in all two instances (*** units); margins of underselling ranged from *** to *** percent.

Table 5.19 Air compressors: Instances of underselling and overselling and the range and average of margins, by product

Quantity in units; margin in percent

Product	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	9	***	***	***	***
Product 2	Underselling	14	***	***	***	***
Product 3	Underselling	—	***	***	***	***
Product 4	Underselling	6	***	***	***	***
Product 5	Underselling	12	***	***	***	***
Total	Underselling	41	***	***	***	***
Product 1	Overselling	3	***	***	***	***
Product 2	Overselling	—	***	***	***	***
Product 3	Overselling	—	***	***	***	***
Product 4	Overselling	—	***	***	***	***
Product 5	Overselling	—	***	***	***	***
Total	Overselling	3	***	***	***	***

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.

Table 5.20 Air compressors: Instances of underselling and overselling and the range and average of margins, by source

Quantity in units; margin in percent

Source	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
China	Underselling	39	***	***	***	***
Malaysia	Underselling	—	***	***	***	***
Vietnam	Underselling	2	***	***	***	***
Total	Underselling	41	***	***	***	***
China	Overselling	3	***	***	***	***
Malaysia	Overselling	—	***	***	***	***
Vietnam	Overselling	—	***	***	***	***
Total	Overselling	3	***	***	***	***

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.

Table 5.21 Air compressors: Instances of underselling and overselling and the range and average of margins, by year

Quantity in units; margin in percent

Year	Type	Number of quarters	Quantity	Average margin	Min margin	Max margin
2023	Underselling	12	***	***	***	***
2024	Underselling	12	***	***	***	***
2025	Underselling	17	***	***	***	***
Total, all years	Underselling	41	***	***	***	***
2023	Overselling	—	***	***	***	***
2024	Overselling	2	***	***	***	***
2025	Overselling	1	***	***	***	***
Total, all years	Overselling	3	***	***	***	***

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.

Price-cost comparisons

As shown in table 5.23, landed duty-paid costs for air compressors imported from China were below the sales price for U.S.-produced product in all 48 instances (*** units); price-cost differentials ranged from *** to *** percent. Landed duty-paid costs for air compressors imported from Malaysia were below the sales price for U.S.-produced product in all 5 instances (*** units); price-cost differentials ranged from *** to *** percent. Landed duty-paid costs for air compressors imported from Vietnam were below the sales price

for U.S.-produced product in all 16 instances (*** units); price-cost differentials ranged from *** to *** percent.

Table 5.22 Air compressors: Instances of lower and higher import purchase costs and the range and average of price-cost differentials, by product

Quantity in units; price-cost differential in percent

Product	Type	Number of quarters	Quantity	Average price-cost differential	Min price-cost differential	Max price-cost differential
Product 1	Lower than US	26	***	***	***	***
Product 2	Lower than US	17	***	***	***	***
Product 3	Lower than US	—	***	***	***	***
Product 4	Lower than US	12	***	***	***	***
Product 5	Lower than US	14	***	***	***	***
All products	Lower than US	69	***	***	***	***
Product 1	Higher than US	—	***	***	***	***
Product 2	Higher than US	—	***	***	***	***
Product 3	Higher than US	—	***	***	***	***
Product 4	Higher than US	—	***	***	***	***
Product 5	Higher than US	—	***	***	***	***
All products	Higher than US	—	***	***	***	***

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.

Table 5.23 Air compressors: Instances of lower and higher import purchase costs and the range and average of price-cost differentials, by source

Quantity in units; price-cost differential in percent

Source	Type	Number of quarters	Quantity	Average price-cost differential	Min price-cost differential	Max price-cost differential
China	Lower than U.S. price	48	***	***	***	***
Malaysia	Lower than U.S. price	5	***	***	***	***
Vietnam	Lower than U.S. price	16	***	***	***	***
Total	Lower than U.S. price	69	***	***	***	***
China	Higher than U.S. price	—	***	***	***	***
Malaysia	Higher than U.S. price	—	***	***	***	***
Vietnam	Higher than U.S. price	—	***	***	***	***
Total	Higher than U.S. price	—	***	***	***	***

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.

Table 5.24 Air compressors: Instances of lower and higher import purchase costs and the range and average of price-cost differentials, by year

Quantity in units; price-cost differential in percent

Year	Type	Number of quarters	Quantity	Average price-cost differential	Min margin	Max margin
2023	Underselling	20	***	***	***	***
2024	Underselling	20	***	***	***	***
2025	Underselling	29	***	***	***	***
Total, all years	Underselling	69	***	***	***	***
2023	Overselling	—	***	***	***	***
2024	Overselling	—	***	***	***	***
2025	Overselling	—	***	***	***	***
Total, all years	Overselling	—	***	***	***	***

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

The Commission requested that U.S. producers of air compressors report purchasers with which they experienced instances of lost sales or revenue due to competition from imports of air compressors from China, Malaysia, and Vietnam during January 2023 to December 2025. Of the two responding U.S. producers, *** reported that it had to reduce prices, roll back announced price increases, and had lost sales. U.S. producer *** submitted lost sales and lost revenue allegations identifying 22 firms with which it lost sales and revenue.

Staff contacted 22 purchasers and received responses from 9 purchasers. Responding purchasers reported purchasing *** units of air compressors during January 2023 to December 2025 (table 5.25).

During 2025, responding purchasers purchased 44.1 percent from U.S. producers, 44.7 percent from China, 2.3 percent from Malaysia, 0.2 percent from Vietnam, 8.5 percent from nonsubject countries, and 0.1 percent from “unknown source” countries. Purchasers were asked about changes in their purchasing patterns from different sources since 2023. Of the responding purchasers, seven reported that their purchases from domestic producers had fluctuated down or steadily decreased, two reported that their purchases from domestic producers fluctuated up, and one reported that it did not purchase domestic product. Purchaser *** reported that its purchases steadily decreased from U.S producers due to rising costs and heightened entry of foreign brands and its imports fluctuated up from Chinese

producers due to a greater reliance on foreign based dropship vendors. Purchaser *** reported reduced purchases as a result of increased prices that slowed sales.

Of the nine responding purchasers, six reported that, since 2023, they had purchased imported air compressors from China, Malaysia, and Vietnam instead of U.S.-produced product and all of these purchasers reported that subject import prices were lower than U.S.-produced product. Only one of these purchasers reported that price was a primary reason for the decision to purchase imported product rather than U.S.-produced product. It estimated the quantity of air compressors from China and Malaysia purchased instead of domestic product; quantities were *** units from China to *** units from Malaysia (table 5.26). Purchaser *** identified strategic partnership, customer service, distribution network, innovation, reliability of supply lead time, fill rate and brand as non-price reasons for purchasing imported rather than U.S.-produced product. Purchaser *** reported that brands can only be produced by certain licensed companies and this is a non-price reason for purchasing imported products. Purchaser *** reported that there are no comparable products offered domestically.

Of the nine responding purchasers, *** reported that U.S. producers had reduced prices in order to compete with lower-priced imports from China and reported a *** percent reduction; five reported that they did not know (table 5.27).

Table 5.25 Air compressors: Purchasers' reported purchases and imports, by firm and source

Quantity in units, share in percent

Purchaser	Domestic quantity	Subject quantity	All other quantity	Change in domestic share	Change in subject country share
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
All firms	***	***	***	***	***

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

Note: All other includes all other sources and unknown sources. Change is the percentage point change in the share of the firm's total purchases of domestic and/or subject country imports between first and last years.

Table 5.26 Air compressors: Purchasers' responses to purchasing subject imports instead of domestic product, by firm

Quantity in units

Purchaser	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity	Explanation
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
All firms	Yes: 6; No: 2	Yes: 6; No: 0	Yes: 1; No: 5	***	NA

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

Table 5.27 Air compressors: Purchasers' responses to U.S. producer price reductions, by firm

Purchaser	Reported producers lowered prices	Estimated percent of U.S. price reduction	Explanation
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
All firms	Yes: 1; No: 3	***	NA

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

Table 5.28 Air compressors: Purchasers' responses to U.S. producer price reductions, by source

Source	Count of purchasers reporting U.S. producers reduced prices	Average percent of estimated U.S. price reduction
China	1	***
Malaysia	0	***
Vietnam	0	***
Subject sources	1	***

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

In responding to the lost sales lost revenue survey, some purchasers provided additional information on purchases and market dynamics. Purchaser *** reported that it purchases Campbell Hausfeld air compressors that were produced in China and that after Campbell Hausfeld was acquired by MAT it continued purchasing from MAT to maintain product consistency and has not pursued other options.

Part 6: Financial experience of U.S. producers

Background[1] [2]

Three U.S. producers (MAT, MITM, and SBD) provided usable financial results on their air compressors operations.[3] All three of the responding U.S. producers provided their financial data based on calendar year or close to calendar year and on the basis of GAAP.[4]

From 2023 to 2025, commercial sales accounted for all net sales. Figure 6.1 presents each responding firm's share of the total reported net sales quantity in 2025, with MAT and SBD shown separately given SBD did not divest its air compressors assets completely to MAT until *** 2025.[5] MAT and SBD account for virtually all of air compressor sales by quantity and value throughout the period for which data were collected.

[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"), fair market value ("FMV"), 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 Mat Industries, LLC ("MAT") is the sole petitioner and may be referred to as "MIND" by petitioner in this proceeding. At the staff conference, the term "MIND" is used by MAT to distinguish MAT's air compressor operations from out-of-scope operations under common ownership of MAT Holdings, Inc ("MAT Holdings"). "MIND" is also the name used by MAT Holdings internally when referencing its in-scope operations. Conference transcript, pp. 7, 28 (Scarpelli), p. 12 (Patton).

[3] In 2011, Stanley Black and Decker ("SBD"; NYSE: SWK) sold two-thirds of its air compressor operations to MAT Holdings but kept producing the in-scope pancake air compressors until *** 2025. Conference transcript, pp. 12 to 13, 15 (Patton) and p. 61 (Hite). In July 2025, SBD sold the last remaining production assets of air compressors to MAT for ***. Details of this sale were not discussed in SBD's Form 10-K (for period ending January 3, 2026), as filed. Conference witness testified that the asset sales to MAT Holdings may be too small to be noted in SBD's public filings or "significant enough to make a threshold of materiality." Conference transcript, p. 59 (Hite).

SBD submitted its U.S. producer questionnaire two weeks after the due date, with certain incorrect and missing financial data. USITC staff worked with SBD to correct its financial data using reasonable estimates so that SBD's questionnaire response could be included in this report. Email from ***, June 2, 2026.

[4] SBD's fiscal year ends on the Saturday closest to December 31st ***.

[5] SBD explained that ***. SBD did ***. These costs are all reflected in SBD's financial data. Email from ***, June 2, 2026.

Figure 6.1 Air compressors: U.S. producers' share of net sales quantity in 2025, by firm

* * * * * * *

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

Operations on air compressors

Table 6.1 presents aggregated data on U.S. producers' operations in relation to air compressors, while table 6.2 presents corresponding changes in AUVs. Table 6.3 presents selected company-specific financial data.

Table 6.1 Air compressors: U.S. producers' results of operations, by item and period

Quantity in units; value in 1,000 dollars; ratio in percent

Item	Measure	2023	2024	2025
Total net sales	Quantity	***	***	***
Total net sales	Value	***	***	***
COGS: Raw materials	Value	***	***	***
COGS: Direct labor	Value	***	***	***
COGS: Other factory	Value	***	***	***
COGS: Total	Value	***	***	***
Gross profit or (loss)	Value	***	***	***
SG&A expenses	Value	***	***	***
Operating income or (loss)	Value	***	***	***
Other expense / (income)	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: 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 6.1 (Continued) Air compressors: U.S. producers' results of operations, by item and period

Share in percent; unit value in dollars per unit; count in number of firms reporting

Item	Measure	2023	2024	2025
COGS: Raw materials	Share	***	***	***
COGS: Direct labor	Share	***	***	***
COGS: Other factory	Share	***	***	***
COGS: Total	Share	100.0	100.0	100.0
Total net sales	Unit value	***	***	***
COGS: Raw materials	Unit value	***	***	***
COGS: Direct labor	Unit value	***	***	***
COGS: Other factory	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	1	1	1
Net losses	Count	1	1	1
Data	Count	3	3	3

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. Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 6.2 Air compressors: Changes in AUVs between comparison periods

Change in percent

Item	2023–25	2023–24	2024–25
Total net sales	▲***	▼***	▲***
COGS: Raw materials	▲***	▼***	▲***
COGS: Direct labor	▼***	▼***	▲***
COGS: Other factory	▲***	▲***	▲***
COGS: Total	▲***	▼***	▲***

Table continued.

Table 6.2 (Continued) Air compressors: Changes in AUVs between comparison periods

Change in dollars per unit

Item	2023–25	2023–24	2024–25
Total net sales	▲***	▼***	▲***
COGS: Raw materials	▲***	▼***	▲***
COGS: Direct labor	▼***	▼***	▲***
COGS: Other factory	▲***	▲***	▲***
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” represent values greater than zero, but less than “0.05” or “0.50,” respectively. 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.

Table 6.3 Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net sales quantity

Quantity in units

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net sales value

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

COGS

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Gross profit or (loss)

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued)Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

SG&A expenses

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Operating income or (loss)

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net income or (loss)

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

COGS to net sales ratio

Ratio in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Gross profit or (loss) to net sales ratio

Ratio in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

SG&A expenses to net sales ratio

Ratio in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Operating income or (loss) to net sales ratio

Ratio in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Net income or (loss) to net sales ratio

Ratio in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit net sales value

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit raw material costs

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit direct labor costs

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit other factory costs

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit COGS

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit gross profit or (loss)

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit SG&A expenses

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit operating income or (loss)

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

Table continued.

Table 6.3 (Continued) Air compressors: U.S. producers' sales, costs/expenses, and profitability, by firm and period

Unit net income or (loss)

Unit value in dollars per unit

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

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 "—".

Net sales

As shown in table 6.1, the quantity and value of U.S. producers' net sales declined each year from 2023 to 2025. Average unit values of net sales were the same in 2023 and 2024 but increased in 2025.

Table 6.3 shows that sales performance varied by producer.[6] The largest U.S. producer *** increased its sales volume each year with net sales AUVs declining each year. *** experienced continuing reductions in both sales quantity and value, with *** net sales AUVs increasing each year and SBD's net sales AUVs decreasing irregularly from 2023 to 2025 (table 6.3).

Cost of goods sold and gross profit or loss

Table 6.1 shows that raw materials continued to account for the largest (and majority) share of total COGS, with other factory costs and direct labor costs fluctuating as the second largest share of total COGS from 2023 to 2025. Absolute raw material costs declined each year from 2023 to 2025 while per unit raw materials increased irregularly during this period. As presented in table 6.3, individual firm's raw materials AUVs varied, driven partially by product mix variations and the closure and subsequent sale of SBD's air compressor production assets.[7] Table 6.4 presents raw material costs, by type.[8]

[6] MAT reported "material" shifts in its financial data once it started production of the smaller pancake air compressor in the second half of 2025 (from its acquisition of SBD's production assets). Conference transcript, p. 58 (Hite).

[7] Conference transcript, p. 15 (Patton).

[8] One U.S. producer (***) reported purchasing inputs (***) from related firms at transfer prices to approximate FMV; these purchased inputs accounted for six percent of its total COGS in 2025.

Table 6.4 Air compressors: U.S. producers' raw material costs in 2025, by major material inputs

Value in 1,000 dollars; share of value in percent

Item	Value	Share of value
Electrical components	***	***
Core structural metal	***	***
Machined mechanical components	***	***
Fluid power and pneumatic components	***	***
Plastics and polymers	***	***
Packaging materials	***	***
Coatings and surface treatment	***	***
Other material inputs	***	***
Fasteners	***	***
Total, raw materials	***	100.0

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

Other factory costs in absolute values decreased while per unit other factory costs increased each year from 2023 to 2025. The U.S. industry's cost of direct labor also decreased each year while the average unit cost of direct labor stayed largely the same from 2023 to 2025.

Total COGS in absolute values decreased each year while total COGS AUVs increased irregularly from 2023 to 2025 (driven mostly by raw material cost increases). As a ratio to net sales value, total COGS was largely steady (moving slightly downward from 2023 to 2024 and was the same from 2024 to 2025). Gross profits declined each year as sales volume declined.

SG&A expenses and operating income or loss

Table 6.1 shows that SG&A expenses decreased each year in absolute terms from 2023 to 2025. The SG&A expense ratio (i.e., total SG&A expenses divided by net sales) increased each year within a narrow band from 2023 to 2025. On a company-specific basis (table 6.3), *** reported higher SG&A expense ratios than the industry average, but these expenses were relatively stable (increased less than one percentage point each year) as sales quantity increased but net sales AUVs declined (***).

Operating income in absolute terms decreased irregularly from 2023 to 2025 (***). U.S. producers' average operating margin (operating income as a ratio to net sales) increased irregularly from 2023 to 2025.

All other expenses and net income or loss

Classified below the operating income level are interest expense, other expense, and other income. In table 6.1, these items are aggregated with the net amount shown. All other expenses/income, net declined each year from 2023 to 2025 (table 6.1). The net amount primarily reflects *** that decreased each year from 2023 to 2025, after being offset by small amounts of *** during this period.

Net income in absolute terms declined irregularly while net income per unit and as a ratio to net sales increased irregularly from 2023 to 2025.[9]

Capital expenditures and R&D expenses

Table 6.5 presents capital expenditures, by firm, and table 6.7 presents R&D expenses, by firm. Tables 6.6 and 6.8 present the firms' narrative explanations of the nature, focus, and significance of their capital expenditures and R&D expenses, respectively. MAT explained that all of the asset purchased from SBD have been recognized and reflected in capital expenditures during the period for which data were collected.[10]

[9] A variance analysis is not shown due to the large variety of product mixes and cost structures among the reporting firms as well as the acquisition of SBD's air compression manufacturing assets by MAT in 2025.

[10] Conference transcript, p. 60 (Hite).

Table 6.5 Air compressors: U.S. producers' capital expenditures, by firm and period

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 6.6 Air compressors: U.S. producers' narrative descriptions of their capital expenditures, by firm

Firm	Narrative on capital expenditures
MAT	***
MITM	***
SBD	***

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

Table 6.7 Air compressors: U.S. producers' R&D expenses, by firm and period

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

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

Note: Zeroes, null values, and undefined calculations are suppressed and shown as "—".

Table 6.8 Air compressors: U.S. producers' narrative descriptions of their R&D expenses, by firm

Firm	Narrative on R&D
MAT	***
MITM	***
SBD	***

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

Assets and return on assets

Table 6.9 presents data on the U.S. producers' total assets while table 6.10 presents their operating ROA.[11] Table 6.11 presents U.S. producers' narrative responses explaining their major asset categories and any significant changes in asset levels over time.

Table 6.9 Air compressors: U.S. producers' total net assets, by firm and period

Value in 1,000 dollars

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

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

Table 6.10 Air compressors: U.S. producers' ROA, by firm and period

Ratio in percent

Firm	2023	2024	2025
MAT	***	***	***
MITM	***	***	***
SBD	***	***	***
All firms	***	***	***

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

Table 6.11 Air compressors: U.S. producers' narrative descriptions of their total net assets, by firm

Firm	Narrative on assets
MAT	***
MITM	***
SBD	***

Source: Compiled from data submitted in response to Commission questionnaires and email from ***, June 2, 2026.

[11] 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.

Capital and investment

The Commission requested U.S. producers of air compressors to describe any actual or potential negative effects of imports of air compressors from China, Malaysia, and/or Vietnam on their firms' growth, investment, ability to raise capital, development and production efforts, or the scale of capital investments. Table 6.12 presents the number of firms reporting an impact in each category and table 6.13 provides the U.S. producers' narrative responses.

Table 6.12 Air compressors: Count of firms indicating actual and anticipated negative effects of imports from subject sources on investment, growth, and development since January 1, 2023, by effect

Count in number of firms reporting effect

Effect	Category	Count
Cancellation, postponement, or rejection of expansion projects	Investment	1
Denial or rejection of investment proposal	Investment	0
Reduction in the size of capital investments	Investment	1
Return on specific investments negatively impacted	Investment	0
Other investment effects	Investment	0
Any negative effects on investment	Investment	1
Rejection of bank loans	Growth	0
Lowering of credit rating	Growth	0
Problem related to the issue of stocks or bonds	Growth	0
Ability to service debt	Growth	0
Other growth and development effects	Growth	1
Any negative effects on growth and development	Growth	1
Anticipated negative effects of imports	Future	1

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

Table 6.13 Air compressors: U.S. producers' narratives relating to actual and anticipated negative effects of imports on investment, growth, and development, since January 1, 2023, by firm and effect

Item	Firm name and narrative on impact of imports
Cancellation, postponement, or rejection of expansion projects	***
Reduction in the size of capital investments	***
Other effects on growth and development	***
Anticipated effects of imports	***

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

Part 7: 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 factors[1]--
>
> (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 4 and 5; and information on the effects of imports of the subject merchandise on U.S. producers' existing development and production efforts is presented in Part 6. 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 approximately 85 firms believed to produce and/or export air compressors from the subject countries.[3] Usable responses to the Commission's questionnaire were received from 4 firms in total representing each subject source other than Malaysia.[4] Table 7.1 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 2025, and their estimated share of total production of air compressors in each subject country during 2025.

Table 7.1 Air compressors: Number of responding producers/exporters/resellers, approximate share of production, and exports to the United States as a share of U.S. imports, by subject foreign industry, 2025

Subject foreign industry	Number of responding firms	Approximate share of production (percent)	Exports as a share of U.S. imports from subject country (percent)
China	2	***	***
Malaysia	—	***	***
Vietnam	2	***	***

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 air compressors in 2025. 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. For countries in which more than one firm responded, the average denominator for reasonably reported estimates is used in the share presented. Approximate shares are rounded to the nearest whole number.

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 U.S. importers' reported imports of air compressors.

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 "—".

[3] These firms were identified through a review of information submitted in the petition and presented in third-party sources.

[4] The Commission also received one questionnaire response from *** which certified that it had not produced or exported air compressors at any time from the subject countries since January 1, 2023.

Table 7.2 presents information on the air compressor operations of the responding subject foreign producers, table 7.3 presents a summary of responding resellers of subject merchandise, and table 7.4 presents a summary of subject foreign producers at the subject country-level.

Table 7.2 Air compressors: Summary data for subject foreign producers, by firm, 2025

Subject foreign industry and producer name	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
China: FNA Zhejiang	***	***	***	***	***	***
China: Suzhou Honbase	***	***	***	***	***	***
Vietnam: Green Planet	***	***	***	***	***	***
All individual producers	***	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 7.3 Air compressors: Summary data for subject foreign resellers, by firm, 2025

Subject foreign industry and reseller name	Resales exported to the United States (units)	Share of resales exported to the United States (percent)
China: FNA Zhejiang	***	***
Vietnam: Forcome	***	***
All individual resellers	***	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 7.4 Air compressors: Summary data for subject foreign producers, by firm, 2025

Subject foreign industry	Production (units)	Share of reported production (percent)	Exports to the United States (units)	Share of reported exports to the United States (percent)	Total shipments (units)	Share of firm's total shipments exported to the United States (percent)
China	***	***	***	***	***	***
Malaysia	***	***	***	***	***	***
Vietnam	***	***	***	***	***	***
All subject foreign industries	***	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 7.5 presents events in the subject countries' industries since January 1, 2023.

Table 7.5 Air compressors: Important industry events in China, Malaysia, and Vietnam since 2023

Item	Event
Expansion (China)	Atlas Copco: In June 2025, Atlas Copco began construction of a new manufacturing facility located in Wuxi National Hi-Tech District.
Acquisition (Malaysia)	Atlas Copco Group: In December 2024, Atlas Copco Group announced acquisition of Malaysian air compressor manufacturer JetCan Engineering.
Expansion (Vietnam)	Elgi Equipments: In March 2023, Elgi equipments announced the creation of a subsidiary company with the name Elgi compressors Vietnam LLC.
Expansion (Vietnam)	SMC Corporation: In February 2025, SMC Manufacturing Vietnam started a $330 million expansion in Vietnam.

Source: Chinadaily, "Atlas Copco breaks ground on major expansion", June 26, 20225. https://regional.chinadaily.com.cn/bizwnden/2025-06/26/c_1103450.htm. Compressedairbeastpracticies, "Altas Copco Group Acquires JetCan Engineering", December 02, 2024. https://www.airbestpractices.com/industry-news/atlas-copco-group-acquires-jetcan-engineering. Marketscreener, "Elgi Equipments Limited Announces", March 03, 2023. https://www.marketscreener.com/quote/stock/ELGI-EQUIPMENTS-LIMITED-9059570/news/Elgi-Equipments-Limited-Announces-Incorporation-of-Wholly-Owned-Subsidiary-Named-Elgi-Compressors-Vi-43155805/. Duc, "SMC to start $330 mln Vietnam expansion", Feb 17, 2025. https://theinvestor.vn/japan-pneumatics-firm-smc-to-start-330-mln-vietnam-expansion-from-july-d14539.html.

Changes in operations

Subject producers were asked to report any change in the character of their operations or organization relating to the production of air compressors since 2023. One foreign producer indicated in its questionnaire that it had experienced such changes. Tables 7.6 presents the changes identified by the firm.[5]

Table 7.6 Air compressors: Reported changes in operations in subject foreign industries since January 1, 2023, by reported change category and firm

Item	Subject foreign industry, firm name, and accompanying narrative response regarding changes in operations
Plant openings	***
Plant closings	***
Relocations	***

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

[5] No foreign producer reported any anticipated changes.

Installed and practical overall capacity

Table 7.7 presents data on subject producers' installed capacity, practical overall capacity, and practical air compressors capacity and production on the same equipment. Producers in the subject foreign industries reported increases in both installed and practical overall capacity between 2023 and 2024, followed by slight decreases in 2025. Practical overall production increased from 2023 to 2025, while practical air compressors production decreased in the same period, showing that subject foreign industries were shifting their production to out-of-scope merchandise.

Table 7.7 Air compressors: Producers' in subject foreign industries installed and practical capacity and production on the same equipment as subject production, by period

Capacity and production in units; Utilization in percent

Item	Measure	2023	2024	2025
Installed overall	Capacity	***	***	***
Installed overall	Production	***	***	***
Installed overall	Utilization	***	***	***
Practical overall	Capacity	***	***	***
Practical overall	Production	***	***	***
Practical overall	Utilization	***	***	***
Practical air compressors	Capacity	***	***	***
Practical air compressors	Production	***	***	***
Practical air compressors	Utilization	***	***	***

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 "—". Practical capacity is much lower than installed and practical overall because one foreign producer *** produces *** on the same line of production.

Constraints on capacity

Table 7.8 presents subject producers' reported production and capacity constraints since January 1, 2023, and table 7.9 presents their narrative explanations. Subject producers reported constraints related to existing labor force, production bottlenecks, and supply material inputs.

Table 7.8 Air compressors: Count of reported production constraints, by subject foreign industry and type of constraint

Count in number of firms reporting

Type of constraint	China	Malaysia	Vietnam	Subject producers
Production bottlenecks	1	0	0	1
Existing labor force	2	0	0	2
Supply of material inputs	1	0	0	1
Fuel or energy	0	0	0	0
Storage capacity	0	0	0	0
Logistics/transportation	0	0	0	0
Other constraints	1	0	0	1

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

Table 7.9 Air compressors: Producers' in subject foreign industries reported constraints to practical overall capacity since January 1, 2023, by type of subject foreign industry, firm, and type of constraint

Type of constraint	Subject foreign industry, firm name, and narrative response on constraints to practical overall capacity
Production bottlenecks	***
Existing labor force	***
Existing labor force	***
Supply of material inputs	***
Other constraints	***

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

Operations on air compressors

Aggregate air compressors operations in the subject countries

Table 7.10 presents summary aggregate operations data for responding subject producers, exporters, and resellers of air compressors. These data are presented at the country level and discussed further below.

Table 7.10 Air compressors: Data on subject foreign industries, by item and period

Quantity in units

Item	2023	2024	2025	Projection 2026	Projection 2027
Capacity	***	***	***	***	***
Production	***	***	***	***	***
End-of-period inventories	***	***	***	***	***
Internal consumption	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***
Home market shipments	***	***	***	***	***
Exports to the United States	***	***	***	***	***
Exports to all other markets	***	***	***	***	***
Export shipments	***	***	***	***	***
Total shipments	***	***	***	***	***
Resales exported to the United States	***	***	***	***	***
Adjusted exports to the United States	***	***	***	***	***
Adjusted total shipments	***	***	***	***	***

Table continued

Table 7.10 (Continued) Air compressors: Data on subject foreign industries, by item and period

Shares and ratios in percent

Item	2023	2024	2025	Projection 2026	Projection 2027
Capacity utilization ratio	***	***	***	***	***
Inventory ratio to production	***	***	***	***	***
Inventory ratio to total shipments	***	***	***	***	***
Internal consumption share	***	***	***	***	***
Commercial home market shipments share	***	***	***	***	***
Home market shipments share	***	***	***	***	***
Exports to the United States share	***	***	***	***	***
Exports to all other markets share	***	***	***	***	***
Export shipments share	***	***	***	***	***
Total shipments share	100.0	100.0	100.0	100.0	100.0
Exports to the United States by foreign producers share	***	***	***	***	***
Exports to the United States by resellers share	***	***	***	***	***
Adjusted exports to the United States share	***	***	***	***	***

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 "—". Reseller *** reported resales produced by ***, and reseller *** reported resaled from ***. These producers have not submitted a foreign producer questionnaire response. As a result, the reseller adjustment adds in the missing volume from the foreign producer into total shipments prior to calculating the adjusted exports to the United States share.

Practical air compressor capacity and production by subject foreign industry

Table 7.11 presents information on subject producers' production, capacity, and capacity utilization by subject country. Subject foreign producers' practical capacity decreased from 2023 to 2025, but it is projected to be higher in 2026 and 2027 compared with 2025. Practical air compressors production also decreased from 2023 to 2025; however, it is projected to be higher in 2026 and 2027 compared with 2025. Similarly to production, capacity utilization decreased from 2023 to 2025 and it is projected to be lower in 2026 and 2027 compared with 2025.

Table 7.11 Air compressors: Subject foreign industries' output, by subject foreign industry and period

Practical capacity

Quantity in units

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.11 (Continued) Air compressors: Subject foreign industries' output, by subject foreign industry and period

Production

Production in units

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.11 (Continued) Air compressors: Subject foreign industries' output, by subject foreign industry and period

Capacity utilization

Ratio in percent

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.11 (Continued) Air compressors: Subject foreign industries' output, by subject foreign industry and period

Share of production

Share in percent

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	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 subject producer’s production to its production capacity.

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 "—".

Air compressors exports, by subject country

Table 7.12 presents information on subject producers' (and resellers) exports of air compressors by subject country. In aggregate, subject producers' exports to the United States as a share of their total shipments ranged between *** percent and *** percent during 2023 through 2025. From 2023 to 2025, subject producers' exports to the United States decreased and are projected to be lower in 2026 and 2027 compared with 2025.

Table 7.12 Air compressors: Subject foreign industries' exports, by subject foreign industry and period

Exports to the United States

Quantity in units

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.12 (Continued) Air compressors: Subject foreign industries' exports, by subject foreign industry and period

Share of total shipments exported to the United States

Share in percent

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.12 (Continued) Air compressors: Subject foreign industries' exports, by subject foreign industry and period

Total exports

Quantity in units

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.12 (Continued) Air compressors: Subject foreign industries' exports, by subject foreign industry and period

Share of total shipments exported

Share in percent

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

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 "—".

Air compressors inventories, by subject foreign industry

Table 7.13 presents information on ending inventory of the responding producers by subject foreign country. From 2023 to 2025, subject producers' ending inventories decreased and are projected to be at the same level in 2026 and 2027 as they were in 2025.[6]

Table 7.13 Air compressors: Subject foreign industries' ending inventories, by source and period

Ending inventories

Quantity in units

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

Table continued.

Table 7.13 (Continued) Air compressors: Subject foreign industries' ending inventories, by source and period

Ratio of inventories to total shipments

Ratio in percent

Subject foreign industry	2023	2024	2025	Projection 2026	Projection 2027
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
All subject foreign industries	***	***	***	***	***

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 "—".

[6] The vast majority of inventories reported ***.

Alternative products

As shown in table 7.14, responding firms in the subject countries produced other products on the same equipment and machinery used to produce air compressors. In aggregate, subject producers' production of other products as a share of their total production did not exceed *** percent in any period examined. From 2023 to 2025, subject producers increased the production of other products. Responding producers reported that they produced *** on the same machinery used to producer air compressors.

Table 7.14 Air compressors: Producers' in subject foreign industries overall production on the same equipment as subject production, by product type and period

Quantity in units; share in percent

Product type	Measure	2023	2024	2025
Air compressors	Quantity	***	***	***
Other products	Quantity	***	***	***
All products	Quantity	***	***	***
Air compressors	Share	***	***	***
Other products	Share	***	***	***
All products	Share	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 "—".

Exports

Table 7.15 presents Global Trade Atlas ("GTA") data for exports of air or gas compressors and vacuum pumps, which includes air compressors, from subject countries to the United States and to all destination markets. In aggregate, subject countries' exports to all destinations, including the United States, increased from 2023 to 2025. Among subject foreign countries, Vietnam had the highest share exported to the United States during 2023 to 2025, while Malaysia had among the smallest shares in that period.

Table 7.15 Air or gas compressors and vacuum pumps: Global exports from subject exporters, by exporter and period

Exports to the United States

Value in $1,000

Exporter	Measure	2023	2024	2025
China	Value	679,685	777,854	677,328
Malaysia	Value	12,904	13,324	49,109
Vietnam	Value	56,233	60,508	86,238
Subject exporters	Value	748,822	851,687	812,676

Table continued.

Table 7.15 (Continued) Air or gas compressors and vacuum pumps: Global exports from subject exporters, by exporter and period

Exports to all destination markets

Value in $1,000

Exporter	Measure	2023	2024	2025
China	Value	4,206,602	4,996,213	5,513,053
Malaysia	Value	100,901	106,039	127,221
Vietnam	Value	85,234	96,321	125,981
Subject exporters	Value	4,392,737	5,198,573	5,766,254

Table continued.

Table 7.15 (Continued) Air or gas compressors and vacuum pumps: Global exports from subject exporters, by exporter and period

Share of exports exported to the United States

Shares in percent

Exporter	Measure	2023	2024	2025
China	Share	16.2	15.6	12.3
Malaysia	Share	12.8	12.6	38.6
Vietnam	Share	66.0	62.8	68.5
Subject exporters	Share	17.0	16.4	14.1

Source: Official exports statistics and official global imports statistics from Vietnam (constructed exports) under HS subheading 8414.80 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed May 12, 2026. This data may be overstated as HS subheadings 8414.80 may contain products outside the scope of this investigation.

Note: Shares represent the shares of value exported to the United States out of all destination markets. 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. inventories of imported merchandise

Table 7.16 presents data on U.S. importers' reported inventories of air compressors. U.S. importers' inventories from subject sources increased from 2023 to 2025, while inventories from nonsubject sources decreased in the same period. Inventories from nonsubject sources, however, were relatively small, thus inventories from all imports also increased from 2023 to 2025.

Table 7.16 Air compressors: U.S. importers' inventories and their ratio to select items, by source and period

Quantity in units; ratio in percent

Measure	Source	2023	2024	2025
Inventories quantity	China	***	***	***
Ratio to imports	China	***	***	***
Ratio to U.S. shipments of imports	China	***	***	***
Ratio to total shipments of imports	China	***	***	***
Inventories quantity	Malaysia	***	***	***
Ratio to imports	Malaysia	***	***	***
Ratio to U.S. shipments of imports	Malaysia	***	***	***
Ratio to total shipments of imports	Malaysia	***	***	***
Inventories quantity	Vietnam	***	***	***
Ratio to imports	Vietnam	***	***	***
Ratio to U.S. shipments of imports	Vietnam	***	***	***
Ratio to total shipments of imports	Vietnam	***	***	***
Inventories quantity	Subject sources	432,221	456,708	532,929
Ratio to imports	Subject sources	18.4	16.7	19.1
Ratio to U.S. shipments of imports	Subject sources	18.3	16.9	19.5
Ratio to total shipments of imports	Subject sources	18.3	16.9	19.5
Inventories quantity	Nonsubject sources	5,839	6,339	5,375
Ratio to imports	Nonsubject sources	13.9	13.0	14.5
Ratio to U.S. shipments of imports	Nonsubject sources	13.1	12.6	11.3
Ratio to total shipments of imports	Nonsubject sources	13.1	12.5	11.3
Inventories quantity	All import sources	438,060	463,047	538,304
Ratio to imports	All import sources	18.3	16.6	19.1
Ratio to U.S. shipments of imports	All import sources	18.2	16.8	19.4
Ratio to total shipments of imports	All import sources	18.2	16.8	19.3

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. importers' outstanding orders

The Commission requested importers to indicate whether they imported or arranged for the importation of air compressors from the subject countries after January 1, 2026. Fourteen U.S. imported reported such data as presented in table 7.17. Imports from China and Vietnam accounted for approximately *** percent of all arranged imports reported.

Table 7.17 Air compressors: Arranged imports, by source and by period

Quantity in units

Source	Q1 2026	Q2 2026	Q3 2026	Q4 2026	Total
China	***	***	***	***	***
Malaysia	***	***	***	***	***
Vietnam	***	***	***	***	***
Subject sources	***	***	***	***	***
Nonsubject sources	***	***	***	***	***
All import sources	***	***	***	***	***

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

Third-country trade actions

There are no known antidumping or countervailing duty orders in third-country markets on air compressors.

Information on nonsubject countries

Table 7.18 presents global export data for HS subheading 8414.80 which includes in-scope air compressors, air compressor assemblies, and out-of-scope products. According to GTA, the leading global exporters of air or gas compressors and vacuum pumps, by quantity, during 2025 were China (19.5 percent) and Germany (13.4 percent).

Table 7.18 Air or gas compressors and vacuum pumps: Global exports, by reporting country and by period

Value in 1,000 dollars

Exporting country	Measure	2023	2024	2025
United States	Value	2,470,990	2,387,628	2,523,099
China	Value	4,206,602	4,996,213	5,513,053
Malaysia	Value	100,901	106,039	127,221
Vietnam	Value	85,234	96,321	125,981
Subject exporters	Value	4,392,737	5,198,573	5,766,254
Germany	Value	3,445,099	3,836,335	3,790,795
Italy	Value	1,165,009	1,297,192	1,420,269
Belgium	Value	1,245,325	1,257,080	1,238,545
Mexico	Value	1,262,645	1,212,175	1,100,139
United Kingdom	Value	932,099	936,217	1,002,805
Switzerland	Value	605,444	641,807	920,038
Romania	Value	996,963	861,385	913,098
France	Value	691,060	796,800	875,415
All other exporters	Value	8,230,924	8,474,820	8,701,034
All reporting exporters	Value	25,438,294	26,900,011	28,251,490
United States	Share of value	9.7	8.9	8.9
China	Share of value	16.5	18.6	19.5
Malaysia	Share of value	0.4	0.4	0.5
Vietnam	Share of value	0.3	0.4	0.4
Subject exporters	Share of value	17.3	19.3	20.4
Germany	Share of value	13.5	14.3	13.4
Italy	Share of value	4.6	4.8	5.0
Belgium	Share of value	4.9	4.7	4.4
Mexico	Share of value	5.0	4.5	3.9
United Kingdom	Share of value	3.7	3.5	3.5
Switzerland	Share of value	2.4	2.4	3.3
Romania	Share of value	3.9	3.2	3.2
France	Share of value	2.7	3.0	3.1
All other exporters	Share of value	32.4	31.5	30.8
All reporting exporters	Share of value	100.0	100.0	100.0

Source: Official exports statistics and official global imports statistics from Vietnam (constructed exports) under HS subheading 8414.80 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed May 12, 2026. This data may be overstated as HS subheadings 8414.80 may contain products outside the scope of this investigation.

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 "—". United States is shown at the top followed by the countries under investigation, all remaining top exporting countries in descending order of 2025 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
91 FR 24294, May 5, 2026	Air Compressors From China, Malaysia, and Vietnam; Institution of Antidumping and Countervailing Duty Investigations and Scheduling of Preliminary Phase Investigations	https://www.govinfo.gov/content/pkg/FR-2026-05-05/pdf/2026-08683.pdf
91 FR 31406, May 27, 2026	Stationary and Portable Air Compressors From the People's Republic of China, Malaysia, and the Socialist Republic of Vietnam: Initiation of Less-Than-Fair-Value Investigations	https://www.govinfo.gov/content/pkg/FR-2026-05-27/pdf/2026-10516.pdf
91 FR 31425, May 27, 2026	Stationary and Portable Air Compressors From the People's Republic of China, Malaysia, and the Socialist Republic of Vietnam: Initiation of Countervailing Duty Investigations	https://www.govinfo.gov/content/pkg/FR-2026-05-27/pdf/2026-10526.pdf

APPENDIX B

LIST OF STAFF CONFERENCE WITNESSES

CALENDAR OF PUBLIC PRELIMINARY CONFERENCE

Those listed below appeared as witnesses at the United States International Trade Commission's preliminary conference:

Subject: Air Compressors from China, Malaysia, and Vietnam

Inv. Nos.: 701-TA-794-796 and 731-TA-1790-1792 (Preliminary)

Date and Time: May 21, 2026 – 9:30 a.m.

Sessions were held in connection with this preliminary phase investigation all virtually via Webex.

OPENING REMARKS:

In Support of Imposition (**Leah N. Scarpelli**, ArentFox Schiff LLP)

In Support of the Imposition of the
Antidumping and Countervailing Duty Orders:

ArentFox Schiff LLP
Washington, D.C.
on behalf of

MAT Industries, LLC
MAT Holdings Inc.

Bob Patton, General Counsel and Chief Compliance Officer, MAT Holdings, Inc.

Robbie Hite, Vice President and General Manager, MAT Industries, LLC

J. Christian Riva, Economic Consultant, ION Economics, LLC

Jennfier Lutz, Partner, ION Economics, LLC

Leah N. Scarpelli)
) – OF COUNSEL

Jessica R. DiPietro)

CLOSING REMARKS:

In Support of Imposition (**Jessica R. DiPietro**, ArentFox Schiff LLP)

APPENDIX C

SUMMARY DATA

Table C.1
Air compressors: Summary data concerning the U.S. market, by item and period
Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted

Item	Reported data, Calendar year 2023	2024	2025	Period change comparisons, Calendar year 2023–25	2023–24	2024–25
U.S. consumption quantity:						
Amount	***	***	***	▲***	▲***	▼***
Producers' share (fn1)	***	***	***	▼***	▼***	▼***
Importers' share (fn1):						
China	***	***	***	▼***	▲***	▼***
Malaysia	***	***	***	▲***	***	▲***
Vietnam	***	***	***	▲***	▲***	▲***
Subject sources	***	***	***	▲***	▲***	▲***
Nonsubject sources	***	***	***	▲***	▲***	▼***
All import sources	***	***	***	▲***	▲***	▲***
U.S. consumption value:						
Amount	***	***	***	▲***	▼***	▲***
Producers' share (fn1)	***	***	***	▼***	▼***	▼***
Importers' share (fn1):						
China	***	***	***	▼***	▲***	▼***
Malaysia	***	***	***	▲***	***	▲***
Vietnam	***	***	***	▲***	▼***	▲***
Subject sources	***	***	***	▲***	▲***	▲***
Nonsubject sources	***	***	***	▲***	▲***	▲***
All import sources	***	***	***	▲***	▲***	▲***
U.S. importers' U.S. shipments of imports from:						
China:						
Quantity	***	***	***	▼***	▲***	▼***
Value	***	***	***	▼***	▲***	▼***
Unit value	***	***	***	▲***	▼***	▲***
Ending inventory quantity	***	***	***	▼***	▲***	▼***
Malaysia:						
Quantity	***	***	***	▲***	***	▲***
Value	***	***	***	▲***	***	▲***
Unit value	***	***	***	▲***	***	▲***
Ending inventory quantity	***	***	***	▲***	***	▲***
Vietnam:						
Quantity	***	***	***	▲***	▲***	▲***
Value	***	***	***	▲***	▼***	▲***
Unit value	***	***	***	▲***	▼***	▲***
Ending inventory quantity	***	***	***	▲***	▼***	▲***
Subject sources:						
Quantity	2,359,873	2,704,497	2,730,650	▲15.7	▲14.6	▲1.0
Value	221,776	243,030	273,539	▲23.3	▲9.6	▲12.6
Unit value	$94	$90	$100	▲6.6	▼(4.4)	▲11.5
Ending inventory quantity	432,221	456,708	532,929	▲23.3	▲5.7	▲16.7
Nonsubject sources:						
Quantity	44,430	50,312	47,490	▲6.9	▲13.2	▼(5.6)
Value	89,746	92,340	99,047	▲10.4	▲2.9	▲7.3
Unit value	$2,020	$1,835	$2,086	▲3.3	▼(9.1)	▲13.6
Ending inventory quantity	5,839	6,339	5,375	▼(7.9)	▲8.6	▼(15.2)
All import sources:						
Quantity	2,404,303	2,754,809	2,778,140	▲15.5	▲14.6	▲0.8
Value	311,522	335,370	372,586	▲19.6	▲7.7	▲11.1
Unit value	$130	$122	$134	▲3.5	▼(6.0)	▲10.2
Ending inventory quantity	438,060	463,047	538,304	▲22.9	▲5.7	▲16.3

Table continued.

Table C.1 Continued
Air compressors: Summary data concerning the U.S. market, by item and period
Quantity=units; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per unit; Period changes=percent--exceptions noted

Item	Reported data			Period change comparisons		
	Calendar year			Calendar year		
	2023	2024	2025	2023–25	2023–24	2024–25
U.S. producers':						
Practical capacity quantity	***	***	***	▼***	▼***	▼***
Production quantity	***	***	***	▼***	▼***	▼***
Capacity utilization (fn1)	***	***	***	▼***	▼***	▼***
U.S. shipments:						
Quantity	***	***	***	▼***	▼***	▼***
Value	***	***	***	▼***	▼***	▼***
Unit value	***	***	***	▲***	▼***	▲***
Adjusted U.S. shipments: (fn3)						
Quantity	***	***	***	▼***	▼***	▼***
Value	***	***	***	▼***	▼***	▼***
Unit value	***	***	***	▲***	▼***	▲***
Export shipments:						
Quantity	***	***	***	▼***	▼***	▼***
Value	***	***	***	▼***	▼***	▼***
Unit value	***	***	***	▲***	▲***	▲***
Ending inventory quantity	***	***	***	▲***	▲***	▼***
Inventories/total shipments (fn1)	***	***	***	▲***	▲***	▼***
Production workers	***	***	***	▼***	▼***	▼***
Hours worked (1,000s)	***	***	***	▼***	▼***	▼***
Wages paid ($1,000)	***	***	***	▼***	▼***	▼***
Hourly wages (dollars per hour)	***	***	***	▲***	▲***	▲***
Productivity (units per 1,000 hours)	***	***	***	▼***	▼***	▼***
Unit labor costs	***	***	***	▲***	▲***	▲***
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 3, 4, 6, and 7 of this report.

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.
fn3.--Two importers, ***, reimported U.S.-origin air compressors after assembling them in a nonsubject source. Their data were added as an adjustment to apparent U.S. consumption and can be found in parts 3 and 4 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.

APPENDIX D

U.S. SHIPMENTS BY PRODUCT TYPES

Table D.1 Air compressors: U.S. producers' U.S. shipments in 2025, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	***

Table continued.

Table D.1 (Continued) Air compressors: U.S. producers' U.S. shipments in 2025, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	100.0
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.1 (Continued) Air compressors: U.S. producers' U.S. shipments in 2025, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	100.0	100.0	100.0	100.0

Table continued.

Table D.1 (Continued) Air compressors: U.S. producers' U.S. shipments in 2025, by power source, pressure tank size, and model type

Share down and across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.2 Air compressors: U.S. importers' U.S. shipments of imports in 2025 from China, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	***

Table continued.

Table D.2 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from China, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	—
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	100.0
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.2 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from China, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	100.0	100.0	100.0	100.0

Table continued.

Table D.2 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from China, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.3 Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Malaysia, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	***

Table continued.

Table D.3 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Malaysia, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	—
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	—
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	—
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	—
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	—
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.3 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Malaysia, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	100.0	100.0	100.0	100.0

Table continued.

Table D.3 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Malaysia, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.4 Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Vietnam, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	***

Table continued.

Table D.4 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Vietnam, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	—
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	—
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	—
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	—
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	—
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.4 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Vietnam, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	—	100.0	100.0	100.0	100.0

Table continued.

Table D.4 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from Vietnam, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.5 Air compressors: U.S. importers' U.S. shipments of imports in 2025 from subject sources, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	2,730,650

Table continued.

Table D.5 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from subject sources, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	—
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	100.0
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.5 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from subject sources, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	100.0	100.0	100.0	100.0

Table continued.

Table D.5 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from subject sources, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.6 Air compressors: U.S. importers' U.S. shipments of imports in 2025 from nonsubject sources, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	47,490

Table continued.

Table D.6 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from nonsubject sources, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	—
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	100.0
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.6 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from nonsubject sources, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	—	100.0	100.0	100.0

Table continued.

Table D.6 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from nonsubject sources, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.7 Air compressors: U.S. importers' U.S. shipments of imports in 2025 from all import sources, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	2,778,140

Table continued.

Table D.7 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from all import sources, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	100.0
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.7 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from all import sources, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	100.0	100.0	100.0	100.0

Table continued.

Table D.7 (Continued) Air compressors: U.S. importers' U.S. shipments of imports in 2025 from all import sources, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Table D.8 Air compressors: U.S. producers' and U.S. importers' U.S. shipments of imports in 2025, by power source, pressure tank size, and model type

Quantity in units

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	***

Table continued.

Table D.8 (Continued) Air compressors: U.S. producers' and U.S. importers' U.S. shipments of imports in 2025, by power source, pressure tank size, and model type

Share across in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	100.0
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	100.0
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	100.0
Electric and/or battery powered: More than 20 gallons	***	***	***	***	100.0
All power sources: Less than 6 gallons	***	***	***	***	100.0
All power sources: Between 6 to 10 gallons	***	***	***	***	100.0
All power sources: Between 10 to 20 gallons	***	***	***	***	100.0
All power sources: More than 20 gallons	***	***	***	***	100.0
Gas and/or diesel powered: All sizes	***	***	***	***	100.0
Electric and/or battery powered: All sizes	***	***	***	***	100.0
All power sources: All sizes	***	***	***	***	100.0

Table continued.

Table D.8 (Continued) Air compressors: U.S. producers' and U.S. importers' U.S. shipments of imports in 2025, by power source, pressure tank size, and model type

Share down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	100.0	100.0	100.0	100.0	100.0

Table continued.

Table D.8 (Continued) Air compressors: U.S. producers' and U.S. importers' U.S. shipments of imports in 2025, by power source, pressure tank size, and model type

Share across and down in percent

Power source and pressure tank size (down)/ model type (across)	Stationary	Portable: pancake	Portable: other	Portable: all	All models
Gas and/or diesel powered: Less than 6 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 6 to 10 gallons	***	***	***	***	***
Gas and/or diesel powered: Between 10 to 20 gallons	***	***	***	***	***
Gas and/or diesel powered: More than 20 gallons	***	***	***	***	***
Electric and/or battery powered: Less than 6 gallons	***	***	***	***	***
Electric and/or battery powered: Between 6 to 10 gallons	***	***	***	***	***
Electric and/or battery powered: Between 10 to 20 gallons	***	***	***	***	***
Electric and/or battery powered: More than 20 gallons	***	***	***	***	***
All power sources: Less than 6 gallons	***	***	***	***	***
All power sources: Between 6 to 10 gallons	***	***	***	***	***
All power sources: Between 10 to 20 gallons	***	***	***	***	***
All power sources: More than 20 gallons	***	***	***	***	***
Gas and/or diesel powered: All sizes	***	***	***	***	***
Electric and/or battery powered: All sizes	***	***	***	***	***
All power sources: All sizes	***	***	***	***	100.0

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

Note: Less than 6 gallons includes 6 gallon-sized air compressors. Between 6 to 10 gallons includes 10 gallon-sized air compressors. Between 10 to 20 gallons includes 20 gallon-sized air compressors.

Figure D.1 Gas and/or diesel powered air compressors: Shares of U.S. shipments from all sources, by model type and pressure tank size, 2025

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

Figure D.2 Electric and/or battery powered air compressors: Shares of U.S. shipments from all sources, by model type and pressure tank size, 2025

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

Figure D.3 All power types of air compressors: Shares of U.S. shipments from all sources, by model type and pressure tank size, 2025

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