

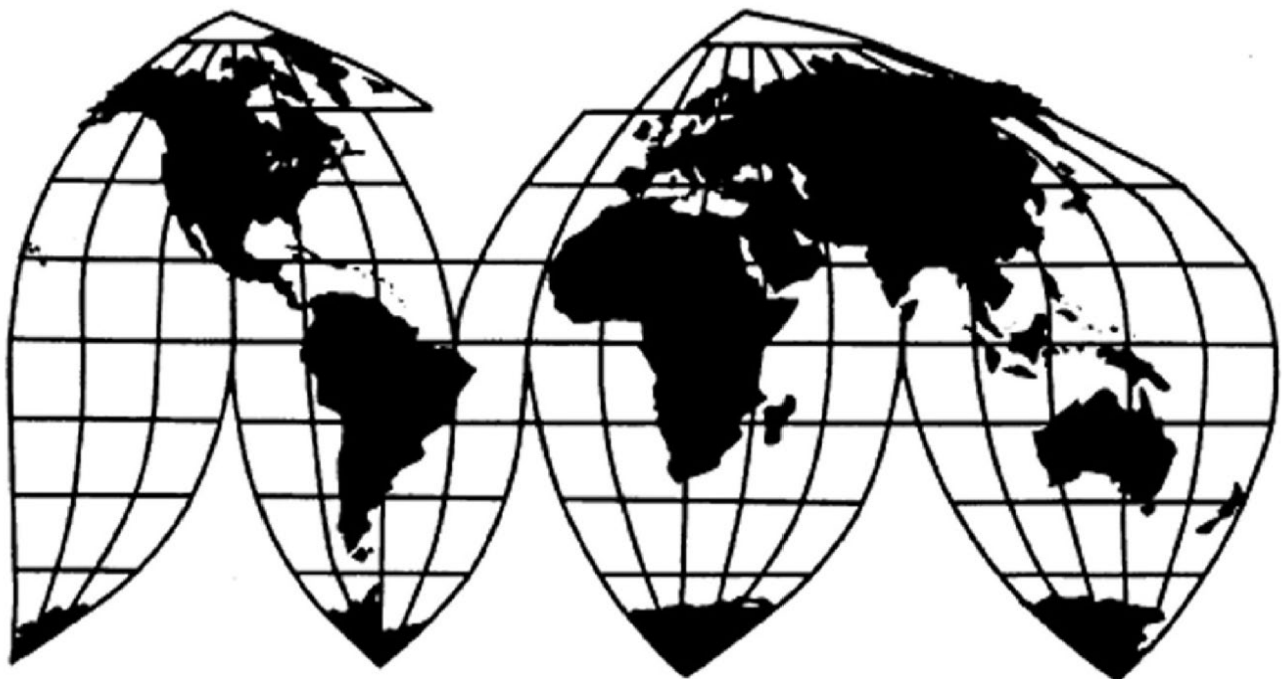
Linear Hydraulic Cylinders from Canada, China, India, Mexico, and South Korea

Investigation Nos. 701-TA-802–804 and 731-TA-1799–1803 (Preliminary)

Publication 5800

October 2026

U.S. International Trade Commission



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Note.—Information that would reveal confidential operations of individual firms may not be published.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-802-804 and 731-TA-1799-1803 (Preliminary)

Linear Hydraulic Cylinders from Canada, China, India, Mexico, and South Korea

DETERMINATIONS

On the basis of the record¹ 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 linear hydraulic cylinders from Canada, China, India, Mexico, and South Korea, provided for in subheadings 8412.21.00 and 8412.90.90 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 subsidized by the governments of China, India, and Mexico.²

³

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,

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 58060; 91 FR 58067 (September 14, 2026).

³ Commissioner Samuel T. Negatu not participating.

who are parties to the investigations. As provided in section 207.20 of the Commission's rules, 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 July 29, 2026, the Hydraulic Cylinders Fair Trade Coalition and its individual members - Aggressive Hydraulics Inc., Cedar, Minnesota; Hol-Mac Corporation, Bay Springs, Mississippi; Ligon Hydraulics, Tonawanda, New York; Prince Manufacturing Corporation, Lexington, South Carolina; PTC Alliance LLC, Wexford, Pennsylvania; Rosenboom Machine and Tool Inc., Sheldon, Iowa; Scot Industries Inc., Lone Star, Texas; Stillwell Inc., Burnsville, Minnesota; and Texas Hydraulics Inc., Temple, Texas - 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 imports of linear hydraulic cylinders from China, India, and Mexico and LTFV imports of linear hydraulic cylinders from Canada, China, India, Mexico, and South Korea. Accordingly, effective July 29, 2026, the Commission instituted countervailing duty investigation Nos. 701-TA-802-804 and antidumping duty investigation Nos. 731-TA-1799-1803 (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 August 4, 2026 (91 FR 49442).⁴ The Commission conducted its conference on August 19, 2026. All persons who requested the opportunity were permitted to participate.

⁴ Due to the notice of extension of the deadline for determining the adequacy of the antidumping and countervailing duty petitions by Commerce, the Commission revised its schedule for this proceeding. The revised schedule was published in a subsequent notice in the *Federal Register* on August 26, 2026 (91 FR 55112).

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 linear hydraulic cylinders and parts thereof (“hydraulic cylinders”) from Canada, China, India, Mexico, and South Korea that are allegedly sold in the United States at less than fair value (“LTFV”) and subsidized by the governments of China, India, and Mexico.

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 Hydraulic Cylinders Fair Trade Coalition and its individual members,³ all of whom are U.S. producers of hydraulic cylinders (“Petitioners”), filed the petitions in these investigations on July 29, 2026. Petitioners appeared at the staff conference with counsel⁴ and

¹ 19 U.S.C. §§ 1671b(a), 1673b(a) (2000); *see also Am. Lamb Co. v. United States*, 785 F.2d 994, 1001–04 (Fed. Cir. 1986); *Aristech Chem. Corp. v. United States*, 20 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 *Am. Lamb Co.*, 785 F.2d at 1001; *see also Tex. Crushed Stone Co. v. United States*, 35 F.3d 1535, 1543 (Fed. Cir. 1994).

³ These individual members are Aggressive Hydraulics Inc., Cedar, Minnesota; Hol-Mac Corporation, Bay Springs, Mississippi; Ligon Hydraulics, Tonawanda, New York; Prince Manufacturing Corporation, Lexington, South Carolina; PTC Alliance LLC, Wexford, Pennsylvania; Rosenboom Machine and Tool Inc., Sheldon, Iowa; Scot Industries Inc., Lone Star, Texas; Stillwell Inc., Burnsville, Minnesota; and Texas Hydraulics Inc., Temple, Texas.

⁴ *See* Transcript of Preliminary Conference, EDIS Doc. 892283 (Aug. 18, 2026) (“Conference Tr.”).

submitted a postconference brief.⁵

Two respondent entities (“Respondents”) participated in these investigations. United Hydraulics, LLC, (“United Hydraulics”) and Deere & Company and Industrias John Deere, S. de R.L. de C.V. (collectively, “Deere”), U.S. producers, importers, and foreign producers of subject merchandise, each submitted a postconference brief.⁶

U.S. industry data in the postconference report are based on the questionnaire responses of 28 firms that accounted for the substantial majority of U.S. production of hydraulic cylinders during 2025.⁷ U.S. import data are based on the questionnaire responses from 93 U.S. importers, accounting for a majority of the U.S. imports from each subject country and approximately half of nonsubject imports under Harmonized Tariff Schedule statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060, and 8412.21.0075.⁸ Foreign industry data and related information are based on the questionnaire responses of 28 producers/exporters of hydraulic cylinders in the subject countries. In 2025, exports of the responding producers/exporters of hydraulic cylinders accounted for approximately *** of hydraulic cylinder imports from Canada, approximately *** percent of hydraulic cylinder imports from China, approximately *** percent of hydraulic cylinder imports from India, approximately *** percent of imports from Mexico, and approximately *** percent of imports from South Korea.⁹

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 those producers whose collective output of a domestic like product constitutes a major

⁵ Petitioners’ Postconference Brief, EDIS Doc. 892495 (Aug. 24, 2026) (“Pets. Postconference Br.”).

⁶ United Hydraulics’ Postconference Brief, EDIS Doc. 892530 (Aug. 24, 2026) (“United Hydraulics Postconference Br.”); Deere’s Postconference Brief, EDIS Doc. 892500 (Aug. 24, 2026) (“Deere Postconference Br.”).

⁷ Confidential Staff Report (“CR”), INV-YY-134 (Sep. 17, 2026) (“CR”) at 1.5; Public Report, *Hydraulic Cylinders from Canada, China, India, Mexico, and South Korea*, Inv. Nos. 701-TA-802–804 and 731-TA-1799–1803 (Preliminary), USITC Pub. 5800 (Oct. 2026) (“PR”) at 1.5.

⁸ CR/PR at 1.5, 4.1.

⁹ CR/PR at 7.3, Tables 4.2, 7.1, 7.13.

¹⁰ 19 U.S.C. § 1677(4)(A).

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 the U.S. Department of Commerce (“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 Commission looks for clear dividing lines among

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 F. 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*, 949 F.3d 710, 717 (Fed. Cir. 2020) (the statute requires the Commission to start with Commerce’s subject merchandise in reaching its own like product determination).

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*, 501 F.3d at 1299; *NEC Corp. v. Dep’t 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).*

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.¹⁹

A. Scope Definition

In its notices of initiation, Commerce defined the imported merchandise within the scope of the investigations as covering:

{C}ertain linear acting hydraulic cylinders (also known as hydraulic power engines) and certain components thereof. Covered linear acting hydraulic cylinders have barrels made of steel, a bore size (inner diameter) of 25.4 mm (one inch) or more, and a return (retracted) length of 101.6 mm (four inches) or more (hydraulic cylinders). For purposes of this scope, the return (retracted) length is the overall end-to-end measurement of the hydraulic cylinder unit when in the retracted position. The scope covers all hydraulic cylinders meeting the physical description above, including but not limited to the following hydraulic cylinder designs: tie-rod, welded body, telescopic, plunger, rodless, differential, position sensing, single acting, double acting, displacement, ram type, piggy-back, double rod, rod-fed, and spring return hydraulic cylinders. All hydraulic cylinders are hydraulically activated. The incorporation of a spring into the design of a hydraulic cylinder otherwise meeting the description above does not exclude a product from the scope.

The scope also covers the following components of hydraulic cylinders: (1) steel barrels, (2) steel piston rods, and (3) any part or component of a hydraulic cylinder that is attached to, assembled with or shipped with a covered steel barrel or a covered piston rod.

Covered steel barrels include processed welded or

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.”).

¹⁹ See, e.g., *Pure Magnesium from China and Israel*, Inv. Nos. 701-TA-403 & 731-TA-895–896 (Final), USITC Pub. 3467 (Nov. 2001) at 8 n.34; *Torrington*, 747 F. Supp. at 748–49 (holding that the Commission is not legally required to limit the domestic like product to the product advocated by the petitioner, co-extensive with the scope).

seamless steel tubes four inches (101.6 mm) or more in length with an inner diameter of one inch (25.4 mm) or more, that have had their inner diameter precision machined (such as through honing or skiving and burnishing), and have otherwise been processed to the point of having as their sole or predominant use a barrel for an in-scope hydraulic cylinder. Such processing may include but is not limited to cutting-to-length, end finishing (e.g., machine-threading, chamfering, etc.), port drilling, and the addition of any weldments, ports, valves, sensors, end caps, gaskets, seals, rings, or any other part, component or attachment for a hydraulic cylinder, or any combination thereof. The addition of any part of a hydraulic cylinder to a barrel has thereby been processed to the point of having as its sole or predominant use as a barrel for an in-scope hydraulic cylinder.

Covered piston rods are solid or hollow steel bars or steel tubes at least four inches (101.6 mm) in length that have been hard chrome plated or chrome coated, cut to length, and machined to be a piston rod.

Included in the scope are any other attachments, parts, or components that are imported with, attached to, or invoiced with a hydraulic cylinder or covered barrel or rod, including but not limited to cylinder mounting parts (e.g., flanges, trunnions, clevises, lugs, etc.), connectors attached to pistons or piston rods, pistons, rings, gaskets, seals, valves, sensors or hydraulic tubing or hydraulic lines (regardless of material) such as for connections to a hydraulic pump. The scope does not cover such attachments, parts, or components when imported or invoiced separately from a hydraulic cylinder.

Also included in the scope are any hydraulic cylinders and parts meeting the physical description above attached to or imported with any equipment or parts of equipment classified in Chapter 84 of the Harmonized Tariff Schedule of the United States (HTSUS). When a hydraulic cylinder is attached to or imported with any equipment or parts of equipment classified in Chapter 84 of the HTSUS, only the hydraulic cylinder is covered by the scope. The covered hydraulic cylinder in that regard includes everything in between and including the mounting pins (e.g., cylinder pin and rod pin) on either end of the cylinder.

Subject merchandise also includes covered hydraulic cylinders, barrels and rods that undergo assembly or minor

processing in a third country in any manner that would not otherwise remove the merchandise from the scope of these investigations if performed in the country of manufacture of the in-scope hydraulic cylinder. Subject merchandise also includes covered hydraulic cylinders, barrels and rods that are attached to any imported equipment or parts of equipment classified in Chapter 84, as discussed in the immediately preceding paragraph, if such attachment occurs in a third country.²⁰

Hydraulic cylinders are used in a wide range of industrial applications that require significant force to move a part.²¹ A hydraulic cylinder, also known as a hydraulic motor, consists of a steel cylinder barrel in which a piston, connected to a piston rod, moves back and forth powered by hydraulic fluid, such as oil, to create linear motion.²² Pressurized hydraulic fluid enters the cylinder through a port from a hydraulic pump that is attached to the cylinder with hydraulic tubing.²³ A cylinder bottom (or cap) and a cylinder head (or gland) close both ends of the cylinder and maintain pressure.²⁴ Mounting end options depend on use, including flanges, trunnions, clevises, and lugs.²⁵ Additionally, piston end mountings can be used to connect the piston rod to the working equipment component that the hydraulic cylinder moves.²⁶

Hydraulic cylinders serve a wide range of industrial applications that require significant force to move a part.

The most common types of hydraulic cylinders in the U.S. market include welded body cylinders, tie rod cylinders, and telescopic cylinders. Welded body cylinders, the most customizable design type, had the largest share of the U.S. market in 2025.²⁷ In welded body cylinders, manufacturers weld the barrel directly to the end caps and weld the ports directly to the barrel.²⁸ Welded body cylinders generally have a narrower body and shorter length

²⁰ *Certain Linear Hydraulic Cylinders and Parts Thereof From Canada, the People's Republic of China, India, the Republic of Korea, and Mexico: Initiation of Less-Than-Fair-Value Investigations*, 91 Fed. Reg. 58060 (Sep. 14, 2026); *Certain Linear Hydraulic Cylinders and Parts Thereof From the People's Republic of China, India, and Mexico: Initiation of Countervailing Duty Investigations*, 91 Fed. Reg. 58067 (Sep. 14, 2026); see also CR/PR at 1.6-1.7.

²¹ CR/PR at 1.21.

²² CR/PR at 1.15.

²³ CR/PR at 1.15.

²⁴ CR/PR at 1.15.

²⁵ CR/PR at 1.15.

²⁶ CR/PR at 1.15.

²⁷ CR/PR at 1.19, 4.20.

²⁸ CR/PR at 1.19.

compared to other design types, allowing them to fit into the tight confines of machinery.²⁹ According to Petitioners, welded body cylinders dominate the mobile hydraulic equipment market (including excavators, bulldozers, and road graders) and material handling equipment (including forklift trucks, telehandlers, and liftgates).³⁰

Tie rod cylinders are characterized by high-strength exterior steel rods that run parallel to the cylinder barrel.³¹ Tie rod cylinders commonly serve in industrial or factory applications because they can be easily disassembled for service or repair.³² According to Petitioners, tie rod cylinders are not always customizable, and the National Fluid Power Association publishes standardized dimensions of tie rod cylinders.³³

Telescopic cylinders are characterized by two to five expanding stages in which the hollow first stage piston rod acts as a barrel for each of the succeeding stage piston rods.³⁴ Telescopic cylinders best serve heavy duty applications with limited space, that require a long stroke.³⁵ Telescopic cylinders cost more to manufacture than welded or tie rod cylinders because they require additional material and engineering.³⁶

Hydraulic cylinders may be single or double acting. Single acting cylinders apply force in only one direction, typically extending the piston rod when hydraulic pressure is applied, and rely on an external force (such as a spring or gravity) to retract the piston rod.³⁷ Double acting cylinders apply force in two directions, both extending and retracting the piston rod.³⁸ Single acting cylinders, with generally simpler designs, cost less than double acting cylinders.³⁹

Manufacturers generally manufactured precision process cold-drawn mechanical tubing via honing or skiving and burnishing to give the cylinder barrel its required shape and smoothness.⁴⁰ They cut the cylinder barrel to the appropriate length for the hydraulic cylinder, finish the ends to accommodate the caps and desired method of attachment, and drill holes into the barrel to integrate ports.⁴¹

Solid steel bar, hollow steel bar, or heavy walled mechanical tubing are typical piston

²⁹ CR/PR at 1.19.

³⁰ CR/PR at 1.19.

³¹ CR/PR at 1.19.

³² CR/PR at 1.19.

³³ CR/PR at 1.19.

³⁴ CR/PR at 1.20.

³⁵ CR/PR at 1.20.

³⁶ CR/PR at 1.20.

³⁷ CR/PR at 1.18.

³⁸ CR/PR at 1.18.

³⁹ CR/PR at 1.18.

⁴⁰ CR/PR at 1.22.

⁴¹ CR/PR at 1.22.

rod inputs.⁴² During production, manufacturers turn and grind the piston rod to achieve a consistent diameter and straightness and hard chrome-plate it to provide hardness and wear resistance, and machine threads for the piston and attachments that secure the rod to the intended equipment.⁴³ Manufacturers typically use high-strength materials like steel or cast iron for pistons that they machine with grooves to fit elastomeric or metal seals and bearing elements.⁴⁴ Manufacturers machine attachments, such as valves, sensors, and other accessories, to customer specifications, and add weldments to the body to enable the hydraulic cylinder to integrate with its intended equipment.⁴⁵

Finally, manufacturers assemble the individual components into a finished hydraulic cylinder.⁴⁶ They attach the piston to the piston rod and place it in the cylinder barrel, install seals, and add end fittings to the rods.⁴⁷ The finished hydraulic cylinder then undergoes pressure testing cleaning, priming, and painting.⁴⁸

B. Arguments of the Parties

Petitioners argue that, under the Commission's six-factor analysis, the various designs of linear hydraulic cylinders form a single domestic like product consisting of a continuum of products with no clear dividing lines.⁴⁹ Respondents take no position at this time on the issue of domestic like product.⁵⁰

C. Analysis and Conclusion

⁴² CR/PR at 1.22.

⁴³ CR/PR at 1.23.

⁴⁴ CR/PR at 1.22.

⁴⁵ CR/PR at 1.22.

⁴⁶ CR/PR at 1.23.

⁴⁷ CR/PR at 1.23.

⁴⁸ CR/PR at 1.23.

⁴⁹ Pets. Postconference Br. at 3-4.

⁵⁰ No party asks to define in-scope barrels or rod components as separate like products; indeed, Petitioners argue that they should be considered part of a single domestic like product under the Commission's semifinished product analysis. See Pets. Postconference Br. at 9-11. Deere requests that, in any final phase investigations, the Commission collect additional information to assess whether downstream heavy equipment (with cylinders attached) is a distinct domestic like product, and if so, whether imports of heavy equipment containing cylinders are causing material injury or threat thereof to the domestic cylinder manufacturing industry. Deere Postconference Br. at 14. In any final phase of the investigations, parties wishing to raise domestic like product issues must do so in their comments on the draft questionnaires. 19 C.F.R. § 207.20(b). Parties must clearly identify and explain the bases for the proposed domestic like product definitions and indicate the new information that would need to be collected for consideration of the proposed definitions.

The record in these preliminary phase investigations appears to show domestic products correspond to the imported products covered by the scope without clear dividing lines among them. Absent any argument to the contrary, we define a single domestic like product consisting of all hydraulic cylinders and parts thereof, coextensive with Commerce's scope.

i. Physical Characteristics and Uses.

All hydraulic cylinders generally share the same physical characteristics and uses, although they may differ in design and specifications according to their specific end-use and customer preference.⁵¹ All hydraulic cylinders consist of a steel cylinder in which a piston, connected to a piston rod, moves back and forth powered by hydraulic fluid to create linear motion.⁵² Broadly, all consist of the same raw materials, including cold-drawn mechanical tubing and steel.⁵³ Three primary design variants in the U.S. market – welded body, tie rod, and telescopic – serve specific end uses, and manufacturers often further tailor hydraulic cylinders customer specifications.⁵⁴ All hydraulic cylinders serve in industrial applications that require significant force to move a part, including: (1) elevators, lifts, and jacks; (2) manufacturing machinery that requires pushing, pulling, shearing, compacting, or bending of materials; (3) mobile equipment such as dump trucks, garbage trucks, lift trailers, construction equipment, earth moving equipment, and agricultural equipment; and (4) material handling equipment such as forklift trucks, telehandlers, and liftgates.⁵⁵

ii. Manufacturing Facilities, Production Processes, and Employees.

Manufacturers reportedly produce all types of hydraulic cylinders are reportedly produced in the same manufacturing facilities, using the same production processes and employees.⁵⁶ They manufacture the primary parts – the barrel, piston, and piston rod –and then assemble them together with attachments.⁵⁷ After assembly, the finished hydraulic cylinder undergoes pressure testing, cleaning, priming, and painting.⁵⁸

⁵¹ CR/PR at 1.16-1.22; *see also* section III.A above.

⁵² CR/PR at 1.16.

⁵³ CR/PR at 1.23, 5.3.

⁵⁴ CR/PR at 1.19-1.22.

⁵⁵ CR/PR at 1.22.

⁵⁶ CR/PR at 1.23-1.24.

⁵⁷ CR/PR at 1.23-1.24.

⁵⁸ CR/PR at 1.24.

iii. Channels of Distribution.

During the January 2023–June 2026 period of investigation, domestic producers shipped hydraulic cylinders within the United States primarily to end users, with a much smaller portion to distributors.⁵⁹

iv. Interchangeability.

The current record indicates limited interchangeability between types and uses of hydraulic cylinders because each cylinder is designed to provide the specific force necessary for particular mechanical tasks and to fit specific equipment.⁶⁰ Petitioners characterize all hydraulic cylinders as interchangeable along a continuum of sizes, pressure ratings, design configurations, and fit for the piece of equipment for which they designed.⁶¹ Additionally, some limitations on the interchangeability among types of products within such a grouping are not unexpected.⁶²

v. Producer and Customer Perceptions.

According to Petitioners, in light of similarities in physical characteristics and uses, market participants perceive all linear hydraulic cylinders to be a single like product, regardless of design type.⁶³

⁵⁹ CR/PR at 2.3, Table 2.4. Domestic producers sold around 95.0 percent of the domestic like product to end users and around 5.0 percent to distributors on an annual basis during the investigation period. *Id.* at Table 2.4.

⁶⁰ CR/PR at 2.9.

⁶¹ Pets. Postconference Br. at 5.

⁶² See, e.g., *Citric Acid and Certain Citrate Salts from Belgium, Colombia, and Thailand*, Inv. Nos. 701-TA-581 & 731-TA-1374–1376 (Preliminary), USITC Pub. 4710 (July 2017) at 10–11 (“{A}s the Commission has indicated in other investigations where the scope encompasses a variety of products, a lack of interchangeability among types of products along the spectrum or included in a grouping of similar products is not unexpected. In those cases, the Commission considers the spectrum or grouping itself to constitute the domestic like product, and it disregards minor variations, absent a clear dividing line between particular products.”); *Van-Type Trailers and Subassemblies from Canada, China, and Mexico*, Inv. Nos. 701-TA-780–782 and 731-TA-1767–1769 (Preliminary), USITC Pub. 5704 (Feb. 2026) at 12 (“Although there may be differences between van-type trailers designated for particular end uses (e.g., dry van versus refrigerated) that limit their interchangeability, some limitations on the interchangeability among types of products within such a grouping are not unexpected.”).

⁶³ Pets. Postconference Br. at 6.

vi. Price.

According to Petitioners, prices of hydraulic cylinder range in a continuum based on design, length, retraction size, pressure rating, and accessories.⁶⁴ The pricing data included three sizes of welded body pricing products and one tie-rod pricing product. Market participants generally reported higher prices for larger hydraulic cylinders, with pricing product 1 ranging from \$*** to \$*** per unit, pricing product 2 ranging from \$*** to \$*** per unit, and pricing product 3 ranging from \$*** to \$*** per unit. Pricing product 4, a tie-rod hydraulic cylinder, ranged from \$*** to \$*** per unit.⁶⁵ Although there is limited overlap among prices for these products, the observed ranges for these specific products are consistent with a continuum of prices based on complexity and size of the product.⁶⁶

vii. Conclusion

The current record shows that all hydraulic cylinders overlap with respect to physical characteristics and uses; manufacturing facilities, production processes, and production employees; channels of distribution; and producer and customer perceptions. The evidence shows a broad range of prices for hydraulic cylinders and suggests these prices exist on a continuum based on size and complexity of the hydraulic cylinder. These considerations suggest that hydraulic cylinders form a continuum of products without clear dividing lines. The evidence also shows limited interchangeability among particular hydraulic cylinders, but such limitations are not unusual across a continuum of products. Therefore, for purposes of these preliminary investigations, we define a single domestic like product encompassing all hydraulic cylinders and parts thereof corresponding to the scope.

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

⁶⁴ Pets. Postconference Br. at 7.

⁶⁵ CR/PR at 5.5, Tables 5.4-5.7.

⁶⁶ Pricing data collected accounted for approximately *** percent of U.S. producers’ U.S. commercial shipments of hydraulic cylinders, *** percent of imports from Canada, *** percent of imports from China, *** percent of imports from India, *** percent of imports from Mexico, and *** percent of imports from South Korea in 2025. CR/PR at 5.6. We invite the parties to comment on the coverage and comparability of pricing products and pricing data in any final phase investigations.

a major proportion of the total domestic production of the product.”⁶⁷ 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.

We consider 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.⁶⁸ Exclusion of such a producer is within the Commission’s discretion based upon the facts presented in each investigation.

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.⁶⁹

⁶⁷ 19 U.S.C. § 1677(4)(A).

⁶⁸ See *Torrington Co. v. United States*, 790 F. Supp. 1161, 1168 (Ct. Int’l Trade 1992), *aff’d mem.*, 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).

⁶⁹ *Changzhou Trina Solar Energy Co. v. USITC*, 100 F. Supp.3d 1314, 1326-31 (Ct. Int’l. Trade 2015); see also *Torrington*, 790 F. Supp. at 1168.

Fifteen domestic producers⁷⁰ imported subject merchandise and/or are related parties for purposes of 19 U.S.C. § 1677(4)(B)(i)-(ii).⁷¹ Neither Petitioners nor Respondents argue for the exclusion of any domestic producers from the domestic industry for purposes of these preliminary investigations.⁷²

We considered the information on the record of these preliminary investigations regarding factors specific to each of the domestic producers and analyzed whether appropriate circumstances exist to exclude any of them. Based on these assessments, for purposes of these preliminary investigations, we find that appropriate circumstances do not exist to exclude any of these firms and accordingly define the domestic industry to include all domestic producers.

Ten⁷³ of the domestic producers each accounted for *** percent or less of domestic hydraulic cylinders production.⁷⁴ Although each firm's volumes of subject imports and ratios of subject imports to U.S. production varied,⁷⁵ each represented a small share of domestic production, and none of them reported financial results suggesting that their operations benefitted from their subject imports or relationships with importers, foreign producers, or that their inclusion would otherwise skew the domestic industry data.⁷⁶ Consequently, their

⁷⁰ ***, ***, ***, ***, ***, ***, ***, ***, Deere, ***, ***, ***, ***, ***, ***, and ***.

⁷¹ Additionally, the Commission has also concluded that a domestic producer that does not itself import subject merchandise, or does not share a corporate affiliation with an importer, may nonetheless be deemed a related party based on its purchases of subject products under certain circumstances. *See, e.g., Forged Steel Fittings from India and Korea*, Inv. Nos. 701-TA-631 and 731-TA-1463-1464 (Final), USITC Pub. 5137 (Nov. 2020); *but see Lemon Juice from Brazil and South Africa*, Inv. Nos. 731-TA-1578-79 (Final), USITC Pub. 5403 at 12 & n.53 (Feb. 2023).

Two firms that did not import subject merchandise and do not share corporate affiliations with an importer or exporter of subject merchandise did purchase subject merchandise from importers. *** accounted for *** percent of domestic production, and its purchases of subject merchandise equated to less than *** percent of its domestic production and these purchases accounted for no more than *** percent of the importer's U.S. imports. CR/PR at Tables 3.31, 3.35. *** arguably produces substantial volumes (*** percent of domestic production), but its purchases of subject merchandise equated to less than *** percent of its domestic production, and the importer accounted for no more than *** percent of imports from *** from 2023 to 2025. *Id.* at Tables 3.31, 3.33. Accordingly, we find that appropriate circumstances do not exist to exclude either domestic producer from the domestic industry.

⁷² *Pets.* Postconference Br. at 11-12; *Deere* Postconference Br. at 4-6; *see generally* *United Hydraulics* Postconference Br.

⁷³ ***, ***, ***, ***, ***, ***, ***, ***, ***, ***, and ***.

⁷⁴ CR/PR at Table 3.1.

⁷⁵ *See* CR/PR at Tables 3.3, 3.17-3.19, 3.22, 3.25, 3.27-3.28, 3.32; *** U.S. Producer Questionnaire, EDIS No. ***.

⁷⁶ ***'s operating and net income margins were *** than the domestic industry average from 2023 to 2025. *Compare* CR/PR at Table 6.1 *with* *** U.S. Producer Questionnaire; *** U.S. Producer Questionnaire; *** U.S. Producer Questionnaire; *** U.S. Producer Questionnaire; *** U.S. Producer Questionnaire; *** U.S. Producer Questionnaire; and *** U.S. Producer Questionnaire. ***'s operating

inclusion in the domestic industry would not mask injury to the domestic industry.

***, the *** U.S. producer, reported a relatively low volume of subject imports and ratio of subject imports to U.S. production, which suggests that its primary interest is in domestic production.⁷⁷ Additionally, its financial performance did not suggest that its operations benefitted from its subject imports to the extent that its inclusion would skew the domestic industry data by masking injury.⁷⁸ Consequently, we find that appropriate circumstances do not exist to exclude *** from the domestic industry. Two other firms, *** and ***, did not provide their financial data, and thus their inclusion cannot skew the industry's data overall.⁷⁹

Two U.S. producers had relatively high volumes of subject imports and ratios of subject imports to their U.S. production and also performed better financially than the domestic industry on average. However, one of these firms, ***, accounted for only *** percent of domestic hydraulic cylinders production, and thus its inclusion in the domestic industry would not skew the data.⁸⁰

The remaining domestic producer, Deere, the *** U.S. producer, accounted for *** percent of domestic production in 2025.⁸¹ Deere imports subject merchandise and owns Mexican producer and exporter John Deere S DE RL DE CV (Mexico), making it subject to potential exclusion from the domestic industry both as an importer and as a related party pursuant to 19 U.S.C. § 1677(4)(B)(i)-(ii).⁸² Deere asserts that its primary interest lies in

and net income margins were *** than the domestic industry average in 2023 and 2024 but *** in 2025. *Compare* CR/PR at Table 6.1 with *** U.S. Producer Questionnaire. From 2023 to 2025, ***' operating income margin was *** than the domestic industry average but its net income margin was *** than the average. *Compare* CR/PR at Table 6.1 with *** U.S. Producer Questionnaire. ***'s operating income margin was *** than the domestic industry average from 2023 to 2025, and its net income margin was *** in 2023 and 2024 but *** in 2025. *Compare* CR/PR at Table 6.1 with *** U.S. Producer Questionnaire.

⁷⁷ CR/PR at Table 3.1. Specifically, ***'s subject imports totaled *** pounds in 2023, *** pounds in 2024, and *** pounds in 2025, and its ratio of its subject imports to its domestic production was *** percent in 2023, *** percent in 2024, and *** percent in 2025. *Id.* at Table 3.26.

⁷⁸ ***'s operating and net income margins were *** than the domestic industry average from 2023 to 2025. CR/PR at Table 6.3.

⁷⁹ CR/PR at 3.1 n.1.

⁸⁰ CR/PR at Tables 3.1, 3.24; *also compare id.* at Table 6.1 with *** U.S. Producer Questionnaire. Specifically, ***'s subject imports totaled *** pounds in 2023, *** pounds in 2024, and *** pounds in 2025, and its ratio of its subject imports to its domestic production was *** percent in 2023, *** percent in 2024, and *** percent in 2025. CR/PR at Table 3.24. Its operating and net income margins were *** than the domestic industry average from 2023 to 2025. *Compare id.* at Table 6.1 with *** U.S. Producer Questionnaire.

⁸¹ CR/PR at Table 3.1.

⁸² CR/PR at Table 3.3; Deere Postconference Br. at 3.

domestic production and that it produces more hydraulic cylinders domestically than it imports.⁸³

Its subject imports totaled *** pounds in 2023, *** pounds in 2024, and *** pounds in 2025.⁸⁴ In comparison, Deere produced *** pounds in 2023, *** pounds in 2024, and *** pounds in 2025.⁸⁵ Accordingly, the ratio of Deere's subject imports to its domestic production was *** percent in 2023, *** percent in 2024, and *** percent in 2025.⁸⁶ Deere's reports producing hydraulic cylinders in both the United States and Mexico and sources from both factories ***. Additionally, Deere ***.⁸⁷

The firm reported capital expenditures totaling \$*** in 2023, \$*** in 2024, and \$*** in 2025.⁸⁸ Deere's operating and net income margins *** the domestic industry average from 2023 to 2025, indicating *** financial performance.⁸⁹ Deere *** on the petitions.⁹⁰

Although Deere reported *** volumes and ratios of subject imports from 2023 to 2025, they *** from 2023 to 2025. As noted, Deere is *** U.S. producer of hydraulic cylinders. Its financial performance *** the domestic industry average; however, it is not clear from the record whether it benefits from its subject imports and Deere's relationship with a subject producer explain its financial performance. Indeed, Petitioners themselves suggest that Deere should not be excluded under the related parties provision, and *** may explain Deere's financial performance.⁹¹

Although we intend to explore these issues further in any final phase investigations, for purposes of these preliminary investigations, in the absence of any argument to the contrary, we find that appropriate circumstances do not exist to exclude Deere from the domestic industry.

Accordingly, consistent with our definition of the domestic like product, we define the domestic industry as all domestic producers of hydraulic cylinders and parts thereof corresponding to the scope.

⁸³ Deere Postconference Br. at 4-6.

⁸⁴ CR/PR at Table 3.23.

⁸⁵ CR/PR at Table 3.23.

⁸⁶ CR/PR at Table 3.23.

⁸⁷ CR/PR at Table 3.30.

⁸⁸ CR/PR at Table 6.5.

⁸⁹ CR/PR at Table 6.3.

⁹⁰ CR/PR at Table 3.1.

⁹¹ Pets. Postconference Br. at 11 n.6. Deere reported *** unit sales values than the domestic industry's average because Deere ***. CR/PR at 6.13.

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.⁹²

Based on the Commission's questionnaire data, during the 12-month period preceding filing of the petitions (July 1, 2025 through June 30, 2026), imports from none of the subject sources individually accounted for less than 3 percent of total imports of hydraulic cylinders by quantity during this period.⁹³ Specifically, subject imports from Canada accounted for *** percent of total imports, China for *** percent, India for *** percent, Mexico for *** percent, and South Korea for *** percent.⁹⁴ As imports from all subject countries exceed negligible levels, we find that they are not negligible.⁹⁵

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

⁹² 19 U.S.C. §§ 1671b(a), 1673b(a), 1677(24)(A)(i). The exceptions to the general three percent rule are not applicable to these investigations.

⁹³ CR/PR at 4.19.

⁹⁴ CR/PR at Table 4.7.

⁹⁵ Deere argues that imports from Mexico are negligible and provides three alternative calculations in support of its claim. Deere Postconference Br. at 10-12. Deere's calculations, however, rely on an outdated questionnaire value for subject imports from Mexico; using the postconference staff report value for such imports, two of Deere's proposed calculations show that subject imports from Mexico exceeded the 3 percent negligibility threshold, and the other comes close. *Derived from* Deere Postconference Br. at 12; CR/PR at Table 4.7. In light of the *American Lamb* standard applicable to preliminary determinations, the evidence shows a reasonable indication that imports from Mexico are not negligible.

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.⁹⁶

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.⁹⁷ Only a “reasonable overlap” of competition is required.⁹⁸

Petitioners ask the Commission to cumulate subject imports because all petitions were filed on the same day, all four factors weigh in favor of cumulation, and no party objects to cumulation.⁹⁹ No respondent addressed cumulation.

We consider subject imports from Canada, China, India, Mexico, and South Korea on a cumulated basis because the statutory criteria for cumulation are satisfied. As an initial matter, Petitioners filed the petitions with respect to all subject countries on the same day, July 29, 2026.¹⁰⁰ As discussed below, the record indicates that subject imports from each subject country are generally fungible with the domestic like product and each other, all sources sell in similar channels of distribution and in similar geographic markets, and have been simultaneously present in the U.S. market for all months of the investigation period.

A. Fungibility.

⁹⁶ 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).

⁹⁷ See, e.g., *Wieland Werke, AG v. United States*, 718 F. Supp. 50 (Ct. Int’l Trade 1989).

⁹⁸ 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.”).

⁹⁹ Pets. Postconference Br. at 13-15.

¹⁰⁰ CR/PR at 1.1.

The record shows general fungibility among domestically produced hydraulic cylinders and imports of hydraulic cylinders from each subject country. The majority of U.S. producers and importers characterized domestically produced hydraulic cylinders and imports of hydraulic cylinders from each subject country as always or frequently interchangeable.¹⁰¹ The record also shows that responding U.S. producers and importers of subject merchandise sold substantial quantities of hydraulic cylinders of similar types to U.S. customers. Welded body complete cylinders accounted for the largest share of 2025 U.S. shipments of complete hydraulic cylinders from U.S. producers and each subject source, with telescopic cylinders accounting for the second largest share among U.S. producers and aggregated import sources.¹⁰² Complete hydraulic cylinders accounted for the majority of U.S. shipments by U.S. producers and U.S. importers from Canada, China, and South Korea, and hydraulic cylinder components accounted for the majority of U.S. shipments by U.S. importers from India and Mexico.¹⁰³

In response to questions concerning how often differences other than price were significant in sales of hydraulic cylinders from different sources, the majority of U.S. producers characterized non-price factors as never significant, as did a significant minority of U.S. importers.¹⁰⁴ However, the majority of U.S. importers characterized non-price factors as always significant.¹⁰⁵

B. Channels of Distribution.

Both domestically produced hydraulic cylinders and subject imports sold to end users and distributors. As discussed above, domestic producers shipped hydraulic cylinders in the United States primarily to end users, with a much smaller portion to distributors.¹⁰⁶ Importers from Canada, China, India, Mexico, and South Korea sold mainly to end users throughout the investigation period, with a smaller portion to distributors.¹⁰⁷

C. Geographic Overlap.

In 2025, official U.S. import statistics for complete linear acting cylinders, a category that includes both in-scope and out-of-scope products, show that imports from all subject sources

¹⁰¹ CR/PR at 2.10, Table 2.11.

¹⁰² CR/PR at 4.20, Table 4.8.

¹⁰³ CR/PR at 4.20, Table 4.8.

¹⁰⁴ CR/PR at 2.13.

¹⁰⁵ CR/PR at 2.13.

¹⁰⁶ CR/PR at 2.3, Table 2.4.

¹⁰⁷ CR/PR at 2.3, Table 2.4.

entered through all four borders of entry.¹⁰⁸ Domestic producers and importers reported shipping domestically produced hydraulic cylinders and hydraulic cylinders from all subject countries, respectively, to all regions in the United States during the investigation period,¹⁰⁹ indicating a geographic overlap. Official import statistics show imports from Canada and China primarily entered through the Northern border; such imports from India and South Korea primarily entered through the Eastern border; and such imports from Mexico primarily entered through the Southern border.¹¹⁰

D. Simultaneous Presence in Market.

U.S. imports of hydraulic from every subject source and domestically produced hydraulic cylinders were present in the U.S. market every month from January 2023 to June 2026.¹¹¹

E. Conclusion

Accordingly, because there appears to be a reasonable overlap of competition between and among the domestic like product and subject imports from all subject countries, we cumulate subject imports from Canada, China, India, Mexico, and South Korea in determining whether there is a reasonable indication of material injury by reason of subject imports.

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.¹¹² 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

¹⁰⁸ CR/PR at 4.23, Table 4.9.

¹⁰⁹ CR/PR at 2.3, Table 2.5.

¹¹⁰ CR/PR at 4.23, Table 4.9.

¹¹¹ CR/PR at 4.25, Tables 4.10, 4.11; see CR/PR at Tables 5.4-7.4 (showing U.S. pricing data for each quarter of the investigation period).

¹¹² 19 U.S.C. §§ 1671b(a), 1673b(a).

operations.¹¹³ The statute defines “material injury” as “harm which is not inconsequential, immaterial, or unimportant.”¹¹⁴ In assessing whether there is a reasonable indication that the domestic industry is materially injured by reason of subject imports, we consider all relevant economic factors that bear on the state of the industry in the United States.¹¹⁵ 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.”¹¹⁶

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,¹¹⁷ 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.¹¹⁸ 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.¹¹⁹

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

¹¹³ 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).

¹¹⁴ 19 U.S.C. § 1677(7)(A).

¹¹⁵ 19 U.S.C. § 1677(7)(C)(iii).

¹¹⁶ 19 U.S.C. § 1677(7)(C)(iii).

¹¹⁷ 19 U.S.C. §§ 1671b(a), 1673b(a).

¹¹⁸ *Angus Chem. 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’d* 944 F. Supp. 943, 951 (Ct. Int’l Trade 1996).

¹¹⁹ 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).

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 injury threshold.¹²⁰ In performing its examination, however, the Commission need not isolate the injury caused by other factors from injury caused by unfairly traded imports.¹²¹ 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.¹²² It is clear that the existence of injury caused by other factors does not compel a negative determination.¹²³

Assessment of whether material injury to the domestic industry is “by reason of” subject

¹²⁰ 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. No. 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. No. 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.

¹²¹ 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 & 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.”))).

¹²² S. Rep. No. 96-249 at 74–75; H.R. Rep. No. 96-317 at 47.

¹²³ *See Nippon Steel Corp.*, 345 F.3d at 1381 (“{A}n 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 “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 imports.”¹²⁴ 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.”¹²⁵ The Federal Circuit has examined and affirmed various Commission methodologies and has disavowed “rigid adherence to a specific formula.”¹²⁶

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.¹²⁷ Congress has delegated this factual finding to the Commission because of the agency’s institutional expertise in resolving injury issues.¹²⁸

B. Conditions of Competition and the Business Cycle¹²⁹

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

i. Demand

Domestic demand for hydraulic cylinders depends on demand for downstream

¹²⁴ *Mittal Steel*, 542 F.3d at 876, 878; *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 *U.S. Steel Group v. United States*, 96 F.3d 1352, 1362 (Fed. Cir. 1996); S. Rep. No. 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*.

¹²⁵ *Mittal Steel*, 542 F.3d at 873, 877–79 (quoting *Gerald Metals*, 132 F.3d at 722). 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.

¹²⁶ *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.”).

¹²⁷ We provide in our discussion below a full analysis of other factors alleged to have caused any material injury experienced by the domestic industry.

¹²⁸ *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. No. 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.”).

¹²⁹ In addition to the conditions discussed below, the captive production provision applies when domestic producers internally transfer significant production of the domestic like product for the production of a downstream article; the domestic like product produced that is internally transferred for

products, such as agricultural equipment, mining equipment, construction equipment (e.g., cranes, excavators and tunnel boring machines), forklifts, various industrial equipment, utility trailers, and trucks.¹³⁰ Petitioners argue that demand for some downstream products increased and for others decreased during the investigation period; similarly, United Hydraulics reports weaker demand for hydraulic cylinders in the agricultural and single-unit housing sectors.¹³¹

Twenty-one of 27 U.S. producers and 34 of 71 importers indicated that the market was subject to business cycles that follow demand cycles for downstream products.¹³² U.S. producers most frequently reported that demand fluctuated downward, whereas responding importers nearly evenly split among no change in demand and increasing and decreasing trends.¹³³

Apparent U.S. consumption, by quantity, fluctuated but decreased by 2.2 percent overall from 2023 to 2025; it was 10.7 percent higher in interim 2026 compared to interim 2025.¹³⁴

ii. Supply

In 2023 and in the interim periods, the domestic industry represented the largest supplier for hydraulic cylinders in the U.S. market, and the second largest supplier in 2024 and 2025.¹³⁵ Its share of apparent U.S. consumption decreased irregularly by 9.5 percentage points from 2023 to 2025 and was 5.3 percentage points lower in interim 2026 than in interim 2025.¹³⁶ Although the domestic industry's practical hydraulic cylinders capacity decreased over

processing into that downstream article does not enter the merchant market for the domestic like product; and the domestic like product is the predominant material input in the production of that downstream article. 19 U.S.C. § 1677(7)(C)(iv). If all of those conditions are met, in determining market share and the factors affecting financial performance, the Commission shall focus primarily on the merchant market for the domestic like product. *Id.*

Although domestic producers internally consumed or transferred to a related firm approximately *** of their U.S. shipments during the investigation period, hydraulic cylinders were not a "predominant" input because they reportedly comprise *** percent of the finished cost of downstream product and *** percent of the quantity by weight. CR/PR at 3.19, 3.25, Tables 3.11, 3.15. Because the second criterion is not satisfied, the captive production provision does not apply; consequently, and in the absence of argument to the contrary, we focus on the total market in our analyses in these investigations.

¹³⁰ CR/PR at 2.7.

¹³¹ Pets. Postconference Br. at 16-17; United Hydraulics Postconference Br. at 4.

¹³² CR/PR at 2.7-2.8.

¹³³ CR/PR at 2.8.

¹³⁴ CR/PR at 4.31, Table 4.12.

¹³⁵ CR/PR at Table 4.12.

¹³⁶ CR/PR at Table 4.12.

the investigation period, its production decreased more, leading capacity utilization to decrease by 6.8 percent from 2023 to 2025.¹³⁷

Several U.S. producers closed plants, reported prolonged shutdowns or production curtailments, and/or reduced employment, and ***.¹³⁸ Petitioners argue that U.S. hydraulic cylinders producers could produce all types of hydraulic cylinders throughout the investigation period.¹³⁹ Apparent U.S. consumption exceeded the domestic industry's capacity throughout this period,¹⁴⁰ but U.S. producers have substantial unused capacity, as Petitioners argue.¹⁴¹ By contrast, United Hydraulics claims that U.S. producers cannot meet demand and that U.S. producers could not ramp up production quickly.¹⁴²

In 2024 and 2025, subject imports represented the largest source of hydraulic cylinders in the U.S. market, and the second largest source in 2023 and the interim periods.¹⁴³ Their share of apparent U.S. consumption increased by 8.0 percentage points from 2023 to 2025 and was 6.5 percentage points higher in interim 2026 than in interim 2025.¹⁴⁴

Nonsubject imports were the smallest source of hydraulic cylinders throughout the investigation period.¹⁴⁵ Their share of apparent U.S. consumption increased irregularly by 1.5 percentage points from 2023 to 2025 and was 1.2 percentage points lower in interim 2026 than in interim 2025.¹⁴⁶ Source countries reported by leading importers of nonsubject hydraulic cylinders included Austria, Brazil, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Poland, Great Britain, Japan, New Zealand, Spain, Sweden, Taiwan, Vietnam, and

¹³⁷ CR/PR at Table 3.6.

¹³⁸ CR/PR at Table 3.5.

¹³⁹ Pets. Postconference Br. at 17-19.

¹⁴⁰ CR/PR at Table C.1. As the Commission previously explained, "the fact that the domestic industry may not be able to supply all of demand does not mean the industry may not be materially injured or threatened with material injury by reason of subject imports." *Small-Diameter Graphite Electrodes from China*, Inv. No. 731-TA-1143 (Final), USITC Pub. 4062 at 22-23 (Feb. 2009) (citations omitted).

¹⁴¹ Pets. Postconference Br. at 17-19.

¹⁴² United Hydraulics Postconference Br. at 5; *see also* Deere Postconference Br. at 3. The parties disagree how long it would take for U.S. producers to ramp up production. At the conference, some domestic industry witnesses reported that their companies could increase production immediately, while one estimated it would take three to nine months. Conf. Tr. at 83-84 (Stillwell, van Eldik, Rosenboom). United Hydraulics characterizes these timelines as unrealistic because ***. United Hydraulics Postconference Br. at Exh. 1 at 3.

¹⁴³ CR/PR at Table 4.12.

¹⁴⁴ CR/PR at Table 4.12.

¹⁴⁵ CR at Table 4.12.

¹⁴⁶ CR/PR at Table 4.12.

Turkey.¹⁴⁷

Six of 27 responding U.S. producers and ten of 77 importers reported that they had experienced supply constraints since January 1, 2023.¹⁴⁸ Petitioners indicated that hiring and training employees would be the most significant – but manageable – constraint on ramping up production.¹⁴⁹ Importers most frequently cited tariff rates and uncertainty as a supply constraint.¹⁵⁰

iii. Substitutability and Other Conditions

Based on the record in the preliminary phase of these investigations, we find at least a moderate degree of substitutability between cumulated subject imports and domestically produced hydraulic cylinders. The record indicates interchangeability between domestically produced hydraulic cylinders and subject imports but lower interchangeability between hydraulic cylinders of different types and uses.¹⁵¹ In their questionnaire responses, the majority of U.S. producers and importers characterized hydraulic cylinders from the subject sources and the United States as always or frequently interchangeable.¹⁵²

The record of these preliminary investigations indicates that price is an important factor in purchasing decisions for hydraulic cylinders. In response to the lost sales/lost revenue survey, purchasers' most often cited quality, price, and delivery reliability as their top three purchasing factors.¹⁵³ The majority of U.S. producers characterized non-price factors as never significant, as did a significant minority of U.S. importers.¹⁵⁴ However, the majority of U.S. importers characterized non-price factors as always significant.¹⁵⁵

Petitioners identify price as an important factor in purchasing decisions because hydraulic cylinders are highly substitutable and purchase managers prioritize price.¹⁵⁶ United Hydraulics, however, disputes the importance of price in purchasing decisions, noting that

¹⁴⁷ CR/PR at 1.4 n.6.

¹⁴⁸ CR/PR at 2.5-2.6.

¹⁴⁹ CR/PR at 2.6.

¹⁵⁰ CR/PR at 2.6.

¹⁵¹ CR/PR at 2.9. We invite the parties to comment further on this dichotomy regarding interchangeability and substitutability in any final phase investigations.

¹⁵² CR/PR at 2.10, Tables 2.10, 2.11.

¹⁵³ CR/PR at 2.10, Table 2.9.

¹⁵⁴ CR/PR at 2.13.

¹⁵⁵ CR/PR at 2.13.

¹⁵⁶ Pets. Postconference Br. at 23-24.

questionnaire responses identify ***.¹⁵⁷ It argues that ***.¹⁵⁸

U.S. producers reported producing *** of their commercial shipments to order; by contrast, importers reported selling approximately *** of their commercial shipments from inventory.¹⁵⁹ U.S. producers' average lead times were shorter than those of importers.¹⁶⁰ U.S. producers most often reported setting prices through transaction-by-transaction negotiations, followed closely by contracts and set price lists.¹⁶¹ Importers most frequently reported using set price lists, followed by transaction-by-transaction negotiations and contracts.¹⁶² U.S. producers reported a relatively even split between using long-term contracts, annual contracts, short-term contracts, and spot sales, with spot sales and annual contracts being slightly more common.¹⁶³ By contrast, importers reported using long-term contracts for approximately two thirds of their sales.¹⁶⁴

Hydraulic cylinders consist primarily of various types of steel, shaped through extensive machining and other manufacturing processes.¹⁶⁵ In general, steel prices declined through the middle of the investigation period, then recovered, ending higher than they started.¹⁶⁶ Raw material costs represented more than 50 percent of U.S. producers' total cost of goods sold ("COGS") throughout the investigation period.¹⁶⁷ On a per-unit basis, raw materials costs declined from 2023 to 2025 but were higher in interim 2026 than in interim 2025.¹⁶⁸ Raw material costs as a ratio to net sales declined from 2023 to 2025 and were lower in interim 2026 than in interim 2025.¹⁶⁹

Hydraulic cylinders from all subject countries currently face additional tariffs under section 232 of the Trade Expansion Act of 1962, as amended and section 301 of the Trade Act of 1974.¹⁷⁰ For portions of the investigation period, subject imports of hydraulic cylinder parts from all subject countries faced additional tariffs under section 122 of the Trade Act of 1974,¹⁷¹

¹⁵⁷ United Hydraulics Postconference Br. at 2-3.

¹⁵⁸ United Hydraulics Postconference Br. at 5.

¹⁵⁹ CR/PR at 2.10.

¹⁶⁰ CR/PR at 2.10.

¹⁶¹ CR/PR at 5.3.

¹⁶² CR/PR at 5.3.

¹⁶³ CR/PR at 5.3.

¹⁶⁴ CR/PR at 5.3.

¹⁶⁵ CR/PR at 5.1.

¹⁶⁶ CR/PR at 5.1, Table 5.1, Figure 5.1.

¹⁶⁷ CR/PR at 6.13.

¹⁶⁸ CR/PR at 6.13.

¹⁶⁹ CR/PR at 6.13.

¹⁷⁰ CR/PR at 1.8-1.9, Tables 1.2, 1.3.

¹⁷¹ CR/PR at 1.12.

and hydraulic cylinders or hydraulic cylinder parts faced tariffs under the International Emergency Economic Powers Act.¹⁷²

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.”¹⁷³

During a period where apparent U.S. consumption fell by 2.2 percent, the volume of cumulated subject imports increased irregularly by 15.5 percent from 2023 to 2025. The volume of cumulated subject imports was 22.8 percent higher in interim 2026 than in interim 2025, and apparent U.S. consumption was 10.7 percent higher in interim 2026 than in interim 2025.¹⁷⁴ This increase in subject import volumes coincided with cumulated subject imports overtaking the domestic industry as the largest source of hydraulic cylinders in 2024 and 2025; as discussed in section VII.B.iii above, their share of apparent U.S. consumption increased by 8.0 percentage points from 2023 to 2025 and was 6.5 percentage points higher in interim 2026 than in interim 2025.¹⁷⁵ Additionally, the ratio of cumulated subject imports to U.S. production increased by 31.4 percentage points from 2023 to 2025 and was 12.3 percentage points higher in interim 2026 than in interim 2025.¹⁷⁶

Accordingly, based on the record in the preliminary phase of these investigations, we find that the volume of and increase in cumulated subject imports is significant, both in absolute terms and relative to U.S. consumption and production.

D. Price Effects

Section 771(7)(C)(ii) of the Tariff Act provides that, in evaluating the price effects of subject imports, the Commission shall consider whether –

¹⁷² CR/PR at 1.13-1.16. For a full history of additional duties applicable to hydraulic cylinders and parts thereof from the subject countries, *see id.* at 1.8-1.16.

¹⁷³ 19 U.S.C. § 1677(7)(C)(i).

¹⁷⁴ CR/PR at Table 4.2. Specifically, subject imports increased from 171.0 million pounds in 2023 to 206.7 million pounds in 2024, then decreased to 197.5 million pounds in 2025. *Id.* They were 44.5 million pounds in interim 2026, compared to 36.2 million pounds in interim 2025. *Id.*

¹⁷⁵ CR/PR at Table 4.2; *see also id.* at Appendix E (showing subject imports also took sales of specific product types from the domestic industry).

¹⁷⁶ CR/PR at Table 4.2.

(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.¹⁷⁷

As discussed in section VII.B.iii. above, we find at least a moderate degree of substitutability between subject imports and domestically produced hydraulic cylinders and that price is an important factor in purchasing decisions.

The Commission collected quarterly data from U.S. producers and importers for the total quantity and f.o.b. value of four hydraulic cylinders products shipped to unrelated U.S. customers during January 2023 to March 2026.¹⁷⁸ The Commission asked firms that imported these products from Canada, China, India, Mexico, and South Korea for their own use to provide purchase cost data on their direct imports.¹⁷⁹

The pricing data collected in these preliminary investigations indicates that subject imports undersold domestically produced hydraulic cylinders in 132 of 183 quarterly

¹⁷⁷ 19 U.S.C. § 1677(7)(C)(ii).

¹⁷⁸ CR/PR at 5.5. These four pricing products are:

Description	Product 1	Product 2	Product 3	Product 4
Barrel / Rod Material Type	Not Stainless Steel	Not Stainless Steel	Not Stainless Steel	Not Stainless Steel
Cylinder Type	Welded	Welded	Welded	Tie Rod
Barrel Wall Thickness	.2-.3"	.35-.5"	0.20-0.40"	.175-.2.25"
Bore Inside Diameter	3.5-4.0"	4.5-6.0"	4.0-5.0"	1.8-2.2"
Piston Rod Diameter	1.75-2.25"	2.5-3.0"	3.0-3.5"	1.0-1.5"
Retract Length	17-21"	34-63"	146-166"	14-17"
Length of Stroke	8.0-9.0"	24-48"	120-140"	4-6"
Single vs. Double-Acting	Double Acting	Double Acting	Double Acting	Double Acting
Sensors	No	No	No	No
Valves	No	1-2	Up to 1	No
Hydraulic Line	No	No	Yes	No

12 U.S. producers and 38 importers provided usable pricing data for sales of the requested products, although not all firms reported pricing for all products for all quarters. *Id.* at 5.6.

¹⁷⁹ CR/PR at 5.5. Twenty importers reported useable import purchase cost data for products 1-4. Purchase cost data reported by these firms accounted for approximately *** percent of imports from Canada, *** percent of imports from China, *** percent of imports from India, *** percent of imports from Mexico, and *** percent of imports from South Korea in 2025. CR/PR at 5.19. We invite the parties to comment on the coverage and comparability of pricing products and purchase cost data in any final phase investigations.

comparisons at margins of underselling ranging from *** percent to *** percent.¹⁸⁰ Shipments in quarters with underselling represented 73.8 percent of total shipments of the pricing products during the investigation period.¹⁸¹

On the current record, purchase cost data represent a smaller volume of subject imports (*** units) than the traditional pricing data (*** units).¹⁸² Purchase cost data indicate that costs for subject imports were lower than costs of U.S.-produced hydraulic cylinders in 75 of 143 quarterly comparisons, reflecting volumes representing *** percent of the total volume of price cost comparisons, with differentials ranging from *** percent to *** percent.¹⁸³

We recognize that some firms choose to import directly instead of purchasing to reduce costs, but that the purchase cost data may not reflect the total cost of importing. Therefore, we requested that importers provide additional information regarding the costs and benefits of directly importing hydraulic cylinders. On the current record, the costs of importing identified by importers do not fully account for the lower subject import purchase costs.¹⁸⁴

We also considered purchasers' responses to the lost sales/lost revenue survey. Of the 12 responding purchasers, 10 reported that they had purchased imported hydraulic cylinders from subject countries instead of U.S.-produced product since 2023.¹⁸⁵ In total, responding purchasers reported purchasing *** pounds of subject imports instead of U.S.-produced hydraulic cylinders.¹⁸⁶ Nine of these purchasers reported lower subject import prices than U.S.-produced product, and five reported that price was a primary reason for purchasing subject imports instead of U.S.-produced merchandise.¹⁸⁷ No responding purchasers reported that U.S. producers had reduced prices to compete with lower-priced imports from subject countries.¹⁸⁸

Based on these considerations, including the at least moderate degree of substitutability between domestically produced hydraulic cylinders and subject imports, the importance of price in purchasing decisions, and underselling by subject imports, we find, for purposes of these preliminary determinations, that underselling by subject imports from Canada, China, India, Mexico, and South Korea was significant. We find that the underselling enabled

¹⁸⁰ CR/PR at 5.36, Tables 5.14-5.16.

¹⁸¹ CR/PR at Table 5.16.

¹⁸² CR/PR at Table 5.16, Table 5.17.

¹⁸³ CR/PR at Table 5.17.

¹⁸⁴ See CR/PR at 5.19-5.20 (discussing reported additional costs and benefits of directly importing rather than purchasing from a U.S. producer or U.S. importer).

¹⁸⁵ CR/PR at 5.42.

¹⁸⁶ CR/PR at Tables 5.23, 5.24.

¹⁸⁷ CR/PR at 5.42.

¹⁸⁸ CR/PR at 5.42.

cumulated subject imports to gain market share from the domestic industry, overtaking it as the largest source of hydraulic cylinders in the U.S. market in 2024 and 2025.

We also examined whether subject imports depressed or suppressed domestic prices. Pricing trends during the investigation period were mixed, with domestic and import prices of some pricing products increasing and others decreasing.¹⁸⁹ The domestic industry's COGS-to-net-sales ratio irregularly declined by 0.2 percentage points from 2023 to 2025 and was 2.5 percentage points lower in interim 2026 than in interim 2025.¹⁹⁰ Its COGS per unit remained fairly flat from 2023 to 2025 but was 2.5 percent higher in interim 2026 than in interim 2025.¹⁹¹ The domestic producers' total net sales average unit value ("AUV") remained fairly stable from 2023 to 2025 but was 5.9 percent higher in interim 2026 than in interim 2025.¹⁹²

In sum, for purposes of these preliminary investigations, we find that subject imports significantly undersold the domestic like product and gained market share at the expense of the domestic industry. Consequently, we find that subject imports had significant price effects.

E. Impact

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 ("R&D"), 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."¹⁹³

The domestic industry's trade, employment, and financial indicators generally declined over the investigation period. Its practical capacity, production, capacity utilization, U.S. shipments, share of apparent U.S. consumption, number of production and related workers ("PRWs"), total hours worked, wages paid, productivity, net sales revenues, gross profit, operating income, net income, operating income as a ratio to net sales, net income as a ratio to

¹⁸⁹ CR/PR at Tables 5.4-5.7.

¹⁹⁰ CR/PR at Tables 6.3, C.1.

¹⁹¹ CR/PR at Tables 6.3, C.1.

¹⁹² CR/PR at Tables 6.3, C.1.

¹⁹³ 19 U.S.C. § 1677(7)(C)(iii).

net sales, capital expenditures, and R&D expenses generally declined,¹⁹⁴ while the industry's end-of-period inventories and end-of-period inventories as a share of total shipments increased.¹⁹⁵

Based on the record in the preliminary phase of these investigations, we find that the significant volume of subject imports undersold the domestic like product to a significant degree, which caused the domestic industry to lose market share to subject imports and to experience declines in its performance indicia. In light of these considerations, we conclude that, for purposes of these preliminary investigations, subject imports had a significant adverse impact on the domestic industry.

We also considered whether other factors may have had an impact on the domestic industry, to ensure that we are not attributing injury from such other factors to subject imports. As discussed above, nonsubject imports accounted for less than 10 percent of apparent U.S. consumption throughout the investigation period.¹⁹⁶ Additionally, their AUVs on average exceeded subject imports'.¹⁹⁷ Thus, nonsubject imports cannot explain the market share gained by subject imports at the expense of the domestic industry. Similarly, although demand

¹⁹⁴ From 2023 to 2025, the industry's practical capacity decreased irregularly by 12.4 percent, its production decreased by 19.8 percent, its capacity utilization decreased by 6.8 percentage points, its U.S. shipments by quantity decreased by 22.8 percent, its share of apparent U.S. consumption decreased by 9.5 percentage points, its number of PRWs decreased by 16.6 percent, its wages paid decreased by 17.7 percent, its net sales revenues decreased by 21.7 percent, its gross profits decreased by 21.0 percent, its operating income decreased by 33.8 percent, its total hours worked decreased by 18.4 percent, its productivity decreased by 1.7 percent, its net income decreased by 38.6 percent, its operating income as a ratio to net sales decreased by 2.0 percentage points, its net income as a ratio to net sales decreased by 2.5 percentage points, its capital expenditures decreased by 23.9 percent, and its R&D expenses decreased by 15.3 percent. CR/PR at Table C.1.

Compared to interim 2025, in interim 2026, the industry's practical capacity was 6.1 percent lower, its production was 5.5 percent higher, its capacity utilization was 9.2 percentage points higher, its U.S. shipments by quantity were 3.3 percent higher, its share of apparent U.S. consumption was 5.3 percentage points lower, its number of PRWs was 3.0 percent lower, its total hours worked were 0.9 percent higher, its wages paid were 4.4 percent higher, its productivity was 4.6 percent higher, its net sales revenues were 7.9 percent higher, its gross profits were 20.7 percent higher, its operating income was 34.7 percent higher, its net income was 55.0 percent higher, its operating income as a ratio to net sales was 2.9 percentage points higher, its net income as a ratio to net sales was 4.3 percentage points higher, its capital expenditures were 27.7 percent lower, and its R&D expenses were 15.9 percent lower. *Id.*

¹⁹⁵ The industry's end-of-period inventories increased by 1.4 percent from 2023 to 2025 and were 5.3 percent higher in interim 2026 than in interim 2025. CR/PR at Table C.1. Its end-of-period inventories as a share of total shipments increased by 5.4 percentage points from 2023 to 2025 and was 0.7 percentage points higher in interim 2026 than in interim 2025. *Id.*

¹⁹⁶ CR/PR at Table 4.2.

¹⁹⁷ CR/PR at Table C.1.

decreased irregularly by 2.2 percent from 2023 to 2025, it was 10.7 percent higher in interim 2026 than in interim 2025, and any decline from 2023 to 2025 cannot explain cumulated subject imports' market share gains at the expense of the domestic industry.

In sum, based on the record in the preliminary phase of these investigations, we conclude 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 imports of hydraulic cylinders from Canada, China, India, Mexico, and South Korea that are allegedly sold in the United States at LTFV and subsidized by the governments of China, India, and Mexico.

Part 1: Introduction

Background

These investigations result from petitions filed with the U.S. Department of Commerce (“Commerce”) and the U.S. International Trade Commission (“USITC” or “Commission”) by the Hydraulic Cylinders Fair Trade Coalition and its individual members: Aggressive Hydraulics Inc., Cedar, Minnesota; Hol-Mac Corporation, Bay Springs, Mississippi; Ligon Hydraulics, Tonawanda, New York; Prince Manufacturing Corporation, Lexington, South Carolina; PTC Alliance LLC, Wexford, Pennsylvania; Rosenboom Machine and Tool Inc., Sheldon, Iowa; Scot Industries Inc., Lone Star, Texas; Stillwell Inc., Burnsville, Minnesota; and Texas Hydraulics Inc., Temple, Texas, on July 29, 2026, 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 linear hydraulic cylinders and parts thereof (“hydraulic cylinders”)¹ from Canada, China, India, Mexico, and South Korea. Table 1.1 presents information relating to the background of these investigations.^{2 3}

Table 1.1 Hydraulic cylinders: Information relating to the background and schedule of this proceeding

Effective date	Action
July 29, 2026	Petitions filed with Commerce and the Commission; institution of the Commission investigations (91 FR 49442, August 4, 2026)
August 18, 2026	Commerce’s notice of extension of the deadline for determining the adequacy of the antidumping and countervailing duty petitions (91 FR 53848, August 20, 2026)
August 19, 2026	Commission’s conference
August 21, 2026	Revised scheduling of Commission investigations (91 FR 55112, August 26, 2026)
September 8, 2026	Commerce’s notices of initiation AD (91 FR 58060, September 14, 2026)
September 8, 2026	Commerce’s notice of initiation CVD (91 FR 58067, September 14, 2026)
September 30, 2026	Commission’s vote
October 9, 2026	Commission’s determinations
October 19, 2026	Commission’s views

Note: Due to the notice of extension of the deadline for determining the adequacy of the antidumping and countervailing duty petitions, the Commission revised its schedule for this proceeding.

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 who appeared at the conference is presented in appendix B of this report.

Statutory criteria

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

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

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

In evaluating the volume of imports of merchandise, the Commission shall consider whether the volume of imports of the merchandise, or any increase in that volume, either in absolute terms or relative to production or consumption in the United States is significant.. . .In evaluating the effect of imports of such merchandise on prices, the Commission shall consider whether. . .(I) there has been significant price underselling by the imported merchandise as compared with the price of domestic like products of the United States, and (II) the effect of imports of such merchandise otherwise depresses prices to a significant degree or prevents price increases, which otherwise would have occurred, to a significant degree.. . . In examining the impact required to be considered under subparagraph (B)(i)(III), the Commission shall evaluate (within the context of the business cycle and conditions of competition that are distinctive to the affected industry) all relevant economic factors which have a bearing on the state of the industry in the United States, including, but not limited to. . . (I) actual and potential decline in output, sales, market share, gross profits, operating profits, net profits, ability to service debt, productivity, return on investments, return on assets, and utilization of capacity, (II) factors affecting domestic prices, (III) actual and potential negative effects on cash flow, inventories, employment, wages, growth, ability to raise capital, and investment, (IV) actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative

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

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.

Organization of report

Part 1 of this report presents information on the subject merchandise, alleged subsidy rates/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.

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

Market summary

Hydraulic cylinders have many applications and can generally be used in any machine where significant forces are required to move a part. The leading U.S. producers of hydraulic cylinders are Deere & Company, Rosenboom Machine & Tool, Inc (“Rosenboom”), Ligon Hydraulics (“Ligon”), and Scot Industries, Inc. (“Scot Industries”). Leading producers of hydraulic cylinders outside the United States include Monarch Industries Limited (“Monarch”) of Canada, Caterpillar (China) Machinery Components Co., Ltd. (“Caterpillar China”) of China, Wipro Enterprises Private Limited (“Wipro India”) of India, Caterpillar Mexico, S.A. de C.V. (“Caterpillar Mexico”) and Industrias John Deere, S. de R.L. de C.V. (“Industrias John Deere”) of Mexico, and DY Power Corporation (“DY Power”) and SH PAC of South Korea. The leading U.S. importers of hydraulic cylinders are Monarch from Canada, Caterpillar Inc. (“Caterpillar”) from China, Caterpillar and Ognibene North America LLC (“Ognibene”) from India, Caterpillar and Deere & Company from Mexico, and DY Power and SH PAC from South Korea. Leading importers of product from nonsubject countries⁶ include Caterpillar, Hyva Corporation Inc (“Hyva”), and Deere & Company. U.S. purchasers of hydraulic cylinders are firms that produce equipment for a variety of different industries including agricultural machinery, load handling equipment, construction equipment, and consumer products in transportation equipment. Leading purchasers include ***.

Apparent U.S. consumption of hydraulic cylinders totaled approximately 433.6 million pounds (\$1.9 billion) in 2025. Currently, at least 28 firms are known to produce hydraulic cylinders in the United States. U.S. producers’ U.S. shipments of hydraulic cylinders totaled 192.8 million pounds (\$975.5 million) in 2025, and accounted for 44.5 percent of apparent U.S. consumption by quantity and 50.9 percent by value.⁷ U.S. shipments of imports from subject sources totaled 200.9 million pounds (\$694.6 million) in 2025 and accounted for 46.3 percent of apparent U.S. consumption by quantity and 36.3 percent by value. U.S. shipments of imports from nonsubject sources totaled 39.8 million pounds (\$246.0 million) in 2025 and accounted for 9.2 percent of apparent U.S. consumption by quantity and 12.8 percent by value.

⁶ Source countries reported by leading importers of nonsubject hydraulic cylinders included Austria, Brazil, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Poland, Great Britain, Japan, New Zealand, Spain, Sweden, Taiwan, Vietnam, and Turkey.

⁷ U.S. producer data for apparent consumption includes U.S. producers’ U.S. shipments and U.S.-origin hydraulic cylinders exported from the United States and subsequently re-imported by U.S. importers.

Summary data and data sources

A summary of data collected in these investigations is presented in appendix C, tables C.1 and C.2. The Commission's questionnaires collected data for the years 2023 to 2025 and interim periods January through March of 2025 ("interim 2025") and January through March of 2026 ("interim 2026"). Except as noted, U.S. industry data are based on questionnaire responses of 28 firms that accounted for the substantial majority of U.S. production of hydraulic cylinders during 2025. U.S. imports are based on questionnaire data of 93 responding U.S. importers.

Previous and related investigations

Hydraulic cylinders have not been the subject of prior countervailing or antidumping duty investigations in the United States.

Nature and extent of alleged subsidies and sales at LTFV

Alleged subsidies

On September 14, 2026, Commerce published a notice in the Federal Register of the initiation of its countervailing duty investigations on hydraulic cylinders from China, India, and Mexico.⁸

Alleged sales at LTFV

On September 14, 2026, Commerce published a notice in the Federal Register of the initiation of its antidumping duty investigations on hydraulic cylinders from Canada, China, India, Mexico, and South Korea.⁹ Commerce has initiated antidumping duty investigations based on estimated dumping margins of 248.33 to 744.85 percent for hydraulic cylinders from Canada, 149.86 to 394.07 percent for hydraulic cylinders from China (Malaysia Surrogate), 103.05 to 197.07 percent for hydraulic cylinders from China (Mexico Surrogate), 299.38 to 440.48 percent for hydraulic cylinders from China (Turkey Surrogate), 85.31 to 370.67 percent for hydraulic cylinders from India, 56.79 to 157.12 percent for hydraulic cylinders from Mexico, and 73.09 to 158.74 percent for hydraulic cylinders from South Korea.

⁸ For further information on the alleged subsidy programs see Commerce's notice of initiation and related CVD Initiation Checklist. 91 FR 58067, September 14, 2026.

⁹ 91 FR 58060, September 14, 2026.

The subject merchandise

Commerce's scope

In the current proceeding, Commerce has defined the scope as follows:¹⁰

The scope of these investigations covers certain linear acting hydraulic cylinders (also known as hydraulic power engines) and certain components thereof. Covered linear acting hydraulic cylinders have barrels made of steel, a bore size (inner diameter) of 25.4 mm (one inch) or more, and a return (retracted) length of 101.6 mm (four inches) or more (hydraulic cylinders). For purposes of this scope, the return (retracted) length is the overall end-to-end measurement of the hydraulic cylinder unit when in the retracted position. The scope covers all hydraulic cylinders meeting the physical description above, including but not limited to the following hydraulic cylinder designs: tie-rod, welded body, telescopic, plunger, rodless, differential, position sensing, single acting, double acting, displacement, ram type, piggy-back, double rod, rod-fed, and spring return hydraulic cylinders. All hydraulic cylinders are hydraulically activated. The incorporation of a spring into the design of a hydraulic cylinder otherwise meeting the description above does not exclude a product from the scope.

The scope also covers the following components of hydraulic cylinders: (1) steel barrels, (2) steel piston rods, and (3) any part or component of a hydraulic cylinder that is attached to, assembled with or shipped with a covered steel barrel or a covered piston rod.

Covered steel barrels include processed welded or seamless steel tubes four inches (101.6 mm) or more in length with an inner diameter of one inch (25.4 mm) or more, that have had their inner diameter precision machined (such as through honing or skiving and burnishing), and have otherwise been processed to the point of having as their sole or predominant use a barrel for an in-scope hydraulic cylinder. Such processing may include but is not limited to cutting-to-length, end finishing (e.g., machine-threading, chamfering, etc.), port drilling, and the addition of any weldments, ports, valves, sensors, end caps, gaskets, seals, rings, or any other part, component or attachment for a hydraulic cylinder, or any combination thereof. The addition of any part of a

¹⁰ 91 FR 58060 and 91 FR 58067, September 14, 2026.

hydraulic cylinder to a barrel has thereby been processed to the point of having as its sole or predominant use as a barrel for an in-scope hydraulic cylinder.

Covered piston rods are solid or hollow steel bars or steel tubes at least four inches (101.6 mm) in length that have been hard chrome plated or chrome coated, cut to length, and machined to be a piston rod.

Included in the scope are any other attachments, parts, or components that are imported with, attached to, or invoiced with a hydraulic cylinder or covered barrel or rod, including but not limited to cylinder mounting parts (e.g., flanges, trunnions, clevises, lugs, etc.), connectors attached to pistons or piston rods, pistons, rings, gaskets, seals, valves, sensors or hydraulic tubing or hydraulic lines (regardless of material) such as for connections to a hydraulic pump. The scope does not cover such attachments, parts, or components when imported or invoiced separately from a hydraulic cylinder.

Also included in the scope are any hydraulic cylinders and parts meeting the physical description above attached to or imported with any equipment or parts of equipment classified in Chapter 84 of the Harmonized Tariff Schedule of the United States (HTSUS). When a hydraulic cylinder is attached to or imported with any equipment or parts of equipment classified in Chapter 84 of the HTSUS, only the hydraulic cylinder is covered by the scope. The covered hydraulic cylinder in that regard includes everything in between and including the mounting pins (e.g., cylinder pin and rod pin) on either end of the cylinder.

Subject merchandise also includes covered hydraulic cylinders, barrels and rods that undergo assembly or minor processing in a third country in any manner that would not otherwise remove the merchandise from the scope of these investigations if performed in the country of manufacture of the in-scope hydraulic cylinder. Subject merchandise also includes covered hydraulic cylinders, barrels and rods that are attached to any imported equipment or parts of equipment classified in Chapter 84, as discussed in the immediately preceding paragraph, if such attachment occurs in a third country.

Tariff treatment

Based upon the scope set forth by Commerce, information available to the Commission indicates that the merchandise subject to these investigations are imported under Harmonized Tariff Schedule of the United States (“HTS”) statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060, 8412.21.0075, and 8412.90.9005. The 2026 general rate of duty is free for HTS subheadings 8412.21.00 (hydraulic cylinders) and 8412.90.90 (hydraulic cylinder parts).¹¹ 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 hydraulic cylinders from Canada, China, India, Mexico, and South Korea. Table 1.2 provides a summary of additional tariffs for hydraulic cylinders (provided for in HTS subheading 8412.21.00) in place as of September 17, 2026. Table 1.3 provides a summary of additional tariffs for hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) in place as of September 17, 2026. Historical information is summarized beneath the tables.

Table 1.2 Hydraulic cylinders: Additional tariffs on imports provided for in HTS subheading 8412.21.00 originating in Canada, China, India, Mexico, and South Korea as of September 17, 2026

Duty rates in percent ad valorem

Additional tariff	Canada	China	India	Mexico	South Korea
Section 232	25.0	25.0	25.0	25.0	15.0
Section 301 specific to China	NA	25.0	NA	NA	NA
Total additional ad valorem rate	25.0	50.0	25.0	25.0	15.0

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

Note: Effective June 8, 2026, the section 232 tariff is only 10 percent for hydraulic cylinders that will be used exclusively in the manufacturing of agricultural equipment, fixed industrial equipment, or mobile industrial equipment.

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.

¹¹ USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

Table 1.3 Hydraulic cylinder parts: Additional tariffs on imports provided for in HTS subheading 8412.90.90 originating in Canada, China, India, Mexico, and South Korea as of September 17, 2026

Duty rates in percent ad valorem

Additional tariff	Canada	China	India	Mexico	South Korea
Section 301 specific to China	NA	25	NA	NA	NA
Section 301 initiated in July 2026	10.0	12.5	10.0	10.0	12.5
Total additional ad valorem rate	10.0	32.5	10.0	10.0	12.5

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

Note: The section 301 tariff initiated in July 2026 does not apply to any products of Canada or Mexico entered free of duty under the United States-Mexico-Canada Agreement (USMCA).

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

Hydraulic cylinders (provided for in HTS subheading 8412.21.00) originating in Canada, China, India, and Mexico are subject to an additional 25 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended.¹² Hydraulic cylinders originating in South Korea are subject to an additional 15 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended.¹³

¹² Effective August 18, 2025, hydraulic cylinders originating in Canada, China, India, and Mexico became subject to an additional 50 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended. Effective April 6, 2026, the duty decreased to 25 percent. From August 18, 2025, to April 5, 2026, the duty applied to the declared value of the steel content of the product. Effective April 6, 2026, the duty applies to the full customs value of the product. 90 FR 40326, August 19, 2025; 91 FR 18201, April 9, 2026. See also HTS heading 9903.82.09 and U.S. note 16(c)(vii) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

¹³ Effective March 12, 2025, hydraulic cylinders originating in South Korea became subject to an additional 25 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended. From March 12, 2025, to April 5, 2026, the duty applied to the declared value of the steel content of the product. Effective April 6, 2026, the duty applied to the full customs value of the product. Effective June 8, 2026, for products originating in South Korea with a Column 1 duty rate that is less than 15 percent, the additional duty is designed so that the sum of the product’s Column 1 duty rate and the additional ad valorem rate of duty for this tariff equaled 15 percent. For those products with a Column 1 (continued...)

However, effective June 8, 2026, hydraulic cylinders originating in Canada, China, India, Mexico, and South Korea that will be used exclusively in the manufacturing of agricultural equipment or fixed industrial equipment or mobile industrial equipment, are only subject to an additional 10 percent ad valorem duty under section 232 of the Trade Expansion Act of 1962, as amended.¹⁴

Hydraulic cylinder parts imported under HTS statistical reporting number 8412.90.9005 are not subject to section 232 tariffs.

Section 301 tariffs

Country specific section 301 tariffs¹⁵

Effective July 6, 2018, hydraulic cylinders (provided for in HTS subheading 8412.21.00) originating in China are subject to an additional 25 percent ad valorem duty under section 301 of the Trade Act of 1974.¹⁶

Effective September 24, 2018, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) 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 hydraulic cylinder parts increased to 25 percent.¹⁷

duty rate that is at least 15 percent, there is no additional 232 duty. 90 FR 9817, February 18, 2025; 90 FR 24199, June 9, 2025; 90 FR 27851, June 30, 2025; 91 FR 18201, April 9, 2026; 91 FR 34085, June 4, 2026. See also HTS heading 9903.82.22 and U.S. note 16(c)(xi) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

¹⁴ According to petitioners, most linear hydraulic cylinders originating from Canada, China, India, Mexico, and South Korea will be subject to an additional 10 percent ad valorem under section 232. Petition, pp. 23 to 24. For products originating in Canada, China, India, Mexico, and South Korea with a Column 1 duty rate that is less than 10 percent, the additional duty is designed so that the sum of the product's Column 1 duty rate and the additional ad valorem rate of duty for this tariff equaled 10 percent. For those products with a Column 1 duty rate that is at least 10 percent, there is no additional 232 duty. 91 FR 34085, June 4, 2026. See also HTS heading 9903.82.23 and U.S. note 16(k) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

¹⁵ Country specific section 301 tariffs are in addition to tariffs initiated in July 2026 under section 301.

¹⁶ 83 FR 28710, June 20, 2018. See also HTS heading 9903.88.01 and U.S. notes 20(a) and 20(b) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

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 18, Publication 5788, September 2026. 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).

Tariffs initiated in July 2026 under section 301

Hydraulic cylinders (provided for in HTS subheading 8412.21.00) originating in Canada, China, India, Mexico, and South Korea are not subject to tariffs initiated in July 2026 under section 301 of the Trade Act of 1974.¹⁸

Effective July 24, 2026, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in Canada and Mexico are subject to an additional 10 percent ad valorem duty as part of tariffs initiated in July 2026 under section 301 of the Trade Act of 1974. However, the tariff does not apply to any products of Canada or Mexico entered free of duty under the United States-Mexico-Canada Agreement (“USMCA”).¹⁹

Effective July 24, 2026, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in China are subject to an additional 12.5 percent ad valorem duty as part of tariffs initiated in July 2026 under section 301 of the Trade Act of 1974.²⁰

Effective July 24, 2026, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in India are subject to an additional 10 percent ad valorem duty as part of tariffs initiated in July 2026 under section 301 of the Trade Act of 1974.²¹

Effective July 24, 2026, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in South Korea are subject to an additional 12.5 percent ad valorem duty as part of tariffs initiated in July 2026 under section 301 of the Trade Act of 1974.²²

¹⁸ Articles subject to section 232 tariffs, including hydraulic cylinders (provided for in HTS subheading 8412.21.00), were not subject to the tariffs initiated in July 2026 under section 301. 91 FR 47717, July 28, 2026. See also HTS heading 9903.05.90 and U.S. note 52(f) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

¹⁹ 91 FR 47717, July 28, 2026. See also HTS headings 9903.05.29, 9903.05.55, 9903.05.93, 9903.05.94, and U.S. note 52 to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

²⁰ 91 FR 47717, July 28, 2026. See also HTS heading 9903.05.31 and U.S. note 52 to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

²¹ 91 FR 47717, July 28, 2026. See also HTS heading 9903.05.44 and U.S. note 52 to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

²² For hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in South Korea with a Column 1 duty rate that is less than 12.5 percent, the additional duty was designed so that the sum of the product’s Column 1 duty rate and the additional ad valorem rate of duty for this tariff equals 12.5 percent. When the Column 1 duty rate is equal to or greater than 12.5 percent, the additional ad valorem rate of duty is zero. The 2026 general rate of duty is free for HTS subheading 8412.90.90. 91 FR (continued...)

Section 338 tariffs

Hydraulic cylinders (provided for in HTS subheading 8412.21.00) and hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in Canada are not subject to an additional duty under section 338 of the Tariff Act of 1930.²³

Section 122 tariffs

Hydraulic cylinders (provided for in HTS subheading 8412.21.00) originating in Canada, China, India, Mexico, and South Korea were not subject to tariffs initiated in February 2026 under section 122 of the Trade Act of 1974.²⁴

Effective February 24, 2026, through July 24, 2026, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in China, India, and South Korea were subject to an additional 10 percent ad valorem duty under section 122 of the Trade Act of 1974.²⁵

Effective February 24, 2026, through July 24, 2026, hydraulic cylinder parts (provided for in HTS subheading 8412.90.90) originating in Canada and Mexico were subject to an additional 10 percent ad valorem duty under section 122 of the Trade Act of 1974. Products originating in Canada or Mexico that enter with duty free treatment under the USMCA were not subject to the additional ad valorem duty under section 122.²⁶

47717, July 28, 2026. See also HTS heading 9903.05.71 and U.S. note 52 to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC, HTS (2026) Revision 18, Publication 5788, September 2026.

²³ See U.S. note 51 to subchapter 3 of chapter 99. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

²⁴ Articles subject to section 232 tariffs, including hydraulic cylinders (provided for in HTS subheading 8412.21.00), were not subject to the tariffs initiated under section 122 that were in effect from February 24, 2026, through July 23, 2026. 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 18, Publication 5788, September 2026.

²⁵ 91 FR 9339, February 25, 2026. See also HTS heading 9903.03.01 and U.S. note 2(aa) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

²⁶ 91 FR 9339, February 25, 2026. See also HTS headings 9903.03.07, 9903.03.08, and U.S. note 2(aa)(vi) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

Tariffs initiated under the International Emergency Economic Powers Act (“IEEPA”)²⁷

Effective February 20, 2026, all tariffs initiated under IEEPA were terminated. Below is a history of the IEEPA tariffs relevant to hydraulic cylinders and parts originating in Canada, China, India, Mexico, and South Korea that were in effect until February 20, 2026.²⁸

Country specific IEEPA tariffs

Effective February 4, 2025, hydraulic cylinders 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.²⁹

Effective March 4, 2025, hydraulic cylinders and parts originating in Canada were subject to an additional 25 percent ad valorem duty under IEEPA. Effective August 1, 2025, the duty rate increased to 35 percent. Effective March 7, 2025, products originating in Canada that entered with duty free treatment under the USMCA were not subject to the additional ad valorem duty under IEEPA. Effective June 4, 2025, hydraulic cylinders and other derivative steel/aluminum articles originating in Canada that was subject to section 232 duties were not subject to this additional duty under IEEPA.³⁰ As noted previously, effective February 20, 2026, tariffs initiated under IEEPA and the associated duties imposed under IEEPA were terminated.³¹

²⁷ 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.

²⁸ 91 FR 9437, February 25, 2026.

²⁹ 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 18, Publication 5788, September 2026.

³⁰ 90 FR 9113, February 7, 2025; 90 FR 9183, February 10, 2025; 90 FR 11785, March 11, 2025; 90 FR 24199, June 9, 2025; 90 FR 37957, August 6, 2025. See also HTS headings 9903.01.10, 9903.01.14, and 9903.01.15 and U.S. notes 2(j), 2(l), and 16 to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

³¹ 91 FR 9437, February 25, 2026; 90 FR 9113, February 7, 2025; 90 FR 9183, February 10, 2025; 90 FR 11785, March 11, 2025; 90 FR 37957, August 6, 2025. See also HTS headings 9903.01.10, 9903.01.14, and 9903.01.15 and U.S. notes 2(j) and 2(l) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

Effective March 4, 2025, hydraulic cylinders and parts originating in Mexico were subject to an additional 25 percent ad valorem duty under IEEPA. Effective March 7, 2025, products originating in Mexico that entered with duty free treatment under the USMCA were not subject to the additional 25 percent ad valorem duty under IEEPA. Effective June 4, 2025, hydraulic cylinders and other derivative steel/aluminum articles originating in Mexico that were subject to section 232 duties were not subject to the additional 25 percent ad valorem duty under IEEPA.³² As noted previously, effective February 20, 2026, tariffs initiated under IEEPA and the associated duties imposed under IEEPA were terminated.³³

Effective August 27, 2025, hydraulic cylinder parts originating in India were subject to an additional 25 percent ad valorem duty under IEEPA. Effective February 7, 2026, the additional tariff specific to India was terminated.³⁴

³² 90 FR 9117, February 7, 2025; 90 FR 9185, February 10, 2025; 90 FR 11787, March 11, 2025; 90 FR 24199, June 9, 2025. See also HTS headings 9903.01.01 and 9903.01.04 and U.S. notes 2(a) and 16 to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

³³ 91 FR 9437, February 25, 2026; 90 FR 9117, February 7, 2025; 90 FR 9185, February 10, 2025; 90 FR 11787, March 11, 2025. See also HTS headings 9903.01.01 and 9903.01.04 and U.S. note 2(a) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

³⁴ Effective August 27, 2025, to February 6, 2026, articles subject to section 232 tariffs, including hydraulic cylinders, were not subject to these tariffs on India under IEEPA. Effective February 7, 2026, these tariffs were terminated for all goods originating in India. 90 FR 38701, August 11, 2025; 91 FR 6501, February 11, 2026. See also HTS headings 9903.01.84, 9903.01.85, 9903.01.86, 9903.01.87, 9903.01.88, and 9903.01.89 and U.S. note 2(z) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

Tariffs initiated in April 2025 under IEEPA

Hydraulic cylinders and parts originating in Canada and Mexico were not subject to tariffs initiated in April 2025 under IEEPA. As noted previously, and applicable to the discussion of tariffs initiated in April under IEEPA below, effective February 20, 2026, tariffs initiated under IEEPA and the associated duties imposed under IEEPA were terminated.³⁵

Effective April 5, 2025, hydraulic cylinders and parts originating China were subject to an additional 10 percent ad valorem duty as part of tariffs initiated in April 2025 under IEEPA. That duty rose to 84 percent ad valorem effective April 9, 2025, and rose again to 125 percent effective April 10, 2025. However, effective May 14, 2025, the duty rate for tariffs initiated in April 2025 under IEEPA on products originating in China was reduced to 10 percent.³⁶

Effective April 5, 2025, hydraulic cylinders and parts originating in India were subject to an additional 10 percent ad valorem duty as part of tariffs initiated in April 2025 under IEEPA. Effective April 9, 2025, India was instead assigned an individualized country duty of 25 percent ad valorem. However, effective April 10, 2025, the individualized country duties were suspended and the additional duty rate as part of tariffs initiated in April 2025 under IEEPA for hydraulic cylinders and parts originating in India was returned to 10 percent. Effective August 7, 2025, India was assigned an individualized country duty of 25 percent.³⁷

Effective April 5, 2025, hydraulic cylinders and parts originating in South Korea were subject to an additional 10 percent ad valorem duty as part of tariffs initiated in April 2025 under IEEPA. Effective April 9, 2025, South Korea was instead assigned an individualized country duty of 25 percent ad valorem. However, effective April 10, 2025, the individualized country duties were suspended, and the additional duty rate was returned to 10 percent. Effective

³⁵ Imports originating in Canada and Mexico were exempt from 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, 9903.01.26, and 9903.01.27 and U.S. note 2(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

³⁶ For China, the duty as part of tariffs initiated in April 2025 under IEEPA was in addition to the 10 percent ad valorem duty under IEEPA that went into effect on November 10, 2025. 90 FR 15041, April 7, 2025; 90 FR 15509, April 14, 2025; 90 FR 15625, April 15, 2025; 90 FR 21831, May 21, 2025; 90 FR 39305, August 14, 2025; 90 FR 50729, November 7, 2025; 91 FR 9437, February 25, 2026. See also HTS headings 9903.01.25 and 9903.01.63 and U.S. note 2(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

³⁷ Individualized country duties as part of tariffs initiated in April 2025 under IEEPA for countries other than China were suspended from April 10, 2025, until August 7, 2025. 90 FR 15041, April 7, 2025; 90 FR 15625, April 15, 2025; 90 FR 30823, July 10, 2025; 90 FR 37963, August 6, 2025; 91 FR 9437, February 25, 2026. See also HTS headings 9903.01.25, 9903.01.55, and 9903.02.26 and U.S. note 2(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

August 7, 2025, South Korea was assigned an individualized country duty of 15 percent. Effective November 14, 2025, the additional duty for hydraulic cylinders and parts originating in South Korea was changed to 15 percent.³⁸

The product

Description and applications

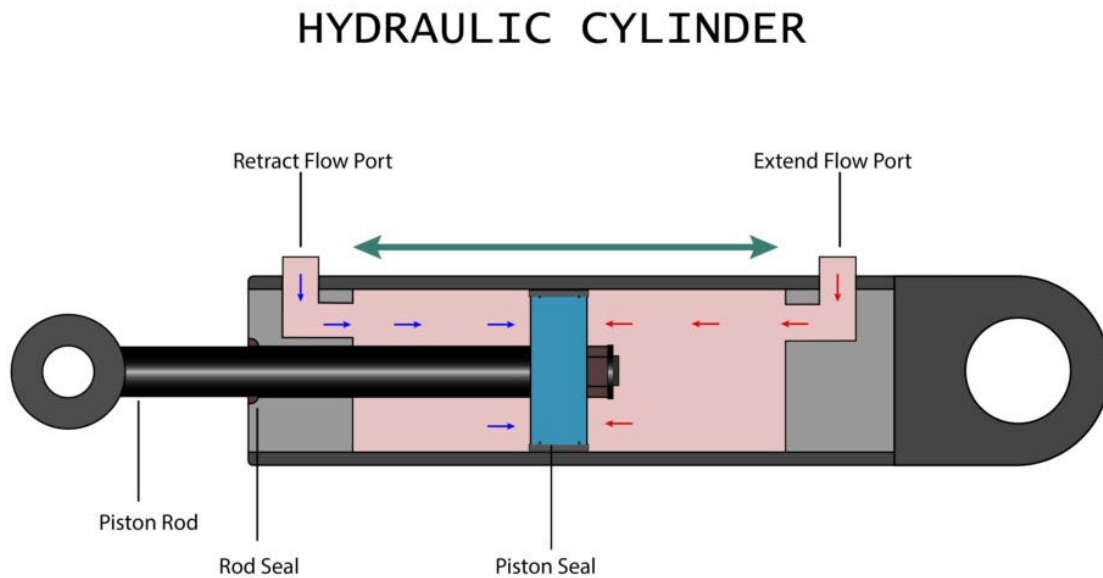
Hydraulic cylinders, also known as hydraulic motors, are mechanical actuators that generate linear force or motion using pressurized hydraulic fluid—typically oil. A hydraulic cylinder is comprised of a steel cylinder barrel in which a piston, connected to a piston rod, moves back and forth powered by hydraulic fluid to create linear motion (figure 1.1).³⁹ Pressurized hydraulic fluid enters the cylinder through a port by a hydraulic pump that is attached to the cylinder with hydraulic tubing. The cylinder is closed on both ends by a cylinder bottom (or cap) and a cylinder head (or gland), which maintains pressure. There are several mounting end options depending on the use, including flanges, trunnions, clevises, and lugs. Additionally, piston end mountings can be used to connect the piston rod to the working equipment component that is being moved by the hydraulic cylinder.⁴⁰

³⁸ From November 14, 2025, to February 20, 2026, for products originating in South Korea with a Column 1 duty rate that is less than 15 percent, the additional duty was designed so that the sum of the product's Column 1 duty rate and the additional ad valorem rate of duty for this tariff equaled 15 percent. For products originating in South Korea with a Column 1 duty rate that is at least 15 percent, the additional ad valorem rate of duty was zero. 90 FR 15041, April 7, 2025; 90 FR 15625, April 15, 2025; 90 FR 30823, July 10, 2025; 90 FR 37963, August 6, 2025; 90 FR 55964, December 4, 2025; 91 FR 9437, February 25, 2026. See also HTS headings 9903.01.25, 9903.01.54, 9903.02.56, 9903.02.79, and 9903.02.80 and U.S. note 2(v) to subchapter 3 of chapter 99 and related tariff provisions for this duty treatment. USITC HTS (2026) Revision 18, Publication 5788, September 2026.

³⁹ Some manufacturers are vertically integrated and produce the main components (e.g., steel cylinder barrel and piston rod) used for their hydraulic cylinder operations, while others purchase these key components to support their manufacturing operations. Conference transcript, p. 15 (Rosenboom).

⁴⁰ Petition, pp. 9 to 10.

Figure 1.1 Hydraulic cylinders: Overview



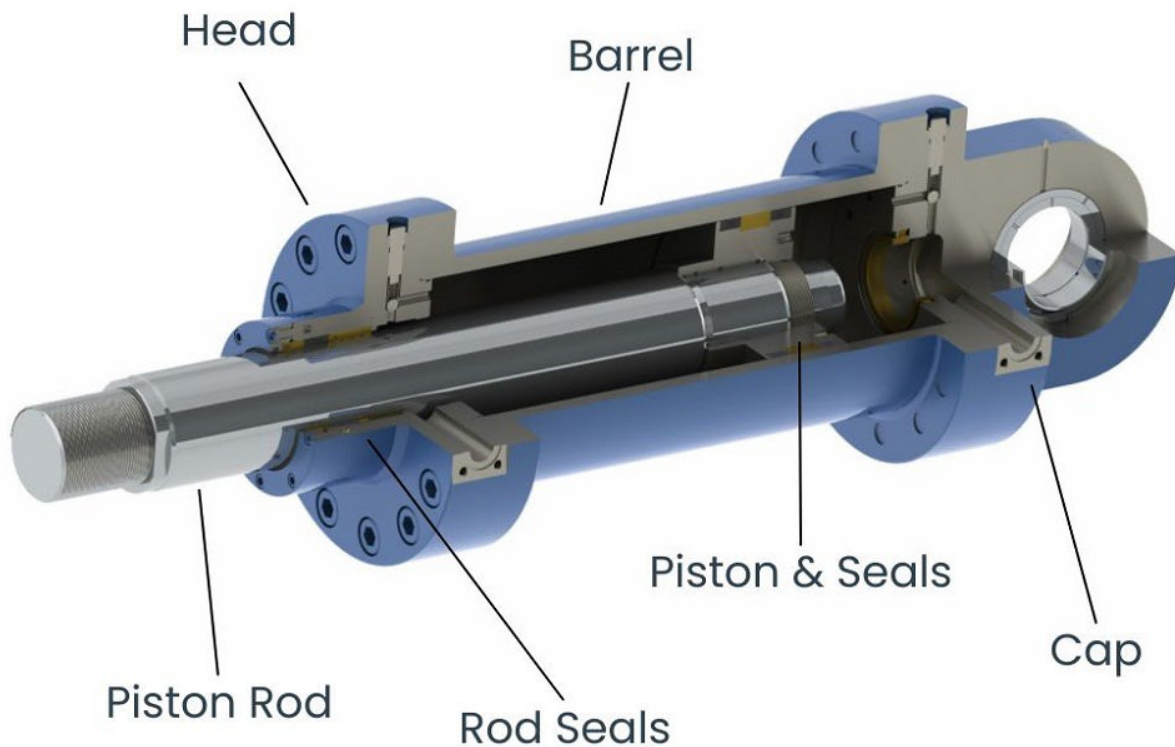
Source: Yates Industries, <https://www.yatesind.com/what-is-a-hydraulic-cylinder/>, August 13, 2021.

The main components of a hydraulic cylinder include the cylinder barrel, piston rod, piston, cylinder cap, cylinder head, and seals (figure 1.2). The cylinder barrel, typically made from cold-drawn seamless or welded steel tubing, is the tubular body of a hydraulic cylinder which acts as a pressure vessel for the hydraulic fluid. Hydraulic cylinders designed for use at higher pressures feature cylinder barrels with thicker walls and bores. The piston rod, made from a hard chrome-plated cold-rolled solid or hollow steel bar or cold-rolled or cold-drawn steel mechanical tubing, attaches to the piston and extends from the hydraulic cylinder through the cylinder head connecting to the working equipment component. The piston rod is highly ground and polished to provide a reliable seal and prevent leakage. Additionally, the piston rod generally features wear and corrosion-resistant surfaces because it operates both inside and outside the barrel and therefore comes into contact with contaminants and abrasives during normal use.⁴¹ The cylinder barrel and piston rod typically represent the most significant weight elements of the hydraulic cylinder.⁴²

⁴¹ Common coating techniques for the surfaces include chrome (nickel) plating, Lunac 2+ duplex, laser cladding, PTA welding, and thermal spraying.

⁴² Petition, pp. 11 to 12.

Figure 1.2 Hydraulic cylinders: Main components



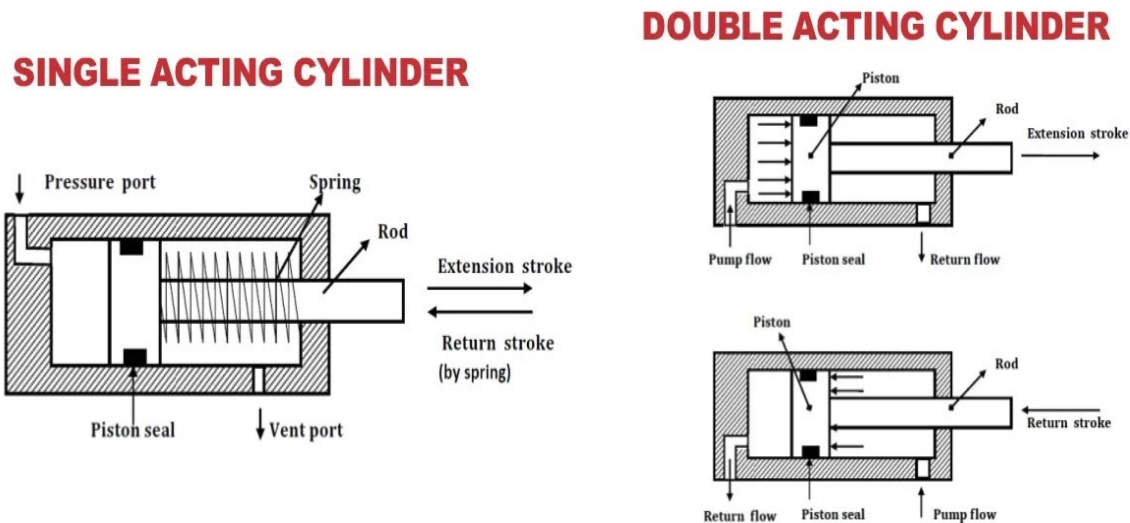
Source: Cylinders Inc., <https://cylindersinc.com/blog/what-is-a-hydraulic-cylinder/>, August 14, 2024.

The piston, generally made from steel or cast iron, separates pressure zones within the cylinder barrel and is connected to the piston rod by threads, bolts, or nuts to transfer motion. The cylinder cap encloses the pressure chamber at one end of the hydraulic cylinder. The cylinder head also functions as the end of the hydraulic cylinder from which the rod moves through to push or pull the connected equipment. The seals prevent leakage of hydraulic oil and maintain pressure within the hydraulic cylinder. Other parts of a hydraulic cylinder include ports and fittings, cylinder base connection, internal threaded ductile heads, head glands, butt plates, eye brackets/clevis brackets, and other mounting devices. Some cylinders may also come with valves, sensors, and accumulators for hydraulic fluid.⁴³

⁴³ Petition, pp. 13 to 16.

Petitioners note that although some hydraulic cylinders are available in catalogs with standard features, most are engineered products designed to meet specific customer requirements.⁴⁴ The most common general design types in the U.S. market are welded body cylinders, tie rod cylinders, and telescopic cylinders.⁴⁵ All of these design types can be single acting cylinders or double acting cylinders (figure 1.3).

Figure 1.3 Hydraulic cylinders: Single acting cylinder (left) and double acting cylinder (right)



Source: Magister Hydraulics, https://www.magisterhyd.com/blog/what-is-the-difference-between-double-and-single-acting-hydraulic-cylinders/?srsltid=AfmBOopzsGGgHoDnxjkizw3mHTceL_WYwf1VGf7SoV7ywXeoqlJVDZi, accessed August 28, 2026.

Single acting cylinders apply force in only one direction, typically extending the piston rod when hydraulic pressure is applied, and rely on an external force (such as a spring or gravity) to retract the piston rod. Double acting cylinders apply force in two directions, both extending and retracting the piston rod. Single acting cylinders are generally simpler in design and less expensive than double acting cylinders.⁴⁶

⁴⁴ Petition, p. 16; conference transcript, pp. 65 to 66 (Rosenboom, Montgomery, and Anderson).

⁴⁵ Conference transcript, p. 16 (Rosenboom).

⁴⁶ Source: Magister Hydraulics, https://www.magisterhyd.com/blog/what-is-the-difference-between-double-and-single-acting-hydraulic-cylinders/?srsltid=AfmBOopzsGGgHoDnxjkizw3mHTceL_WYwf1VGf7SoV7ywXeoqlJVDZi, accessed August 28, 2026.

Welded body cylinders are the most common design type among hydraulic cylinders and the most customizable. In welded body cylinders, the barrel is welded directly to the end caps, and the ports are welded directly to the barrel (figure 1.4). They generally have a narrower body and shorter length compared to other design types, allowing them to fit into the tight confines of machinery. According to petitioners, welded body cylinders dominate the mobile hydraulic equipment market for their use in construction equipment (e.g., excavators, bulldozers, and road graders) and material handling equipment (e.g., forklift trucks, telehandlers, and liftgates).⁴⁷

Figure 1.4 Hydraulic cylinders: Welded body cylinder

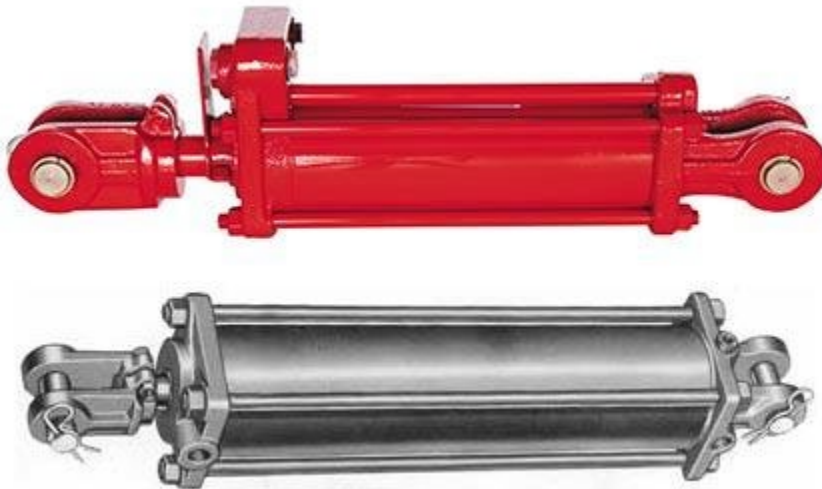


Source: Petition, p. 18.

⁴⁷ Petition, pp. 17 to 18.

Tie rod cylinders are characterized by high-strength exterior steel rods that run parallel to the cylinder barrel (figure 1.5).⁴⁸ Tie rod cylinders are commonly used in industrial or factory applications because they can be easily disassembled for service or repair. Petitioners note that tie rod cylinders are not always customizable, and that the National Fluid Power Association publishes standardized dimensions of tie rod cylinders.⁴⁹

Figure 1.5 Hydraulic cylinders: Tie rod cylinder



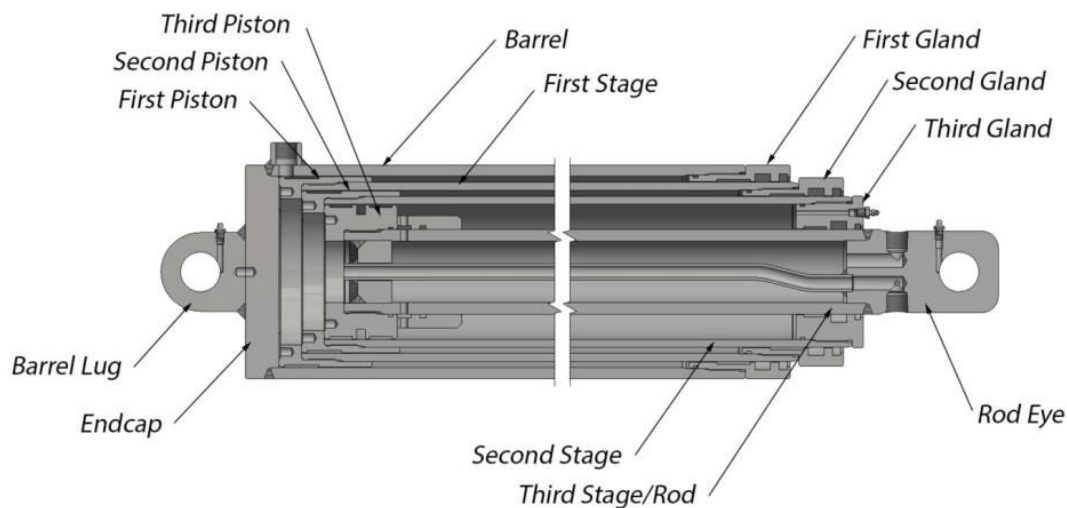
Source: Cross Manufacturing, Inc., <https://crossmfg.com/hydraulics/cylinders/tie-rod-cylinders>, accessed August 28, 2026.

⁴⁸ Tie rod cylinders feature anywhere from 4 to 20 tie rods depending on the bore and the pressure rating. Petition, p. 17; conference transcript, p. 16 (Rosenboom).

⁴⁹ Petition, p. 17.

Telescopic cylinders are characterized by multiple expanding stages (commonly two to five) in which the first stage piston rod is hollow and acts as a barrel for each of the succeeding stage piston rods (figure 1.6).⁵⁰ Telescopic cylinders are best suited for heavy duty applications where space is limited, but a long stroke is required.⁵¹ Telescopic cylinders are more expensive to manufacture than welded or tie rod cylinders because they require additional material and engineering.

Figure 1.6 Hydraulic cylinders: Telescopic cylinder



Source: Petition, p. 19.

Hydraulic cylinders are used in a wide range of industrial applications that require significant force to move a part, including for use in: (1) elevators, lifts, and jacks; (2) manufacturing machinery that requires pushing, pulling, shearing, compacting, or bending of materials; (3) mobile equipment such as dump trucks, garbage trucks, lift trailers, construction equipment, earth moving equipment, and agricultural equipment; and (4) material handling equipment such as forklift trucks, telehandlers, and liftgates.⁵²

⁵⁰ Petition, p. 18; conference transcript, p. 16 (Rosenboom).

⁵¹ Conference transcript, p. 16 (Rosenboom).

⁵² Petition, p. 20.

Manufacturing processes

As discussed above, the main components of a hydraulic cylinder are the cylinder barrel and piston rod. The cylinder barrel is generally manufactured from cold-drawn mechanical tubing, which is precision processed (via honing or skiving and burnishing) to give it the required shape and smoothness.⁵³ This processing ensures that the barrel has a precise, smooth surface required for compressing hydraulic fluid without leakage and an efficient path for the piston. The cylinder barrel is then cut to the appropriate length for the hydraulic cylinder, and the ends are finished based on the type of end caps it will be attached to and the method of attachment. Additionally, holes are drilled into the barrel to integrate ports.⁵⁴

The piston rod is typically manufactured from solid steel bars, hollow steel bars, or heavy walled mechanical tubing. During production, the piston rod is turned and ground on a CNC lathe, where threads are machined for both the piston and the mounting eye. To achieve a consistent diameter and straightness with tight tolerances, the rod is passed through a centerless grinder. The piston rod is also hard chrome-plated (20–50 μm) to provide hardness and wear resistance.⁵⁵ After initial processing, the bar or tubing is cut to the required length and machined on one end to attach the piston. The opposite end typically also requires machining to fit the attachments that secure the rod to the intended equipment.⁵⁶

The piston is typically made from high-strength materials like steel or cast iron to ensure durability. The piston is machined with grooves to fit elastomeric or metal seals and bearing elements, to create a leak-proof seal and smooth and efficient operation.

At this stage, attachments, such as valves, sensors, and other accessories, are machined to meet customer specifications. Weldments and other additions to the body are added to ensure the hydraulic cylinder can be properly integrated with the equipment for which it was designed.⁵⁷

⁵³ Honing uses rotating, abrasive grind stones held under pressure on a controlled path to remove small amounts of material from the inner diameter. Skiving and burnishing first uses a cutting tool (skiving cutter) to remove a thin layer of material from the surface of the inner diameter, then is followed by roller burnishing, in which a hardened, highly polished roller tool is pressed against the rotating tubing to provide a smooth finish. Petition, p. 20.

⁵⁴ Petition, pp. 20 to 21.

⁵⁵ In this process the rod is submerged in an electrochemical bath of chromic acid to bond the chromium to the steel.

⁵⁶ Petition, p. 21.

⁵⁷ Petition, p. 22.

Once all the individual components have been manufactured, they are then assembled into a finished hydraulic cylinder. The piston is attached to the piston rod and placed in the cylinder barrel, seals are installed, and end fittings are added to the rods. After assembly, the finished hydraulic cylinder undergoes pressure testing. This step is completed to ensure the hydraulic cylinder meets the pressure requirements and operates without failure. Finally, the hydraulic cylinder is cleaned, primed, and painted with enamel or epoxy paint.⁵⁸

Domestic like product issues

The petitioner proposes that the Commission should find a single like product coextensive with the scope of the investigation, encompassing hydraulic cylinders, barrels, and piston rods, consistent with the scope.⁵⁹

Respondent Deere & Company and Industrias John Deere, S. de R.L. de C.V. (collectively “Deere”) requests that if the investigations proceed to a final phase, the Commission collect additional information to assess whether downstream heavy equipment (with cylinders attached) is a distinct domestic like product, and if so, whether imports of heavy equipment containing cylinders is causing material injury or threat thereof to the domestic cylinder manufacturing industry.⁶⁰

⁵⁸ Petition, p. 22.

⁵⁹ Petitioner’s postconference brief, pp. 3 to 4.

⁶⁰ Deere’s postconference brief, p. 14.

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

U.S. market characteristics

A linear hydraulic cylinder is a mechanical actuator that creates linear force or motion using fluid pressure. Hydraulic cylinders are powered by pressurized hydraulic fluid, typically oil, which is itself incompressible. The hydraulic cylinder consists of a steel cylinder barrel in which a piston, connected to a piston rod, moves back and forth powered by pressurized hydraulic fluid, creating linear motion. Hydraulic cylinders have many applications and can be used in any machine where significant forces are required to move a part. Common industrial applications for hydraulic cylinders are in elevators, lifts, and jacks; manufacturing machinery that requires pushing, pulling, shearing, compacting, or bending of materials; mobile equipment such as dump trucks, garbage trucks, lift trailers, construction equipment, earth moving equipment (e.g., backhoes, bulldozers, road graders), and agricultural equipment; and material handling equipment (e.g., forklift trucks, telehandlers and liftgates), among many other uses.

Fifteen of 26 responding U.S. producers, and 27 of 68 responding importers indicated that the market was subject to distinctive conditions of competition. U.S. producer *** reported that highly customized cylinders are typically co-designed while working with the end users to understand their application requirements; in contrast, commodity cylinders meet standard requirements and measurements.

Importer *** reported that a significant volume of hydraulic cylinder procurement is not the result of independent sourcing decisions directed at the cylinder itself. Rather, for original equipment manufacturers, the hydraulic cylinder is acquired as part of a broader machine purchase or is dictated by the machine's engineering specifications. Differences in bore size, stroke length, mounting configuration, pressure rating, and seal compatibility mean that cylinders designed for one application generally cannot be substituted into another without significant reengineering. This high degree of specialization severely limits interchangeability across applications. Purchasing decisions are constrained by engineering requirements, machine-level procurement decisions, and original manufacturing specifications.

Apparent U.S. consumption of hydraulic cylinders, by quantity, fluctuated downward during 2023 to 2025 but was higher during interim 2026 compared to interim 2025.

Impact of section 301 tariffs, 232 tariffs, and new tariffs

U.S. producers and importers were asked to report the impact of section 301 tariffs and 232 tariffs on overall demand, supply, prices, or raw material costs (tables 2.1 and 2.2). A majority of U.S. producers and importers reported that the various tariffs had an impact by raising imported prices as well as input costs primarily through increased costs for steel and/or other tariff-affected inputs and components used in hydraulic cylinders.

Table 2.1 Hydraulic cylinders: Count of firms' responses regarding whether there was an impact of section 301 tariffs, by firm type

Firm type	No	Yes	Don't know
U.S. producers	7	13	7
Importers	14	39	26

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

Table 2.2 Hydraulic cylinders: Count of firms' responses regarding whether there was an impact of section 232 measures, by firm type

Firm type	No	Yes	Don't know
U.S. producers	6	14	7
Importers	8	48	27

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

Table 2.3 Hydraulic cylinders: Count of firms' responses regarding whether there was an impact of new/modified tariffs, by firm type

Firm type	No	Yes	Don't know
U.S. producers	5	15	6
Importers	11	51	20

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

Channels of distribution

U.S. producers sold mainly to end users. Importers from Canada, China, India, Mexico, and South Korea sold mainly to end users throughout the POI, as shown in table 2.4.

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

Shares in percent; interim is January through March

Source	Channel	2023	2024	2025	Interim 2025	Interim 2026
United States	Distributor	5.0	5.2	4.8	4.7	4.9
United States	End user	95.0	94.8	95.2	95.3	95.1
Canada	Distributor	***	***	***	***	***
Canada	End user	***	***	***	***	***
China	Distributor	17.0	16.9	16.4	21.4	19.5
China	End user	83.0	83.1	83.6	78.6	80.5
India	Distributor	***	***	***	***	***
India	End user	***	***	***	***	***
Mexico	Distributor	***	***	***	***	***
Mexico	End user	***	***	***	***	***
South Korea	Distributor	22.1	27.2	29.8	34.0	17.1
South Korea	End user	77.9	72.8	70.2	66.0	82.9
Subject sources	Distributor	15.8	16.2	15.1	20.7	14.1
Subject sources	End user	84.2	83.8	84.9	79.3	85.9
Nonsubject sources	Distributor	40.0	29.7	23.5	42.8	42.6
Nonsubject sources	End user	60.0	70.3	76.5	57.2	57.4
All import sources	Distributor	19.8	18.5	16.5	23.9	17.1
All import sources	End user	80.2	81.5	83.5	76.1	82.9

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

Geographic distribution

U.S. producers and importers reported selling hydraulic cylinders to all regions in the contiguous United States (table 2.5). For U.S. producers, 9.9 percent of sales were within 100 miles of their production facility, 78.1 percent were between 101 and 1,000 miles, and 12.0 percent were over 1,000 miles. Importers sold 17.7 percent within 100 miles of their U.S. point of shipment, 66.6 percent between 101 and 1,000 miles, and 15.7 percent over 1,000 miles.

Table 2.5 Hydraulic cylinders: Count of U.S. producers' and U.S. importers' geographic markets

Region	U.S. producers	Canada	China	India	Mexico	South Korea	Subject sources
Northeast	19	10	21	15	4	5	34
Midwest	24	12	28	15	3	5	41
Southeast	26	11	32	18	5	6	47
Central Southwest	20	10	25	17	4	4	38
Mountain	16	9	21	14	3	3	30
Pacific Coast	20	8	21	14	4	6	32
Other	6	7	13	7	4	3	20
All regions (except Other)	15	8	17	12	3	3	25
Reporting firms	26	15	38	21	6	6	58

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 hydraulic cylinders from U.S. producers and from subject countries. Reported supply factors varied considerably by country. Capacity declined between 2023 and 2025 in the United States, Canada, and South Korea, while it increased in China, India, and Mexico. Capacity utilization also moved in different directions: it rose in Canada, Mexico, and China, but fell in the United States, India, and South Korea. Canada and South Korea maintained the highest utilization rates, suggesting comparatively little spare capacity available to expand shipments to the United States, while India's low and declining utilization suggests it holds the most readily available spare capacity. The United States reported the highest and fastest-growing inventories-to-shipments ratio.

The United States and India shipped the large majority of their production to their respective home markets, while Canada and Mexico shipped only a small share domestically and a comparatively small share to non-U.S. export markets. China and South Korea reported the largest shares of shipments to non-U.S. export markets, indicating more geographically diversified export bases.

A small minority of U.S. producers (5 of 28) reported that they could switch production from other products to hydraulic cylinders. U.S. producers reported that factors affecting their ability to shift production from alternate products were equipment setup, retooling machinery, and retraining their workforce. Producers ***, ***, and *** reported that their current installed capacity is largely specialized for hydraulic cylinder manufacturing and any production shift faces major challenges of retooling manufacturing capabilities and retraining workforce. U.S. producer *** reported that shifting production away from hydraulic

cylinders is significantly limited due to the need for extensive retooling, operator retraining, new programming, and customer requalification, making such changes time consuming and reducing cylinder output.

None of the Canadian or South Korean producers reported that they could switch production from other products to hydraulic cylinders. Most of Canadian producers reported that their engineering and facilities are set up only for manufacturing hydraulic cylinders. A small minority of Chinese producers (1 of 5), Indian producers (1 of 6), and Mexican producers (1 of 5) reported that they could switch production from other products to hydraulic cylinders.

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

Quantity in 1,000 pounds; ratio and share in percent; Count in number of firms reporting

Factor	Measure	United States	Canada	China	India	Mexico	South Korea
Capacity 2023	Quantity	298,009	***	***	***	***	***
Capacity 2025	Quantity	261,127	***	***	***	***	***
Capacity utilization 2023	Ratio	80.4	***	***	***	***	***
Capacity utilization 2025	Ratio	73.7	***	***	***	***	***
Inventories to total shipments 2023	Ratio	17.5	***	***	***	***	***
Inventories to total shipments 2025	Ratio	22.9	***	***	***	***	***
Home market shipments 2025	Share	95.8	***	***	***	***	***
Non-US export market shipments 2025	Share	4.2	***	***	***	***	***
Ability to shift production	Count	5 of 28	***	***	***	***	***

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

Note: Responding U.S. producers accounted for substantial majority U.S. production of hydraulic cylinders in 2025. Responding foreign producer/exporter firms accounted for virtually all U.S. imports of hydraulic cylinders from Canada, less than 25 percent of U.S. imports of hydraulic cylinders from China, less than half of U.S. imports of hydraulic cylinders from India, more than half of U.S. imports of hydraulic cylinders from Mexico, and more than 75 percent of U.S. imports of hydraulic cylinders from South Korea, 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 7.2

Supply constraints

Six of 27 responding U.S. producers and 10 of 77 importers reported that they had experienced supply constraints since January 1, 2023. Of those U.S. producers that reported they had experienced supply constraints, 6 reported the constraints occurred during 2023, 4 reported they occurred during 2024, 4 during 2025, and 3 during 2026 (table 2.7). Producer *** reported that the global supply chain constraints after COVID-19 impacted

the industry. Producer *** reported that the shutdown of Seasonal Steel Mill and Timken generated a domestic steel supply gap. Producer *** reported that raw material supply disruptions caused production delays.

Petitioners reported that they could increase production almost immediately, citing available materials and existing capacity as key advantages. The main bottleneck identified was workforce (i.e., needing to hire and train employees), but petitioners characterized this as a manageable, familiar challenge. Realistic ramp-up timelines were estimated at three to nine months, depending on the scale of hiring needed to fully staff existing equipment.¹

Of those importers that reported they had experienced supply constraints, 8 reported the constraints occurred during 2023, 9 reported they occurred during 2024, 12 during 2025, and 11 during 2026 (table 2.6). Importer *** reported that global freight disruptions, tariff uncertainty, manufacturing lead times, and transportation delays impacted product availability. Importer *** reported that more tariff applied to China forced them to move their cylinders supply chain from China to India. Other importers including *** and *** also reported that tariff rates caused supply constraints.

Table 2.7 Hydraulic cylinders: Count of firms' responses indicating supply constraints, by firm type and period

Reporting firm: Whose constraint(s)	2023	2024	2025	2026 to date
Producers: Indicating own constraints	6	4	4	3
Importers: Indicating own constraints	8	9	12	11

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

Purchaser *** reported that it experienced constraints due to a poor performing supplier (e.g., slow in delivery, bad communication, constant price increases) that will not be given further business at any facility. Purchaser *** reported that it made the decision to shift some hydraulic cylinder sourcing away from U.S. producers based on a comprehensive evaluation of supplier performance and total value, rather than price alone. It stated that in addition to cost competitiveness, it experienced significant performance gaps with certain U.S. based suppliers in critical areas such as delivery reliability and quality, including past supply disruptions that resulted in production line shutdowns. It also encountered instances of substantial unilateral price increases, including situations where suppliers indicated they would not continue shipments unless the higher pricing was accepted, as well as recurring year-over-year increases that did not necessarily reflect prevailing market conditions at the time.

¹ Conference transcript, pp. 83 to 84 (Anderson, Luberda, Montgomery, Rosenboom, Stillwell, Tjepkes, Van Eldik).

Purchaser *** reported that there are only limited domestic suppliers that sell hydraulic cylinders with the features it needs for its products. Within the available pool of domestic suppliers, even fewer were able to consistently meet its specific needs, quality standards and production deadlines; the only U.S. suppliers that could meet their needs sourced hydraulic cylinders from China and India. The firm stated that it continues to purchase the majority of its hydraulic cylinders from U.S. sources and has a strong financial incentive to do so due to the impact of non-U.S. metal content on its potential Section 232 tariff burden in connection with ***. *** indicated that, while the foreign-produced cylinders are generally less expensive, any cost savings may be offset by potential downstream tariff exposure. The firm reported that its primary concern in sourcing of linear hydraulic cylinders is quality, quantity, and timeliness.

U.S. demand

Based on available information, the overall demand for hydraulic cylinders is likely to experience small to moderate changes in response to changes in price. The main contributing factors are the lack of substitute products and that hydraulic cylinders can make up a small to a very large cost share in most of its end-use products.

End uses and cost share

U.S. demand for hydraulic cylinders depends on the demand for U.S.-produced downstream products. Reported end uses include agricultural equipment, mining equipment, construction equipment (e.g., cranes, excavators and tunnel boring machines), forklifts, various industrial equipment, utility trailers, and trucks.

Hydraulic cylinders account for a small to moderate share of the cost of the end-use products in which they are used. Reported cost shares for ranged from 1 to 80 percent.

Business cycles

Twenty-one of 27 U.S. producers and 34 of 71 importers indicated that the market was subject to business cycles. Specifically, some U.S. producers reported that the market for hydraulic cylinders depends on the state of the economy and the end-use market. U.S. producer *** reported that the market for hydraulic cylinders is influenced by cyclical conditions in major end-use industries including construction, agriculture, mining, material handling, heavy-duty trucks, oil and gas, and industrial manufacturing. U.S. producers ***, ***, and *** reported that the hydraulic cylinder market moves in both yearly and multi-year cycles because its demand depends heavily on sectors like construction,

agriculture, mining, oil and gas, material handling, and general industrial activity. U.S. producer *** reported that the hydraulic cylinder market moves with the trailer building cycle—peaking in late spring and summer—and rises when natural disasters increase equipment needs and when the housing market is strong.

Importer *** reported that demand for hydraulic cylinders generally decreases in November and December, as they are components used by equipment builders. Importer *** stated that hydraulic cylinder demand peaks in late spring and summer, aligning with trailer manufacturing cycles, natural disasters, and housing market trends. Importer *** reported that agricultural demand for hydraulic cylinders typically follows a seven-year cycle, with five years of growth followed by two years of decline. Importer *** reported that the hydraulic cylinders market is cyclical, with demand rising in spring and summer due to construction and agricultural activity and shifting in response to infrastructure spending, housing starts, and interest rate policies.

Demand trends

Reported U.S. demand for hydraulic cylinders since January 1, 2023, was mixed by firm type (table 2.8). U.S. producers most frequently reported that demand fluctuated downward, whereas responding importers were nearly evenly split between no change in demand and increasing and decreasing trends. For foreign demand, U.S. producers mostly reported downward fluctuations, while importers predominantly reported no change.

Petitioners characterized overall demand as relatively strong but also stated that demand was highly uneven by end-use sector rather than uniformly strong or weak. Utilities and power grid work, data centers, mobile cranes, mining, and material handling were repeatedly cited as strong or steady markets, as was hay/livestock-related agricultural equipment and infrastructure-driven segments like road paving. By contrast, grain and planting-related agriculture was described as depressed, single-unit housing construction was soft, and transportation/emergency vehicle equipment tied to municipal and government funding was softening.²

² Conference transcript, pp. 71 to 76 (Anderson, Luberd, Montgomery, Ringel, Rosenboom, Rosenthal, Stillwell, Tjepkes) .

Table 2.8 Hydraulic cylinders: 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	5	3	3	13	1
Domestic demand	Importers	11	11	20	13	8
Foreign demand	U.S. producers	4	3	3	7	0
Foreign demand	Importers	4	6	19	5	4

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

Substitute products

Substitutes for hydraulic cylinders are extremely limited. Most U.S. producers, and importers reported that there were no substitutes, although some importers reported pneumatic cylinders or hoists as possible alternatives.

Substitutability issues

This section assesses the degree to which U.S.-produced hydraulic cylinders and imports of hydraulic cylinders from subject countries can be substituted for one another by examining the importance of certain purchasing factors and the comparability of hydraulic cylinders from domestic and imported sources based on those factors. Based on available data, staff believes that there is a moderate to high degree of substitutability between domestically produced hydraulic cylinders and hydraulic cylinders imported from subject sources.³ Factors contributing to this level of substitutability include similar quality, availability, and lead times for hydraulic cylinders from inventory and those that are produced-to-order, little preference for particular country of origin or producer, and broad interchangeability between domestic and subject sources. Factors limiting substitutability between sources include some limited reports of delivery reliability, and very limited interchangeability between different types and use cases of hydraulic cylinders.

³ The degree of substitution between domestic and imported hydraulic cylinder depends upon the extent of product differentiation between the domestic and imported products and reflects how easily purchasers can switch from domestically produced hydraulic cylinder to the hydraulic cylinder 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.).

Factors affecting purchasing decisions

Most important purchase factors

Purchasers responding to lost sales lost revenue allegations⁴ were asked to identify the main purchasing factors their firm considered in their purchasing decisions for hydraulic cylinders.

The most often cited top three factors' firms consider in their purchasing decisions for hydraulic cylinders were quality (11 firms), price (9 firms), and delivery reliability (7 firms), as shown in table 2.9. Quality was the most frequently cited first-most important factor (cited by 6 firms), followed by delivery reliability (3 firms); quality was also the most frequently reported second-most important factor (5 firms); and price was the most frequently reported third-most important factor (7 firms).

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

Factor	First	Second	Third	Total
Quality	6	5	0	11
Price / Cost	1	1	7	9
Delivery reliability	3	3	1	7
Capability to manufacture	2	1	1	4
Production capacity available	0	2	0	2
Leadtime	0	0	2	2
Engineering/customer support	0	0	1	1

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

Lead times

Hydraulic cylinders are primarily produced-to-order for U.S. producers and sold from inventory for importers. U.S. producers reported that 94.2 percent of their commercial shipments were produced-to-order, with lead times averaging 72 days. The remaining 5.8 percent of their commercial shipments came from inventories, with lead times averaging 7.4 days.

Importers reported that 72.1 percent of their commercial shipments were sold from inventory, with lead times averaging 27 days from their U.S. inventories and 82 days from their foreign inventories. The remaining 27.9 percent of their commercial shipments were produced-to-order, with lead times averaging 98 days.

⁴ This information is compiled from responses by purchasers identified by Petitioners in their lost sales-lost revenue allegations. See Part 5 for additional information.

Comparison of U.S.-produced and imported hydraulic cylinders

In order to determine whether U.S.-produced hydraulic cylinders can generally be used in the same applications as imports from Canada, China, India, Mexico, and South Korea, U.S. producers and importers were asked whether the products can always, frequently, sometimes, or never be used interchangeably. As shown in tables 2.10 to 2.11, the majority of U.S. producers and importers reported that hydraulic cylinders are always or frequently interchangeable.

Petitioners stated that all hydraulic cylinders are interchangeable along a continuum of sizes, pressure ratings, design configurations, and fit for the piece of equipment for which it was designed. Each unit is designed to deliver the necessary power to mechanically move the loads necessary and to fit the piece of equipment. Two hydraulic cylinders of the same design type (e.g., welded body) but of different sizes and pressure ratings would not be substitutable for one another because they might not fit the same space on the equipment or provide the same maximum working pressure necessary for the application. The same is true of two hydraulic cylinders of different design types (e.g., welded versus tie-rod). This limited interchangeability in some end uses is consistent with a continuum product with a wide range of characteristics.⁵

⁵ Petitioners' postconference brief, p. 5.

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

Country pair	Always	Frequently	Sometimes	Never
United States vs. Canada	11	9	0	0
United States vs. China	11	9	2	0
United States vs. India	11	9	1	0
United States vs. Mexico	11	7	0	0
United States vs. South Korea	11	7	1	0
Canada vs. China	11	6	0	0
Canada vs. India	11	6	0	0
Canada vs. Mexico	11	4	0	0
Canada vs. South Korea	11	5	0	0
China vs. India	11	7	0	0
China vs. Mexico	11	5	0	0
China vs. South Korea	11	4	0	0
India vs. Mexico	11	5	0	0
India vs. South Korea	11	4	0	0
Mexico vs. South Korea	11	5	0	0
United States vs. Other	11	7	0	0
Canada vs. Other	11	5	0	0
China vs. Other	11	5	0	0
India vs. Other	11	5	0	0
Mexico vs. Other	11	4	0	0
South Korea vs. Other	11	4	0	0

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

Table 2.11 Hydraulic cylinders: Count of U.S. importers reporting interchangeability between product produced in the United States and in other countries reported, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. Canada	8	8	5	5
United States vs. China	8	19	11	3
United States vs. India	5	15	5	4
United States vs. Mexico	5	5	2	3
United States vs. South Korea	4	8	2	2
Canada vs. China	6	11	2	5
Canada vs. India	5	8	2	3
Canada vs. Mexico	5	5	1	3
Canada vs. South Korea	4	7	0	3
China vs. India	8	9	2	2
China vs. Mexico	4	3	1	3
China vs. South Korea	4	4	1	1
India vs. Mexico	4	3	1	3
India vs. South Korea	4	3	2	1
Mexico vs. South Korea	4	4	1	3
United States vs. Other	5	10	4	6
Canada vs. Other	5	6	1	5
China vs. Other	5	8	1	1
India vs. Other	5	7	2	1
Mexico vs. Other	5	5	1	3
South Korea vs. Other	5	6	1	1

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

In addition, U.S. producers and importers were asked to assess how often differences other than price were significant in sales of hydraulic cylinders from the United States, subject, or nonsubject countries. As seen in tables 2.12 to 2.13, the majority of U.S. producers reported that differences other than price between U.S. and subject hydraulic cylinders were never significant. The majority of importers reported that differences other than price between U.S. and subject hydraulic cylinders were always significant, with a substantial share reporting they were never significant.

Petitioners stated that major customers of hydraulic cylinders have moved away from engineering-led purchasing to centralized purchasing by procurement managers or globalized sourcing. According to petitioners, that purchasing manager/global sourcing model places high emphasis on obtaining the lowest price, and domestic industry witnesses at the staff conference explained that centralized purchasing has led to the purchasing discussions becoming “exclusively about price.”⁶

⁶ Petitioners’ postconference brief p. 23

Table 2.12 Hydraulic cylinders: Count of U.S. producers reporting the significance of differences other than price between product produced in the United States and in other countries reported, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. Canada	1	3	6	10
United States vs. China	4	2	7	9
United States vs. India	4	1	6	10
United States vs. Mexico	4	0	5	9
United States vs. South Korea	4	1	4	10
Canada vs. China	4	0	4	9
Canada vs. India	4	0	3	10
Canada vs. Mexico	4	0	2	9
Canada vs. South Korea	4	0	2	10
China vs. India	4	0	4	9
China vs. Mexico	4	0	3	9
China vs. South Korea	4	0	2	9
India vs. Mexico	4	0	2	9
India vs. South Korea	4	0	2	9
Mexico vs. South Korea	4	0	2	9
United States vs. Other	4	0	4	9
Canada vs. Other	4	0	1	9
China vs. Other	4	0	2	8
India vs. Other	4	0	1	8
Mexico vs. Other	4	0	2	8
South Korea vs. Other	4	0	1	8

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

Table 2.13 Hydraulic cylinders: Count of U.S. importers reporting the significance of differences other than price between product produced in the United States and in other countries reported, by country pair

Country pair	Always	Frequently	Sometimes	Never
United States vs. Canada	9	8	4	7
United States vs. China	15	6	12	7
United States vs. India	9	4	9	6
United States vs. Mexico	8	1	2	4
United States vs. South Korea	8	2	2	5
Canada vs. China	9	2	5	8
Canada vs. India	7	2	3	7
Canada vs. Mexico	7	1	1	4
Canada vs. South Korea	6	0	1	5
China vs. India	6	1	5	7
China vs. Mexico	6	0	2	4
China vs. South Korea	6	1	1	4
India vs. Mexico	6	0	1	4
India vs. South Korea	6	1	1	4
Mexico vs. South Korea	7	0	1	4
United States vs. Other	9	2	7	6
Canada vs. Other	7	1	2	5
China vs. Other	7	1	3	4
India vs. Other	7	2	3	4
Mexico vs. Other	7	1	2	4
South Korea vs. Other	7	1	2	4

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 and (except as noted) is based on the questionnaire responses of 28 firms that accounted for the substantial majority of U.S. production of hydraulic cylinders during 2025.

U.S. producers

The Commission issued a U.S. producer questionnaire to 80 firms based on information contained in the petition, and through staff research. 28 firms provided usable data on their operations.¹ Tables 3.1 and 3.2 list U.S. producers of hydraulic cylinders, their production locations, positions on the petition, and shares of total production.

¹ Five firms certified that they have not produced hydraulic cylinders in the United States since 2023. *** submitted a largely blank questionnaire without usable data. *** and *** submitted late/incomplete responses and are not included in the report. *** and *** submitted U.S. producer questionnaires that contained usable trade data but not usable financial data. Eight U.S. producers reported not keeping record in metrics the Commission requested. As a result, one U.S. producer, *** provided incomplete data (e.g. reporting in units rather than in pounds). Staff adjusted the firm's missing data accordingly based on specific assessments of the reporting issue (e.g. for firms that could not report the requested data in pounds, this data was derived using the average unit weight for U.S. producers).

Table 3.1 Hydraulic cylinders: U.S. producers, their positions on the petition, production locations, and shares of reported production, 2025

Shares in percent

Firm	Position on petition	Production location(s)	Share of production
Aggressive Hydraulics	Petitioner	Cedar, MN	***
Aurelius	***	Braham, MN	***
Bailey	***	Knoxville, TN	***
Beiler Hydraulics	***	Leola, PA	***
Bobalee Hydraulics	***	Laurens, IA	***
Bolzoni	***	Sulligent, AL	***
Cascade	***	Springfield, OH Warner Robins, GA	***
Caterpillar	***	Sumter, SC	***
Columbus Hydraulics	***	Columbus, NE	***
Cross Manufacturing	***	Lewis, KS Pratt, KS Hays, KS	***
Custom Hoists	***	Ashland, Ohio	***
Deere & Company	***	Moline, IL	***
Hol-Mac	Petitioner	Bay Springs, MS	***
Industrial Hard Chrome	***	Geneva, IL	***
Jarp	***	Schofield, WI Wausau, WI	***
Ligon	Petitioner	Luarens, IA Great Bend, KS Hampton, IA Buffalo, NY Spencer, WI Monticello, IA	***
Ognibene	***	Charlotte, NC	***
Prince	Petitioner	North Sioux City, SD Hartington, NE Yankton, SD Brookings, SD	***
PTC	Petitioner	Alliance, OH Darlington, PA Beaver Falls I , PA Beaver Falls II , PA Hannibal, MO	***
Rosenboom	Petitioner	Sheldon, IA Spirit Lake, IA Milford, IA Bowling Green, OH	***

Table continued.

Table 3.1 (Continued) Hydraulic cylinders: U.S. producers, their positions on the petition, production locations, and shares of reported production, 2025

Shares in percent

Firm	Position on petition	Production location(s)	Share of production
Scot Industries	Petitioner	Lone Star, TX Muscoda, WI Centralia, WA Sugar Grove, IL Talladega, AL Wooster, OH	***
Stillwell	Petitioner	Burnsville, MN Cleburne, TX	***
TMS Hydraulics	***	Temple, TX	***
Texas Hydraulics	Petitioner	Temple, TX Waco, TX	***
V&P Hydraulic	***	Delaware, OH	***
West Craft Manufacturing	***	Alto, TX	***
Wipro	***	Chambersburg, PA	***
York PMH	***	York, PA	***
All firms	Various	Various	100.0

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

Note: Caterpillar closed its hydraulic cylinder production facility in Sumter, SC in August 2024, as noted in table 3.4.

Table 3.2 Hydraulic cylinders: Share of production of U.S. producers based on their position on the petition, by position, 2025

Shares in percent

Firm type and position	Share of production
Petitioners	***
Non-petitioners: Support	***
Non-petitioners: Mixed partial	***
Non-petitioners: Opposed	***
Non-petitioners: No position	***

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

Table 3.3 presents information on U.S. producers' ownership, related and/or affiliated firms.

Table 3.3 Hydraulic cylinders: U.S. producers' ownership, related and/or affiliated firms

[illegible]

Table continued.

Table 3.3 (Continued) Hydraulic cylinders: U.S. producers' ownership, related and/or affiliated firms

[illegible]

Table continued.

Table 3.3 (Continued) Hydraulic cylinders: 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.

As indicated in table 3.3, seven U.S. producers are related to foreign producers of the subject merchandise and seven U.S. producers are related to U.S. importers of the subject merchandise. In addition, as discussed in greater detail below, 13 U.S. producers directly import hydraulic cylinders from subject sources and seven purchase hydraulic cylinders from subject sources through U.S. importers.

Table 3.4 presents important events in the U.S. industry since January 1, 2023.

Table 3.4 Hydraulic cylinders: Important industry events since 2023

Item	Firm	Event
Plant closing	Caterpillar	In the first quarter of 2024, Caterpillar closed its hydraulic cylinder plant in Sumter, South Carolina. Approximately 100 employees were impacted by the closure.
Acquisition	Texas Hydraulics	In 2024, Wynnchurch Capital sold TH Holdings, an industrial manufacturer that operates under the brands Texas Hydraulics and Hydromotion, to Fortress Investment Group.
Acquisition	Swanson Industries	In June 2024, Turnspire Capital Partners acquired Swanson Industries, a manufacturer of hydraulic cylinders.
Acquisition	Columbus Hydraulics	In August 2024, Wipro Hydraulics acquired Columbus Hydraulics.

Source: ConEquip, [Caterpillar's Strategic Consolidation Plan in Sumter, South Carolina](#), June 1, 2023; WARNTracker, [Caterpillar Inc. Lays Off 109 Workers — Sumter, SC WARN Notice August 2024](#), accessed August 27, 2026; Private Equity Professional, [Wynnchurch Sells Texas Hydraulics to Fortress](#), December, 5, 2024; Citybiz, [Turnspire Capital Partners Acquires Swanson Industries and Tiefenbach North America | citybiz](#), June 6, 2024; Pro MFG Media, [Wipro Hydraulics Acquires Columbus Hydraulics](#), August 2024.

Producers in the United States were asked to report any change in the character of their operations or organization relating to the production of hydraulic cylinders since 2023. Sixteen of 28 producers indicated in their questionnaires that they had experienced such changes. Table 3.5 presents the changes identified by these producers. Ten of the responding producers reported either production curtailments or prolonged shutdowns in their response, and three producers reported plant closings. Further information on U.S. producers' production activities and domestic operations with respect to manufacturing of hydraulic cylinders are available in Appendix D.

Table 3.5 Hydraulic cylinders: U.S. producers' reported changes in operations, since January 1, 2023

Item	Firm name and narrative response on changes in operations
Plant openings	***
Plant closings	***
Plant closings	***
Plant closings	***
Prolonged shutdowns	***
Prolonged shutdowns	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***
Production curtailments	***

Table continued.

Table 3.5 (Continued) Hydraulic cylinders: U.S. producers' reported changes in operations, since January 1, 2023

Item	Firm name and narrative response on changes in operations
Production curtailments	***
Production curtailments	***
Relocations	***
Relocations	***
Expansions	***
Expansions	***
Acquisitions	***
Acquisitions	***
Acquisitions	***
Acquisitions	***
Weather-related or force majeure events	***
Other	***
Other	***
Other	***

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

U.S. production, capacity, and capacity utilization

Table 3.6 presents U.S. producers' installed and practical capacity and production on the same equipment. From 2023 to 2025, installed overall capacity increased by 2.0 percent and practical overall capacity decreased by 12.6 percent. They were both comparable during the interim periods. Overall production decreased by 19.5 percent from 2023 to 2025 but was higher in interim 2026 than in interim 2025. Both installed and practical overall capacity utilization decreased from 2023 to 2025 but were higher in interim 2026 compared to interim 2025.

Table 3.6 Hydraulic cylinders: U.S. producers' installed and practical capacity and production on the same equipment as in-scope production, by period

Capacity and production in 1,000 pounds; utilization in percent; interim period is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
Installed overall	Capacity	595,290	607,142	607,339	150,456	149,821
Installed overall	Production	260,550	226,930	209,695	52,577	57,055
Installed overall	Utilization	43.8	37.4	34.5	34.9	38.1
Practical overall	Capacity	324,295	283,674	283,564	70,480	70,165
Practical overall	Production	260,550	226,930	209,695	52,577	57,055
Practical overall	Utilization	80.3	80.0	73.9	74.6	81.3
Practical hydraulic cylinders	Capacity	298,009	257,855	261,127	65,187	61,204
Practical hydraulic cylinders	Production	239,733	206,389	192,340	48,382	51,026
Practical hydraulic cylinders	Utilization	80.4	80.0	73.7	74.2	83.4

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

Table 3.7 presents U.S. producers' reported narratives regarding practical capacity constraints. The most common type of capacity constraint was existing labor force, reported by 21 U.S. producers, followed by production bottlenecks and supply of material inputs, reported by 10 and seven U.S. producers, respectively.

Table 3.7 Hydraulic cylinders: U.S. producers' reported capacity constraints since January 1, 2023

Item	Firm name and narrative response on constraints to practical overall capacity
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***

Table continued.

Table 3.7 (Continued) Hydraulic cylinders: U.S. producers' reported capacity constraints since January 1, 2023

Item	Firm name and narrative response on constraints to practical overall capacity
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Fuel or energy	***
Logistics/transportation	***
Logistics/transportation	***
Other constraints	***
Other constraints	***
Other constraints	***

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

Table 3.8 and figure 3.1 present U.S. producers' hydraulic cylinder production, capacity, and capacity utilization. Practical hydraulic cylinder capacity decreased irregularly during 2023 to 2025 and was lower in interim 2026 than interim 2025. During 2023 to 2025, 17 U.S. producers reported a decrease in hydraulic cylinder production capacity and seven reported an increase, with the remainder reporting no change. Hydraulic cylinder production decreased by 19.8 percent from 2023 to 2025 but was higher in interim 2026 than in interim 2025. ***, the largest U.S. producer in each period, accounted for 38 percent of the capacity decrease and 13 percent of the production decrease during 2023 to 2025. Capacity utilization decreased from 80.4 percent in 2023 to 73.7 percent in 2025 but was higher in interim 2026 than in interim 2025. Thirteen U.S. producers reported lower and six reported higher capacity utilization in 2025 than in 2023, with the remainder reporting no change.

Table 3.8 Hydraulic cylinders: U.S. producers' output, by firm and period

Practical capacity

Capacity in 1,000 pounds; interim period is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Aggressive Hydraulics	***	***	***	***	***
Aurelius	***	***	***	***	***
Bailey	***	***	***	***	***
Beiler Hydraulics	***	***	***	***	***
Bobalee Hydraulics	***	***	***	***	***
Bolzoni	***	***	***	***	***
Cascade	***	***	***	***	***
Caterpillar	***	***	***	***	***
Columbus Hydraulics	***	***	***	***	***
Cross Manufacturing	***	***	***	***	***
Custom Hoists	***	***	***	***	***
Deere & Company	***	***	***	***	***
Hol-Mac	***	***	***	***	***
Industrial Hard Chrome	***	***	***	***	***
Jarp	***	***	***	***	***
Ligon	***	***	***	***	***
Ognibene	***	***	***	***	***
Prince	***	***	***	***	***
PTC	***	***	***	***	***
Rosenboom	***	***	***	***	***
Scot Industries	***	***	***	***	***
Stillwell	***	***	***	***	***
TMS Hydraulics	***	***	***	***	***
Texas Hydraulics	***	***	***	***	***
V&P Hydraulic	***	***	***	***	***
West Craft Manufacturing	***	***	***	***	***
Wipro	***	***	***	***	***
York PMH	***	***	***	***	***
All firms	298,009	257,855	261,127	65,187	61,204

Table continued.

Table 3.8 (Continued) Hydraulic cylinders: U.S. producers' output, by firm and period**Production**

Production in 1,000 pounds; interim period is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Aggressive Hydraulics	***	***	***	***	***
Aurelius	***	***	***	***	***
Bailey	***	***	***	***	***
Beiler Hydraulics	***	***	***	***	***
Bobalee Hydraulics	***	***	***	***	***
Bolzoni	***	***	***	***	***
Cascade	***	***	***	***	***
Caterpillar	***	***	***	***	***
Columbus Hydraulics	***	***	***	***	***
Cross Manufacturing	***	***	***	***	***
Custom Hoists	***	***	***	***	***
Deere & Company	***	***	***	***	***
Hol-Mac	***	***	***	***	***
Industrial Hard Chrome	***	***	***	***	***
Jarp	***	***	***	***	***
Ligon	***	***	***	***	***
Ognibene	***	***	***	***	***
Prince	***	***	***	***	***
PTC	***	***	***	***	***
Rosenboom	***	***	***	***	***
Scot Industries	***	***	***	***	***
Stillwell	***	***	***	***	***
TMS Hydraulics	***	***	***	***	***
Texas Hydraulics	***	***	***	***	***
V&P Hydraulic	***	***	***	***	***
West Craft Manufacturing	***	***	***	***	***
Wipro	***	***	***	***	***
York PMH	***	***	***	***	***
All firms	239,733	206,389	192,340	48,382	51,026

Table continued.

Table 3.8 (Continued) Hydraulic cylinders: U.S. producers' output, by firm and period

Capacity utilization

Capacity utilization in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Aggressive Hydraulics	***	***	***	***	***
Aurelius	***	***	***	***	***
Bailey	***	***	***	***	***
Beiler Hydraulics	***	***	***	***	***
Bobalee Hydraulics	***	***	***	***	***
Bolzoni	***	***	***	***	***
Cascade	***	***	***	***	***
Caterpillar	***	***	***	***	***
Columbus Hydraulics	***	***	***	***	***
Cross Manufacturing	***	***	***	***	***
Custom Hoists	***	***	***	***	***
Deere & Company	***	***	***	***	***
Hol-Mac	***	***	***	***	***
Industrial Hard Chrome	***	***	***	***	***
Jarp	***	***	***	***	***
Ligon	***	***	***	***	***
Ognibene	***	***	***	***	***
Prince	***	***	***	***	***
PTC	***	***	***	***	***
Rosenboom	***	***	***	***	***
Scot Industries	***	***	***	***	***
Stillwell	***	***	***	***	***
TMS Hydraulics	***	***	***	***	***
Texas Hydraulics	***	***	***	***	***
V&P Hydraulic	***	***	***	***	***
West Craft Manufacturing	***	***	***	***	***
Wipro	***	***	***	***	***
York PMH	***	***	***	***	***
All firms	80.4	80.0	73.7	74.2	83.4

Note: Capacity utilization ratio represents the ratio of the U.S. producer's production to its production capacity.

Table continued.

Table 3.8 (Continued) Hydraulic cylinders: U.S. producers' output, by firm and period

Share of production

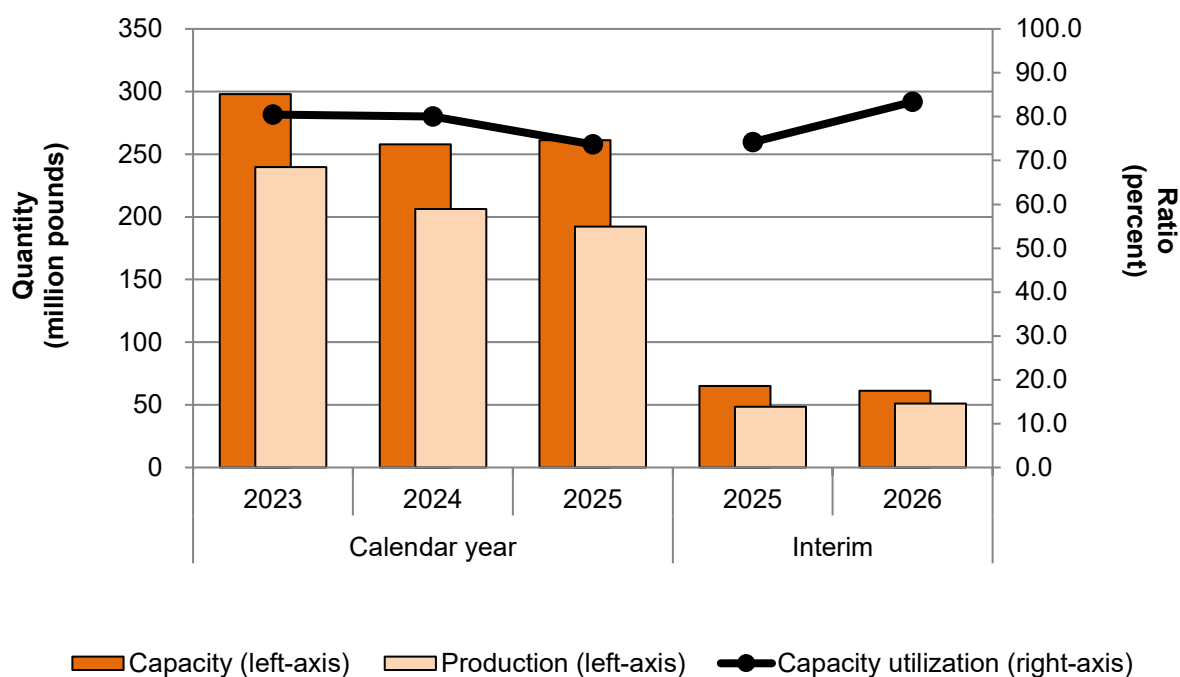
Share in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Aggressive Hydraulics	***	***	***	***	***
Aurelius	***	***	***	***	***
Bailey	***	***	***	***	***
Beiler Hydraulics	***	***	***	***	***
Bobalee Hydraulics	***	***	***	***	***
Bolzoni	***	***	***	***	***
Cascade	***	***	***	***	***
Caterpillar	***	***	***	***	***
Columbus Hydraulics	***	***	***	***	***
Cross Manufacturing	***	***	***	***	***
Custom Hoists	***	***	***	***	***
Deere & Company	***	***	***	***	***
Hol-Mac	***	***	***	***	***
Industrial Hard Chrome	***	***	***	***	***
Jarp	***	***	***	***	***
Ligon	***	***	***	***	***
Ognibene	***	***	***	***	***
Prince	***	***	***	***	***
PTC	***	***	***	***	***
Rosenboom	***	***	***	***	***
Scot Industries	***	***	***	***	***
Stillwell	***	***	***	***	***
TMS Hydraulics	***	***	***	***	***
Texas Hydraulics	***	***	***	***	***
V&P Hydraulic	***	***	***	***	***
West Craft Manufacturing	***	***	***	***	***
Wipro	***	***	***	***	***
York PMH	***	***	***	***	***
All firms	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 3.1 Hydraulic cylinders: U.S. producers' output, by period



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

Alternative products

As shown in table 3.9, the large majority (at least *** percent in each period) of the production during 2023 to 2025 and the interim periods by U.S. producers was hydraulic cylinders. Four of 28 firms reported producing other products on the same equipment that is used to produce hydraulic cylinders. Such products included ***.

Table 3.9 Hydraulic cylinders: U.S. producers' overall production on the same equipment as in-scope production, by period

Quantity in 1,000 pounds; share in percent; interim is January through March

Product type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Hydraulic cylinders	Quantity	239,733	206,389	192,340	48,382	51,026
Other products	Quantity	***	***	***	***	***
All products	Quantity	***	***	***	***	***
Hydraulic cylinders	Share	***	***	***	***	***
Other products	Share	***	***	***	***	***
All products	Share	100.0	100.0	100.0	100.0	100.0

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

U.S. producers' U.S. shipments and exports

Table 3.10 presents U.S. producers' U.S. shipments, export shipments, and total shipments of hydraulic cylinders. U.S. producers' U.S. shipments decreased by both quantity and value during 2023 to 2025 but were higher in interim 2026 compared to interim 2025. Unit values remained relatively stable, varying by no more than 4.5 percent from 2023 to 2025 and during the interim periods. U.S. shipments accounted for between 95.2 and 96.6 percent of all shipments. Eighteen U.S. producers reported exports of hydraulic cylinders during 2023 to 2025.² Unit values of export shipments were lower than those of U.S. shipments in all periods for which data were collected.

² Two firms, *** and ***, accounted for over half of exports in any single period, with principal exports markets Brazil, Canada, Germany, Italy, and Mexico.

Table 3.10 Hydraulic cylinders: U.S. producers' shipments, by destination and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit value in dollars per pound; share in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. shipments	Quantity	237,518	196,614	183,481	48,004	49,584
Export shipments	Quantity	9,199	9,492	8,037	2,430	1,742
Total shipments	Quantity	246,717	206,106	191,517	50,434	51,327
U.S. shipments	Value	1,260,088	1,058,081	950,646	232,573	250,725
Export shipments	Value	40,632	39,413	36,909	10,520	7,826
Total shipments	Value	1,300,719	1,097,494	987,555	243,093	258,551
U.S. shipments	Unit value	5.31	5.38	5.18	4.84	5.06
Export shipments	Unit value	4.42	4.15	4.59	4.33	4.49
Total shipments	Unit value	5.27	5.32	5.16	4.82	5.04
U.S. shipments	Share of quantity	96.3	95.4	95.8	95.2	96.6
Export shipments	Share of quantity	3.7	4.6	4.2	4.8	3.4
Total shipments	Share of quantity	100.0	100.0	100.0	100.0	100.0
U.S. shipments	Share of value	96.9	96.4	96.3	95.7	97.0
Export shipments	Share of value	3.1	3.6	3.7	4.3	3.0
Total shipments	Share of value	100.0	100.0	100.0	100.0	100.0

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

Table 3.11 presents U.S. producers' U.S. shipments by type. Commercial shipments accounted for between *** and *** percent of all U.S. shipments in all periods for which information was collected. In all periods, internal consumption accounted for between *** and *** percent and transfers to related firms accounted for between *** and *** percent of all U.S. shipments. *** accounted for a substantial majority of both internal consumption and transfers to related firms shipments in all periods.

Table 3.11 Hydraulic cylinders: U.S. producers' U.S. shipments, by type and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
Commercial U.S. shipments	Quantity	***	***	***	***	***
Internal consumption	Quantity	***	***	***	***	***
Transfers to related firms	Quantity	***	***	***	***	***
U.S. shipments	Quantity	237,518	196,614	183,481	48,004	49,584
Commercial U.S. shipments	Value	***	***	***	***	***
Internal consumption	Value	***	***	***	***	***
Transfers to related firms	Value	***	***	***	***	***
U.S. shipments	Value	1,260,088	1,058,081	950,646	232,573	250,725
Commercial U.S. shipments	Unit value	***	***	***	***	***
Internal consumption	Unit value	***	***	***	***	***
Transfers to related firms	Unit value	***	***	***	***	***
U.S. shipments	Unit value	5.31	5.38	5.18	4.84	5.06
Commercial U.S. shipments	Share of quantity	***	***	***	***	***
Internal consumption	Share of quantity	***	***	***	***	***
Transfers to related firms	Share of quantity	***	***	***	***	***
U.S. shipments	Share of quantity	100.0	100.0	100.0	100.0	100.0
Commercial U.S. shipments	Share of value	***	***	***	***	***
Internal consumption	Share of value	***	***	***	***	***
Transfers to related firms	Share of value	***	***	***	***	***
U.S. shipments	Share of value	100.0	100.0	100.0	100.0	100.0

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

Table 3.12 presents U.S. producers' U.S. shipments by complete hydraulic cylinders, hydraulic cylinder components, and complete hydraulic cylinders shipped attached to out-of-scope machinery. Complete hydraulic cylinders not attached to out-of-scope machinery accounted for between *** and *** percent of all U.S. shipments in all periods for which information was collected, while hydraulic cylinder components accounted for between 23.0 and 24.6 percent.³ Detailed tables of U.S. shipments of hydraulic cylinders by type are available in Appendix E.

³ Only one firm, ***, reported shipments of complete hydraulic cylinders shipped attached to out-of-scope machinery ***.

Table 3.12 Hydraulic cylinders: U.S. producers' U.S. shipments, by type and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through March

Type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinders: Not attached	Quantity	***	***	***	***	***
Complete cylinders: Attached	Quantity	***	***	***	***	***
Complete cylinders	Quantity	***	***	***	***	***
Components	Quantity	***	***	***	***	***
All levels of processing	Quantity	237,518	196,614	183,481	48,004	49,584
Complete cylinders: Not attached	Value	***	***	***	***	***
Complete cylinders: Attached	Value	***	***	***	***	***
Complete cylinders	Value	***	***	***	***	***
Components	Value	***	***	***	***	***
All levels of processing	Value	1,260,088	1,058,081	950,646	232,573	250,725
Complete cylinders: Not attached	Unit value	***	***	***	***	***
Complete cylinders: Attached	Unit value	***	***	***	***	***
Complete cylinders	Unit value	***	***	***	***	***
Components	Unit value	***	***	***	***	***
All levels of processing	Unit value	5.31	5.38	5.18	4.84	5.06
Complete cylinders: Not attached	Share of quantity	***	***	***	***	***
Complete cylinders: Attached	Share of quantity	***	***	***	***	***
Complete cylinders	Share of quantity	***	***	***	***	***
Components	Share of quantity	***	***	***	***	***
All levels of processing	Share of quantity	100.0	100.0	100.0	100.0	100.0
Complete cylinders: Not attached	Share of value	***	***	***	***	***
Complete cylinders: Attached	Share of value	***	***	***	***	***
Complete cylinders	Share of value	***	***	***	***	***
Components	Share of value	***	***	***	***	***
All levels of processing	Share of value	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 "—".

Table 3.13 presents information on U.S.-origin hydraulic cylinders exported from the United States and subsequently re-imported by U.S. importers by complete hydraulic cylinders, hydraulic cylinder components, and complete hydraulic cylinders shipped attached to out-of-scope machinery. Such re-imports, reported by nine U.S. importers, accounted for a miniscule portion of reported U.S. hydraulic cylinder production and U.S. imports of hydraulic cylinders during 2023 to 2025. The majority of such imports in 2023 and 2024 were complete hydraulic cylinders attached to out-of-scope machinery, while in 2025 the majority was of U.S. imports of complete hydraulic cylinders not attached to any equipment.

Table 3.13 Hydraulic cylinders: U.S. importers' U.S. (re-)imports of domestic origin cylinders, by type and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; interim period is January through March

Type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinders: Not attached	Quantity	***	***	***	***	***
Complete cylinders: Attached	Quantity	***	***	***	***	***
Complete cylinders	Quantity	***	***	***	***	***
Components	Quantity	***	***	***	***	***
All levels of processing	Quantity	1,751	3,384	9,352	1,870	234
Complete cylinders: Not attached	Value	***	***	***	***	***
Complete cylinders: Attached	Value	***	***	***	***	***
Complete cylinders	Value	***	***	***	***	***
Components	Value	***	***	***	***	***
All levels of processing	Value	25,025	20,662	24,858	5,788	2,833
Complete cylinders: Not attached	Unit value	***	***	***	***	***
Complete cylinders: Attached	Unit value	***	***	***	***	***
Complete cylinders	Unit value	***	***	***	***	***
Components	Unit value	***	***	***	***	***
All levels of processing	Unit value	14.29	6.11	2.66	3.09	12.10
Complete cylinders: Not attached	Share of quantity	***	***	***	***	***
Complete cylinders: Attached	Share of quantity	***	***	***	***	***
Complete cylinders	Share of quantity	***	***	***	***	***
Components	Share of quantity	***	***	***	***	***
All levels of processing	Share of quantity	100.0	100.0	100.0	100.0	100.0
Complete cylinders: Not attached	Share of value	***	***	***	***	***
Complete cylinders: Attached	Share of value	***	***	***	***	***
Complete cylinders	Share of value	***	***	***	***	***
Components	Share of value	***	***	***	***	***
All levels of processing	Share of value	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 "—".

Table 3.14 presents U.S. producers' U.S. shipments for use in apparent consumption which include U.S.-origin hydraulic cylinders re-imported back to the United States.

Table 3.14 Hydraulic cylinders: U.S. producers' U.S. shipments for use in apparent consumption, by period

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; interim period is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers U.S. shipments	Quantity	237,518	196,614	183,481	48,004	49,584
U.S. importers U.S. (re-)imports of domestic origin cylinders	Quantity	1,751	3,384	9,352	1,870	234
Combined U.S. producers data for apparent consumption	Quantity	239,269	199,997	192,833	49,875	49,818
U.S. producers U.S. shipments	Value	1,260,088	1,058,081	950,646	232,573	250,725
U.S. importers U.S. (re-)imports of domestic origin cylinders	Value	25,025	20,662	24,858	5,788	2,833
Combined U.S. producers data for apparent consumption	Value	1,285,113	1,078,743	975,504	238,361	253,558
U.S. producers U.S. shipments	Unit value	5.31	5.38	5.18	4.84	5.06
U.S. importers U.S. (re-)imports of domestic origin cylinders	Unit value	14.29	6.11	2.66	3.09	12.10
Combined U.S. producers data for apparent consumption	Unit value	5.37	5.39	5.06	4.78	5.09
U.S. producers U.S. shipments	Share of quantity	99.3	98.3	95.2	96.2	99.5
U.S. importers U.S. (re-)imports of domestic origin cylinders	Share of quantity	0.7	1.7	4.8	3.8	0.5
Combined U.S. producers data for apparent consumption	Share of quantity	100.0	100.0	100.0	100.0	100.0
U.S. producers U.S. shipments	Share of value	98.1	98.1	97.5	97.6	98.9
U.S. importers U.S. (re-)imports of domestic origin cylinders	Share of value	1.9	1.9	2.5	2.4	1.1
Combined U.S. producers data for apparent consumption	Share of value	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 "—".

Captive production

Section 771(7)(C)(iv) of the Act states that—⁴

If domestic producers internally transfer significant production of the domestic like product for the production of a downstream article and sell significant production of the domestic like product in the merchant market, and the Commission finds that—

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

then the Commission, in determining market share and the factors affecting financial performance . . . , shall focus primarily on the merchant market for the domestic like product.

Transfers and sales

As reported in table 3.11, internal consumption and transfers to related firms accounted for between 17.1 and 20.0 percent of U.S. producers' U.S. shipments of hydraulic cylinders.

First statutory criterion in captive production

The first requirement for application of the captive production provision is that the domestic like product that is internally transferred for processing into that downstream article not enter the merchant market for the domestic like product. U.S. producers reported internal consumption and transfers to related forms of hydraulic cylinders for incorporation in the production of downstream products.⁵ The Commission did not collect information on volumes of hydraulic cylinders shipments that might re-enter the merchant market; however, it collected information on the share of hydraulic cylinders in downstream production.

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

⁵ Some of such reported downstream products containing cylinders included: ***.

Second statutory criterion in captive production

The second criterion of the captive production provision concerns whether the domestic like product is the predominant material input in the production of the downstream article that is captively produced. With respect to downstream articles resulting from captive production, hydraulic cylinders reportedly comprise *** percent of the finished cost of downstream product.

Table 3.15 Hydraulic cylinders: Share of production of hydraulic cylinder contribution to downstream product, by material input, 2025

Share in percent

Material input	Share of value contribution	Share of quantity contribution
Hydraulic cylinder	***	***
Other material input	***	***
Total of material inputs in final product	100.0	100.0

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

U.S. producers' inventories

Table 3.16 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.⁶ U.S. producers' end-of-period inventories remained relatively constant during 2023 to 2025 and were slightly higher in interim 2026 compared to interim 2025. Inventories as a ratio to U.S. production, U.S. shipments, and total shipments increased year to year from 2023 to 2025 and were comparable during the interim periods.

Table 3.16 Hydraulic cylinders: U.S. producers' inventories and their ratio to select items, by period

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	2023	2024	2025	Interim 2025	Interim 2026
End-of-period inventory quantity	43,156	43,388	43,765	40,893	43,050
Inventory ratio to U.S. production	18.0	21.0	22.8	21.1	21.1
Inventory ratio to U.S. shipments	18.2	22.1	23.9	21.3	21.7
Inventory ratio to total shipments	17.5	21.1	22.9	20.3	21.0

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

⁶ One U.S. producer, ***, which produced exclusively ***, accounted for between *** and *** percent of U.S. producer inventories in each period and had an inventory ratio to U.S. production of ***.

U.S. producers' imports from subject sources

U.S. producers' subject imports of hydraulic cylinders are presented in tables 3.17 through 3.29. U.S. producers' reasons for importing hydraulic cylinders are presented in table 3.30. Seven U.S. producers reported subject imports of hydraulic cylinders exceeding 50.0 percent of their reported U.S. production during the period of investigation.

Table 3.17 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India 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 3.18 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India 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 3.19 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India 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 3.20 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from Canada	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from Canada to U.S. production	Ratio	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***
Imports from subject sources to U.S. production	Ratio	***	***	***	***	***

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

Table 3.21 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from Canada	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from Mexico	Quantity	***	***	***	***	***
Imports from South Korea	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from Canada to U.S. production	Ratio	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***
Imports from South Korea 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 3.22 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***

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

Table 3.23 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from Canada	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from Mexico	Quantity	***	***	***	***	***
Imports from South Korea	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from Canada to U.S. production	Ratio	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***
Imports from Mexico to U.S. production	Ratio	***	***	***	***	***
Imports from South Korea 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 3.24 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***
Imports from subject sources to U.S. production	Ratio	***	***	***	***	***

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

Table 3.25 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***

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

Table 3.26 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from Canada	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from Canada to U.S. production	Ratio	***	***	***	***	***
Imports from China 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 3.27 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from China 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 3.28 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from China 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 3.29 Hydraulic cylinders: *'s U.S. production, U.S. imports from subject sources, and ratio of subject imports to production, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. production	Quantity	***	***	***	***	***
Imports from Canada	Quantity	***	***	***	***	***
Imports from China	Quantity	***	***	***	***	***
Imports from India	Quantity	***	***	***	***	***
Imports from Mexico	Quantity	***	***	***	***	***
Imports from subject sources	Quantity	***	***	***	***	***
Imports from Canada to U.S. production	Ratio	***	***	***	***	***
Imports from China to U.S. production	Ratio	***	***	***	***	***
Imports from India to U.S. production	Ratio	***	***	***	***	***
Imports from Mexico 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 "—". *** includes U.S. producers *** and U.S. importers ***.

Table 3.30 Hydraulic cylinders: U.S. producers' reasons for importing, by firm

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

Table continued.

Table 3.30 (Continued) Hydraulic cylinders: U.S. producers' reasons for importing, by firm

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

U.S. producers' purchases of imports of hydraulic cylinders from subject sources are presented in tables 3.31 through 3.35. U.S. producers' reasons for purchasing subject hydraulic cylinders are presented in table 3.36.

Table 3.31 Hydraulic cylinders: *'s U.S. purchases of imports from subject sources and select ratios, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
***'s U.S. production	Quantity	***	***	***	***	***
***'s purchases of imports from *** imported by ***	Quantity	***	***	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***	***	***
The producers' purchases of imports relative to overall U.S. imports from ***	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 3.32 Hydraulic cylinders: *'s U.S. purchases of imports from subject sources and select ratios, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
***'s U.S. production	Quantity	***	***	***	***	***
***'s purchases of imports from *** imported by ***	Quantity	***	***	***	***	***
U.S. imports from *** imported by ***	Quantity	***	***	***	***	***
Ratio 1: The producer's purchases relative to the importers' imports	Ratio	***	***	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 2: The importers' imports relative to overall U.S. imports from ***	Ratio	***	***	***	***	***
Ratio 3: The importers' U.S. imports relative to the producer's production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires and proprietary, Census-edited Customs' import records using statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed July 30, 2026.

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 3.33 Hydraulic cylinders: *'s U.S. purchases of imports from subject sources and select ratios, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
***'s U.S. production	Quantity	***	***	***	***	***
***'s purchases of imports from *** imported by ***	Quantity	***	***	***	***	***
***'s U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 1: The producer's purchases relative to the importers' imports	Ratio	***	***	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 2: The importers' imports relative to overall U.S. imports from ***	Ratio	***	***	***	***	***
Ratio 3: The importers' U.S. imports relative to the producer's production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires and proprietary, Census-edited Customs' import records using statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed July 30, 2026.

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 3.34 Hydraulic cylinders: *'s U.S. purchases of imports from subject sources and select ratios, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
***'s U.S. production	Quantity	***	***	***	***	***
***'s Imports from *** imported by ***	Quantity	***	***	***	***	***
***'s U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 1: The producer's purchases relative to the importers' imports	Ratio	***	***	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 2: The importers' imports relative to overall U.S. imports from ***	Ratio	***	***	***	***	***
Ratio 3: The importers' U.S. imports relative to the producer's production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires and proprietary, Census-edited Customs' import records using statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed July 30, 2026.

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 3.35 Hydraulic cylinders: *'s U.S. purchases of imports from subject sources and select ratios, by period**

Quantity in 1,000 pounds; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
***'s U.S. production	Quantity	***	***	***	***	***
***'s Imports from *** imported by ***	Quantity	***	***	***	***	***
***'s U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 1: The producer's purchases relative to the importers' imports	Ratio	***	***	***	***	***
Overall U.S. imports from ***	Quantity	***	***	***	***	***
Ratio 2: The importers' imports relative to overall U.S. imports from ***	Ratio	***	***	***	***	***
Ratio 3: The importers' U.S. imports relative to the producer's production	Ratio	***	***	***	***	***

Source: Compiled from data submitted in response to Commission questionnaires and proprietary, Census-edited Customs' import records using statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed July 30, 2026.

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 3.36 Hydraulic cylinders: U.S. producers' reasons for purchasing

Item	Narrative response on reasons for purchasing
***'s reason for purchasing	***
***'s reason for purchasing	***
***'s reason for purchasing	***
***'s reason for purchasing	***
***'s reason 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 3.37 shows U.S. producers' employment-related data. The number of production and related workers ("PRWs") reported by U.S. producers decreased from 2023 to 2025 and was lower in interim 2026 compared to interim 2025.⁷ Total hours worked and wages paid also decreased from 2023 to 2025 but were higher in interim 2026 than in interim 2025. Total hours worked per PRW decreased irregularly during 2023 to 2025 but was higher in interim 2026 than in interim 2025. During the same period, hourly wages, productivity, and unit labor costs remained relatively steady.

Table 3.37 Hydraulic cylinders: U.S. producers' employment related information, by period

Interim is January through March

Item	2023	2024	2025	Interim 2025	Interim 2026
Production and related workers (PRWs) (number)	3,643	3,324	3,040	3,070	2,978
Total hours worked (1,000 hours)	7,191	6,220	5,867	1,477	1,489
Hours worked per PRW (hours)	1,974	1,871	1,930	481	500
Wages paid (\$1,000)	202,982	178,019	167,145	42,559	44,412
Hourly wages (dollars per hour)	\$28.23	\$28.62	\$28.49	\$28.82	\$29.82
Productivity (pounds per hour)	33.3	33.2	32.8	32.8	34.3
Unit labor costs (dollars per pound)	\$0.85	\$0.86	\$0.87	\$0.88	\$0.87

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

⁷ *** and *** accounted for almost half of that decrease.

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

U.S. importers

The Commission issued importer questionnaires to 350 potential importers of subject hydraulic cylinders, as well as to all U.S. producers of hydraulic cylinders.¹ Usable questionnaire responses were received from 93 companies, representing the following shares of U.S. imports of hydraulic cylinders in 2025, by weight, under HTS statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060, and 8412.21.0075:^{2 3 4}

- A majority of U.S. imports of hydraulic cylinders from Canada.
- A majority of U.S. imports of hydraulic cylinders from China.
- A majority of U.S. imports of hydraulic cylinders from India.
- A substantial majority of U.S. imports of hydraulic cylinders from Mexico.
- A substantial majority of U.S. imports of hydraulic cylinders from South Korea.
- A majority of U.S. imports of hydraulic cylinders from subject sources.
- Approximately half of U.S. imports of hydraulic cylinders from nonsubject sources.

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

² Twenty-eight firms submitted certified responses stating that they have not imported in-scope hydraulic cylinders since January 1, 2023. *** submitted incomplete/late responses that did not contain usable data and were not included in the data set. Jiangsu Hengli Hydraulic, which is believed to be a major Chinese producer and U.S. importer of hydraulic cylinders the United States did not submit a U.S. importer questionnaire response.

³ The HTS statistical reporting numbers listed are for complete cylinders and include some out-of-scope products, and do not include HTS statistical reporting number 8412.90.90.05 which covers in-scope parts as well as out-of-scope merchandise.

⁴ Forty-two importers reported not keeping record in metrics the Commission requested. As a result, a number of these importers provided incomplete data (e.g. reporting in units rather than in pounds or vice-versa, or reporting only one of these metrics). These firms did not respond to inquiries, and so staff adjusted these firms' data accordingly based on firm specific assessments of the reporting issue (e.g. for firms that did not report the requested data in pounds, this data was derived using the average unit weight for importers from that source).

Table 4.1 lists all responding U.S. importers of hydraulic cylinders from Canada, China, India, Mexico, and South Korea and other sources, their locations, and their shares of U.S. imports, in 2025.

Table 4.1 Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Canada	China	India	Mexico	South Korea
Advanced Cylinders	Chino, CA	***	***	***	***	***
AGCO	Duluth, GA	***	***	***	***	***
Alcoa	Pittsburgh, PA	***	***	***	***	***
Altec	Birmingham, AL	***	***	***	***	***
Anvil Innovations	Slaughter, LA	***	***	***	***	***
Bailey	Knoxville, TN	***	***	***	***	***
Beckwood Press	Fenton, MO	***	***	***	***	***
Beiler Hydraulics	Leola, PA	***	***	***	***	***
BMF Hydraulics	Williamsburg, VA	***	***	***	***	***
Bobalee	Laurens, IA	***	***	***	***	***
Bolzoni	Sulligent, AL	***	***	***	***	***
Bray	Houston, TX	***	***	***	***	***
CAB Worldwide	Buford, GA	***	***	***	***	***
CalPortland	Summerlin, NV	***	***	***	***	***
Cardinal Tools	Roanoke, VA	***	***	***	***	***
Cascade	Fairview, OR	***	***	***	***	***
Caterpillar	Irving, TX	***	***	***	***	***
CLAAS	Omaha, NE	***	***	***	***	***
CLB Industries	West Seneca, NY	***	***	***	***	***
CNH Industrial	Oak Brook, IL	***	***	***	***	***
CTD Group	Winnipeg, MB	***	***	***	***	***
Custom Hoists	Ashland, OH	***	***	***	***	***
D&S Castings	Hamilton, NJ	***	***	***	***	***
Deere & Company	Moline, IL	***	***	***	***	***
Dellner Hydratech USA	Robertsdale, AL	***	***	***	***	***

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Canada	China	India	Mexico	South Korea
DLH Fluid Power	S El Monte, CA	***	***	***	***	***
Doosan Bobcat	West Fargo, ND	***	***	***	***	***
DY Power	Changwon,	***	***	***	***	***
Eagle Hydraulic Canada	Mirabel, QC	***	***	***	***	***
Edney	Lakeville, MN	***	***	***	***	***
Eickhoff	Wheeling, WV	***	***	***	***	***
Elmer's	Altona, MB	***	***	***	***	***
Federal Fluid Power	Vestaburg, MI	***	***	***	***	***
FIMIC	Laurel, MS	***	***	***	***	***
FLSMIDTH	Midvale, UT	***	***	***	***	***
Fluid Motion Sales	Dallas, TX	***	***	***	***	***
Global Excotrans	Doral, FL	***	***	***	***	***
Hazemag	Mt. Braddock, PA	***	***	***	***	***
Herrenknecht	Sumner, WA	***	***	***	***	***
HF Rubber Machinery	Topeka, KS	***	***	***	***	***
Houston Cement	Houston, TX	***	***	***	***	***
Humboldt Wedag	Peachtree Corners, GA	***	***	***	***	***
Hyster-Yale	Greenville, NC	***	***	***	***	***
Hyva	Elk Grove Village, IL	***	***	***	***	***
Jindal Pipe USA	Baytown, TX	***	***	***	***	***
Jindal Tubular USA	Bay Saint Louis, MS	***	***	***	***	***
JP Southwest	Seminole, TX	***	***	***	***	***
JRB	West Seneca, NY	***	***	***	***	***
KTI Hydraulics	Tustin, CA	***	***	***	***	***
Lhoist	Fort Worth, TX	***	***	***	***	***

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Canada	China	India	Mexico	South Korea
Link-Belt	Lexington, KY	***	***	***	***	***
Mailhot Canada	Saint Jacques,	***	***	***	***	***
Mailhot USA	Wausau, WI	***	***	***	***	***
Manitowoc	Milwaukee, WI	***	***	***	***	***
Mercedes-Benz	Wilmington, DE	***	***	***	***	***
MGL Engineering	Lakeland, FL	***	***	***	***	***
Miners NC	Archdale, NC	***	***	***	***	***
Monarch USA	Winnipeg, MB	***	***	***	***	***
Monroe	Rochester Hills, MI	***	***	***	***	***
National Oilwell Varco	Houston, TX	***	***	***	***	***
Ognibene	Charlotte, NC	***	***	***	***	***
Oil-Air	Plymouth, MN	***	***	***	***	***
Oskosh	Oshkosh, WI	***	***	***	***	***
Peak Industries	Spokane, WA	***	***	***	***	***
PowerX	Pewaukee, WI	***	***	***	***	***
Premium Oilfield	Houston, TX	***	***	***	***	***
Premium Supply	Greenville, TX	***	***	***	***	***
Pressure Connections	Columbus, OH	***	***	***	***	***
Prince	North Sioux City, SD	***	***	***	***	***
Resansil	City Of Miami Gardens, FL	***	***	***	***	***
Reubicon	Austin, TX	***	***	***	***	***
Riverside Industries	Huron, SD	***	***	***	***	***
Robeck Fluid Power	Aurora, OH	***	***	***	***	***
Rockmac	Watertown, SD	***	***	***	***	***
Rosenboom	Sheldon, IA	***	***	***	***	***

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Canada	China	India	Mexico	South Korea
Samchully	Lake Forest, CA	***	***	***	***	***
SHPAC USA	Canfield, OH	***	***	***	***	***
Siddons Martin	Houston, TX	***	***	***	***	***
Steel Dynamics	Fort Wayne, IN	***	***	***	***	***
Stillwell	Burnsville, MN	***	***	***	***	***
Stoney Point	Stilwell, OK	***	***	***	***	***
Supreme	Spring Lake, MI	***	***	***	***	***
SVI International	Dekalb, IL	***	***	***	***	***
T&T Weber	Clinton, MA	***	***	***	***	***
Tadano	Houston, TX	***	***	***	***	***
Titanium Pro	St. Augustine, FL	***	***	***	***	***
Vecoplan	Greensboro, NC	***	***	***	***	***
W.E. Lott	Bucyrus, OH	***	***	***	***	***
Wacker Neuson	Menomonee Falls, WI	***	***	***	***	***
Weima	Fort Mill, SC	***	***	***	***	***
West Craft Manufacturing	Alto, TX	***	***	***	***	***
Wipro	Chambersburg, PA	***	***	***	***	***
Woods Equipment	Oregon, IL	***	***	***	***	***
All firms	Various	100.0	100.0	100.0	100.0	100.0

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Subject sources	Nonsubject sources	All import sources
Advanced Cylinders	Chino, CA	***	***	***
AGCO	Duluth, GA	***	***	***
Alcoa	Pittsburgh, PA	***	***	***
Altec	Birmingham, AL	***	***	***
Anvil Innovations	Slaughter, LA	***	***	***
Bailey	Knoxville, TN	***	***	***
Beckwood Press	Fenton, MO	***	***	***
Beiler Hydraulics	Leola, PA	***	***	***
BMF Hydraulics	Williamsburg, VA	***	***	***
Bobalee	Laurens, IA	***	***	***
Bolzoni	Sulligent, AL	***	***	***
Bray	Houston, TX	***	***	***
CAB Worldwide	Buford, GA	***	***	***
CalPortland	Summerlin, NV	***	***	***
Cardinal Tools	Roanoke, VA	***	***	***
Cascade	Fairview, OR	***	***	***
Caterpillar	Irving, TX	***	***	***
CLAAS	Omaha, NE	***	***	***
CLB Industries	West Seneca, NY	***	***	***
CNH Industrial	Oak Brook, IL	***	***	***
CTD Group	Winnipeg, MB	***	***	***
Custom Hoists	Ashland, OH	***	***	***
D&S Castings	Hamilton, NJ	***	***	***
Deere & Company	Moline, IL	***	***	***
Dellner Hydratech USA	Robertsdale, AL	***	***	***

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Subject sources	Nonsubject sources	All import sources
DLH Fluid Power	S El Monte, CA	***	***	***
Doosan Bobcat	West Fargo, ND	***	***	***
DY Power	Changwon,	***	***	***
Eagle Hydraulic Canada	Mirabel, QC	***	***	***
Edney	Lakeville, MN	***	***	***
Eickhoff	Wheeling, WV	***	***	***
Elmer's	Altona, MB	***	***	***
Federal Fluid Power	Vestaburg, MI	***	***	***
FIMIC	Laurel, MS	***	***	***
FLSMIDTH	Midvale, UT	***	***	***
Fluid Motion Sales	Dallas, TX	***	***	***
Global Excotrans	Doral, FL	***	***	***
Hazemag	Mt. Braddock, PA	***	***	***
Herrenknecht	Sumner, WA	***	***	***
HF Rubber Machinery	Topeka, KS	***	***	***
Houston Cement	Houston, TX	***	***	***
Humboldt Wedag	Peachtree Corners, GA	***	***	***
Hyster-Yale	Greenville, NC	***	***	***
Hyva	Elk Grove Village, IL	***	***	***
Jindal Pipe USA	Baytown, TX	***	***	***
Jindal Tubular USA	Bay Saint Louis, MS	***	***	***
JP Southwest	Seminole, TX	***	***	***
JRB	West Seneca, NY	***	***	***
KTI Hydraulics	Tustin, CA	***	***	***
Lhoist	Fort Worth, TX	***	***	***

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Subject sources	Nonsubject sources	All import sources
Link-Belt	Lexington, KY	***	***	***
Mailhot Canada	Saint Jacques,	***	***	***
Mailhot USA	Wausau, WI	***	***	***
Manitowoc	Milwaukee, WI	***	***	***
Mercedes-Benz	Wilmington, DE	***	***	***
MGL Engineering	Lakeland, FL	***	***	***
Miners NC	Archdale, NC	***	***	***
Monarch USA	Winnipeg, MB	***	***	***
Monroe	Rochester Hills, MI	***	***	***
National Oilwell Varco	Houston, TX	***	***	***
Ognibene	Charlotte, NC	***	***	***
Oil-Air	Plymouth, MN	***	***	***
Oskosh	Oshkosh, WI	***	***	***
Peak Industries	Spokane, WA	***	***	***
PowerX	Pewaukee, WI	***	***	***
Premium Oilfield	Houston, TX	***	***	***
Premium Supply	Greenville, TX	***	***	***
Pressure Connections	Columbus, OH	***	***	***
Prince	North Sioux City, SD	***	***	***
Resansil	City Of Miami Gardens, FL	***	***	***
Reubicon	Austin, TX	***	***	***
Riverside Industries	Huron, SD	***	***	***
Robeck Fluid Power	Aurora, OH	***	***	***
Rockmac	Watertown, SD	***	***	***
Rosenboom	Sheldon, IA	***	***	***

Table continued.

Table 4.1 (Continued) Hydraulic cylinders: U.S. importers, their headquarters, and share of imports within each source, 2025

Share in percent

Firm	Headquarters	Subject sources	Nonsubject sources	All import sources
Samchully	Lake Forest, CA	***	***	***
SHPAC USA	Canfield, OH	***	***	***
Siddons Martin	Houston, TX	***	***	***
Steel Dynamics	Fort Wayne, IN	***	***	***
Stillwell	Burnsville, MN	***	***	***
Stoney Point	Stillwell, OK	***	***	***
Supreme	Spring Lake, MI	***	***	***
SVI International	Dekalb, IL	***	***	***
T&T Weber	Clinton, MA	***	***	***
Tadano	Houston, TX	***	***	***
Titanium Pro	St. Augustine, FL	***	***	***
Vecoplan	Greensboro, NC	***	***	***
W.E. Lott	Bucyrus, OH	***	***	***
Wacker Neuson	Menomonee Falls, WI	***	***	***
Weima	Fort Mill, SC	***	***	***
West Craft Manufacturing	Alto, TX	***	***	***
Wipro	Chambersburg, PA	***	***	***
Woods Equipment	Oregon, IL	***	***	***
All firms	Na, NA	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 4.2 and 4.3 and figure 4.1 present data for U.S. imports of hydraulic cylinders from Canada, China, India, Mexico, and South Korea and all other sources. Subject imports increased irregularly by quantity and decreased by value from 2023 to 2025, while both metrics were higher in interim 2026 than in interim 2025. Subject imports accounted for at least 82.0 percent, by quantity, and at least 72.6 percent, by value, of all imports during 2023 to 2025 and the interim periods. South Korea was the largest source of subject imports, by quantity, during 2023 to 2025, followed by China, Mexico, Canada, and India. From 2023 to 2025, U.S. subject imports of hydraulic cylinders increased year by year for Mexico, increased irregularly for Canada and India, and decreased irregularly for China and South Korea. As a ratio to U.S. production, from 2023 to 2025, subject imports increased from 71.3 percent to 102.7 percent. The ratio was higher in interim 2026 compared to interim 2025. During the same period, subject merchandise unit values increased year by year for imports from China and Mexico, decreased irregularly for imports from India, and decreased year by year for imports from Canada and South Korea.

Table 4.2 Hydraulic cylinders: U.S. imports by source and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit value in dollars per pound; interim is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
Canada	Quantity	22,832	22,974	25,929	5,431	6,862
China	Quantity	51,294	58,208	48,801	11,440	6,997
India	Quantity	9,718	18,641	18,453	2,428	3,534
Mexico	Quantity	25,153	39,754	47,962	5,630	8,966
South Korea	Quantity	62,017	67,086	56,386	11,307	18,129
Subject sources	Quantity	171,014	206,664	197,531	36,235	44,489
Nonsubject sources	Quantity	33,347	45,280	41,461	6,117	7,230
All import sources	Quantity	204,361	251,943	238,992	42,352	51,719
Canada	Value	108,170	108,733	110,337	29,492	30,112
China	Value	114,575	138,299	128,721	26,794	17,053
India	Value	30,189	46,891	48,047	7,250	11,796
Mexico	Value	62,993	144,476	181,600	23,579	31,777
South Korea	Value	968,208	227,103	170,071	34,298	50,904
Subject sources	Value	1,284,136	665,503	638,777	121,413	141,642
Nonsubject sources	Value	188,077	235,498	240,942	38,054	36,955
All import sources	Value	1,472,213	901,001	879,719	159,467	178,597
Canada	Unit value	4.74	4.73	4.26	5.43	4.39
China	Unit value	2.23	2.38	2.64	2.34	2.44
India	Unit value	3.11	2.52	2.60	2.99	3.34
Mexico	Unit value	2.50	3.63	3.79	4.19	3.54
South Korea	Unit value	15.61	3.39	3.02	3.03	2.81
Subject sources	Unit value	7.51	3.22	3.23	3.35	3.18
Nonsubject sources	Unit value	5.64	5.20	5.81	6.22	5.11
All import sources	Unit value	7.20	3.58	3.68	3.77	3.45

Table continued.

Table 4.2 (Continued) Hydraulic cylinders: Share of U.S. imports by source and period

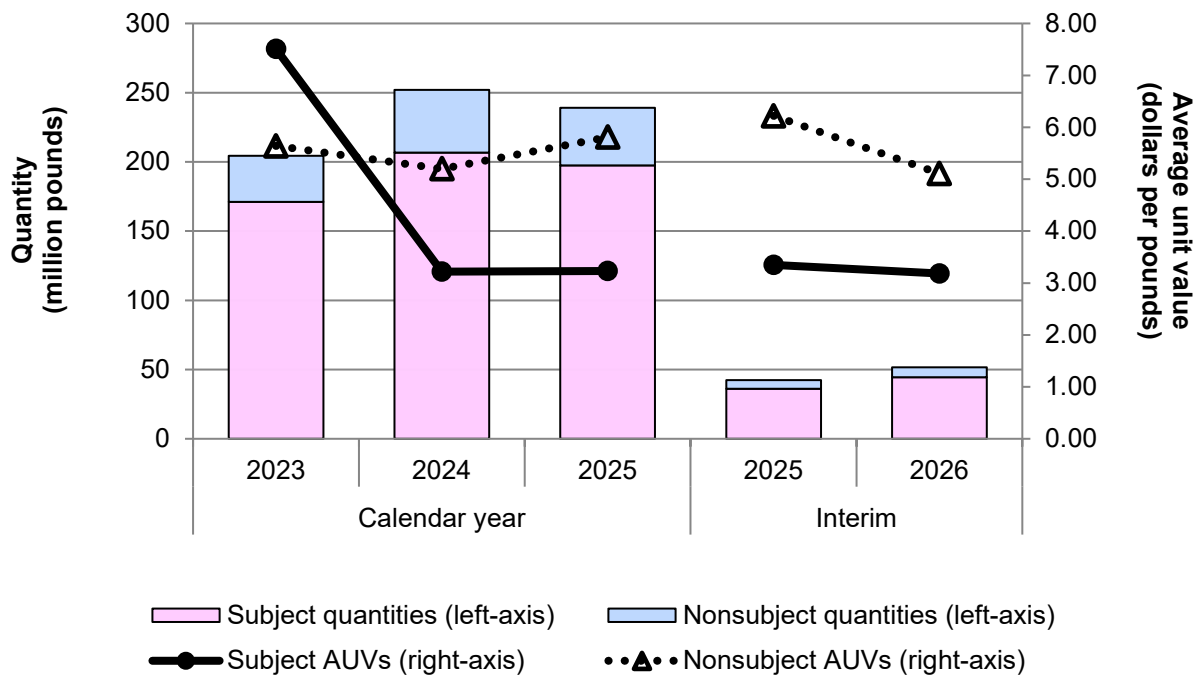
Shares and ratio in percent; interim is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
Canada	Share of quantity	11.2	9.1	10.8	12.8	13.3
China	Share of quantity	25.1	23.1	20.4	27.0	13.5
India	Share of quantity	4.8	7.4	7.7	5.7	6.8
Mexico	Share of quantity	12.3	15.8	20.1	13.3	17.3
South Korea	Share of quantity	30.3	26.6	23.6	26.7	35.1
Subject sources	Share of quantity	83.7	82.0	82.7	85.6	86.0
Nonsubject sources	Share of quantity	16.3	18.0	17.3	14.4	14.0
All import sources	Share of quantity	100.0	100.0	100.0	100.0	100.0
Canada	Share of value	7.3	12.1	12.5	18.5	16.9
China	Share of value	7.8	15.3	14.6	16.8	9.5
India	Share of value	2.1	5.2	5.5	4.5	6.6
Mexico	Share of value	4.3	16.0	20.6	14.8	17.8
South Korea	Share of value	65.8	25.2	19.3	21.5	28.5
Subject sources	Share of value	87.2	73.9	72.6	76.1	79.3
Nonsubject sources	Share of value	12.8	26.1	27.4	23.9	20.7
All import sources	Share of value	100.0	100.0	100.0	100.0	100.0
Canada	Ratio	9.5	11.1	13.5	11.2	13.4
China	Ratio	21.4	28.2	25.4	23.6	13.7
India	Ratio	4.1	9.0	9.6	5.0	6.9
Mexico	Ratio	10.5	19.3	24.9	11.6	17.6
South Korea	Ratio	25.9	32.5	29.3	23.4	35.5
Subject sources	Ratio	71.3	100.1	102.7	74.9	87.2
Nonsubject sources	Ratio	13.9	21.9	21.6	12.6	14.2
All import sources	Ratio	85.2	122.1	124.3	87.5	101.4

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

Note: Share of quantity is the share of U.S. imports by quantity; share of value is the share of U.S. imports by value; ratio are U.S. imports to production.

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



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

Table 4.3 Hydraulic cylinders: 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	Interim 2025 to 2026
Canada	%Δ Quantity	▲ 13.6	▲ 0.6	▲ 12.9	▲ 26.4
China	%Δ Quantity	▼ (4.9)	▲ 13.5	▼ (16.2)	▼ (38.8)
India	%Δ Quantity	▲ 89.9	▲ 91.8	▼ (1.0)	▲ 45.6
Mexico	%Δ Quantity	▲ 90.7	▲ 58.0	▲ 20.6	▲ 59.3
South Korea	%Δ Quantity	▼ (9.1)	▲ 8.2	▼ (15.9)	▲ 60.3
Subject sources	%Δ Quantity	▲ 15.5	▲ 20.8	▼ (4.4)	▲ 22.8
Nonsubject sources	%Δ Quantity	▲ 24.3	▲ 35.8	▼ (8.4)	▲ 18.2
All import sources	%Δ Quantity	▲ 16.9	▲ 23.3	▼ (5.1)	▲ 22.1
Canada	%Δ Value	▲ 2.0	▲ 0.5	▲ 1.5	▲ 2.1
China	%Δ Value	▲ 12.3	▲ 20.7	▼ (6.9)	▼ (36.4)
India	%Δ Value	▲ 59.2	▲ 55.3	▲ 2.5	▲ 62.7
Mexico	%Δ Value	▲ 188.3	▲ 129.4	▲ 25.7	▲ 34.8
South Korea	%Δ Value	▼ (82.4)	▼ (76.5)	▼ (25.1)	▲ 48.4
Subject sources	%Δ Value	▼ (50.3)	▼ (48.2)	▼ (4.0)	▲ 16.7
Nonsubject sources	%Δ Value	▲ 28.1	▲ 25.2	▲ 2.3	▼ (2.9)
All import sources	%Δ Value	▼ (40.2)	▼ (38.8)	▼ (2.4)	▲ 12.0
Canada	%Δ Unit value	▼ (10.2)	▼ (0.1)	▼ (10.1)	▼ (19.2)
China	%Δ Unit value	▲ 18.1	▲ 6.4	▲ 11.0	▲ 4.1
India	%Δ Unit value	▼ (16.2)	▼ (19.0)	▲ 3.5	▲ 11.8
Mexico	%Δ Unit value	▲ 51.2	▲ 45.1	▲ 4.2	▼ (15.4)
South Korea	%Δ Unit value	▼ (80.7)	▼ (78.3)	▼ (10.9)	▼ (7.4)
Subject sources	%Δ Unit value	▼ (56.9)	▼ (57.1)	▲ 0.4	▼ (5.0)
Nonsubject sources	%Δ Unit value	▲ 3.0	▼ (7.8)	▲ 11.7	▼ (17.8)
All import sources	%Δ Unit value	▼ (48.9)	▼ (50.4)	▲ 2.9	▼ (8.3)

Table continued.

Table 4.3 Continued Hydraulic cylinders: Changes in U.S. imports, by source and periodChanges (Δ) in percent (%) or percentage point (ppt)

Source	Measure	2023 to 2025	2023 to 2024	2024 to 2025	Interim 2025 to 2026
Canada	ppt Δ Quantity	▼(0.3)	▼(2.1)	▲1.7	▲0.4
China	ppt Δ Quantity	▼(4.7)	▼(2.0)	▼(2.7)	▼(13.5)
India	ppt Δ Quantity	▲3.0	▲2.6	▲0.3	▲1.1
Mexico	ppt Δ Quantity	▲7.8	▲3.5	▲4.3	▲4.0
South Korea	ppt Δ Quantity	▼(6.8)	▼(3.7)	▼(3.0)	▲8.4
Subject sources	ppt Δ Quantity	▼(1.0)	▼(1.7)	▲0.6	▲0.5
Nonsubject sources	ppt Δ Quantity	▲1.0	▲1.7	▼(0.6)	▼(0.5)
All import sources	ppt Δ Quantity	—	—	—	—
Canada	ppt Δ Value	▲5.2	▲4.7	▲0.5	▼(1.6)
China	ppt Δ Value	▲6.8	▲7.6	▼(0.7)	▼(7.3)
India	ppt Δ Value	▲3.4	▲3.2	▲0.3	▲2.1
Mexico	ppt Δ Value	▲16.4	▲11.8	▲4.6	▲3.0
South Korea	ppt Δ Value	▼(46.4)	▼(40.6)	▼(5.9)	▲7.0
Subject sources	ppt Δ Value	▼(14.6)	▼(13.4)	▼(1.3)	▲3.2
Nonsubject sources	ppt Δ Value	▲14.6	▲13.4	▲1.3	▼(3.2)
All import sources	ppt Δ Value	—	—	—	—
Canada	ppt Δ Ratio	▲4.0	▲1.6	▲2.3	▲2.2
China	ppt Δ Ratio	▲4.0	▲6.8	▼(2.8)	▼(9.9)
India	ppt Δ Ratio	▲5.5	▲5.0	▲0.6	▲1.9
Mexico	ppt Δ Ratio	▲14.4	▲8.8	▲5.7	▲5.9
South Korea	ppt Δ Ratio	▲3.4	▲6.6	▼(3.2)	▲12.2
Subject sources	ppt Δ Ratio	▲31.4	▲28.8	▲2.6	▲12.3
Nonsubject sources	ppt Δ Ratio	▲7.6	▲8.0	▼(0.4)	▲1.5
All import sources	ppt Δ Ratio	▲39.0	▲36.8	▲2.2	▲13.8

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.

Table 4.4 presents U.S. imports of hydraulic cylinders by U.S. producers and/or their affiliates.

Table 4.4 Hydraulic cylinders: U.S. producers' and/or their affiliates' U.S. imports, by source and period

Quantity in 1,000 pounds; share in percent; interim period is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
Canada	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
South Korea	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
Canada	Share	***	***	***	***	***
China	Share	***	***	***	***	***
India	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
South Korea	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***

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

Note: Share is the share U.S. producers' and/or their affiliates' U.S. imports to total imports from that source.

Table 4.5 presents U.S. imports of subject merchandise by complete hydraulic cylinders, hydraulic cylinder components, and complete hydraulic cylinders shipped attached to out-of-scope machinery. Complete hydraulic cylinders not attached to out-of-scope machinery accounted for at least two-thirds of all U.S. imports of hydraulic cylinders during each period for which data were collected.⁵

Table 4.5 Hydraulic cylinders: U.S. importers' U.S. imports from subject sources, by type and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through March

Type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinders: Not attached	Quantity	135,676	141,455	131,303	31,421	33,379
Complete cylinders: Attached	Quantity	9,452	44,037	49,369	748	6,611
Complete cylinders	Quantity	145,128	185,492	180,672	32,170	39,990
Components	Quantity	25,887	21,172	16,859	4,066	4,499
All levels of processing	Quantity	171,014	206,664	197,531	36,235	44,489
Complete cylinders: Not attached	Value	1,087,479	460,853	421,976	105,560	109,107
Complete cylinders: Attached	Value	33,745	147,017	167,568	4,121	20,810
Complete cylinders	Value	1,121,224	607,871	589,544	109,681	129,917
Components	Value	162,912	57,632	49,234	11,732	11,725
All levels of processing	Value	1,284,136	665,503	638,777	121,413	141,642
Complete cylinders: Not attached	Unit value	8.02	3.26	3.21	3.36	3.27
Complete cylinders: Attached	Unit value	3.57	3.34	3.39	5.51	3.15
Complete cylinders	Unit value	7.73	3.28	3.26	3.41	3.25
Components	Unit value	6.29	2.72	2.92	2.89	2.61
All levels of processing	Unit value	7.51	3.22	3.23	3.35	3.18
Complete cylinders: Not attached	Share of quantity	79.3	68.4	66.5	86.7	75.0
Complete cylinders: Attached	Share of quantity	5.5	21.3	25.0	2.1	14.9
Complete cylinders	Share of quantity	84.9	89.8	91.5	88.8	89.9
Components	Share of quantity	15.1	10.2	8.5	11.2	10.1
All levels of processing	Share of quantity	100.0	100.0	100.0	100.0	100.0
Complete cylinders: Not attached	Share of value	84.7	69.2	66.1	86.9	77.0
Complete cylinders: Attached	Share of value	2.6	22.1	26.2	3.4	14.7
Complete cylinders	Share of value	87.3	91.3	92.3	90.3	91.7
Components	Share of value	12.7	8.7	7.7	9.7	8.3
All levels of processing	Share of value	100.0	100.0	100.0	100.0	100.0

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

⁵ Twelve firms had U.S. imports from subject sources of complete cylinders attached to out-of-scope machinery, the vast majority of which in 2024 and 2025 was reported by ***.

Table 4.6 presents U.S. imports of hydraulic cylinders from nonsubject sources by complete hydraulic cylinders, hydraulic cylinder components, and complete hydraulic cylinders shipped attached to out-of-scope machinery. Complete hydraulic cylinders not attached to out-of-scope machinery accounted for at least half of all U.S. imports of hydraulic cylinders during each period for which data were collected. Detailed tables of U.S. importers' U.S. shipments of hydraulic cylinders by type are available in Appendix E.

Table 4.6 Hydraulic cylinders: U.S. importers' U.S. imports from nonsubject sources, by level of processing and period

Quantity in 1,000 pounds; value in 1,000 dollars; unit values in dollars per pound; share in percent; interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	Quantity	19,275	20,724	18,221	4,244	5,661
Complete cylinder: Attached	Quantity	5,217	18,789	20,072	1,069	692
Complete cylinder	Quantity	24,493	39,513	38,293	5,313	6,353
Components	Quantity	8,854	5,766	3,167	804	877
All levels of processing	Quantity	33,347	45,280	41,461	6,117	7,230
Complete cylinder: Not attached	Value	126,108	119,232	107,271	25,783	24,706
Complete cylinder: Attached	Value	28,256	94,247	117,036	8,242	8,222
Complete cylinder	Value	154,364	213,480	224,307	34,025	32,928
Components	Value	33,713	22,018	16,635	4,029	4,027
All levels of processing	Value	188,077	235,498	240,942	38,054	36,955
Complete cylinder: Not attached	Unit value	6.54	5.75	5.89	6.08	4.36
Complete cylinder: Attached	Unit value	5.42	5.02	5.83	7.71	11.88
Complete cylinder	Unit value	6.30	5.40	5.86	6.40	5.18
Components	Unit value	3.81	3.82	5.25	5.01	4.59
All levels of processing	Unit value	5.64	5.20	5.81	6.22	5.11
Complete cylinder: Not attached	Share of quantity	57.8	45.8	43.9	69.4	78.3
Complete cylinder: Attached	Share of quantity	15.6	41.5	48.4	17.5	9.6
Complete cylinder	Share of quantity	73.4	87.3	92.4	86.9	87.9
Components	Share of quantity	26.6	12.7	7.6	13.1	12.1
All levels of processing	Share of quantity	100.0	100.0	100.0	100.0	100.0
Complete cylinder: Not attached	Share of value	67.1	50.6	44.5	67.8	66.9
Complete cylinder: Attached	Share of value	15.0	40.0	48.6	21.7	22.2
Complete cylinder	Share of value	82.1	90.7	93.1	89.4	89.1
Components	Share of value	17.9	9.3	6.9	10.6	10.9
All levels of processing	Share of value	100.0	100.0	100.0	100.0	100.0

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 4.7 presents information on imports from Canada, China, India, Mexico, South Korea and all other sources in the 12-month period preceding the filing of the petition (i.e., July 1, 2025 through June 30, 2026). Imports from none of the subject sources individually accounted for less than 3 percent of total imports of hydraulic cylinders by quantity during this period.

Table 4.7 Hydraulic cylinders: U.S. imports in the twelve-month period preceding the filing of the petition, July 2025 through June 2026

Quantity in pounds; share in percent

Source of imports	Quantity	Share of quantity
Canada	***	***
China	***	***
India	***	***
Mexico	***	***
South Korea	***	***
All other sources	***	***
All import sources	159,042	100.0

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

⁶ Sections 703(a)(1), 705(b)(1), 733(a)(1), and 735(b)(1) of the Act (19 U.S.C. §§ 1671b(a)(1), 1671d(b)(1), 1673b(a)(1), and 1673d(b)(1)).

⁷ Section 771 (24) of the Act (19 U.S.C § 1677(24)).

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

Table 4.8 and figure 4.2 present information on U.S. producers' and U.S. importers' U.S. shipments in 2025 of hydraulic cylinders by product type – welded body, telescopic, tie-rod, and all other complete hydraulic cylinders, and hydraulic cylinder components. Welded body complete cylinders accounted for the largest share of 2025 U.S. shipments of complete hydraulic cylinders from U.S. producers and each subject source, with telescopic cylinders accounting for the second largest share among U.S. producers and aggregated import sources. Complete hydraulic cylinders accounted for the majority of U.S. shipments of U.S. producers and U.S. importers from Canada, China, South Korea, and nonsubject sources whereas hydraulic cylinder components accounted for the majority of U.S. shipments of U.S. importers from India and Mexico.

U.S. producers were the largest source of U.S. shipments for each complete hydraulic cylinder product type except for "all other;" the largest source of "all other" was nonsubject countries. U.S. producers were the largest source of U.S. shipments for hydraulic cylinder components, followed by imports from Mexico and China.

Table 4.8 Hydraulic cylinders: U.S. producers' and U.S. importers' U.S. shipments, by source and by product type, 2025

Quantity in 1,000 pounds

Source	Complete Welded Body	Complete Telescopic	Complete Tie Rod	Complete Other	All complete cylinders	Components	All items
U.S. producers	***	***	***	***	***	***	***
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
Subject sources	***	***	***	***	***	***	***
Nonsubject sources	***	***	***	***	***	***	***
All import sources	***	***	***	***	***	***	***
All sources	***	***	***	***	***	***	***

Table continued.

Table 4.8 (Continued) Hydraulic cylinders: U.S. producers' and U.S. importers' U.S. shipments, by source and by product type, 2025

Share across in percent

Source	Complete Welded Body	Complete Telescopic	Complete Tie Rod	Complete Other	All complete cylinders	Components	All items
U.S. producers	***	***	***	***	***	***	100.0
Canada	***	***	***	***	***	***	100.0
China	***	***	***	***	***	***	100.0
India	***	***	***	***	***	***	100.0
Mexico	***	***	***	***	***	***	100.0
South Korea	***	***	***	***	***	***	100.0
Subject sources	***	***	***	***	***	***	100.0
Nonsubject sources	***	***	***	***	***	***	100.0
All import sources	***	***	***	***	***	***	100.0
All sources	***	***	***	***	***	***	100.0

Table continued.

Table 4.8 (Continued) Hydraulic cylinders: U.S. producers' and U.S. importers' U.S. shipments, by source and by product type, 2025

Share down in percent

Source	Complete Welded Body	Complete Telescopic	Complete Tie Rod	Complete Other	All complete cylinders	Components	All items
U.S. producers	***	***	***	***	***	***	***
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
Subject sources	***	***	***	***	***	***	***
Nonsubject sources	***	***	***	***	***	***	***
All import sources	***	***	***	***	***	***	***
All sources	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

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

Figure 4.2 Hydraulic cylinders: U.S. producers' and U.S. importers' U.S. shipments, by source and item, 2025

* * * * *

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

Geographical markets

Hydraulic cylinders produced in the United States are shipped nationwide.⁸ In 2025, official U.S. import statistics for complete linear acting cylinders, a category that includes both in-scope and out-of-scope products, show that imports from all sources entered through all four borders of entry (i.e., East, North, South, and West). These data are presented in table 4.9. The Eastern border of entry accounted for the greatest share of all imported merchandise in 2025 at 37.8 percent and the Northern border of entry accounted for the greatest share of subject merchandise at 35.3 percent. Unlike other subject imports, the vast majority of imports from Mexico entered through the Southern border of entry.

⁸ See Part 2 for additional information on geographic markets.

Table 4.9 Complete hydraulic cylinders: U.S. imports, by source and by border of entry, 2025

Value in 1,000 dollars

Source	East	North	South	West	All borders
Canada	40,570	171,922	10,929	35,630	259,051
China	50,816	96,013	30,917	32,321	210,068
India	53,646	21,064	6,697	1,932	83,340
Mexico	1,889	11,240	149,041	4,480	166,651
South Korea	85,949	6,899	8,626	49,586	151,060
Subject sources	232,871	307,138	206,210	123,950	870,170
Nonsubject sources	474,977	222,427	191,493	115,668	1,004,565
All import sources	707,848	529,565	397,704	239,618	1,874,735

Table continued.

Table 4.9 (Continued) Complete hydraulic cylinders: U.S. imports, by source and by border of entry, 2025

Share across in percent

Source	East	North	South	West	All borders
Canada	15.7	66.4	4.2	13.8	100.0
China	24.2	45.7	14.7	15.4	100.0
India	64.4	25.3	8.0	2.3	100.0
Mexico	1.1	6.7	89.4	2.7	100.0
South Korea	56.9	4.6	5.7	32.8	100.0
Subject sources	26.8	35.3	23.7	14.2	100.0
Nonsubject sources	47.3	22.1	19.1	11.5	100.0
All import sources	37.8	28.2	21.2	12.8	100.0

Table continued.

Table 4.9 (Continued) Complete hydraulic cylinders: U.S. imports, by source and by border of entry, 2025

Share down in percent

Source	East	North	South	West	All borders
Canada	5.7	32.5	2.7	14.9	13.8
China	7.2	18.1	7.8	13.5	11.2
India	7.6	4.0	1.7	0.8	4.4
Mexico	0.3	2.1	37.5	1.9	8.9
South Korea	12.1	1.3	2.2	20.7	8.1
Subject sources	32.9	58.0	51.9	51.7	46.4
Nonsubject sources	67.1	42.0	48.1	48.3	53.6
All import sources	100.0	100.0	100.0	100.0	100.0

Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number(s) 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed August 24, 2026. Imports are based on the imports for consumption data series.

Presence in the market

Tables 4.10 and 4.11 and figures 4.3 and 4.4 present monthly U.S. imports, a category that include out-of-scope products. U.S. imports of such merchandise from every subject source and nonsubject sources were present every month from January 2023 to June 2026.

Table 4.10 Complete hydraulic cylinders: U.S. imports from subject sources, by month and source

Value in 1,000 dollars

Year	Month	Canada	China	India	Mexico	South Korea
2023	January	21,811	17,146	5,562	10,335	15,934
2023	February	24,544	17,774	4,313	10,178	12,909
2023	March	24,036	17,887	4,096	10,277	15,055
2023	April	24,467	21,841	4,450	9,874	18,771
2023	May	23,744	19,940	3,921	11,932	15,321
2023	June	22,854	18,937	3,096	8,932	23,101
2023	July	22,803	20,839	4,586	10,582	17,600
2023	August	18,744	16,173	3,487	11,116	20,077
2023	September	22,775	20,943	3,954	9,560	11,886
2023	October	25,294	23,881	4,797	10,584	19,166
2023	November	20,656	16,573	4,099	9,006	10,538
2023	December	22,293	19,598	4,238	7,368	17,099
2024	January	22,595	21,292	4,357	8,191	20,553
2024	February	21,169	20,788	5,145	8,572	13,191
2024	March	23,557	18,440	8,841	9,635	21,297
2024	April	21,016	17,306	7,392	8,659	25,527
2024	May	21,064	17,985	8,731	8,252	21,958
2024	June	24,656	23,733	6,206	5,175	16,791
2024	July	20,622	21,319	6,877	8,112	19,518
2024	August	17,971	19,463	6,973	7,535	18,247
2024	September	26,253	19,612	6,113	7,575	13,042
2024	October	20,945	16,081	5,758	8,046	12,068
2024	November	24,380	16,180	5,586	9,224	15,883
2024	December	19,450	18,362	5,092	8,029	13,259

Table continued

Table 4.10 (Continued) Complete hydraulic cylinders: U.S. imports from subject sources, by month and source

Value in 1,000 dollars

Year	Month	Canada	China	India	Mexico	South Korea
2025	January	17,268	20,725	5,536	7,859	13,783
2025	February	22,618	14,739	4,626	9,519	10,659
2025	March	26,492	20,204	4,399	13,726	14,562
2025	April	20,208	18,971	6,733	12,724	15,046
2025	May	22,909	19,796	7,874	12,412	13,589
2025	June	22,687	15,551	5,971	12,498	13,901
2025	July	20,031	21,580	7,034	16,131	16,264
2025	August	18,987	15,983	8,382	14,134	8,677
2025	September	23,584	16,583	8,309	16,898	12,136
2025	October	21,059	16,949	9,481	18,435	10,898
2025	November	22,144	13,390	7,456	16,635	9,804
2025	December	21,063	15,597	7,540	15,681	11,740
2026	January	17,918	17,618	10,317	15,455	13,420
2026	February	21,683	14,413	6,946	17,038	12,684
2026	March	23,836	14,608	6,155	17,391	11,904
2026	April	21,892	11,367	6,215	17,557	12,061
2026	May	23,071	14,243	8,726	18,072	15,290
2026	June	19,689	12,176	22,455	17,345	12,977

Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting numbers 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed August 24, 2026. Imports are based on the imports for consumption data series. Data are presented by value as official import statistics do not present imports entered under these HTS statistical reporting numbers in weight.

Table 4.11 Complete hydraulic cylinders: U.S. imports from aggregate sources, by month and source

Value in 1,000 dollars

Year	Month	Subject sources	Nonsubject sources	All import sources
2023	January	70,787	66,724	137,511
2023	February	69,718	68,059	137,777
2023	March	71,349	68,642	139,992
2023	April	79,403	67,866	147,269
2023	May	74,858	70,118	144,977
2023	June	76,919	73,230	150,149
2023	July	76,409	71,678	148,087
2023	August	69,596	78,686	148,283
2023	September	69,118	67,443	136,560
2023	October	83,722	84,552	168,273
2023	November	60,872	71,971	132,843
2023	December	70,595	68,509	139,104
2024	January	76,988	77,164	154,153
2024	February	68,865	76,466	145,330
2024	March	81,769	78,984	160,754
2024	April	79,900	86,183	166,084
2024	May	77,990	79,255	157,245
2024	June	76,562	74,875	151,437
2024	July	76,447	83,426	159,874
2024	August	70,190	75,604	145,793
2024	September	72,596	76,704	149,300
2024	October	62,898	76,934	139,831
2024	November	71,252	73,129	144,381
2024	December	64,192	82,119	146,310

Table continued

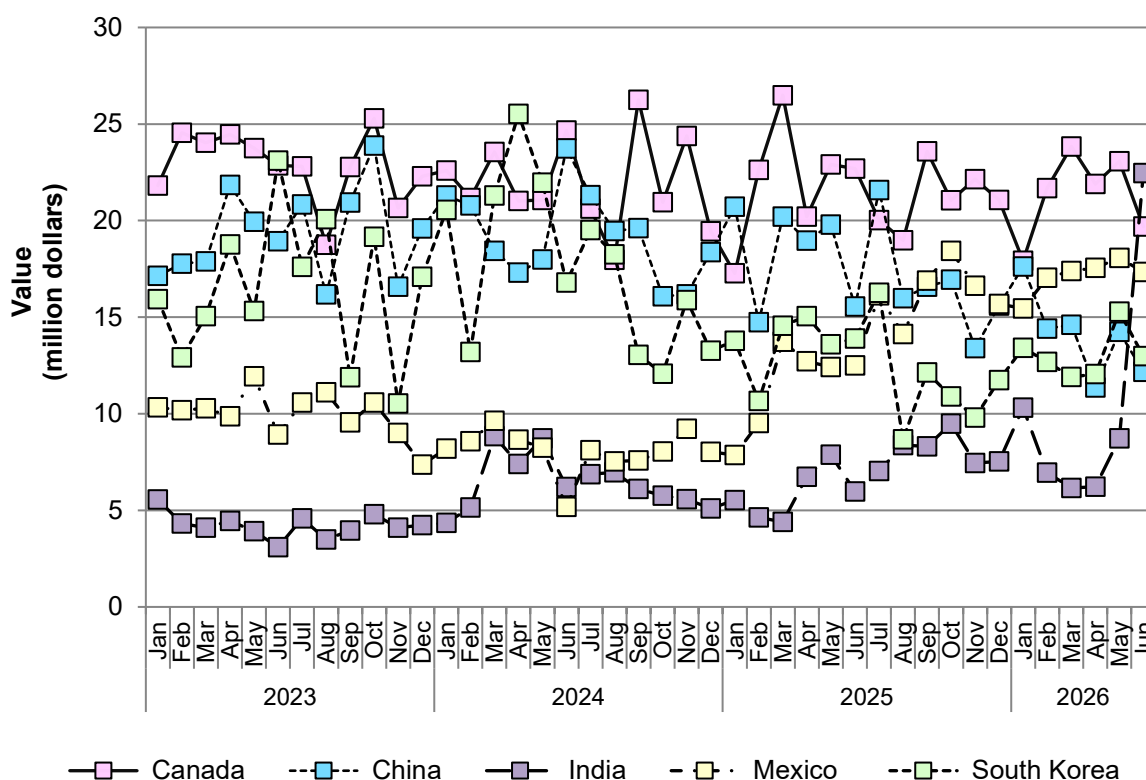
Table 4.11 (Continued) Complete hydraulic cylinders: U.S. imports from aggregate sources, by month and source

Value in 1,000 dollars

Year	Month	Subject sources	Nonsubject sources	All import sources
2025	January	65,171	64,270	129,441
2025	February	62,160	67,219	129,379
2025	March	79,383	81,209	160,592
2025	April	73,681	78,143	151,824
2025	May	76,580	80,292	156,872
2025	June	70,608	81,146	151,754
2025	July	81,041	90,755	171,795
2025	August	66,163	90,483	156,646
2025	September	77,510	90,096	167,606
2025	October	76,821	97,832	174,653
2025	November	69,430	90,118	159,548
2025	December	71,621	93,002	164,623
2026	January	74,728	83,483	158,211
2026	February	72,764	81,632	154,396
2026	March	73,895	105,135	179,030
2026	April	69,092	99,094	168,186
2026	May	79,402	97,330	176,732
2026	June	84,643	92,121	176,764

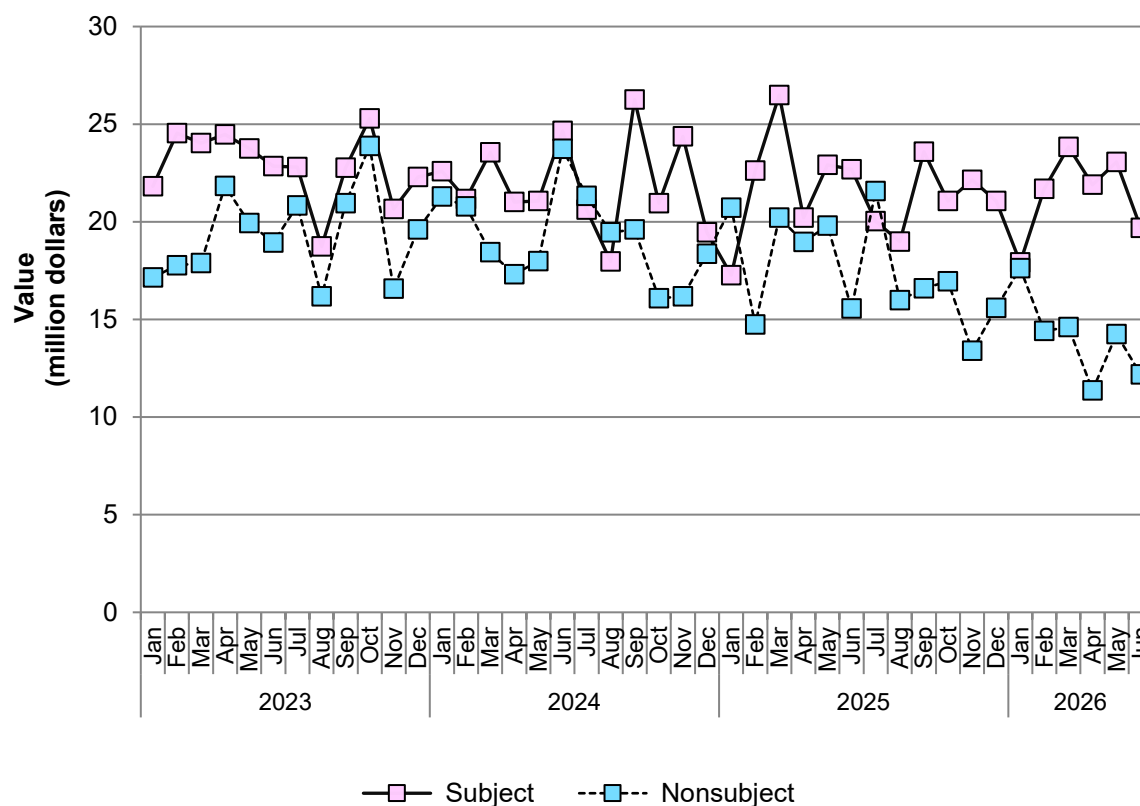
Source: Compiled from official U.S. import statistics of the U.S. Department of Commerce Census Bureau using statistical reporting number(s) 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed August 24, 2026. Imports are based on the imports for consumption data series. Data are presented by value as official import statistics do not present imports entered under these HTS statistical reporting numbers in weight.

Figure 4.3 Complete hydraulic cylinders: U.S. imports from individual subject 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) 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed August 24, 2026. Imports are based on the imports for consumption data series. Data are presented by value as official import statistics present imports entered under these HTS statistical reporting numbers in units.

Figure 4.4 Complete hydraulic cylinders: 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) 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060 and 8412.21.0075 accessed August 24, 2026. Imports are based on the imports for consumption data series. Data are presented by value as official import statistics present imports entered under these HTS statistical reporting numbers in units.

Apparent U.S. consumption and market shares

Quantity

Table 4.12 and figure 4.5 present data on apparent U.S. consumption and U.S. market shares by quantity for hydraulic cylinders. Apparent U.S. consumption, by quantity, decreased by 2.2 percent from 2023 to 2025, but was 10.7 percent higher in interim 2026 compared to interim 2025. During the same period, U.S. producers' market share decreased from 54.0 percent to 44.5 percent, and it was lower in interim 2026 than in interim 2025. The share of subject imports increased from 38.4 percent to 46.3 percent from 2023 to 2025 and was higher in interim 2026 than in interim 2025. During 2023 to 2025, the market share of subject imports from Canada, China, India, and Mexico increased, while it decreased for South Korea.

Table 4.12 Hydraulic cylinders: Apparent U.S. consumption and market shares based on quantity, by source and period

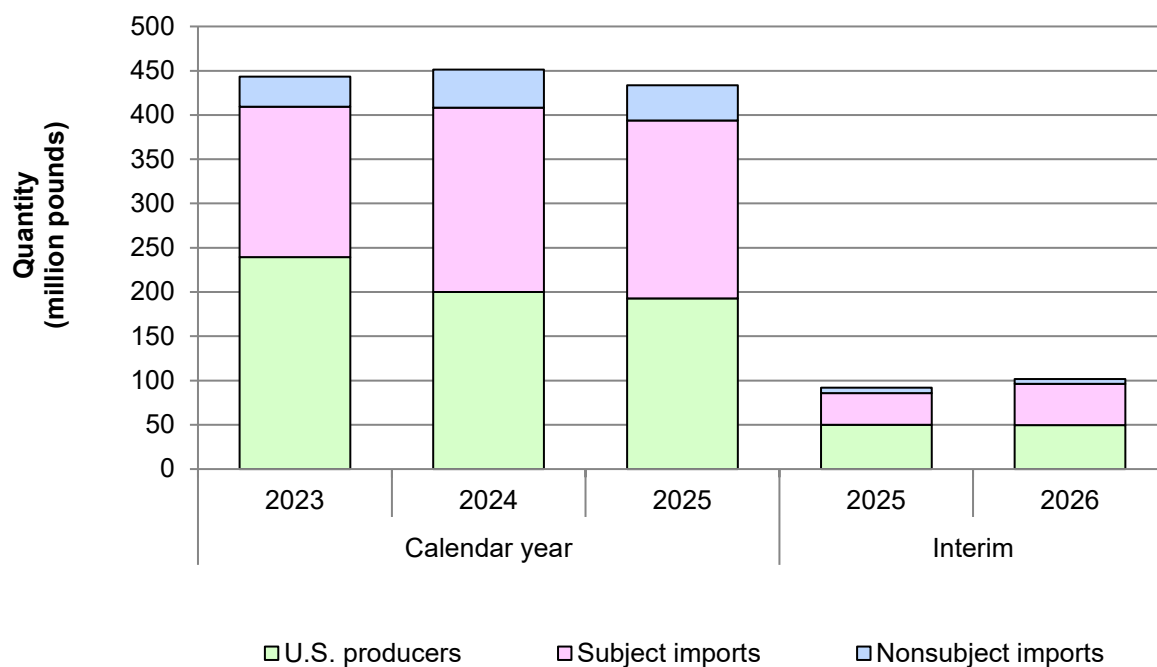
Quantity in 1,000 pounds; shares in percent; interim period is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers	Quantity	239,269	199,997	192,833	49,875	49,818
Canada	Quantity	22,844	22,763	25,934	5,611	6,878
China	Quantity	49,533	60,429	52,471	10,934	8,796
India	Quantity	10,628	18,258	18,173	2,436	3,661
Mexico	Quantity	25,138	39,753	47,957	5,634	8,975
South Korea	Quantity	62,017	67,086	56,386	11,307	18,129
Subject sources	Quantity	170,161	208,289	200,921	35,923	46,439
Nonsubject sources	Quantity	34,030	42,961	39,804	6,068	5,474
All import sources	Quantity	204,191	251,251	240,726	41,992	51,913
All sources	Quantity	443,460	451,248	433,559	91,866	101,732
U.S. producers	Share	54.0	44.3	44.5	54.3	49.0
Canada	Share	5.2	5.0	6.0	6.1	6.8
China	Share	11.2	13.4	12.1	11.9	8.6
India	Share	2.4	4.0	4.2	2.7	3.6
Mexico	Share	5.7	8.8	11.1	6.1	8.8
South Korea	Share	14.0	14.9	13.0	12.3	17.8
Subject sources	Share	38.4	46.2	46.3	39.1	45.6
Nonsubject sources	Share	7.7	9.5	9.2	6.6	5.4
All import sources	Share	46.0	55.7	55.5	45.7	51.0
All sources	Share	100.0	100.0	100.0	100.0	100.0

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

Note: U.S. producer data includes U.S. producers' U.S. shipments and U.S.-origin hydraulic cylinders exported from the United States and subsequently re-imported by U.S. importers.

Figure 4.5 Hydraulic cylinders: Apparent U.S. consumption based on quantity, by source and period



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

Note: U.S. producer data includes U.S. producers' U.S. shipments and U.S.-origin hydraulic cylinders exported from the United States and subsequently re-imported by U.S. importers.

Value

Table 4.13 and figure 4.6 present data on apparent U.S. consumption and U.S. market shares by value for hydraulic cylinders. U.S. consumption, by value, decreased by 10.8 percent from 2023 to 2025, but was 9.0 percent higher in interim 2026 compared to interim 2025. During the same period, U.S. producers' market share decreased from 59.8 percent to 50.9 percent, and was lower in interim 2026 than in interim 2025. The share of subject imports increased from 31.1 percent to 36.3 percent from 2023 to 2025 and was higher in interim 2026 than in interim 2025. During 2023 to 2025, the market share of subject imports from Canada, China, India, and Mexico increased, while it decreased for South Korea.

Table 4.13 Hydraulic cylinders: Apparent U.S. consumption and market shares based on value, by source and period

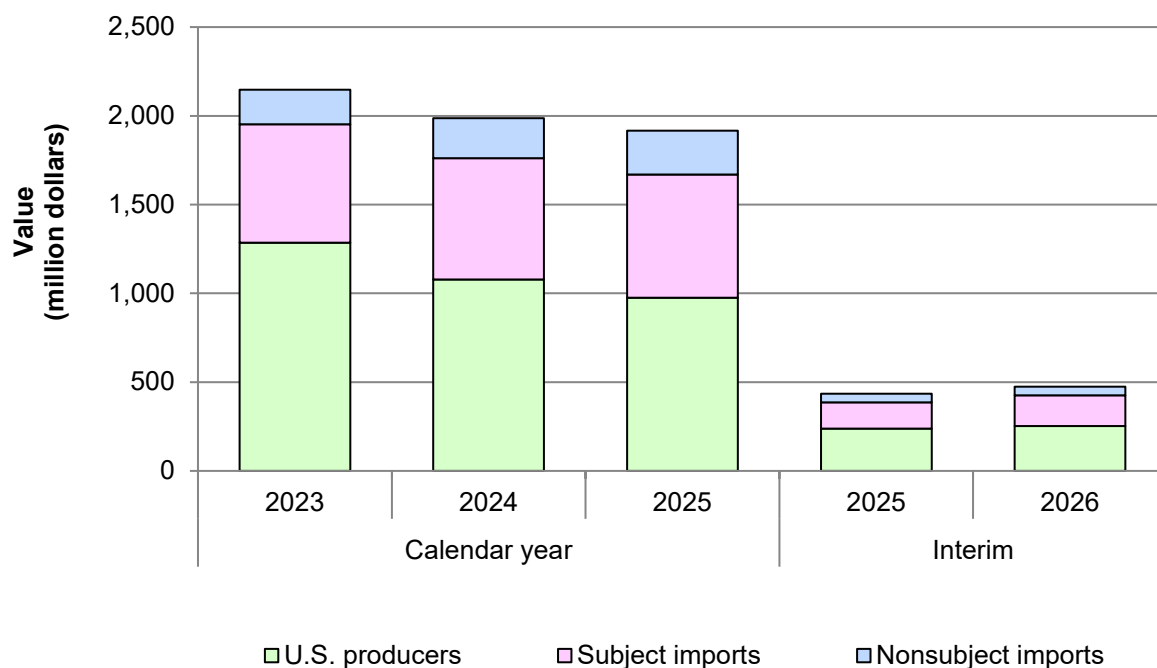
Value in 1,000 dollars; shares in percent; interim is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers	Value	1,285,113	1,078,743	975,504	238,361	253,558
Canada	Value	124,823	122,549	124,663	32,957	35,336
China	Value	149,073	173,395	161,695	46,291	36,838
India	Value	42,943	53,668	57,048	10,451	16,579
Mexico	Value	62,589	105,931	181,137	23,454	31,724
South Korea	Value	288,363	227,103	170,081	34,298	50,904
Subject sources	Value	667,791	682,646	694,625	147,450	171,381
Nonsubject sources	Value	195,138	225,033	246,017	49,372	49,574
All import sources	Value	862,929	907,679	940,642	196,823	220,955
All sources	Value	2,148,042	1,986,422	1,916,146	435,184	474,513
U.S. producers	Share	59.8	54.3	50.9	54.8	53.4
Canada	Share	5.8	6.2	6.5	7.6	7.4
China	Share	6.9	8.7	8.4	10.6	7.8
India	Share	2.0	2.7	3.0	2.4	3.5
Mexico	Share	2.9	5.3	9.5	5.4	6.7
South Korea	Share	13.4	11.4	8.9	7.9	10.7
Subject sources	Share	31.1	34.4	36.3	33.9	36.1
Nonsubject sources	Share	9.1	11.3	12.8	11.3	10.4
All import sources	Share	40.2	45.7	49.1	45.2	46.6
All sources	Share	100.0	100.0	100.0	100.0	100.0

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

Note: U.S. producer data includes U.S. producers' U.S. shipments and U.S.-origin hydraulic cylinders exported from the United States and subsequently re-imported by U.S. importers.

Figure 4.6 Hydraulic cylinders: Apparent U.S. consumption based on value, by source and period



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

Note: U.S. producer data includes U.S. producers' U.S. shipments and U.S.-origin hydraulic cylinders exported from the United States and subsequently re-imported by U.S. importers.

Part 5: Pricing data

Factors affecting prices

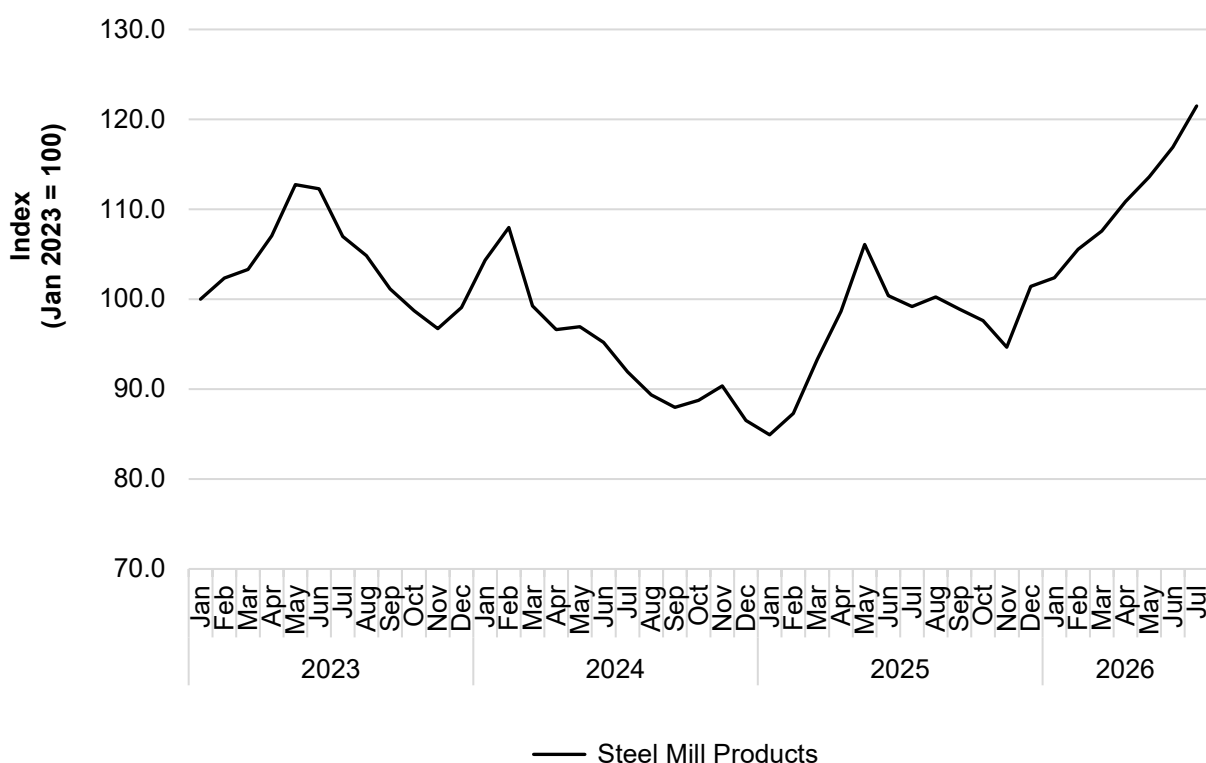
Raw material costs

Hydraulic cylinders are made primarily of steel, shaped through extensive machining and other manufacturing processes. The barrel is typically cold-drawn seamless or welded steel mechanical tubing; the piston rod is typically cold-rolled solid or hollow steel bar, or cold-rolled or cold-drawn steel mechanical tubing; and the piston is typically made from a high-strength material such as steel or cast iron.

The producer price index (“PPI”) for steel mill products (table 5.1 and figure 5.1) rose in early 2023, reflecting continued post-pandemic price strength, before falling steadily through November 2023. Prices recovered during December 2023 through February 2024 but then fluctuated downwards for the remainder of the year. Prices bottomed out further in January 2025, before beginning a sustained climb, which eased somewhat over the summer and fall, and then accelerated again heading into 2026.

Raw materials, as a share of U.S. producers’ cost of goods sold (“COGS”), steadily declined from 57.4 percent in 2023 to 53.0 percent in 2025, and were 54.2 percent in January to March 2026.

Figure 5.1 Hydraulic cylinders: Raw material prices for steel mill products, by month



Source: U.S. Bureau of Labor Statistics, Producer Price Index by Commodity: Metals and Metal Products: Steel Mill Products ***, retrieved from FRED, Federal Reserve Bank of St. Louis;
<https://fred.stlouisfed.org/series/WPU1017>, August 27, 2026.

Table 5.1 Hydraulic cylinders: Raw material prices for steel mill products, by month

Index in percent

Month	2023	2024	2025	2026
January	100.00	104.34	84.92	102.39
February	102.35	107.95	87.29	105.55
March	103.30	99.24	93.29	107.58
April	107.04	96.61	98.64	110.87
May	112.73	96.93	106.08	113.60
June	112.27	95.21	100.39	116.90
July	106.96	91.91	99.19	121.49
August	104.84	89.37	100.24	NA
September	101.14	87.97	98.88	NA
October	98.73	88.77	97.61	NA
November	96.74	90.36	94.65	NA
December	99.06	86.52	101.42	NA

Source: U.S. Bureau of Labor Statistics, Producer Price Index by Commodity: Metals and Metal Products: Steel Mill Products ***, retrieved from FRED, Federal Reserve Bank of St. Louis;
<https://fred.stlouisfed.org/series/WPU1017>, August 27, 2026.

Note: Index 1982=100, Not Seasonally Adjusted

Transportation costs to the U.S. market

Transportation costs for hydraulic cylinders shipped from subject countries to the United States averaged 0.5 percent for Canada, 3.9 percent for China, 3.5 percent for India, 1.5 percent for Mexico, and 1.3 percent for South Korea during 2025. These estimates were derived from official import data and represent the transportation and other charges on imports.¹

U.S. inland transportation costs

Most responding U.S. producers (18 of 26) reported that their customers typically arrange transportation themselves. Most responding importers (47 of 67) reported that they typically arrange transportation to their customers. Most U.S. producers reported that their U.S. inland transportation costs ranged from 1 to 10 percent while most importers reported costs of 2 to 20 percent.

Pricing practices

Pricing methods

U.S. producers and importers reported setting prices using transaction-by-transaction negotiations, contracts, price lists, and other methods (table 5.2). Most responding firms indicated using more than one method; U.S. producers most often reported transaction-by-transaction negotiations (16 of 27 firms), followed closely by contracts (14 firms) and set price lists (12 firms). Among importers, set price lists were the most frequently cited method (41 of 67 firms), followed by transaction-by-transaction negotiations (27 firms) and contracts (20 firms).

Hydraulic cylinders are sold under long-term contracts, annual contracts, short-term contracts, and spot sales (table 5.3). U.S. producers reported a relatively even split across sale types, with spot sales and annual contracts being slightly more common. Subject importers, by contrast, relied heavily on long-term contracts, which accounted for 66.5 percent of their sales.

¹ 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 number 8412.21.0015, 8412.21.0030, 8412.21.0045, 8412.21.0060, 8412.21.0075.

Table 5.2 Hydraulic cylinders: Count of U.S. producers' and importers' reported price setting methods

Method	U.S. producers	U.S. importers
Transaction-by-transaction	16	27
Contract	14	20
Set price list	12	41
Other	8	13
Responding firms	27	67

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.

Table 5.3 Hydraulic cylinders: U.S. producers' and subject U.S. importers' shares of commercial U.S. shipments by type of sale, 2025

Share in percent

Sale type	U.S. producers	Subject U.S. importers
Long-term contracts	22.2	66.5
Annual contract	26.3	5.7
Short-term contracts	22.6	11.5
Spot sales	28.9	16.3
All sales types	100.0	100.0

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

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

U.S. producers' and importers' contract provisions were broadly similar. Price renegotiation and indexing to raw material costs were common features of contracts for both U.S. producers and importers, generally becoming more prevalent as contract length increased. U.S. producers' contracts showed a relatively balanced mix of fixed-quantity, fixed-price, and fixed-both provisions across all contract durations, while importers' contracts leaned more heavily toward fixed-price terms, particularly for one-year agreements, with fixed-quantity provisions appearing much less frequently.

Sales terms and discounts

U.S. producers and importers typically quote prices on an f.o.b. basis. Around a third of U.S. producers and half of importers reported no discount policy. Of the firms that did offer discounts, quantity discounts were more common than total volume. U.S. producers also reported price adjustment mechanisms for cost inflations or reductions.

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 hydraulic cylinders products shipped to unrelated U.S. customers during January 2023 to March 2026. Firms that imported these products from Canada, China, India, Mexico, and South Korea for their own use were requested to provide import purchase cost data.

Hydraulic Cylinders: Summary of pricing product characteristics

Description	Product 1	Product 2	Product 3	Product 4
Barrel / Rod Material Type	Not Stainless Steel	Not Stainless Steel	Not Stainless Steel	Not Stainless Steel
Cylinder Type	Welded	Welded	Welded	Tie Rod
Barrel Wall Thickness	.2-.3"	.35-.5"	0.20-0.40"	.175-.2.25"
Bore Inside Diameter	3.5-4.0"	4.5-6.0"	4.0-5.0"	1.8-2.2"
Piston Rod Diameter	1.75-2.25"	2.5-3.0"	3.0-3.5"	1.0-1.5"
Retract Length	17-21"	34-63"	146-166"	14-17"
Length of Stroke	8.0-9.0"	24-48"	120-140"	4-6"
Single vs. Double-Acting	Double Acting	Double Acting	Double Acting	Double Acting
Sensors	No	No	No	No
Valves	No	1-2	Up to 1	No
Hydraulic Line	No	No	Yes	No

Price data

12 U.S. producers and 38 importers provided usable pricing data² 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. commercial shipments of hydraulic cylinders, *** percent of imports from Canada, *** percent of imports from China, *** percent of imports from India, *** percent of imports from Mexico , and *** percent of imports from South Korea in 2025.⁴ Price data for products 1-4 are presented in tables 5.4 to 5.8 and figures 5.2 to 5.5.

² Importer ***. Staff removed its pricing data as not being comparable.

Importer ***. Staff removed its pricing data as not being comparable.

Importer ***, staff removed the singular unit for being significantly more expensive than all other reported prices.

Importer ***, staff removed the two units for being significantly more expensive than all other reported prices.

All pricing data from importer ***.

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 Pricing coverage is based on imports reported in questionnaires which represent a small share of total imports.

Table 5.4 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	Canada price	Canada quantity	Canada margin	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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.4 Continued

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	India price	India quantity	India margin	Mexico price	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.4 Continued

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

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	South Korea price	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.2 Hydraulic cylinders: 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.

Table 5.5 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 2 and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	Canada price	Canada quantity	Canada margin	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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.5 Continued

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	India price	India quantity	India margin	Mexico price	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.5 Continued

Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 2 and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	South Korea price	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.3 Hydraulic cylinders: 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.

Table 5.6 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 3 and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	Canada price	Canada quantity	Canada margin	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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.6 Continued

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	India price	India quantity	India margin	Mexico price	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.6 Continued

Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 3 and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	South Korea price	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.4 Hydraulic cylinders: 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.

Table 5.7 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 4 and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	Canada price	Canada quantity	Canada margin	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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.7 Continued

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	India price	India quantity	India margin	Mexico price	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.7 Continued

Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 4 and margins of underselling/(overselling), by source and quarter

Quantity in units; Prices in dollars per unit; Margins in percent

Period	U.S. price	U.S. quantity	South Korea price	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.5 Hydraulic cylinders: 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.

Import purchase cost data

Twenty importers reported useable import purchase cost data for products 1-4.⁵ Purchase cost data reported by these firms accounted for approximately *** percent of imports from Canada, *** percent of imports from China, *** percent of imports from India, *** percent of imports from Mexico, and *** percent of imports from South Korea in 2025. Landed duty-paid purchase cost data for imports from Canada, China, India, Mexico, and South Korea are presented in tables 5.8 to 5.11, along with U.S. producers' sales prices.⁶

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

Fifteen of 34 importers reported that they incurred additional costs beyond landed duty-paid costs by importing hydraulic cylinders themselves rather than purchasing from a U.S. producer or U.S. importer. Of these, nine importers estimated the total additional cost incurred; estimates ranged from 1 to 50 percent compared to the landed duty-paid value. Firms were also asked to identify specific additional costs they incurred as a result of importing hydraulic cylinders. Reported costs include tariffs and other import duties, freight charges, and a requirement to maintain a higher inventory level due to long lead times.

Firms were also asked to describe how these additional costs incurred by importing hydraulic cylinders themselves compares with additional costs incurred when purchasing from a U.S. producer or U.S. importer. Firms stated that carrying costs would be lower when purchasing from a US producer or importer, because the shorter lead time would require less inventory. There are also additional costs associated with warehousing, freight, inventory management, internal logistics, and import administration.

⁵ Importer ***.

The high purchase costs for product 2 and 3 from Canada are entirely from importer ***. Staff have requested additional information from the firm in order to determine if the data should be removed.

⁶ Landed duty paid (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.

Twenty-four of 32 responding importers reported that they compare costs of importing to the cost of purchasing from a U.S. producer in determining whether to import hydraulic cylinders, 19 importers compare costs to purchasing from a U.S. importer, and 9 importers do not compare costs of purchasing from either U.S. producers or importers.

Thirty-one importers identified benefits from importing hydraulic cylinders themselves instead of purchasing from U.S. producers or importers, including many that cited lower prices. Several importers *** reported that there is limited domestic production capability for their product or that foreign suppliers had higher quality. Importer *** reported that U.S. producers favor long term partnerships with OEM's and large companies, which does not allow a competitive position for small and middle market companies.

Firms were also asked whether the import cost (both excluding and including additional costs) of hydraulic cylinders they imported are lower than the price of purchasing hydraulic cylinders from a U.S. producer or importer.

Seventeen importers estimated that they saved between 5 and 48 percent of the purchase price by importing hydraulic cylinders rather than purchasing from a U.S. importer, and 18 reported saving between 9 and 86 percent compared to purchasing the product from a U.S. producer.⁷

⁷ Thirteen firms reported that they based their estimates on previous company transactions, 17 reported basing their estimates on market research, and 5 reported other bases for their estimates, including supplier quotations, commodity knowledge, and feedback from current and new customers.

Table 5.8 Hydraulic cylinders: Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	Canada unit LDP value	Canada quantity	Canada differential	China unit LDP value	China quantity	China 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.8 Continued

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	India unit LDP value	India quantity	India differential	Mexico unit LDP value	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.8 Continued

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

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	South Korea unit LDP value	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.6 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported product 1, by source and 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.

Table 5.9 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 2 and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	Canada unit LDP value	Canada quantity	Canada differential	China unit LDP value	China quantity	China 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.9 Continued

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	India unit LDP value	India quantity	India differential	Mexico unit LDP value	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.9 Continued

Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 2 and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	South Korea unit LDP value	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.7 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported product 2, and margins of underselling/(overselling), by source and 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.

Table 5.10 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 3 and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	Canada unit LDP value	Canada quantity	Canada differential	China unit LDP value	China quantity	China 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.10 Continued

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	India unit LDP value	India quantity	India differential	Mexico unit LDP value	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.10 Continued

Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 3 and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	South Korea unit LDP value	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.8 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported product 3, and margins of underselling/(overselling), by source and quarter

U.S. price and import purchase cost of product 3

* * * * *

Volume of Product 3

* * * * *

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

Table 5.11 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 4 and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	Canada unit LDP value	Canada quantity	Canada differential	China unit LDP value	China quantity	China 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table 5.11 Continued

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	India unit LDP value	India quantity	India differential	Mexico unit LDP value	Mexico quantity	Mexico 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	***	***	***	***	***	***	***	***
2026 Q1	***	***	***	***	***	***	***	***

Table continued on next page.

Table 5.11 Continued

Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported Product 4 and margins of underselling/(overselling), by source and quarter

Quantity in units; Price and unit LDP value in dollars per unit; Differentials in percent

Period	U.S. price	U.S. quantity	South Korea unit LDP value	South Korea quantity	South Korea 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	***	***	***	***	***
2026 Q1	***	***	***	***	***

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

Figure 5.9 Hydraulic cylinders: Weighted-average f.o.b. prices and quantities of domestic and imported product 4, and margins of underselling/(overselling), by source and 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.

Price and purchase cost trends

In general, price changes were mixed during January 2023 to March 2026. Tables 5.12 and 5.13 summarize the price trends by country and by product. As shown in the tables, changes in domestic prices ranged from an increase of *** percent to a decrease of *** percent during January 2023 to March 2026, while changes in subject import prices ranged from an increase of *** percent to a decrease of *** percent. Landed duty-paid cost changes ranged from an increase of *** percent to a decrease of *** percent.

Although the four pricing products were narrowly defined, reported products served a variety of different end uses. Pricing products reported by firms can differ substantially in intended application, complexity, and manufacturing cost, factors that likely contribute to the price variation observed across responding firms.

Prices reported by U.S. producers and importers varied significantly, even within the same pricing product. For example, within ***. This more than fourfold price difference illustrates how end use, production volume, and degree of customization can affect price even among cylinders reported under the same pricing product.

This price variation also reflects fundamental differences in how firms manufacture hydraulic cylinders. Some U.S. producers and importers manufacture cylinders at high volume, producing standardized units by the thousands, which allows them to benefit from economies of scale and offer lower per-unit prices. Other firms instead specialize in highly customized, made-to-order cylinders, often producing fewer than a hundred units of a given specification. These custom products typically involve more manual engineering, possibly tighter tolerance requirements, or application-specific design work, all of which raise per-unit production costs. Given these differences in manufacturing approach and scale, price variation among reported products, even within the same pricing product, is to be expected.

Table 5.12 Hydraulic cylinders: Summary of price data, by product and source, January 2023 through March 2026

Prices in dollars per unit; Quantity in units; Change in percent

Product	Source	Number of quarters	Quantity	Low price	High price	First quarter price	Last quarter price	Change over period
Product 1	United States	13	***	***	***	***	***	***
Product 1	Canada	13	***	***	***	***	***	***
Product 1	China	13	***	***	***	***	***	***
Product 1	India	13	***	***	***	***	***	***
Product 1	Mexico	2	***	***	***	***	***	***
Product 1	South Korea	—	***	***	***	***	***	***
Product 2	United States	13	***	***	***	***	***	***
Product 2	Canada	13	***	***	***	***	***	***
Product 2	China	13	***	***	***	***	***	***
Product 2	India	11	***	***	***	***	***	***
Product 2	Mexico	13	***	***	***	***	***	***
Product 2	South Korea	13	***	***	***	***	***	***
Product 3	United States	13	***	***	***	***	***	***
Product 3	Canada	13	***	***	***	***	***	***
Product 3	China	13	***	***	***	***	***	***
Product 3	India	1	***	***	***	***	***	***
Product 3	Mexico	13	***	***	***	***	***	***
Product 3	South Korea	—	***	***	***	***	***	***
Product 4	United States	13	***	***	***	***	***	***
Product 4	Canada	13	***	***	***	***	***	***
Product 4	China	13	***	***	***	***	***	***
Product 4	India	13	***	***	***	***	***	***
Product 4	Mexico	—	***	***	***	***	***	***
Product 4	South Korea	—	***	***	***	***	***	***

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

Table 5.13 Hydraulic cylinders: Summary of cost data, by product and source, January 2023 through March 2026

Unit LDP values in dollars per unit; Quantity in units; Change in percent

Product	Source	Number of quarters	Quantity	Low cost	High cost	First quarter cost	Last quarter cost	Change over period
Product 1	United States	13	***	***	***	***	***	***
Product 1	Canada	—	***	***	***	***	***	***
Product 1	China	13	***	***	***	***	***	***
Product 1	India	13	***	***	***	***	***	***
Product 1	Mexico	1	***	***	***	***	***	***
Product 1	South Korea	13	***	***	***	***	***	***
Product 2	United States	13	***	***	***	***	***	***
Product 2	Canada	13	***	***	***	***	***	***
Product 2	China	13	***	***	***	***	***	***
Product 2	India	—	***	***	***	***	***	***
Product 2	Mexico	13	***	***	***	***	***	***
Product 2	South Korea	13	***	***	***	***	***	***
Product 3	United States	13	***	***	***	***	***	***
Product 3	Canada	13	***	***	***	***	***	***
Product 3	China	12	***	***	***	***	***	***
Product 3	India	—	***	***	***	***	***	***
Product 3	Mexico	13	***	***	***	***	***	***
Product 3	South Korea	—	***	***	***	***	***	***
Product 4	United States	13	***	***	***	***	***	***
Product 4	Canada	—	***	***	***	***	***	***
Product 4	China	—	***	***	***	***	***	***
Product 4	India	—	***	***	***	***	***	***
Product 4	Mexico	—	***	***	***	***	***	***
Product 4	South Korea	13	***	***	***	***	***	***

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 2026.

Price and purchase cost comparisons

Price comparisons

As shown in tables 5.14 to 5.16, prices for product imported from subject countries were below those for U.S.-produced product in 132 of 183 instances (***) units); margins of underselling ranged from *** to *** percent.

Prices for product imported from Canada were below those for U.S.-produced product in 36 of 52 instances (***) units); margins of underselling ranged from *** to *** percent. In the remaining 16 instances (***) units), prices for product from Canada were between *** and *** percent above prices for the domestic product.

Prices for product imported from China were below those for U.S.-produced product in 39 of 52 instances (***) units); margins of underselling ranged from *** to *** percent. In the remaining 13 instances (***) units), prices for product from China were between *** and *** percent above prices for the domestic product.

Prices for product imported from India were below those for U.S.-produced product in 36 of 38 instances (***) units); margins of underselling ranged from *** to *** percent. In the remaining 2 instances (***) units), prices for product from India were between *** and *** percent above prices for the domestic product.

Prices for product imported from Mexico were below those for U.S.-produced product in 21 of 28 instances (***) units); margins of underselling ranged from *** to *** percent. In the remaining 7 instances (***) units), prices for product from Mexico were between *** and *** percent above prices for the domestic product.

Prices for product imported from South Korea were above those for U.S.-produced product in all 13 instances (***) units); prices for product from South Korea were between *** and *** percent above prices for the domestic product.

Table 5.14 Hydraulic cylinders: Instances and quantities of underselling/overselling and the range and average of margins, by product

Quantity in units; Margins in percent

Products	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
Product 1	Underselling	14	***	***	***	***
Product 2	Underselling	41	***	***	***	***
Product 3	Underselling	40	***	***	***	***
Product 4	Underselling	37	***	***	***	***
All products	Underselling	132	***	***	***	***
Product 1	Overselling	27	***	***	***	***
Product 2	Overselling	22	***	***	***	***
Product 3	Overselling	—	***	***	***	***
Product 4	Overselling	2	***	***	***	***
All products	Overselling	51	***	***	***	***

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 5.15 Hydraulic cylinders: Instances and quantities of underselling/overselling and the range and average of margins, by source

Quantity in units; Margins in percent

Sources	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
Canada	Underselling	36	***	***	***	***
China	Underselling	39	***	***	***	***
India	Underselling	36	***	***	***	***
Mexico	Underselling	21	***	***	***	***
South Korea	Underselling	—	***	***	***	***
All subject sources	Underselling	132	***	***	***	***
Canada	Overselling	16	***	***	***	***
China	Overselling	13	***	***	***	***
India	Overselling	2	***	***	***	***
Mexico	Overselling	7	***	***	***	***
South Korea	Overselling	13	***	***	***	***
All subject sources	Overselling	51	***	***	***	***

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 5.16 Hydraulic cylinders: Instances and quantities of underselling/overselling and the range and average of margins, by period

Quantity in units; Margins in percent

Period	Type	Number of instances	Quantity	Average margin	Min margin	Max margin
2023	Underselling	42	***	***	***	***
2024	Underselling	41	***	***	***	***
2025	Underselling	38	***	***	***	***
January through March 2026	Underselling	11	***	***	***	***
All periods	Underselling	132	***	***	***	***
2023	Overselling	15	***	***	***	***
2024	Overselling	15	***	***	***	***
2025	Overselling	17	***	***	***	***
January through March 2026	Overselling	4	***	***	***	***
All periods	Overselling	51	***	***	***	***

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 tables 5.17 to 5.19, landed duty-paid costs for hydraulic cylinders imported from Canada were above the sales price for U.S.-produced product in all 26 instances (*** units), by between *** and *** percent.

Landed duty-paid costs for hydraulic cylinders imported from China were below the sales price for U.S.-produced product in 29 of 38 instances (*** units); price-cost differentials ranged from *** to *** percent. In the remaining 9 instances (*** units), landed duty-paid costs for hydraulic cylinders from China were between *** and *** percent above sales prices for the domestic product.

Landed duty-paid costs for hydraulic cylinders imported from India were below the sales price for U.S.-produced product in all 13 of 13 instances (*** units); price-cost differentials ranged from *** to *** percent.

Landed duty-paid costs for hydraulic cylinders imported from Mexico were below the sales price for U.S.-produced product in 21 of 27 instances (*** units); price-cost differentials ranged from *** to *** percent. In the remaining 6 instances (*** units), landed duty-paid costs for hydraulic cylinders from Mexico were between *** and *** percent above sales prices for the domestic product.

Landed duty-paid costs for hydraulic cylinders imported from South Korea were below the sales price for U.S.-produced product in 12 of 39 instances (** units); price-cost differentials ranged from ** to ** percent. In the remaining 27 instances (** units), landed duty-paid costs for hydraulic cylinders from South Korea were between ** and ** percent above sales prices for the domestic product.

Table 5.17 Hydraulic cylinders: Instances and quantities of lower/(Higher) average unit purchase costs compared to U.S. prices and the range and average of price/cost differentials, by product

Quantity in units; Differentials in percent

Products	Type	Number of instances	Quantity	Average differential	Min differential	Max differential
Product 1	Lower than US	17	**	**	**	**
Product 2	Lower than US	33	**	**	**	**
Product 3	Lower than US	25	**	**	**	**
Product 4	Lower than US	—	**	**	**	**
All products	Lower than US	75	**	**	**	**
Product 1	Higher than US	23	**	**	**	**
Product 2	Higher than US	19	**	**	**	**
Product 3	Higher than US	13	**	**	**	**
Product 4	Higher than US	13	**	**	**	**
All products	Higher than US	68	**	**	**	**

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 5.18 Hydraulic cylinders: Instances and quantities of lower/(Higher) average unit purchase costs compared to U.S. prices and the range and average of price/cost differentials, by source

Quantity in units; Differentials in percent

Sources	Type	Number of instances	Quantity	Average differential	Mln differential	Max differential
Canada	Lower than US	—	***	***	***	***
China	Lower than US	29	***	***	***	***
India	Lower than US	13	***	***	***	***
Mexico	Lower than US	21	***	***	***	***
South Korea	Lower than US	12	***	***	***	***
All subject sources	Lower than US	75	***	***	***	***
Canada	Higher than US	26	***	***	***	***
China	Higher than US	9	***	***	***	***
India	Higher than US	—	***	***	***	***
Mexico	Higher than US	6	***	***	***	***
South Korea	Higher than US	27	***	***	***	***
All subject sources	Higher than US	68	***	***	***	***

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 5.19 Hydraulic cylinders: Instances and quantities of lower/(Higher) average unit purchase costs compared to U.S. prices and the range and average of price/cost differentials, by period

Quantity in units; Differentials in percent

Period	Type	Number of instances	Quantity	Average differential	Min differential	Max differential
2023	Lower than US	24	***	***	***	***
2024	Lower than US	22	***	***	***	***
2025	Lower than US	23	***	***	***	***
January through March 2026	Lower than US	6	***	***	***	***
All periods	Lower than US	75	***	***	***	***
2023	Higher than US	21	***	***	***	***
2024	Higher than US	22	***	***	***	***
2025	Higher than US	21	***	***	***	***
January through March 2026	Higher than US	4	***	***	***	***
All periods	Higher than US	68	***	***	***	***

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

Lost sales and lost revenue

The Commission requested that U.S. producers of hydraulic cylinders report purchasers with which they experienced instances of lost sales or revenue due to competition from imports of hydraulic cylinders from Canada, China, India, Mexico, and South Korea during January 2023 to March 2026. Of the 27 responding U.S. producers, 16 reported that they had to reduce prices, 10 reported that they had to roll back announced price increases, and 20 firms reported that they had lost sales. Seven U.S. producers submitted lost sales and lost revenue allegations. The seven responding U.S. producers identified 97 firms with which they lost sales and revenue and a majority of the allegations concerned imports originating from China.

Staff contacted 85 purchasers and received responses from 12 purchasers. Responding purchasers reported purchasing 676,489 units of hydraulic cylinders during January 2023 to March 2026 (table 5.22).

During 2025, responding purchasers purchased 51.0 percent from U.S. producers, 11.6 percent from Canada, 6.1 percent from China, 2.1 percent from India, 6.4 percent from Mexico, 17.3 percent from South Korea, 5.3 percent from nonsubject countries, and 0.2 percent from “unknown source” countries. Purchasers were asked about changes in their purchasing patterns from different sources since January 1, 2023 (table 5.20). Purchasers reported purchasing mostly standalone hydraulic cylinders (table 5.21).

Of the responding purchasers, seven reported decreasing purchases from domestic producers, three reported increasing purchases, one reported no change, and one did not purchase any domestic product. Explanations for decreasing purchases of domestic product included lower market demand: purchaser *** reported that in 2024 it experienced long lead times for U.S. produced product and it did not re-order due to price increases. Purchaser *** reported that domestic products had higher pricing, poor delivery, and poor communication, while Purchaser *** reported procuring cylinders from other locations due to performance and cost.

Table 5.20 hydraulic cylinders: Count of purchasers' responses regarding changes in purchase patterns from U.S., subject, and nonsubject countries

Source of purchases	Steadily Increase	Fluctuate Up	No change	Fluctuate Down	Steadily Decrease	Did not purchase
United States	0	3	1	3	4	1
Canada	0	5	1	0	1	5
China	2	2	2	2	3	1
India	2	2	2	1	0	5
Mexico	0	3	1	1	0	7
South Korea	1	2	2	0	1	6
All other sources	0	1	2	3	1	4
Sources unknown	0	0	3	1	0	7

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

Table 5.21 Hydraulic cylinders: U.S. purchaser's' purchases and imports of hydraulic cylinders, by level of processing in 2025

Level of processing	Quantity	Share
Components	***	***
Complete standalone	***	***
Complete attached	***	***
All product forms	196,382	100.0

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

Of the 12 purchasers, 10 reported that, since 2023, they had purchased imported hydraulic cylinders from subject countries instead of U.S.-produced product (table 5.23). Nine of these purchasers reported that subject import prices were lower than U.S.-produced product, and five of these purchasers reported that price was a primary reason for the decision to purchase imported product rather than U.S.-produced product. Four purchasers estimated the quantity of hydraulic cylinders from subject countries purchased instead of domestic product; quantities ranged from *** units to *** units. Purchasers identified several non-price reasons for purchasing imported rather than U.S.-produced product.

Purchaser *** reported that it is a U.S. distributor for a company in South Korea, so it must purchase from its South Korean supplier.

Purchaser *** reported that its purchasing strategy is to dual or triple source critical components to ensure component availability.

Purchaser *** reported that its purchasing decisions were driven by strategic sourcing considerations rather than price alone. It selected import suppliers based on a combination of factors, including application-specific technical expertise, available production capacity, reliable delivery performance, and consistent product quality.

Purchaser *** reported that its prior domestic suppliers were severely underperforming in quality and delivery reliability and that past supply disruptions had resulted in production line shutdowns. It also encountered instances of substantial unilateral price increases, including situations where domestic suppliers indicated they would not continue shipments unless the higher pricing was accepted. It did state that price was a tertiary consideration.

Purchaser *** reported that sometimes imports are more expensive than U.S.-made products, and sometimes they are cheaper. It further reported that, because it sells a large scope of products, price is not its primary purchasing factor, nor does it always know if it is purchasing a lower priced product.

Of the 11 responding purchasers, none reported that U.S. producers had reduced prices in order to compete with lower-priced imports from subject countries; five reported that they did not know (table 5.25).

Table 5.22 Hydraulic cylinders: U.S. purchasers' reported purchases and imports, by firm and source

Quantity in units; Change in shares in percentage points

Firm	Domestic quantity	Subject quantity	All other quantity	Change in domestic share	Change in subject share	Change in all other share
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
***	***	***	***	***	***	***
All firms	333,791	294,866	47,832	1.8	1.1	(2.9)

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

Table 5.23 Hydraulic cylinders: U.S. purchasers' responses to purchasing subject imports instead of domestic product, by firm

Quantity in 1,000 pounds

Firm	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity	Narrative on reasons for purchasing imports
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***

Table Continues

Table 5.23 Continued.

Quantity in 1,000 pounds

Firm	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity	Narrative on reasons for purchasing imports
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
***	***	***	***	***	***
All firms	Yes: 10; No: 2	Yes: 9; No: 1	Yes: 5; No: 5	***	NA

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

Table 5.24 Hydraulic cylinders: U.S. purchasers' responses to purchasing subject imports instead of domestic product, by source

Count in number of firms reporting; Quantity in 1,000 pounds

Source	Purchased subject imports instead of domestic	Imports priced lower	Choice based on price	Quantity
Canada	5	4	2	***
China	8	6	3	***
India	5	3	1	***
Mexico	2	1	0	***
South Korea	5	4	1	***
Subject sources	10	9	5	***

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

Table 5.25 Hydraulic cylinders: U.S. purchasers' responses to U.S. producer price reductions, by firm

Count in number of firms reporting; Price reductions in percent

Firm	Producers lowered prices	Price reduction	Narrative on producer price reductions
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
***	***	***	***
All firms	Yes: 0; No: 6	***	NA

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

Part 6: Financial experience of U.S. producers

Background¹

Twenty six U.S. producers provided usable financial results on their hydraulic cylinders operations: Aggressive Hydraulics, Aurelius, Bailey, Beiler Hydraulics, Bobalee Hydraulics, Bolzoni, Columbus Hydraulics, Cross Manufacturing, Custom Hoists, Deere & Company, Hol-Mac, Industrial Hard Chrome, Jarp, Ligon, Ognibene, Prince, PTC, Rosenboom, Scot Industries, Stillwell, Texas Hydraulics, TMS Hydraulics, V&P Hydraulic, West Craft Manufacturing, Wipro, and York PMH.² Most of the responding U.S. producers provided their financial data on the basis of GAAP.³ Revenue primarily reflects commercial sales but also includes transfers and internal consumption. Collectively, internal consumption and transfers accounted for 17.5 percent of net sales quantity in 2025.

Figure 6.1 presents the four largest firms' shares of the total reported net sales quantity in 2025.

¹ The following abbreviations are used in the tables and/or text of this section: generally accepted accounting principles ("GAAP"), fiscal year ("FY"), net sales ("NS"), cost of goods sold ("COGS"), selling, general, and administrative expenses ("SG&A expenses"), average unit values ("AUVs"), research and development expenses ("R&D expenses"), and return on assets ("ROA").

² *** only manufacture hydraulic cylinder components.

³ *** reported its financial results on a cash basis and *** reported their financial results on a tax accrual basis.

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

* * * * *

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

Operations on hydraulic cylinders

Table 6.1 presents aggregated data on U.S. producers' operations in relation to hydraulic cylinders, while table 6.2 presents corresponding changes in AUVs. Table 6.3 presents selected company-specific financial data for the largest four firms with data for all other responding firms shown in aggregate.

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

Quantity in 1,000 pounds; value in 1,000 dollars; ratio in percent; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
Commercial sales	Quantity	197,323	165,743	156,438	41,608	40,797
Internal consumption	Quantity	***	***	***	***	***
Transfers to related firms	Quantity	***	***	***	***	***
Total net sales	Quantity	241,608	202,767	189,671	49,955	50,894
Commercial sales	Value	1,048,223	891,281	817,915	203,803	211,378
Internal consumption	Value	***	***	***	***	***
Transfers to related firms	Value	***	***	***	***	***
Total net sales	Value	1,209,643	1,024,128	946,694	232,535	250,947
COGS: Raw materials	Value	550,426	450,900	396,613	97,019	103,224
COGS: Direct labor	Value	155,895	135,751	133,546	30,882	35,189
COGS: Other factory	Value	252,378	226,537	218,189	54,625	52,196
COGS: Total	Value	958,699	813,188	748,348	182,525	190,609
Gross profit or (loss)	Value	250,944	210,940	198,346	50,010	60,339
SG&A expenses	Value	95,343	98,382	95,292	23,320	24,378
Operating income or (loss)	Value	155,601	112,558	103,054	26,689	35,961
All other expenses/(income), net	Value	12,764	17,314	15,315	3,924	678
Net income or (loss)	Value	142,837	95,244	87,739	22,766	35,283
Depreciation/amortization	Value	32,809	34,090	35,866	8,542	9,098
Cash flow	Value	175,645	129,334	123,605	31,308	44,381
COGS: Raw materials	Ratio to NS	45.5	44.0	41.9	41.7	41.1
COGS: Direct labor	Ratio to NS	12.9	13.3	14.1	13.3	14.0
COGS: Other factory	Ratio to NS	20.9	22.1	23.0	23.5	20.8
COGS: Total	Ratio to NS	79.3	79.4	79.0	78.5	76.0
Gross profit	Ratio to NS	20.7	20.6	21.0	21.5	24.0
SG&A expense	Ratio to NS	7.9	9.6	10.1	10.0	9.7
Operating income or (loss)	Ratio to NS	12.9	11.0	10.9	11.5	14.3
Net income or (loss)	Ratio to NS	11.8	9.3	9.3	9.8	14.1

Table continued.

Table 6.1 (Continued) Hydraulic cylinders: U.S. producers' results of operations, by item and period

Share in percent; unit value in dollars per pound; count in number of firms reporting; interim is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
COGS: Raw materials	Share	57.4	55.4	53.0	53.2	54.2
COGS: Direct labor	Share	16.3	16.7	17.8	16.9	18.5
COGS: Other factory	Share	26.3	27.9	29.2	29.9	27.4
COGS: Total	Share	100.0	100.0	100.0	100.0	100.0
Commercial sales	Unit value	5.31	5.38	5.23	4.90	5.18
Internal consumption	Unit value	***	***	***	***	***
Transfers to related firms	Unit value	***	***	***	***	***
Total net sales	Unit value	5.01	5.05	4.99	4.65	4.93
COGS: Raw materials	Unit value	2.28	2.22	2.09	1.94	2.03
COGS: Direct labor	Unit value	0.65	0.67	0.70	0.62	0.69
COGS: Other factory	Unit value	1.04	1.12	1.15	1.09	1.03
COGS: Total	Unit value	3.97	4.01	3.95	3.65	3.75
Gross profit or (loss)	Unit value	1.04	1.04	1.05	1.00	1.19
SG&A expenses	Unit value	0.39	0.49	0.50	0.47	0.48
Operating income or (loss)	Unit value	0.64	0.56	0.54	0.53	0.71
Net income or (loss)	Unit value	0.59	0.47	0.46	0.46	0.69
Operating losses	Count	4	7	8	6	6
Net losses	Count	4	8	9	7	4
Data	Count	26	26	26	26	26

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

Note: Shares represent the share of COGS.

Table 6.2 Hydraulic cylinders: Changes in AUVs between comparison periods

Change in percent; interim is January through March

Item	2023 to 2025	2023 to 2024	2024 to 2025	Interim 2025 to interim 2026
Commercial sales	▼(1.6)	▲1.2	▼(2.8)	▲5.8
Internal consumption	***	***	***	***
Transfers to related firms	***	***	***	***
Total net sales	▼(0.3)	▲0.9	▼(1.2)	▲5.9
COGS: Raw materials	▼(8.2)	▼(2.4)	▼(6.0)	▲4.4
COGS: Direct labor	▲9.1	▲3.8	▲5.2	▲11.8
COGS: Other factory	▲10.1	▲7.0	▲3.0	▼(6.2)
COGS: Total	▼(0.6)	▲1.1	▼(1.6)	▲2.5

Table continued.

Table 6.2 (Continued) Hydraulic cylinders: Changes in AUVs between comparison periods

Change in dollars per pound; interim is January through March

Item	2023 to 2025	2023 to 2024	2024 to 2025	Interim 2025 to interim 2026
Commercial sales	▼(0.08)	▲0.07	▼(0.15)	▲0.28
Internal consumption	***	***	***	***
Transfers to related firms	***	***	***	***
Total net sales	▼(0.02)	▲0.04	▼(0.06)	▲0.28
COGS: Raw materials	▼(0.19)	▼(0.05)	▼(0.13)	▲0.09
COGS: Direct labor	▲0.06	▲0.02	▲0.03	▲0.07
COGS: Other factory	▲0.11	▲0.07	▲0.03	▼(0.07)
COGS: Total	▼(0.02)	▲0.04	▼(0.06)	▲0.09
Gross profit or (loss)	▲0.01	▲0.00	▲0.01	▲0.18
SG&A expense	▲0.11	▲0.09	▲0.02	▲0.01
Operating income or (loss)	▼(0.10)	▼(0.09)	▼(0.01)	▲0.17
Net income or (loss)	▼(0.13)	▼(0.12)	▼(0.01)	▲0.24

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

Note: Changes in unit values shown as “0.00” represent values greater than zero, but less than “0.005,” respectively. Period changes preceded by a “▲” represent an increase, while period changes preceded by a “▼” represent a decrease.

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

Net sales quantity

Quantity in 1,000 pounds; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	241,608	202,767	189,671	49,955	50,894

Table continued.

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

Net sales value

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	1,209,643	1,024,128	946,694	232,535	250,947

Table continued.

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

COGS

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	958,699	813,188	748,348	182,525	190,609

Table continued.

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

Gross profit or (loss)

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	250,944	210,940	198,346	50,010	60,339

Table continued.

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

SG&A expenses

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	95,343	98,382	95,292	23,320	24,378

Table continued.

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

Operating income or (loss)

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	155,601	112,558	103,054	26,689	35,961

Table continued.

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

Net income or (loss)

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	142,837	95,244	87,739	22,766	35,283

Table continued.

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

COGS to net sales ratio

Ratio in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	79.3	79.4	79.0	78.5	76.0

Table continued.

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

Gross profit or (loss) to net sales ratio

Ratio in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	20.7	20.6	21.0	21.5	24.0

Table continued.

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

SG&A expenses to net sales ratio

Ratio in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	7.9	9.6	10.1	10.0	9.7

Table continued.

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

Operating income or (loss) to net sales ratio

Ratio in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	12.9	11.0	10.9	11.5	14.3

Table continued.

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

Net income or (loss) to net sales ratio

Ratio in percent; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	11.8	9.3	9.3	9.8	14.1

Table continued.

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

Unit net sales value

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	5.01	5.05	4.99	4.65	4.93

Table continued.

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

Unit raw material costs

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	2.28	2.22	2.09	1.94	2.03

Table continued.

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

Unit direct labor costs

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	0.65	0.67	0.70	0.62	0.69

Table continued.

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

Unit other factory costs

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	1.04	1.12	1.15	1.09	1.03

Table continued.

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

Unit COGS

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	3.97	4.01	3.95	3.65	3.75

Table continued.

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

Unit gross profit or (loss)

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	1.04	1.04	1.05	1.00	1.19

Table continued.

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

Unit SG&A expenses

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	0.39	0.49	0.50	0.47	0.48

Table continued.

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

Unit operating income or (loss)

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	0.64	0.56	0.54	0.53	0.71

Table continued.

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

Unit net income or (loss)

Unit value in dollars per pound; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	0.59	0.47	0.46	0.46	0.69

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 industry's total net sales quantity and value declined from 2023 to 2025 but were higher in interim 2026 than in interim 2025. As shown in table 6.3, each of the largest four firms reported an overall decline in both net sales quantity and value from 2023 to 2025 and *** reported higher net sales quantity and value in interim 2026 than in interim 2025. The net sales AUV for the industry as a whole irregularly declined from 2023 to 2025 but was higher in interim 2026 than in interim 2025. On a company-by-company basis, *** reported overall declining unit sales value from 2023 to 2025 and *** reported higher unit sales value in interim 2026 than in interim 2025. ***.⁴

Cost of goods sold and gross profit or loss

Raw materials

Raw material costs represent the largest component of total COGS, accounting for over 50 percent of COGS throughout the period for which data were collected. On a per-unit basis, U.S. producers' raw materials costs declined from 2023 to 2025 but were higher in interim 2026 than in interim 2025. Raw material costs as a ratio to net sales declined from 2023 to 2025 and were lower in interim 2026 than in interim 2025. As shown in table 6.3, all four of the largest firms reported overall declining raw material costs per unit from 2023 to 2025, but higher raw material costs per unit in interim 2026 than in interim 2025.

The primary raw material inputs to manufacture hydraulic cylinders include a cylinder barrel (tube), piston rod, piston, end caps/cylinder head, hydraulic ports, and other material inputs such as ***. Table 6.4 presents raw materials by type in 2025.⁵

⁴ ***. Email from ***, August 21, 2026.

⁵ Appendix F presents COGS by raw material category, origin, and period.

Table 6.4 Hydraulic cylinders: U.S. producers' raw material costs in 2025

Value in 1,000 dollars; share of value in percent

Item	Value	Share of value
Cylinder barrel (Tube)	***	***
Piston Rod	***	***
Piston	***	***
End caps/cylinder head	***	***
Hydraulic ports	***	***
Other material inputs	***	***
All raw materials	***	100.0

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

Note: Table 6.4 excludes raw material costs for ***, as they did not report raw material costs by input.

Direct labor and other factory costs

Direct labor, the smallest component of COGS in each full year and interim period, accounted for more than 15 percent of total COGS throughout the period for which data were collected. The direct labor costs per unit increased from 2023 to 2025 and were higher in interim 2026 than in interim 2025. Direct labor costs as a ratio to net sales increased from 2023 to 2025 and were higher in interim 2025 and interim 2026.

Other factory costs were the second largest component of COGS, accounting for more than 25 percent of total COGS during the period for which data were collected. As a ratio to net sales and on a per unit basis, other factory costs overall increased from 2023 to 2025 but were lower in interim 2026 than in interim 2025.

COGS and gross profit or loss

The industry's COGS declined from 2023 to 2025 but was higher in interim 2026 than in interim 2025. The COGS to net sales ratio irregularly declined from 2023 to 2025 and was lower in interim 2026 than in interim 2025. As depicted in table 6.2, COGS per unit declined (reflecting declining raw material costs) from 2023 to 2025 but was higher in interim 2026 than in interim 2025. As shown in table 6.3, *** reported declining COGS per unit from 2023 to 2025 and all four of the largest firms reported a higher COGS per unit in interim 2026 than in interim 2025.

As shown in table 6.1, the decline in total net sales value from 2023 to 2025 exceeded the corresponding decrease in total COGS, thus gross profit declined from 2023 to 2025. The industry's gross profit was higher in interim 2026 than in interim 2025, as the growth in net sales value was greater than the growth in COGS. As a ratio to net sales, gross profit irregularly increased from 2023 to 2025 and was higher in interim 2026 than in interim 2025. As shown in

table 6.3, all four of the largest companies reported declining gross profit from 2023 to 2025 and *** reported a higher gross profit in interim 2026 than in interim 2025.

SG&A expenses and operating income or loss

As shown in table 6.1, the U.S. industry's SG&A expenses declined irregularly from 2023 to 2025 but were higher in interim 2026 than in interim 2025. In light of the net sales value trends discussed above, the SG&A expense ratio (i.e., total SG&A expenses divided by net sales value) increased from 2023 to 2025 but was lower in interim 2026 than in interim 2025. Table 6.3 shows that all four of the largest firms reported an overall increase in SG&A expense ratio from 2023 to 2025 and *** reported a lower SG&A expense ratio in interim 2026 than in interim 2025.

Similar to the trend in gross profit, the decline in net sales value from 2023 to 2025 exceeded the corresponding decrease in COGS and SG&A expenses, thus operating income declined from 2023 to 2025. The industry's operating income was higher in interim 2026 than in interim 2025 as the growth in net sales value exceeded the growth in COGS and SG&A expenses. As a ratio to net sales, operating income declined from 2023 to 2025 but was higher in interim 2026 than in interim 2025. As shown in table 6.3, all four of the largest companies reported declining operating income from 2023 to 2025 and *** reported a higher operating income in interim 2026 than in interim 2025.

All other expenses and net income or loss

Interest expense, other expenses, and other income are classified below the operating income level. In table 6.1, these items are aggregated and only the net amount is shown. Aggregate all other expenses increased irregularly from 2023 to 2025 but were lower in interim 2026 than in interim 2025. The principal contributors to all other expenses were ***.

Similar to the trends of gross profit and operating income, the industry's net income declined from 2023 to 2025 but was higher in interim 2026 than in interim 2025. As a ratio to net sales, net income overall declined from 2023 to 2025 but was higher in interim 2026 than in interim 2025. As shown in table 6.3, all four of the largest companies reported declining net income from 2023 to 2025 and *** reported a higher net income in interim 2026 than in interim 2025.⁶

⁶ The Commission's variance analysis is generally more meaningful when product mix remains the same throughout the period. Because of the variation in unit values and cost structures, a variance analysis is not shown.

Capital expenditures and research and development 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. The industry's capital expenditures and R&D expenses overall declined from 2023 to 2025 and were lower in interim 2026 than in interim 2025.

Table 6.5 Hydraulic cylinders: U.S. producers' capital expenditures, by firm and period

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	30,510	34,492	23,210	6,758	4,882

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

Table 6.6 Hydraulic cylinders: U.S. producers' narrative descriptions of their capital expenditures, by firm

Firm	Narrative on capital expenditures
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Firm	Narrative on capital expenditures
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

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

Table 6.7 Hydraulic cylinders: U.S. producers' R&D expenses, by firm and period

Value in 1,000 dollars; interim is January through March

Firm	2023	2024	2025	Interim 2025	Interim 2026
Deere & Company	***	***	***	***	***
Rosenboom	***	***	***	***	***
Ligon	***	***	***	***	***
Scot Industries	***	***	***	***	***
All other firms	***	***	***	***	***
All firms	15,673	14,446	13,274	3,347	2,813

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

Table 6.8 Hydraulic cylinders: U.S. producers' narrative descriptions of their R&D expenses, by firm

Firm	Narrative on R&D expenses
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

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.⁷ Table 6.11 presents U.S. producers' narrative responses explaining their major asset categories and any significant changes in asset levels over time. The industry's total asset values and ROA each declined from 2023 to 2025.

Table 6.9 Hydraulic cylinders: U.S. producers' total net assets, by firm and period

Value in 1,000 dollars

Firm	2023	2024	2025
Deere & Company	***	***	***
Rosenboom	***	***	***
Ligon	***	***	***
Scot Industries	***	***	***
All other firms	***	***	***
All firms	602,633	551,599	537,096

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

Table 6.10 Hydraulic cylinders: U.S. producers' ROA, by firm and period

Ratio in percent

Firm	2023	2024	2025
Deere & Company	***	***	***
Rosenboom	***	***	***
Ligon	***	***	***
Scot Industries	***	***	***
All other firms	***	***	***
All firms	25.8	20.4	19.2

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

⁷ The operating ROA is calculated as operating income divided by total assets. With respect to a firm's overall operations, the total asset value reflects an aggregation of a number of assets which are generally not product specific. Thus, high-level allocations are generally required in order to report a total asset value on a product-specific basis.

Table 6.11 Hydraulic cylinders: U.S. producers' narrative descriptions of their total net assets, by firm

Firm	Narrative on assets
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

Firm	Narrative on assets
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***
***	***

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

Capital and investment

The Commission requested U.S. producers of hydraulic cylinders to describe any actual or potential negative effects of imports of hydraulic cylinders from Canada, China, India, Mexico, and South Korea 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 Hydraulic cylinders: 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	8
Denial or rejection of investment proposal	Investment	1
Reduction in the size of capital investments	Investment	8
Return on specific investments negatively impacted	Investment	8
Other investment effects	Investment	2
Any negative effects on investment	Investment	14
Rejection of bank loans	Growth	1
Lowering of credit rating	Growth	2
Problem related to the issue of stocks or bonds	Growth	0
Ability to service debt	Growth	1
Other growth and development effects	Growth	7
Any negative effects on growth and development	Growth	8
Anticipated negative effects of imports	Future	19

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

Table 6.13 Hydraulic cylinders: 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	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Cancellation, postponement, or rejection of expansion projects	***
Denial or rejection of investment proposal	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***

Item	Firm name and narrative on impact of imports
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Reduction in the size of capital investments	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Return on specific investments negatively impacted	***
Other negative effects on investments	***
Other negative effects on investments	***
Rejection of bank loans	***

Item	Firm name and narrative on impact of imports
Lowering of credit rating	***
Lowering of credit rating	***
Ability to service debt	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***
Other effects on growth and development	***
Anticipated effects of imports	***
Anticipated effects of imports	***

Item	Firm name and narrative on impact of imports
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***

Item	Firm name and narrative on impact of imports
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***
Anticipated effects of imports	***

Item	Firm name and narrative on impact of imports
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 factors¹--

- (I) if a countervailable subsidy is involved, such information as may be presented to it by the administering authority as to the nature of the subsidy (particularly as to whether the countervailable subsidy is a subsidy described in Article 3 or 6.1 of the Subsidies Agreement), and whether imports of the subject merchandise are likely to increase,
- (II) any existing unused production capacity or imminent, substantial increase in production capacity in the exporting country indicating the likelihood of substantially increased imports of the subject merchandise into the United States, taking into account the availability of other export markets to absorb any additional exports,
- (III) a significant rate of increase of the volume or market penetration of imports of the subject merchandise indicating the likelihood of substantially increased imports,
- (IV) whether imports of the subject merchandise are entering at prices that are likely to have a significant depressing or suppressing effect on domestic prices, and are likely to increase demand for further imports,
- (V) inventories of the subject merchandise,

¹ Section 771(7)(F)(ii) of the Act (19 U.S.C. § 1677(7)(F)(ii)) provides that “The Commission shall consider {these factors} . . . as a whole in making a determination of whether further dumped or subsidized imports are imminent and whether material injury by reason of imports would occur unless an order is issued or a suspension agreement is accepted under this title. The presence or absence of any factor which the Commission is required to consider . . . shall not necessarily give decisive guidance with respect to the determination. Such a determination may not be made on the basis of mere conjecture or supposition.”

- (VI) the potential for product-shifting if production facilities in the foreign country, which can be used to produce the subject merchandise, are currently being used to produce other products,
- (VII) in any investigation under this title which involves imports of both a raw agricultural product (within the meaning of paragraph (4)(E)(iv)) and any product processed from such raw agricultural product, the likelihood that there will be increased imports, by reason of product shifting, if there is an affirmative determination by the Commission under section 705(b)(1) or 735(b)(1) with respect to either the raw agricultural product or the processed agricultural product (but not both),
- (VIII) the actual and potential negative effects on the existing development and production efforts of the domestic industry, including efforts to develop a derivative or more advanced version of the domestic like product, and
- (IX) any other demonstrable adverse trends that indicate the probability that there is likely to be material injury by reason of imports (or sale for importation) of the subject merchandise (whether or not it is actually being imported at the time).²

Information on the nature of the alleged 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 170 firms believed to produce and/or export hydraulic cylinders from Canada, China, India, Mexico, or South Korea.³ Usable responses to the Commission's questionnaire were received from 28 firms in total.⁴

Table 7.1 presents the number of producers/exporters that responded to the Commission's questionnaire, their estimated share of total production of hydraulic cylinders, and their exports to the United States as a share of U.S. imports, by each subject country in 2025.

Table 7.1 Hydraulic cylinders: Number of responding producers/exporters, 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)
Canada	6	***	***
China	6	***	***
India	7	***	***
Mexico	6	***	***
South Korea	3	***	***

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 hydraulic cylinders 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.

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 import data reported by firms in response to the Commission's U.S. importer questionnaire

³ These firms were identified through a review of information submitted in the petition and presented in third-party sources.

⁴ Ten firms submitted certified responses stating that they have not produced or exported to the United States in-scope hydraulic cylinders since January 1, 2023. *** submitted an incomplete response that did not contain usable data. Jiangsu Hengli Hydraulic, which is believed to be a major Chinese producer and exporter of hydraulic cylinders to the United States did not submit a foreign producer questionnaire response. Thirteen foreign producers reported not keeping record in metrics the Commission requested. As a result, one foreign producer, *** provided incomplete data (e.g. reporting in units rather than in pounds). Staff adjusted the firm's missing data accordingly based on specific assessments of the reporting issue (e.g. for firms that could not report the requested data in pounds, this data was derived using the average unit weight for foreign producers).

Table 7.2 presents information on the hydraulic cylinders operations of the responding subject producers, by firm, table 7.3 presents summary information on responding resellers of subject hydraulic cylinders, and table 7.4 presents summary information on the subject foreign industries.

Table 7.2 Hydraulic cylinders: Summary data on responding subject foreign producers in 2025, by firm

Subject foreign industry and producer name	Production (1,000 pounds)	Share of reported production (percent)	Exports to the United States (1,000 pounds)	Share of reported exports to the United States (percent)	Total shipments (1,000 pounds)	Share of firm's total shipments exported to the United States (percent)
Canada: CTD Group	***	***	***	***	***	***
Canada: Eagle Hydraulic Canada	***	***	***	***	***	***
Canada: HYCO Canada	***	***	***	***	***	***
Canada: Mailhot Canada	***	***	***	***	***	***
Canada: Monarch	***	***	***	***	***	***
Canada: VicRoc	***	***	***	***	***	***
China: Caterpillar China	***	***	***	***	***	***
China: Custom Hoists	***	***	***	***	***	***
China: Jiangyin Eagle Hydraulics	***	***	***	***	***	***
China: Lind Jensen China	***	***	***	***	***	***
India: Canara	***	***	***	***	***	***
India: Dantal	***	***	***	***	***	***
India: Lind Jensen India	***	***	***	***	***	***
India: Wipro India	***	***	***	***	***	***
India: Yerik India	***	***	***	***	***	***
Mexico: Caterpillar Mexico	***	***	***	***	***	***
Mexico: Industrias John Deere	***	***	***	***	***	***
Mexico: Industrias Montacargas	***	***	***	***	***	***
Mexico: Mailhot Mexico	***	***	***	***	***	***
South Korea: DY Power	***	***	***	***	***	***
South Korea: SHPAC	***	***	***	***	***	***
All individual producers	***	100.0	***	100.0	***	***

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

Table 7.3 Hydraulic cylinders: Summary data for subject foreign resellers, by subject foreign industry, 2025

Subject foreign industry and reseller name	Resales exported to the United States (1,000 pounds)	Share of resales exported to the United States (percent)
Canada: Eagle Hydraulic Canada	***	***
Canada: Mailhot Canada	***	***
Canada: Monarch	***	***
China: Custom Hoists	***	***
China: Hyster-Yale China	***	***
China: Trailer Gear Max	***	***
India: EastArise	***	***
India: Canara	***	***
India: PBH Impex	***	***
Mexico: Horizon Trailers	***	***
Mexico: Hyster-Yale Mexico	***	***
Mexico: Industrias Montacargas	***	***
South Korea: Milltech	***	***
All individual resellers	***	100.0

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

Note: *** began hydraulic cylinder import operations in 2026 and only reported future projections for resale exports of hydraulic cylinders. *** only provided interim 2026 and future projection figures.

Table 7.4 Hydraulic cylinders: Summary data for subject foreign producers, by subject foreign industry, 2025

Subject foreign industry	Production (1,000 pounds)	Share of reported production (percent)	Exports to the United States (1,000 pounds)	Share of reported exports to the United States (percent)	Total shipments (1,000 pounds)	Share of firm's total shipments exported to the United States (percent)
Canada	***	***	***	***	***	***
China	***	***	***	***	***	***
India	***	***	***	***	***	***
Mexico	***	***	***	***	***	***
South Korea	***	***	***	***	***	***
All subject foreign industries	***	100.0	***	100.0	***	***

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

Table 7.5 presents important industry events in the subject countries' industries since January 1, 2023.

Table 7.5 Hydraulic cylinders: Important industry events in the subject foreign industry since 2023

Item	Country: Firm: Event
Plant Opening	China: Jiangsu Hengli Hydraulics: 2023, Opening of a Brazilian subsidiary, Hengli Brazil, in Sao Paolo.
Plant Opening	China: Jiangsu Hengli Hydraulics: 2024, commencement of production at Hengli Precision Industry.
Plant Opening	India: Wipro Hydraulics: August 2024, Wipro Hydraulics opened a new manufacturing facility in Jaipur with a capacity to manufacture over 1,000 hydraulic cylinders per day.
Plant Opening	China: Jiangsu Hengli Hydraulics: 2025, factory opening in Monterey, Nuevo Leon, Mexico. The factory covers an area of 141,000 square meters and constitutes an investment of 269 million USD.
Plant Opening	South Korea: SHPAC: 2026 investment of 40 million USD into establishing a new manufacturing facility in León, Guanajuato, Mexico, employing 120 people.
Expansion	Canada: Eagle Hydraulics: 2023, expansion of headquarters in Mirabel to open a new production line of hydraulic cylinders.
Expansion	Canada: Mailhot Industries: 2023, investment of \$20 million in increasing production capacity and productivity by 70% at their Canadian plant.
Expansion	China: Jinan Huachen Industrial Co. Ltd: 2023, opening of a research and development center in Jinan employing six new hydraulic engineers.
Expansion	South Korea: DY Power: 2023 incorporation of DY Mechatronics, S.A. DE C.V., Mexico.
Expansion	India: Dantal Hydraulics: 2023 opening of a sales office in Alabama, USA.
Expansion	India: Dantal Hydraulics: 2024 production expansion to more than 450,000 cylinders between 2023 and 2024.
Expansion	India: Lind Jensen India: 2023 and 2025 acquisition of new CNC machines and welding robots.
Expansion	Canada: Monarch Industries: 2025, completion of a 110,000 square foot expansion at their Winnipeg facility.
Expansion	China: Jiangsu Hengli Hydraulics: 2025, opening of a new global research and development center in Changzhou.
Expansion	India: Lind Jensen India: 2025 establishment of Lind Jensen Handel Pvt Ltd in India, a new import and export trading company aimed at strengthening global trade and logistical coordination in the region.
Expansion	India: SEA Hydrosystems: 2025 production and export expansion, increasing inventory and output.
Expansion	Canada: Eagle Hydraulics: 2026, automated welding unit opened with \$29.2 million of government funding.
Expansion	Mexico: Caterpillar Mexico: 2026 expansion of 116,000 square foot to the Monterrey, Mexico facility.

Table continued.

Table 7.5 (Continued) Hydraulic cylinders: Important industry events in the subject foreign industry since 2023

Item	Country: Firm: Event
Acquisition	Canada: Mailhot Industries: 2024 acquisition by Wipro industries, part of India headquartered Wipro Enterprises.
Acquisition	Mexico: BlackHawk de Mexico: 2024 acquisition of Factory Outlet Tooling in Richardson, Texas, USA as part of a greater “aggressive expansion” initiative.
Acquisition	India: Yerik India: May 2025 Acquisition of 50% of shares in Yerik Hydraulics Pvt. Ltd., by Monarch Industries, Canada.
Acquisition	Canada: HYCO Canada: 2026 acquisition of Montanhydraulik Group, HYCO Canada's parent group, by One Equity Partners "OEP".
Relocation	Mexico: Industrias John Deere: 2025 production transfer of Dubuque Works Iowa's 100 series cylinder plant to Ramos, Mexico.

Source: Jiangsu Hengli Hydraulic Co., [Hengli Brazil Company](#), November 4, 2025; September 2, 2026; Jiangsu Hengli Hydraulics Co, [About Us – History](#), Accessed September 4, 2026; The Economic Times, [Wipro Hydraulics opens Rs 250 cr manufacturing facility in Jaipur](#), August 22, 2024; Jiangsu Hengli Hydraulic Co., [Hengli Mexico factory officially opened!](#), June 14, 2025; iNEWS, [Interpretation of Hengli Hydraulics' 2024 Annual Report: Administrative expenses increased by 46.35%, and net cash flow decreased by 7.40%](#), September 2, 2026; Jiangsu Hengli Hydraulics Co, [About Us – History](#), Accessed September 4, 2026; Pro Mexico Industry, [SHPAC Invests USD 40 Million in New Plant in León, Guanajuato](#), November 16, 2025; Eagle Hydraulics inc., [We are pleased to announce that our company Eagle Hydraulic, is undertaking an...](#), 2023; Mailhot Industries, [Government of Canada Supports Mailhot Industries](#), November 15, 2023; Jinan Huachen Industrial Co, Ltd., [About HCIC – Hydraulic Solutions – What is HCIC](#), Accessed September 4, 2026; Jinan Huachen Industrial Co, Ltd., [Company Strength Company Profile](#), Accessed September 4, 2026; DY Power, [History](#), Accessed September 9, 2026; Dantal Hydraulics, [Our History](#), Accessed September 9, 2026; Lind Jensen Maskinfabrik A/S, [About Lind Jensen](#), Accessed September 9, 2026; WasteExpo 2025, [Monarch Industries, Ltd.](#), 2025; The Globe and Mail, [Collaboration is key at Monarch Industries: 'We check our titles at the door'](#), 2025; Monarch Industries, [Monarch Industries – India](#), Accessed September 4, 2026; Jiangsu Hengli Hydraulics Co, [About Us – History](#), Accessed September 4, 2026; Lind Jensen Maskinfabrik A/S, [About Lind Jensen](#), Accessed September 9, 2026; SEA Hydrosystems, [2025: A Year of Strength, Precision, and Global Connections](#), January, 2026; Eagle Hydraulics Inc., [Three months ago, we launched our new automated welding unit](#), August, 2026; Eagle Hydraulics Inc., [Proud to be part of this initiative supporting the future of Canadian manufacturing](#), April, 2026; NAI Mexico, [CATERPILLAR expands Monterrey operations with 316,000 sf dual lease renewal and expansion](#), March 6, 2026; Mailhot Industries, [Part of a Larger Family](#), May 9, 2024; BlackHawk Industrial, [BlackHawk Accelerates Growth With Aggressive Expansion in Texas](#), May 8, 2024; Kochhar&Co. Advocates & Legal Consultants, [Kochhar & Co. Advises Monarch Industries Limited, a portfolio company of TriWest Capital Partners, on their investment in Yerik Hydraulics Private Limited](#), June 16, 2025; Government of Canada, [Decisions and Notification Index](#), May, 2026; John Deere News & Innovations: Equipment, Technology, Solutions, [John Deere to Invest \\$55 Million in a New Construction Equipment Plant in Mexico](#), December 9, 2024; When In Your State, [Iowa loses hundreds of jobs as John Deere moves \\$55M operations to Mexico](#), December 30, 2025.

Changes in operations

Subject producers were asked to report any change in the character of their operations or organization relating to the production of hydraulic cylinders since 2023. Fifteen of 28 producers indicated in their questionnaires that they had experienced such changes. Tables 7.6 and 7.7 present the changes identified by these producers.

Table 7.6 Hydraulic cylinders: Count of reported changes in operations since January 1, 2023, by change and subject foreign industry

Count in number of firms reporting

Item	Canada	China	India	Mexico	South Korea	Subject producers
Plant openings	1	0	2	0	1	4
Plant closings	0	0	0	0	0	0
Prolonged shutdowns	0	0	0	0	0	0
Production curtailments	0	0	0	0	1	1
Relocations	1	0	0	2	1	4
Expansions	2	0	2	1	0	5
Acquisitions	3	0	1	1	0	5
Consolidations	1	0	0	0	0	1
Weather-related or force majeure events	0	0	0	0	0	0
Other	3	1	1	0	0	5
Any change	5	1	4	3	2	15

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

Table 7.7 Hydraulic cylinders: Reported changes in operations in the subject countries since January 1, 2023, by change, subject foreign industry, and firm

Item	Subject foreign industry, firm name, and accompanying narrative response regarding changes in operations
Plant openings	***
Plant openings	***
Plant openings	***
Plant openings	***
Production curtailments	***
Relocations	***
Relocations	***
Relocations	***
Relocations	***
Expansions	***
Expansions	***
Expansions	***
Expansions	***

Table continued.

Table 7.7 (Continued) Hydraulic cylinders: Reported changes in operations in the subject countries since January 1, 2023, by change, subject foreign industry, and firm

Item	Subject foreign industry, firm name, and accompanying narrative response regarding changes in operations
Acquisitions	***
Acquisitions	***
Acquisitions	***
Acquisitions	***
Acquisitions	***
Consolidations	***
Other	***
Other	***
Other	***
Other	***
Other	***

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

Only two foreign producers reported anticipating changes in the character of their operations relating to the production of hydraulic cylinders in the future. Mexican producer *** is *** and Chinese producer *** is anticipating ***.

Installed and practical overall capacity

Table 7.8 presents data on subject producers' installed capacity, practical overall capacity, and practical hydraulic cylinders capacity and production on the same equipment. Installed overall capacity increased 4.8 percent from 2023 to 2025 but was lower in interim 2026 than in interim 2025.⁵ Practical overall and practical hydraulic cylinder capacity decreased from 2023 to 2024 before increasing in 2025, for a 2.4 percent and 2.1 percent overall increase, respectively, from 2023 to 2025. They were both higher in interim 2026 compared to interim 2025. Both overall and hydraulic cylinder production declined between 2023 and 2025 but were higher in interim 2026 than in interim 2025. During the same period, capacity utilization for installed overall, practical overall, and chassis production declined by 6.1, 6.4, and 6.6 percentage points, respectively.

Table 7.8 Hydraulic cylinders: Subject producers' installed and practical capacity and production on the same equipment as in-scope production, by period

Capacity and production in 1,000 pounds; utilization in percent; Interim period is January through March

Item	Measure	2023	2024	2025	Interim 2025	Interim 2026
Installed overall	Capacity	651,989	657,990	683,518	189,729	180,469
Installed overall	Production	399,712	379,212	377,377	92,032	99,879
Installed overall	Utilization	61.3	57.6	55.2	48.5	55.3
Practical overall	Capacity	488,079	465,375	499,775	123,567	133,398
Practical overall	Production	399,712	379,212	377,377	92,032	99,879
Practical overall	Utilization	81.9	81.5	75.5	74.5	74.9
Practical Hydraulic cylinders	Capacity	477,161	454,628	487,064	120,339	130,008
Practical Hydraulic cylinders	Production	388,630	368,416	364,617	88,766	96,447
Practical Hydraulic cylinders	Utilization	81.4	81.0	74.9	73.8	74.2

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

⁵ Almost half of that increase was accounted for by *** which ***. ***'s foreign producer questionnaire response, section 2.2a.

Constraints on capacity

Tables 7.9 and 7.10 present subject producers' reported production and capacity constraints since January 1, 2023. The leading reported constraint was existing labor force, followed by production bottlenecks, and supply of material inputs.

Table 7.9 Hydraulic cylinders: Constraints on practical overall capacity, by subject foreign industry

Count in number of firms reporting

Type of constraint	Canada	China	India	Mexico	South Korea	Subject producers
Production bottlenecks	5	2	2	1	1	11
Existing labor force	6	3	3	1	1	14
Supply of material inputs	2	1	1	2	1	7
Fuel or energy	0	0	0	0	0	0
Storage capacity	0	0	0	0	0	0
Logistics/transportation	0	0	1	0	0	1
Other constraints	0	1	0	0	0	1

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

Table 7.10 Hydraulic cylinders: Subject producers' reported practical overall capacity constraints since January 1, 2023, by constraint and firm

Type of constraint	Subject foreign industry, firm name, and narrative response on constraints to practical overall capacity
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Production bottlenecks	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***

Table continued.

Table 7.10 (Continued) Hydraulic cylinders: Subject producers' reported practical overall capacity constraints since January 1, 2023, by constraint and firm

Type of constraint	Subject foreign industry, firm name, and narrative response on constraints to practical overall capacity
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Existing labor force	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Supply of material inputs	***
Other constraints	***
Other constraints	***

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

Operations on hydraulic cylinders

Aggregate hydraulic cylinders operations in the subject countries

Table 7.11 presents information on the hydraulic cylinders operations of the responding producers/exporters (aggregate data for all subject foreign industries). Subject producers' combined capacity increased irregularly by 2.1 percent from 2023 to 2025, was higher in interim 2026 than in interim 2025, and is projected to increase by 6.9 percent in 2026 before declining by 0.9 percent in 2027. Production decreased by 6.2 percent from 2022 to 2025 but was higher in interim 2026 than in interim 2025 and is expected to increase by 11.3 and 0.2 percent in 2026 and 2027, respectively. Capacity utilization decreased from 81.4 percent in 2023 to 74.9 percent in 2025 and is expected to increase to 77.9 percent by 2026 and 78.9 percent in 2027. Inventory levels increased irregularly by 7.6 percent from 2023 to 2025, were higher in interim 2026 than in interim 2025, and are projected to increase in 2026 before declining in 2027. Home market shipments accounted for between 43.8 and 50.2 percent of all shipments between 2023 and 2025. Exports of hydraulic cylinders to the United States, including resales, accounted for between 30.8 and 33.4 percent of subject producers' total shipments in all periods.

Table 7.11 Hydraulic cylinders: Data on subject foreign industries, by item and period

Quantity in 1,000 pounds; Interim period is January through March

Item	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Capacity	477,161	454,628	487,064	120,339	130,008	520,789	515,873
Production	388,630	368,416	364,617	88,766	96,447	405,873	406,786
End-of-period inventories	20,730	17,424	22,310	18,726	19,476	24,329	18,891
Internal consumption	***	***	***	***	***	***	***
Commercial home market shipments	***	***	***	***	***	***	***
Home market shipments	195,358	175,067	157,311	41,053	45,050	173,848	174,809
Exports to the United States	***	***	***	***	***	***	***
Exports to all other markets	***	***	***	***	***	***	***
Export shipments	193,996	197,903	202,193	46,877	54,459	230,069	230,055
Total shipments	389,354	372,970	359,504	87,930	99,509	403,917	404,863
Resales exported to the United States	***	***	***	***	***	***	***
Total exports to the United States	123,341	126,659	123,868	30,577	31,641	139,185	141,896

Table continued.

Table 7.11 (Continued) Hydraulic cylinders: Data on subject foreign industries, by period

Shares and ratios in percent; Interim period is January through March

Item	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Capacity utilization ratio	81.4	81.0	74.9	73.8	74.2	77.9	78.9
Inventory ratio to production	5.3	4.7	6.1	5.3	5.0	6.0	4.6
Inventory ratio to total shipments	5.3	4.7	6.2	5.3	4.9	6.0	4.7
Internal consumption share	***	***	***	***	***	***	***
Commercial home market shipments share	***	***	***	***	***	***	***
Home market shipments share	50.2	46.9	43.8	46.7	45.3	43.0	43.2
Exports to the United States share	***	***	***	***	***	***	***
Exports to all other markets share	***	***	***	***	***	***	***
Export shipments share	49.8	53.1	56.2	53.3	54.7	57.0	56.8
Total shipments share	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Direct exports to the United States ratio to total exports to the United States	***	***	***	***	***	***	***
Resale exports to the United States ratio to total exports to the United States	***	***	***	***	***	***	***
Adjusted total shipments exported to the United States ratio to total shipments	***	***	***	***	***	***	***

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

Note: Adjusted total shipments include total shipments of foreign producers and resales exported to the United States.

Practical hydraulic cylinders capacity and production by subject foreign industry

Table 7.12 presents information on subject producers' production, capacity, and capacity utilization by subject country. Between 2023 and 2025, practical capacity increased for all sources except Canada and South Korea, while production rose for all except Canada, India, and South Korea. Capacity and production are projected to increase in all sources in 2026, and to continue increasing in 2027 for all except India and Mexico, with Canadian production also expected to decline.

Responding Canadian producers' hydraulic cylinder capacity and production decreased irregularly from 2023 to 2025 but are projected to increase through 2027. Chinese producers' capacity and production increased from 2023 to 2025 and are projected to increase further in 2026. Indian producers' capacity increased from 2023 to 2025 while production declined irregularly but both are projected to increase in 2026. Mexican producers' capacity and production increased irregularly from 2023 to 2025 and both are projected to increase in 2026. While South Korean producers' capacity and production decreased from 2023 to 2025, both are projected to increase in 2026.

Table 7.12 Hydraulic cylinders: Subject producers' output, by country and period

Practical capacity

Capacity in 1,000 pounds; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	477,161	454,628	487,064	120,339	130,008	520,789	515,873

Table continued.

Table 7.12 (Continued) Hydraulic cylinders: Subject producers' output, by country and period**Production**

Production in 1,000 pounds; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	388,630	368,416	364,617	88,766	96,447	405,873	406,786

Table continued.

Table 7.12 (Continued) Hydraulic cylinders: Subject producers' output, by country and period**Capacity utilization**

Capacity utilization in percent; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	81.4	81.0	74.9	73.8	74.2	77.9	78.9

Table continued.

Note: Capacity utilization ratio represents the ratio of the subject producer's production to its production capacity.

Table 7.12 (Continued) Hydraulic cylinders: Subject producers' output, by country and period**Share of production**

Share in percent; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

Hydraulic cylinders exports, by subject country

Table 7.13 presents information on subject producers' (and resellers) exports of hydraulic cylinders by subject country. Exports of hydraulic cylinders to the United States from subject producers in Canada, China, and South Korea, decreased from 2023 to 2025, while such imports from subject producers in India and Mexico increased. Exports to the United States from subject producers in each subject country except for India are projected to increase in 2026. During 2023 to 2025, shipments of exports of hydraulic cylinders to the United States from Canada and Mexico accounted for the majority of their total shipments. Exports to the United States from India accounted for the lowest share to total shipments among subject countries, accounting for less than *** percent in each period. India was also the only subject country where *** of total shipments of hydraulic cylinders were export shipments during each period for which data was collected.

Table 7.13 Hydraulic cylinders: Subject producers' (and resellers') exports: Exports to the United States, by source and period

Exports to the United States

Quantity in 1,000 pounds; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	123,341	126,659	123,868	30,577	31,641	139,185	141,896

Table continued.

Table 7.13 (Continued) Hydraulic cylinders: Subject producers' (and resellers') exports: Share of total shipments exported to the United States, by source and period

Share of total shipments exported to the United States

Share in percent; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	***	***	***	***	***	***	***

Note: Shares for ***.

Table continued.

Table 7.13 (Continued) Hydraulic cylinders: Subject producers' (and resellers') exports: Exports to all destination markets, by source and period

Total exports

Quantity in 1,000 pounds; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	***	***	***	***	***	***	***

Table continued.

Table 7.13 (Continued) Hydraulic cylinders: Subject producers' (and resellers') exports: Share of total shipments exported to all destinations, by source and period

Share of total shipments exported

Share in percent; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	***	***	***	***	***	***	***

Note: Shares for ***.

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

Hydraulic cylinders inventories, by subject foreign industry

Table 7.14 presents information on ending inventory of the responding producers by subject foreign country. Overall, subject producers' inventories increased irregularly by 7.6 percent from 2023 to 2025, were higher in interim 2026 than in interim 2025, and are projected to increase in 2026 before decreasing in 2027. Subject producers in Canada held the highest ratio of inventories to total shipments while subject producers in Mexico held the lowest.

Table 7.14 Hydraulic cylinders: Subject foreign industries' ending inventories: Ending inventories, by source and period

Quantity in 1,000 pounds; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	20,730	17,424	22,310	18,726	19,476	24,329	18,891

Table continued.

Table 7.14 (Continued) Hydraulic cylinders: Subject foreign industries' ending inventories: Ratio of ending inventories to total shipments, by source and period

Ratio in percent; Interim period is January through March

Subject foreign industry	2023	2024	2025	Interim 2025	Interim 2026	Projection 2026	Projection 2027
Canada	***	***	***	***	***	***	***
China	***	***	***	***	***	***	***
India	***	***	***	***	***	***	***
Mexico	***	***	***	***	***	***	***
South Korea	***	***	***	***	***	***	***
All subject foreign industries	5.3	4.7	6.2	5.3	4.9	6.0	4.7

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

Alternative products

As shown in table 7.15, responding subject producers manufactured other products on the same equipment and machinery used to produce hydraulic cylinders, though the vast majority of all production during each period for which information was collected was hydraulic cylinders. Only four subject producers *** reported such out-of-scope production. Other reported production on the same equipment included ***.

Table 7.15 Hydraulic cylinders: Subject foreign industries' overall production on the same equipment as in-scope production, by product type and period

Quantities in 1,000 pounds; shares in percent; interim period is January through March

Product type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Hydraulic cylinders	Quantity	388,630	368,416	364,617	88,766	96,447
Other products	Quantity	***	***	***	***	***
All products	Quantity	***	***	***	***	***
Hydraulic cylinders	Share	***	***	***	***	***
Other products	Share	***	***	***	***	***
All products	Share	100.0	100.0	100.0	100.0	100.0

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

Exports

Table 7.16 presents Global Trade Atlas (“GTA”) data for exports of hydraulic power engines and motors, linear acting cylinders from subject countries to the United States and to all destination markets. While such exports to the United States declined from 2023 to 2025, exports to the rest of the world increased during the same time period.

Table 7.16 Hydraulic power engines and motors, linear acting cylinders: Global exports from subject foreign industries: Exports to the United States, by subject foreign country and period

Value in 1,000 dollars

Exporter	Measure	2023	2024	2025
Canada	Value	300,133	286,542	272,322
China	Value	211,773	225,667	196,217
India	Value	26,734	38,509	42,147
Mexico	Value	130,638	102,337	123,258
South Korea	Value	189,621	192,822	140,163
Subject exporters	Value	858,898	845,877	774,107

Table continued.

Table 7.16 (Continued) Hydraulic power engines and motors, linear acting cylinders: Global exports from subject foreign industries: Exports to all destination markets, by subject foreign country and period

Value in 1,000 dollars

Exporter	Measure	2023	2024	2025
Canada	Value	366,005	347,209	327,301
China	Value	1,088,768	1,195,073	1,296,151
India	Value	71,950	102,252	113,628
Mexico	Value	141,448	110,722	141,393
South Korea	Value	361,560	348,390	308,869
Subject exporters	Value	2,029,730	2,103,646	2,187,342

Table continued.

Table 7.16 (Continued) Hydraulic power engines and motors, linear acting cylinders: Global exports from subject foreign industries: Share of exports exported to the United States, by subject foreign country and period

Share in percent

Exporter	Measure	2023	2024	2025
Canada	Share	82.0	82.5	83.2
China	Share	19.5	18.9	15.1
India	Share	37.2	37.7	37.1
Mexico	Share	92.4	92.4	87.2
South Korea	Share	52.4	55.3	45.4
Subject exporters	Share	42.3	40.2	35.4

Source: Official exports statistics and official global imports statistics from Canada, China, India, Mexico and South Korea (constructed exports) under HS subheadings 8412.21 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed August 24, 2026. Global Trade Atlas data quantity data is provided in units and not pounds, therefore information is presented using value data.

Note: Shares represent the shares of value exported to the United States out of all destination markets.

U.S. inventories of imported merchandise

Table 7.17 presents data on U.S. importers' reported inventories of hydraulic cylinders. U.S. importers' inventories of imports from subject sources decreased by 29.6 percent from 2023 to 2025, and were 33.7 percent lower in interim 2026 compared to interim 2025. This trend was driven by inventories of subject imports from China, which accounted for the majority of inventories in each period for which information was collected. Inventories of subject imports from China and India accounted for virtually all inventories from subject sources in each period. U.S. subject importers' ratios of inventories to U.S. imports and U.S. shipments of imports declined from 2023 to 2025 and were lower in interim 2026 compared to interim 2025.

Table 7.17 Hydraulic cylinders: U.S. importers' inventories and their ratio to select items, by source and period

Quantity in 1,000 pounds; Ratio in percent; Interim period is January through March

Measure	Source	2023	2024	2025	Interim 2025	Interim 2026
Inventories quantity	Canada	***	***	***	***	***
Ratio to imports	Canada	***	***	***	***	***
Ratio to U.S. shipments of imports	Canada	***	***	***	***	***
Ratio to total shipments of imports	Canada	***	***	***	***	***
Inventories quantity	China	***	***	***	***	***
Ratio to imports	China	***	***	***	***	***
Ratio to U.S. shipments of imports	China	***	***	***	***	***
Ratio to total shipments of imports	China	***	***	***	***	***
Inventories quantity	India	***	***	***	***	***
Ratio to imports	India	***	***	***	***	***
Ratio to U.S. shipments of imports	India	***	***	***	***	***
Ratio to total shipments of imports	India	***	***	***	***	***
Inventories quantity	Mexico	***	***	***	***	***
Ratio to imports	Mexico	***	***	***	***	***
Ratio to U.S. shipments of imports	Mexico	***	***	***	***	***
Ratio to total shipments of imports	Mexico	***	***	***	***	***
Inventories quantity	South Korea	***	***	***	***	***
Ratio to imports	South Korea	***	***	***	***	***
Ratio to U.S. shipments of imports	South Korea	***	***	***	***	***
Ratio to total shipments of imports	South Korea	***	***	***	***	***
Inventories quantity	Subject sources	19,925	17,946	14,032	18,151	12,036
Ratio to imports	Subject sources	11.7	8.7	7.1	12.5	6.8
Ratio to U.S. shipments of imports	Subject sources	11.7	8.6	7.0	12.6	6.5
Ratio to total shipments of imports	Subject sources	11.7	8.6	6.9	12.5	6.4
Inventories quantity	Nonsubject sources	4,961	6,618	7,892	6,492	9,618
Ratio to imports	Nonsubject sources	14.9	14.6	19.0	26.5	33.3
Ratio to U.S. shipments of imports	Nonsubject sources	14.6	15.4	19.8	26.7	43.9
Ratio to total shipments of imports	Nonsubject sources	14.4	15.3	19.7	26.4	43.3
Inventories quantity	All import sources	24,886	24,565	21,924	24,643	21,654
Ratio to imports	All import sources	12.2	9.8	9.2	14.5	10.5
Ratio to U.S. shipments of imports	All import sources	12.2	9.8	9.1	14.7	10.4
Ratio to total shipments of imports	All import sources	12.1	9.7	9.1	14.5	10.4

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

U.S. importers' outstanding orders

The Commission requested importers to indicate whether they imported or arranged for the importation of hydraulic cylinders from Canada, China, India, Mexico, or South Korea after March 31, 2026. Their reported data are presented in table 7.18. The majority of U.S. importers of hydraulic cylinders reported such imports. The leading individual source of U.S. importers' total arranged subject imports was South Korea, closely followed by China and Canada. Subject sources accounted for approximately three quarters of all reported arranged imports of hydraulic cylinders after March 21, 2026.

Table 7.18 Hydraulic cylinders: U.S. importers' arranged imports, by source and period

Quantity in 1,000 pounds

Source	Q2 2026	Q3 2026	Q4 2026	Q1 2027	Total
Canada	***	***	***	***	***
China	***	***	***	***	***
India	***	***	***	***	***
Mexico	***	***	***	***	***
South Korea	***	***	***	***	***
Subject sources	21,176	20,837	17,956	14,410	74,378
Nonsubject sources	5,700	5,351	6,499	8,900	26,449
All import sources	26,876	26,187	24,455	23,309	100,827

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

Third-country trade actions

There are no known trade remedy actions on hydraulic cylinders in third-country markets.

Information on nonsubject countries

Global exports of hydraulic cylinders increased by 14.6 percent during 2023 to 2025, from \$8.2 billion in 2023 to \$9.4 billion in 2025 (table 7.19). The United States was the largest global exporter of hydraulic cylinders in 2025, with exports totaling \$1.6 billion, or 17.2 percent of total exports by value. After the United States, the next largest global exporters in 2025 were Germany (with exports totaling \$1.3 billion, or 14.0 percent of total exports), China (with exports totaling \$1.3 billion, or 13.8 percent of total exports), and the United Kingdom (with exports totaling \$536.7 million, or 5.7 percent of total exports).

Table 7.19 Hydraulic power engines and motors, linear acting cylinders: Global exports by exporter and period

Value in 1,000 dollars; share in percent

Exporting country	Measure	2023	2024	2025
United States	Value	1,394,772	1,565,584	1,618,567
Canada	Value	366,005	347,209	327,301
China	Value	1,088,768	1,195,073	1,296,151
India	Value	71,950	102,252	113,628
Mexico	Value	141,448	110,722	141,393
South Korea	Value	361,560	348,390	308,869
Subject exporters	Value	2,029,730	2,103,646	2,187,342
Germany	Value	1,151,723	1,087,875	1,320,295
United Kingdom	Value	421,148	490,494	536,670
Netherlands	Value	319,216	353,723	450,117
France	Value	282,432	335,391	312,323
Italy	Value	254,686	279,035	289,945
Bulgaria	Value	260,220	252,625	279,940
Japan	Value	257,173	232,657	264,597
Poland	Value	127,433	129,056	202,250
Austria	Value	209,646	193,332	198,940
Singapore	Value	108,304	156,656	182,900
All other exporters	Value	1,391,439	1,367,135	1,564,012
All reporting exporters	Value	8,207,920	8,547,210	9,407,897

Table continued.

Table 7.19 (Continued) Hydraulic power engines and motors, linear acting cylinders: Global exports by exporter and period

Shares in percent

Exporting country	Measure	2023	2024	2025
United States	Share of value	17.0	18.3	17.2
Canada	Share of value	4.5	4.1	3.5
China	Share of value	13.3	14.0	13.8
India	Share of value	0.9	1.2	1.2
Mexico	Share of value	1.7	1.3	1.5
South Korea	Share of value	4.4	4.1	3.3
Subject exporters	Share of value	24.7	24.6	23.3
Germany	Share of value	14.0	12.7	14.0
United Kingdom	Share of value	5.1	5.7	5.7
Netherlands	Share of value	3.9	4.1	4.8
France	Share of value	3.4	3.9	3.3
Italy	Share of value	3.1	3.3	3.1
Bulgaria	Share of value	3.2	3.0	3.0
Japan	Share of value	3.1	2.7	2.8
Poland	Share of value	1.6	1.5	2.1
Austria	Share of value	2.6	2.3	2.1
Singapore	Share of value	1.3	1.8	1.9
All other exporters	Share of value	17.0	16.0	16.6
All reporting exporters	Share of value	100.0	100.0	100.0

Source: Official exports statistics under HS subheading 8412.21 as reported by various national statistical authorities in the Global Trade Atlas Suite database, accessed August 24, 2026.

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. This data may be overstated as HS subheadings 8412.21 may contain products outside the scope of this proceeding.

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 49442, August 4, 2026	Linear Hydraulic Cylinders From Canada, China, India, Mexico, and South Korea; Institution of Antidumping and Countervailing Duty Investigations and Scheduling of Preliminary Phase Investigations	https://www.govinfo.gov/content/pkg/FR-2026-08-04/pdf/2026-15722.pdf
91 FR 53848, August 20, 2026	Notice of Extension of the Deadline for Determining the Adequacy of the Antidumping and Countervailing Duty Petitions: Certain Linear Hydraulic Cylinders and Parts Thereof From Canada, the People's Republic of China, India, the Republic of Korea, and Mexico	https://www.govinfo.gov/content/pkg/FR-2026-08-20/pdf/2026-17034.pdf
91 FR 55112, August 26, 2026	Linear Hydraulic Cylinders From Canada, China, India, Mexico, and South Korea; Revised Schedule for the Subject Investigations	https://www.govinfo.gov/content/pkg/FR-2026-08-26/pdf/2026-17367.pdf
91 FR 58060, September 14, 2026	Certain Linear Hydraulic Cylinders and Parts Thereof From Canada, the People's Republic of China, India, the Republic of Korea, and Mexico: Initiation of Less-Than-Fair-Value Investigations	https://www.govinfo.gov/content/pkg/FR-2026-09-14/pdf/2026-18706.pdf
91 FR 58067, September 14, 2026	Certain Linear Hydraulic Cylinders and Parts Thereof From the People's Republic of China, India, and Mexico: Initiation of Countervailing Duty Investigations	https://www.govinfo.gov/content/pkg/FR-2026-09-14/pdf/2026-18707.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: Linear Hydraulic Cylinders from Canada, China, India, Mexico, And South Korea

Inv. Nos.: 701-TA-802-804 and 731-TA-1799-1803 (Preliminary)

Date and Time: August 19, 2025 – 9:30 a.m.

Sessions were held in connection with these preliminary phase investigations in the Main Hearing Room (Room 101), 500 E Street, SW., Washington, D.C.

OPENING REMARKS:

In Support of Imposition (**R. Alan Luberda**, Kelley Drye & Warren LLP)

In Support of the Imposition of the Antidumping and Countervailing Duty Orders:

Kelley, Drye & Warren LLP
Washington, DC
on behalf of

Hydraulic Cylinders Fair Trade Coalition
Aggressive Hydraulics, Inc.
Hol-Mac Corporation
Ligon Hydraulics
Prince Manufacturing Corporation
PTC Alliance LLC
Rosenboom Machine & Tool, Inc.
Scot Industries, Inc.
Stillwell Inc.
Texas Hydraulics, Inc.

Joel Tjepkes, Vice President of Operations, Aggressive Hydraulics, Inc.

**In Support of the Continuation of the
and Countervailing Duty Orders (continued):**

Gavin Hatcher, Senior Vice President of Proprietary Products, Hol-Mac Corporation

Jeffrey Holder, Chief Financial Officer, Hol-Mac Corporation

William J. Anderson, President, Ligon Hydraulics

Dan Van Eldik, President and Chief Executive Office, Prince Manufacturing Corporation

Richard K. Sindt, Chief Financial Officer, Prince Manufacturing Corporation

Brian Rosenboom, Vice President of Procurement, Rosenboom Machine & Tool, Inc.

Drew Stillwell, President, Stillwell Inc.

Ben Murphy, Chief Strategy Officer, Stillwell Inc.

Mark A. Montgomery, Director of Sales, Texas Hydraulics, Inc.

Michael T. Kerwin, Assistant Director, Georgetown Economic Services LLC

Brad Hudgens, Senior Trade Analyst, Georgetown Economic Services LLC

R. Alan Luberd	)	
Paul C. Rosenthal	)	
Brooke M. Ringel	)	– OF COUNSEL
Joshua R. Morey	)	
Matthew T. Martin	)	

CLOSING REMARKS:

In Support of Imposition (**Brooke Ringel**, Kelley Drye & Warren LLP)

APPENDIX C

SUMMARY DATA

Table C.1: Hydraulic cylinders: Summary data concerning the U.S. market.....	C.3
Table C.2: Hydraulic cylinders: Summary data concerning the U.S. market with related party exclusions.....	C.6

All U.S. producers

Table C.1

Hydraulic cylinders: Summary data concerning the U.S. market, by item and period

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through March

Item	Reported data					Period change comparisons			
	2023	Calendar year 2024	2025	Interim 2025	2026	2023-25	Calendar year 2023-24	2024-25	Interim 2025-26
U.S. consumption quantity:									
Amount.....	443,460	451,248	433,559	91,866	101,732	▼(2.2)	▲1.8	▼(3.9)	▲10.7
Producers' share (fn1).....	54.0	44.3	44.5	54.3	49.0	▼(9.5)	▼(9.6)	▲0.2	▼(5.3)
Importers' share (fn1):									
Canada.....	5.2	5.0	6.0	6.1	6.8	▲0.8	▼(0.1)	▲0.9	▲0.7
China.....	11.2	13.4	12.1	11.9	8.6	▲0.9	▲2.2	▼(1.3)	▼(3.3)
India.....	2.4	4.0	4.2	2.7	3.6	▲1.8	▲1.6	▲0.1	▲0.9
Mexico.....	5.7	8.8	11.1	6.1	8.8	▲5.4	▲3.1	▲2.3	▲2.7
South Korea.....	14.0	14.9	13.0	12.3	17.8	▼(1.0)	▲0.9	▼(1.9)	▲5.5
Subject sources.....	38.4	46.2	46.3	39.1	45.6	▲8.0	▲7.8	▲0.2	▲6.5
Nonsubject sources.....	7.7	9.5	9.2	6.6	5.4	▲1.5	▲1.8	▼(0.3)	▼(1.2)
All import sources.....	46.0	55.7	55.5	45.7	51.0	▲9.5	▲9.6	▼(0.2)	▲5.3
U.S. consumption value:									
Amount.....	2,148,042	1,986,422	1,916,146	435,184	474,513	▼(10.8)	▼(7.5)	▼(3.5)	▲9.0
Producers' share (fn1).....	59.8	54.3	50.9	54.8	53.4	▼(8.9)	▼(5.5)	▼(3.4)	▼(1.3)
Importers' share (fn1):									
Canada.....	5.8	6.2	6.5	7.6	7.4	▲0.7	▲0.4	▲0.3	▼(0.1)
China.....	6.9	8.7	8.4	10.6	7.8	▲1.5	▲1.8	▼(0.3)	▼(2.9)
India.....	2.0	2.7	3.0	2.4	3.5	▲1.0	▲0.7	▲0.3	▲1.1
Mexico.....	2.9	5.3	9.5	5.4	6.7	▲6.5	▲2.4	▲4.1	▲1.3
South Korea.....	13.4	11.4	8.9	7.9	10.7	▼(4.5)	▼(2.0)	▼(2.6)	▲2.8
Subject sources.....	31.1	34.4	36.3	33.9	36.1	▲5.2	▲3.3	▲1.9	▲2.2
Nonsubject sources.....	9.1	11.3	12.8	11.3	10.4	▲3.8	▲2.2	▲1.5	▼(0.9)
All import sources.....	40.2	45.7	49.1	45.2	46.6	▲8.9	▲5.5	▲3.4	▲1.3
U.S. importers U.S. shipments of imports from:									
Canada:									
Quantity.....	22,844	22,763	25,934	5,611	6,878	▲13.5	▼(0.4)	▲13.9	▲22.6
Value.....	124,823	122,549	124,663	32,957	35,336	▼(0.1)	▼(1.8)	▲1.7	▲7.2
Unit value.....	\$5.46	\$5.38	\$4.81	\$5.87	\$5.14	▼(12.0)	▼(1.5)	▼(10.7)	▼(12.5)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
China:									
Quantity.....	49,533	60,429	52,471	10,934	8,796	▲5.9	▲22.0	▼(13.2)	▼(19.6)
Value.....	149,073	173,395	161,695	46,291	36,838	▲8.5	▲16.3	▼(6.7)	▼(20.4)
Unit value.....	\$3.01	\$2.87	\$3.08	\$4.23	\$4.19	▲2.4	▼(4.7)	▲7.4	▼(1.1)
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
India:									
Quantity.....	10,628	18,258	18,173	2,436	3,661	▲71.0	▲71.8	▼(0.5)	▲50.3
Value.....	42,943	53,668	57,048	10,451	16,579	▲32.8	▲25.0	▲6.3	▲58.6
Unit value.....	\$4.04	\$2.94	\$3.14	\$4.29	\$4.53	▼(22.3)	▼(27.2)	▲6.8	▲5.6
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Mexico:									
Quantity.....	25,138	39,753	47,957	5,634	8,975	▲90.8	▲58.1	▲20.6	▲59.3
Value.....	62,589	105,931	181,137	23,454	31,724	▲189.4	▲69.2	▲71.0	▲35.3
Unit value.....	\$2.49	\$2.66	\$3.78	\$4.16	\$3.53	▲51.7	▲7.0	▲41.7	▼(15.1)
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
South Korea:									
Quantity.....	62,017	67,086	56,386	11,307	18,129	▼(9.1)	▲8.2	▼(15.9)	▲60.3
Value.....	288,363	227,103	170,081	34,298	50,904	▼(41.0)	▼(21.2)	▼(25.1)	▲48.4
Unit value.....	\$4.65	\$3.39	\$3.02	\$3.03	\$2.81	▼(35.1)	▼(27.2)	▼(10.9)	▼(7.4)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***

Table continued.

Table C.1 Continued

Hydraulic cylinders: Summary data concerning the U.S. market, by item and period

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through March

Item	Reported data					Period change comparisons			
	Calendar year			Interim		Calendar year		Interim	
	2023	2024	2025	2025	2026	2023–25	2023–24	2024–25	2025–26
Subject sources:									
Quantity.....	170,161	208,289	200,921	35,923	46,439	▲18.1	▲22.4	▼(3.5)	▲29.3
Value.....	667,791	682,646	694,625	147,450	171,381	▲4.0	▲2.2	▲1.8	▲16.2
Unit value.....	\$3.92	\$3.28	\$3.46	\$4.10	\$3.69	▼(11.9)	▼(16.5)	▲5.5	▼(10.1)
Ending inventory quantity.....	19,925	17,946	14,032	18,151	12,036	▼(29.6)	▼(9.9)	▼(21.8)	▼(33.7)
Nonsubject sources:									
Quantity.....	34,030	42,961	39,804	6,068	5,474	▲17.0	▲26.2	▼(7.3)	▼(9.8)
Value.....	195,138	225,033	246,017	49,372	49,574	▲26.1	▲15.3	▲9.3	▲0.4
Unit value.....	\$5.73	\$5.24	\$6.18	\$8.14	\$9.06	▲7.8	▼(8.7)	▲18.0	▲11.3
Ending inventory quantity.....	4,961	6,618	7,892	6,492	9,618	▲59.1	▲33.4	▲19.3	▲48.1
All import sources:									
Quantity.....	204,191	251,251	240,726	41,992	51,913	▲17.9	▲23.0	▼(4.2)	▲23.6
Value.....	862,929	907,679	940,642	196,823	220,955	▲9.0	▲5.2	▲3.6	▲12.3
Unit value.....	\$4.23	\$3.61	\$3.91	\$4.69	\$4.26	▼(7.5)	▼(14.5)	▲8.2	▼(9.2)
Ending inventory quantity.....	24,886	24,565	21,924	24,643	21,654	▼(11.9)	▼(1.3)	▼(10.8)	▼(12.1)
U.S. producers':									
Practical capacity quantity.....	298,009	257,855	261,127	65,187	61,204	▼(12.4)	▼(13.5)	▲1.3	▼(6.1)
Production quantity.....	239,733	206,389	192,340	48,382	51,026	▼(19.8)	▼(13.9)	▼(6.8)	▲5.5
Capacity utilization (fn1).....	80.4	80.0	73.7	74.2	83.4	▼(6.8)	▼(0.4)	▼(6.4)	▲9.2
U.S. shipments:									
Quantity.....	237,518	196,614	183,481	48,004	49,584	▼(22.8)	▼(17.2)	▼(6.7)	▲3.3
Value.....	1,260,088	1,058,081	950,646	232,573	250,725	▼(24.6)	▼(16.0)	▼(10.2)	▲7.8
Unit value.....	\$5.31	\$5.38	\$5.18	\$4.84	\$5.06	▼(2.3)	▲1.4	▼(3.7)	▲4.4
U.S. (re-)imports U.S. origin:									
Quantity.....	1,751	3,384	9,352	1,870	234	▲434.1	▲93.2	▲176.4	▼(87.5)
Value.....	25,025	20,662	24,858	5,788	2,833	▼(0.7)	▼(17.4)	▲20.3	▼(51.1)
Unit value.....	\$14.29	\$6.11	\$2.66	\$3.09	\$12.10	▼(81.4)	▼(57.3)	▼(56.5)	▲291.1
Combined U.S. shipments for consumption:									
Quantity.....	239,269	199,997	192,833	49,875	49,818	▼(19.4)	▼(16.4)	▼(3.6)	▼(0.1)
Value.....	1,285,113	1,078,743	975,504	238,361	253,558	▼(24.1)	▼(16.1)	▼(9.6)	▲6.4
Unit value.....	\$5.37	\$5.39	\$5.06	\$4.78	\$5.09	▼(5.8)	▲0.4	▼(6.2)	▲6.5
Export shipments:									
Quantity.....	9,199	9,492	8,037	2,430	1,742	▼(12.6)	▲3.2	▼(15.3)	▼(28.3)
Value.....	40,632	39,413	36,909	10,520	7,826	▼(9.2)	▼(3.0)	▼(6.4)	▼(25.6)
Unit value.....	\$4.42	\$4.15	\$4.59	\$4.33	\$4.49	▲4.0	▼(6.0)	▲10.6	▲3.7
Ending inventory quantity.....	43,156	43,388	43,765	40,893	43,050	▲1.4	▲0.5	▲0.9	▲5.3
Inventories/total shipments (fn1).....	17.5	21.1	22.9	20.3	21.0	▲5.4	▲3.6	▲1.8	▲0.7
Production workers.....	3,643	3,324	3,040	3,070	2,978	▼(16.6)	▼(8.8)	▼(8.5)	▼(3.0)
Hours worked (1,000s).....	7,191	6,220	5,867	1,477	1,489	▼(18.4)	▼(13.5)	▼(5.7)	▲0.9
Wages paid (\$1,000).....	202,982	178,019	167,145	42,559	44,412	▼(17.7)	▼(12.3)	▼(6.1)	▲4.4
Hourly wages (dollars per hour).....	\$28.23	\$28.62	\$28.49	\$28.82	\$29.82	▲0.9	▲1.4	▼(0.5)	▲3.5
Productivity (pounds per hour).....	33.3	33.2	32.8	32.8	34.3	▼(1.7)	▼(0.5)	▼(1.2)	▲4.6
Unit labor costs.....	\$0.85	\$0.86	\$0.87	\$0.88	\$0.87	▲2.6	▲1.9	▲0.7	▼(1.1)

Table continued.

Table C.1 Continued

Hydraulic cylinders: Summary data concerning the U.S. market, by item and period

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through March

Item	Reported data					Period change comparisons			
	Calendar year			Interim		Calendar year		Interim	
	2023	2024	2025	2025	2026	2023–25	2023–24	2024–25	2025–26
U.S. producers'--Continued									
Net sales:									
Quantity.....	241,608	202,767	189,671	49,955	50,894	▼(21.5)	▼(16.1)	▼(6.5)	▲1.9
Value.....	1,209,643	1,024,128	946,694	232,535	250,947	▼(21.7)	▼(15.3)	▼(7.6)	▲7.9
Unit value.....	\$5.01	\$5.05	\$4.99	\$4.65	\$4.93	▼(0.3)	▲0.9	▼(1.2)	▲5.9
Cost of goods sold (COGS).....	958,699	813,188	748,348	182,525	190,609	▼(21.9)	▼(15.2)	▼(8.0)	▲4.4
Gross profit or (loss) (fn2).....	250,944	210,940	198,346	50,010	60,339	▼(21.0)	▼(15.9)	▼(6.0)	▲20.7
SG&A expenses.....	95,343	98,382	95,292	23,320	24,378	▼(0.1)	▲3.2	▼(3.1)	▲4.5
Operating income or (loss) (fn2).....	155,601	112,558	103,054	26,689	35,961	▼(33.8)	▼(27.7)	▼(8.4)	▲34.7
Net income or (loss) (fn2).....	142,837	95,244	87,739	22,766	35,283	▼(38.6)	▼(33.3)	▼(7.9)	▲55.0
Unit COGS.....	\$3.97	\$4.01	\$3.95	\$3.65	\$3.75	▼(0.6)	▲1.1	▼(1.6)	▲2.5
Unit SG&A expenses.....	\$0.39	\$0.49	\$0.50	\$0.47	\$0.48	▲27.3	▲23.0	▲3.5	▲2.6
Unit operating income or (loss) (fn2).....	\$0.64	\$0.56	\$0.54	\$0.53	\$0.71	▼(15.6)	▼(13.8)	▼(2.1)	▲32.3
Unit net income or (loss) (fn2).....	\$0.59	\$0.47	\$0.46	\$0.46	\$0.69	▼(21.8)	▼(20.5)	▼(1.5)	▲52.1
COGS/sales (fn1).....	79.3	79.4	79.0	78.5	76.0	▼(0.2)	▲0.1	▼(0.4)	▼(2.5)
Operating income or (loss)/sales (fn1).....	12.9	11.0	10.9	11.5	14.3	▼(2.0)	▼(1.9)	▼(0.1)	▲2.9
Net income or (loss)/sales (fn1).....	11.8	9.3	9.3	9.8	14.1	▼(2.5)	▼(2.5)	▼(0.0)	▲4.3
Capital expenditures.....	30,510	34,492	23,210	6,758	4,882	▼(23.9)	▲13.1	▼(32.7)	▼(27.7)
Research and development expenses.....	15,673	14,446	13,274	3,347	2,813	▼(15.3)	▼(7.8)	▼(8.1)	▼(15.9)
Total assets.....	602,633	551,599	537,096	NA	NA	▼(10.9)	▼(8.5)	▼(2.6)	NA

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.

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.

Related party exclusion

Table C.2

Hydraulic cylinders: Summary data concerning the U.S. market excluding nine related parties as identified in footnote 1 (fn1), by item and period

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through March

Item	Reported data					Period change comparisons			
	2023	2024	2025	Interim 2025	2026	2023–25	2023–24	2024–25	Interim 2025–26
U.S. consumption quantity:									
Amount.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Producers' share (fn2):									
Included U.S. producers.....	***	***	***	***	***	▼***	▼***	▲***	▼***
Excluded U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***
All U.S. producers.....	***	***	***	***	***	▼***	▼***	▲***	▼***
Importers' share (fn2):									
Canada.....	***	***	***	***	***	▲***	▼***	▲***	▲***
China.....	***	***	***	***	***	▲***	▲***	▼***	▼***
India.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Mexico.....	***	***	***	***	***	▲***	▲***	▲***	▲***
South Korea.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Subject sources.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▼***	▼***
All import sources.....	***	***	***	***	***	▲***	▲***	▼***	▲***
U.S. consumption value:									
Amount.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Producers' share (fn2):									
Included U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Excluded U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▲***
All U.S. producers.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Importers' share (fn2):									
Canada.....	***	***	***	***	***	▲***	▲***	▲***	▼***
China.....	***	***	***	***	***	▲***	▲***	▼***	▼***
India.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Mexico.....	***	***	***	***	***	▲***	▲***	▲***	▲***
South Korea.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Subject sources.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Nonsubject sources.....	***	***	***	***	***	▲***	▲***	▲***	▼***
All import sources.....	***	***	***	***	***	▲***	▲***	▲***	▲***
U.S. importers U.S. shipments of imports from:									
Canada:									
Quantity.....	22,844	22,763	25,934	5,611	6,878	▲13.5	▼(0.4)	▲13.9	▲22.6
Value.....	124,823	122,549	124,663	32,957	35,336	▼(0.1)	▼(1.8)	▲1.7	▲7.2
Unit value.....	\$5.46	\$5.38	\$4.81	\$5.87	\$5.14	▼(12.0)	▼(1.5)	▼(10.7)	▼(12.5)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
China:									
Quantity.....	49,533	60,429	52,471	10,934	8,796	▲5.9	▲22.0	▼(13.2)	▼(19.6)
Value.....	149,073	173,395	161,695	46,291	36,838	▲8.5	▲16.3	▼(6.7)	▼(20.4)
Unit value.....	\$3.01	\$2.87	\$3.08	\$4.23	\$4.19	▲2.4	▼(4.7)	▲7.4	▼(1.1)
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
India:									
Quantity.....	10,628	18,258	18,173	2,436	3,661	▲71.0	▲71.8	▼(0.5)	▲50.3
Value.....	42,943	53,668	57,048	10,451	16,579	▲32.8	▲25.0	▲6.3	▲58.6
Unit value.....	\$4.04	\$2.94	\$3.14	\$4.29	\$4.53	▼(22.3)	▼(27.2)	▲6.8	▲5.6
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Mexico:									
Quantity.....	25,138	39,753	47,957	5,634	8,975	▲90.8	▲58.1	▲20.6	▲59.3
Value.....	62,589	105,931	181,137	23,454	31,724	▲189.4	▲69.2	▲71.0	▲35.3
Unit value.....	\$2.49	\$2.66	\$3.78	\$4.16	\$3.53	▲51.7	▲7.0	▲41.7	▼(15.1)
Ending inventory quantity.....	***	***	***	***	***	▼***	▼***	▼***	▼***
South Korea:									
Quantity.....	62,017	67,086	56,386	11,307	18,129	▼(9.1)	▲8.2	▼(15.9)	▲60.3
Value.....	288,363	227,103	170,081	34,298	50,904	▼(41.0)	▼(21.2)	▼(25.1)	▲48.4
Unit value.....	\$4.65	\$3.39	\$3.02	\$3.03	\$2.81	▼(35.1)	▼(27.2)	▼(10.9)	▼(7.4)
Ending inventory quantity.....	***	***	***	***	***	▲***	▲***	▲***	▲***

Table continued.

Table C.2 Continued

Hydraulic cylinders: Summary data concerning the U.S. market excluding nine related parties as identified in footnote 1 (fn1), by item and period

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through March

Item	Reported data					Period change comparisons			
	Calendar year		2025	Interim		Calendar year		Interim	
	2023	2024		2025	2026	2023–25	2023–24	2024–25	2025–26
Subject sources:									
Quantity.....	170,161	208,289	200,921	35,923	46,439	▲18.1	▲22.4	▼(3.5)	▲29.3
Value.....	667,791	682,646	694,625	147,450	171,381	▲4.0	▲2.2	▲1.8	▲16.2
Unit value.....	\$3.92	\$3.28	\$3.46	\$4.10	\$3.69	▼(11.9)	▼(16.5)	▲5.5	▼(10.1)
Ending inventory quantity.....	19,925	17,946	14,032	18,151	12,036	▼(29.6)	▼(9.9)	▼(21.8)	▼(33.7)
Nonsubject sources:									
Quantity.....	34,030	42,961	39,804	6,068	5,474	▲17.0	▲26.2	▼(7.3)	▼(9.8)
Value.....	195,138	225,033	246,017	49,372	49,574	▲26.1	▲15.3	▲9.3	▲0.4
Unit value.....	\$5.73	\$5.24	\$6.18	\$8.14	\$9.06	▲7.8	▼(8.7)	▲18.0	▲11.3
Ending inventory quantity.....	4,961	6,618	7,892	6,492	9,618	▲59.1	▲33.4	▲19.3	▲48.1
All import sources:									
Quantity.....	204,191	251,251	240,726	41,992	51,913	▲17.9	▲23.0	▼(4.2)	▲23.6
Value.....	862,929	907,679	940,642	196,823	220,955	▲9.0	▲5.2	▲3.6	▲12.3
Unit value.....	\$4.23	\$3.61	\$3.91	\$4.69	\$4.26	▼(7.5)	▼(14.5)	▲8.2	▼(9.2)
Ending inventory quantity.....	24,886	24,565	21,924	24,643	21,654	▼(11.9)	▼(1.3)	▼(10.8)	▼(12.1)
Included U.S. producers:									
Practical capacity quantity.....	***	***	***	***	***	▼***	▼***	▲***	▼***
Production quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Capacity utilization (fn2).....	***	***	***	***	***	▼***	▼***	▼***	▲***
U.S. shipments:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
U.S. (re-)imports U.S. origin:									
Quantity.....	***	***	***	***	***	▲***	▲***	▲***	▼***
Value.....	***	***	***	***	***	▼***	▼***	▲***	▼***
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Combined U.S. shipments for consumption:									
Quantity.....	***	***	***	***	***	▼***	▼***	▲***	▼***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Unit value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Export shipments:									
Quantity.....	***	***	***	***	***	▼***	▲***	▼***	▼***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit value.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Ending inventory quantity.....	***	***	***	***	***	▲***	▼***	▲***	▲***
Inventories/total shipments (fn2).....	***	***	***	***	***	▲***	▲***	▲***	▲***
Production workers.....	***	***	***	***	***	▼***	▼***	▼***	▼***
Hours worked (1,000s).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Wages paid (\$1,000).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Hourly wages (dollars per hour).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Productivity (Pounds per hour).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Unit labor costs.....	***	***	***	***	***	▲***	▲***	▼***	▲***

Table continued.

Table C.2 Continued

Hydraulic cylinders: Summary data concerning the U.S. market excluding nine related parties as indentified in footnote 1 (fn1), by item and period

Quantity=1,000 pounds; Value=1,000 dollars; Unit values, unit labor costs, and unit expenses=dollars per pound; Period changes=percent--exceptions noted; Interim period is January through March

Item	Reported data					Period change comparisons			
	Calendar year			Interim		Calendar year			Interim
	2023	2024	2025	2025	2026	2023–25	2023–24	2024–25	2025–26
Included U.S. producers'--Continued									
Net sales:									
Quantity.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Value.....	***	***	***	***	***	▼***	▼***	▼***	▲***
Unit value.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Cost of goods sold (COGS).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Gross profit or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▲***
SG&A expenses.....	***	***	***	***	***	▲***	▲***	▼***	▲***
Operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Unit COGS.....	***	***	***	***	***	▼***	▲***	▼***	▲***
Unit SG&A expenses.....	***	***	***	***	***	▲***	▲***	▲***	▲***
Unit operating income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▼***
Unit net income or (loss) (fn3).....	***	***	***	***	***	▼***	▼***	▼***	▲***
COGS/sales (fn2).....	***	***	***	***	***	▼***	▼***	▼***	▲***
Operating income or (loss)/sales (fn2).....	***	***	***	***	***	▼***	▼***	▲***	▼***
Net income or (loss)/sales (fn2).....	***	***	***	***	***	▼***	▼***	▼***	▲***
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 available upon request.

fn1.--The nine (9) related parties excluded from this analysis include: *** whose subject imports exceeded 50 percent of their domestic production in one or more periods..

fn2.--Reported data are in percent and period changes are in percentage points.

fn3.--Percent changes only calculated when both comparison values represent profits; The directional change in profitability provided when one or both comparison values represent a loss.

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

SUFFICIENT PRODUCTION RELATED ACTIVITIES

Table D.1 Hydraulic cylinders: U.S. producers' narratives on their domestic activities

Item	Firm name and narrative response
Aggressive Hydraulics	***
Aurelius	***
Bailey	***
Beiler Hydraulics	***
Bobalee Hydraulics	***
Bolzoni	***
Cascade	***
Columbus Hydraulics	***
Cross Manufacturing	***
Custom Hoists	***

Item	Firm name and narrative response
Deere & Company	***
Hol-Mac	***
Jarp	***

Item	Firm name and narrative response
Ligon	***
Ognibene	***
Prince	***
PTC	***
Rosenboom	***

Item	Firm name and narrative response
Scot Industries	***
Stillwell	***
Texas Hydraulics	***
V&P Hydraulic	***
West Craft Manufacturing	***

Item	Firm name and narrative response
Wipro	***
York PMH	***

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

Table D.2 Hydraulic cylinders: U.S. producers' reported complexity and importance of operations

Ratings of 1 are minimally complex, intense, or important; Ratings of 5 are extremely complex, intense, or important

Firm	Rating	Narrative response on complexity and importance rating
Aggressive Hydraulics	***	***
Aurelius	***	***
Bailey	***	***
Beiler Hydraulics	***	***
Bobalee Hydraulics	***	***
Bolzoni	***	***
Cascade	***	***
Caterpillar	***	***
Columbus Hydraulics	***	***
Cross Manufacturing	***	***
Custom Hoists	***	***
Deere & Company	***	***
Hol-Mac	***	***
Industrial Hard Chrome	***	***
Jarp	***	***
Ligon	***	***
Ognibene	***	***

Firm	Rating	Narrative response on complexity and importance rating
Prince	***	***
PTC	***	***
Rosenboom	***	***
Scot Industries	***	***
Stillwell	***	***
TMS Hydraulics	***	***
Texas Hydraulics	***	***
V&P Hydraulic	***	***
West Craft Manufacturing	***	***
Wipro	***	***
York PMH	***	***

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

Table D.3 Hydraulic cylinders: U.S. producers' domestic operations, by firm and factor

Firm	Value-added: Conversion cost ratio component manufacturing	Value-added: Conversion cost ratio final assembly	Value-added: Conversion costs across all levels of vertical integration	Value-added: Conversion costs across all levels of vertical integration	Parts analysis: Share of RM components from domestic sources	Parts analysis: Share of RM components from subject sources	Parts analysis: Share of RM components from nonsubject sources
Aggressive Hydraulics	***	*** percent	*** percent	***	*** percent	***	***
Aurelius	*** percent	*** percent	*** percent	***	*** percent	*** percent	*** percent
Beiler Hydraulics	*** percent	***	*** percent	***	***	***	***
Bobalee Hydraulics	***	*** percent	*** percent	***	*** percent	***	*** percent
Bolzoni	*** percent	*** percent	*** percent	***	*** percent	***	***
Cross Manufacturing	***	*** percent	*** percent	***	*** percent	***	*** percent
Hol-Mac	*** percent	*** percent	*** percent	***	*** percent	***	***
Industrial Hard Chrome	*** percent	***	*** percent	***	***	***	***
Ligon	***	*** percent	*** percent	***	*** percent	*** percent	*** percent
Prince	***	*** percent	*** percent	***	*** percent	***	***
PTC	*** percent	***	*** percent	***	***	***	***
Rosenboom	*** percent	*** percent	*** percent	***	*** percent	*** percent	***
Scot Industries	*** percent	***	*** percent	***	*** percent	***	***
Stillwell	*** percent	*** percent	*** percent	***	*** percent	*** percent	***
Texas Hydraulics	*** percent	*** percent	*** percent	***	*** percent	*** percent	***
TMS Hydraulics	***	*** percent	*** percent	***	*** percent	***	***
V&P Hydraulic	*** percent	***	*** percent	***	***	***	***
West Craft Manufacturing	*** percent	***	*** percent	***	***	***	***
York PMH	*** percent	*** percent	*** percent	***	*** percent	***	***
Included producers (in table C-2)	*** percent	*** percent	*** percent	***	*** percent	*** percent	*** percent
Bailey	***	*** percent	*** percent	***	*** percent	*** percent	*** percent

Firm	Value-added: Conversion cost ratio component manufacturing	Value-added: Conversion cost ratio final assembly	Value-added: Conversion costs across all levels of vertical integration	Value-added: Conversion costs across all levels of vertical integration	Parts analysis: Share of RM components from domestic sources	Parts analysis: Share of RM components from subject sources	Parts analysis: Share of RM components from nonsubject sources
Cascade	***	***	***	***	***	***	***
Caterpillar	***	***	***	***	***	***	***
Columbus Hydraulics	***	***	***	***	***	***	***
Custom Hoists	percent	percent	percent	***	percent	percent	
Deere & Company	***	percent	percent	***	percent	percent	percent
Jarp	percent	percent	percent	***	percent	***	percent
Ognibene	***	percent	percent	***	***	percent	percent
Wipro	percent	percent	percent	***	percent	***	percent
Excluded producers (from table C-2)	percent	percent	percent	***	percent	percent	percent
All producers (in table C-1)	percent	percent	percent	***	percent	percent	percent

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

Note: The estimated greenfield investment cost was reported by firms per the question text based on the present-day dollars amount it would take to replicate their current day asset base and production operations' footprint in 2026. The assets reported here are the average of assets reported for the three full calendar years of the data collection period and would therefore represent the historical investment costs net of accumulated dedication for their reported operations over the data collection period. The capital expenditures (CapEx) reported here is the average of the capital expenditures made by the firm over the three full calendar years of the data collection period. Zeroes, null values, and undefined calculations are suppressed and shown as "None reported".

Table D.4 Hydraulic cylinders: U.S. producers' narratives on their domestic activities, by item

Item	Firm name and narrative response
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***

Item	Firm name and narrative response
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Capital investments	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***

Item	Firm name and narrative response
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Technical expertise	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***

Item	Firm name and narrative response
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Value added	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***

Item	Firm name and narrative response
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***
Employment	***

Item	Firm name and narrative response
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***

Item	Firm name and narrative response
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Quantity, type, and source of parts	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***

Item	Firm name and narrative response
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***
Costs and activities	***

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

APPENDIX E

U.S. SHIPMENTS BY PRODUCT TYPE

Table E.1 Hydraulic cylinders: U.S. producers' U.S. shipments, by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.2 Hydraulic cylinders: U.S. Importers' (re-)imports from the United States, by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.3 Hydraulic cylinders: Domestically produced U.S. shipments (U.S. producers' U.S. shipments and U.S. importers' (re-)imports), by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.4 Hydraulic cylinders: U.S. Importers' imports from Canada , by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.5 Hydraulic cylinders: U.S. Importers' imports from China , by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.6 Hydraulic cylinders: U.S. Importers' imports from India , by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.7 Hydraulic cylinders: U.S. Importers' imports from Mexico , by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.8 Hydraulic cylinders: U.S. Importers' imports from South Korea , by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.9 Hydraulic cylinders: U.S. Importers' imports from subject sources, by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.10 Hydraulic cylinders: U.S. Importers' imports from nonsubject sources, by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.11 Hydraulic cylinders: U.S. Importers' imports from all sources, by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.12 Hydraulic cylinders: Combined domestically produced U.S. shipments (U.S. producers' U.S. shipments and U.S. importers' (re-)imports) and U.S. importers' imports, by type and period

Interim period is January through March

Level of processing	Measure	2023	2024	2025	Interim 2025	Interim 2026
Complete cylinder: Not attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Not attached	Units	***	***	***	***	***
Complete cylinder: Not attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Not attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Not attached	\$ per unit	***	***	***	***	***
Complete cylinder: Not attached	lbs per unit	***	***	***	***	***
Complete cylinder: Attached	1,000 pounds	***	***	***	***	***
Complete cylinder: Attached	Units	***	***	***	***	***
Complete cylinder: Attached	1,000 dollars	***	***	***	***	***
Complete cylinder: Attached	\$ per lbs	***	***	***	***	***
Complete cylinder: Attached	\$ per unit	***	***	***	***	***
Complete cylinder: Attached	lbs per unit	***	***	***	***	***
Complete cylinder	1,000 pounds	***	***	***	***	***
Complete cylinder	Units	***	***	***	***	***
Complete cylinder	1,000 dollars	***	***	***	***	***
Complete cylinder	\$ per lbs	***	***	***	***	***
Complete cylinder	\$ per unit	***	***	***	***	***
Complete cylinder	lbs per unit	***	***	***	***	***
Components	1,000 pounds	***	***	***	***	***
Components	1,000 dollars	***	***	***	***	***
Components	\$ per lbs	***	***	***	***	***
All levels of processing	1,000 pounds	***	***	***	***	***
All levels of processing	1,000 dollars	***	***	***	***	***
All levels of processing	\$ per lbs	***	***	***	***	***

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

Table E.13 Complete unattached hydraulic cylinders: U.S. producers' U.S. shipments and U.S. importers' U.S. imports, by source and period

Quantity in 1,000 pounds; shares and ratios in percent; interim period is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers	Quantity	***	***	***	***	***
Canada	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
South Korea	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Canada	Share	***	***	***	***	***
China	Share	***	***	***	***	***
India	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
South Korea	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Canada	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
South Korea	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Table E.14 Complete attached hydraulic cylinders: U.S. producers' U.S. shipments and U.S. importers' U.S. imports, by source and period

Quantity in 1,000 pounds; shares and ratios in percent; interim period is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers	Quantity	***	***	***	***	***
Canada	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
South Korea	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Canada	Share	***	***	***	***	***
China	Share	***	***	***	***	***
India	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
South Korea	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Canada	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
South Korea	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: Ratio is the ratio to aggregate apparent U.S. consumption.

Table E.15 Complete hydraulic cylinders: U.S. producers' U.S. shipments and U.S. importers' U.S. imports, by source and period

Quantity in 1,000 pounds; shares and ratios in percent; interim period is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers	Quantity	***	***	***	***	***
Canada	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
South Korea	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Canada	Share	***	***	***	***	***
China	Share	***	***	***	***	***
India	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
South Korea	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Canada	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
South Korea	Ratio	***	***	***	***	***
Subject sources	Ratio	***	***	***	***	***
Nonsubject sources	Ratio	***	***	***	***	***
All import sources	Ratio	***	***	***	***	***
All sources	Ratio	***	***	***	***	***

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

Table E.16 Hydraulic cylinder components: U.S. producers' U.S. shipments and U.S. importers' U.S. imports, by source and period

Quantity in 1,000 pounds; shares and ratios in percent; interim period is January through March

Source	Measure	2023	2024	2025	Interim 2025	Interim 2026
U.S. producers	Quantity	***	***	***	***	***
Canada	Quantity	***	***	***	***	***
China	Quantity	***	***	***	***	***
India	Quantity	***	***	***	***	***
Mexico	Quantity	***	***	***	***	***
South Korea	Quantity	***	***	***	***	***
Subject sources	Quantity	***	***	***	***	***
Nonsubject sources	Quantity	***	***	***	***	***
All import sources	Quantity	***	***	***	***	***
All sources	Quantity	***	***	***	***	***
U.S. producers	Share	***	***	***	***	***
Canada	Share	***	***	***	***	***
China	Share	***	***	***	***	***
India	Share	***	***	***	***	***
Mexico	Share	***	***	***	***	***
South Korea	Share	***	***	***	***	***
Subject sources	Share	***	***	***	***	***
Nonsubject sources	Share	***	***	***	***	***
All import sources	Share	***	***	***	***	***
All sources	Share	100.0	100.0	100.0	100.0	100.0
U.S. producers	Ratio	***	***	***	***	***
Canada	Ratio	***	***	***	***	***
China	Ratio	***	***	***	***	***
India	Ratio	***	***	***	***	***
Mexico	Ratio	***	***	***	***	***
South Korea	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: Ratio is the ratio to aggregate apparent U.S. consumption.

APPENDIX F

U.S. PRODUCERS' COGS BY RAW MATERIAL CATEGORY

Table F.1 Hydraulic cylinders: U.S. producers' COGS by raw material category, origin, and period¹

Value in 1,000 dollars; interim is January through March

Raw material type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Cylinder barrels: Internally produced costs COGS	Value	***	***	***	***	***
Cylinder barrels: Purchased/imported domestic costs COGS	Value	***	***	***	***	***
Cylinder barrels: Purchased/imported subject costs COGS	Value	***	***	***	***	***
Cylinder barrels: Purchased/imported nonsubject costs COGS	Value	***	***	***	***	***
Cylinder barrels: Purchased/imported costs COGS	Value	***	***	***	***	***
Cylinder barrels: Total cylinder barrel costs COGS	Value	***	***	***	***	***
Pistons and piston rods: Internally produced costs COGS	Value	***	***	***	***	***
Pistons and piston rods: Purchased/imported domestic costs COGS	Value	***	***	***	***	***
Pistons and piston rods: Purchased/imported subject costs COGS	Value	***	***	***	***	***
Pistons and piston rods: Purchased/imported nonsubject costs COGS	Value	***	***	***	***	***
Pistons and piston rods: Purchased/imported costs COGS	Value	***	***	***	***	***
Pistons and piston rods: Total pistons and piston rods costs	Value	***	***	***	***	***
Other parts: Internally produced costs COGS	Value	***	***	***	***	***
Other parts: Purchased/imported domestic costs COGS	Value	***	***	***	***	***
Other parts: Purchased/imported subject costs COGS	Value	***	***	***	***	***
Other parts: Purchased/imported nonsubject costs COGS	Value	***	***	***	***	***
Other parts: Purchased/imported costs COGS	Value	***	***	***	***	***
Other parts: Total other parts costs COGS	Value	***	***	***	***	***
Direct labor costs and other factory costs of cylinder assembly activities	Value	***	***	***	***	***
Total COGS of hydraulic cylinders	Value	***	***	***	***	***

Table continued.

¹ Out of twenty-six U.S. producers that submitted usable financial data regarding their hydraulic cylinder operations, twenty-one reported their COGS by raw materials: ***.

Table F.1 (Continued) Hydraulic cylinders: U.S. producers' COGS by raw material category, origin, and period

Share in percent; interim is January through March

Raw material type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Cylinder barrels: Internally produced costs COGS	Share of value	***	***	***	***	***
Cylinder barrels: Purchased/imported domestic costs COGS	Share of value	***	***	***	***	***
Cylinder barrels: Purchased/imported subject costs COGS	Share of value	***	***	***	***	***
Cylinder barrels: Purchased/imported nonsubject costs COGS	Share of value	***	***	***	***	***
Cylinder barrels: Purchased/imported costs COGS	Share of value	***	***	***	***	***
Cylinder barrels: Total cylinder barrel costs COGS	Share of value	***	***	***	***	***
Pistons and piston rods: Internally produced costs COGS	Share of value	***	***	***	***	***
Pistons and piston rods: Purchased/imported domestic costs COGS	Share of value	***	***	***	***	***
Pistons and piston rods: Purchased/imported subject costs COGS	Share of value	***	***	***	***	***
Pistons and piston rods: Purchased/imported nonsubject costs COGS	Share of value	***	***	***	***	***
Pistons and piston rods: Purchased/imported costs COGS	Share of value	***	***	***	***	***
Pistons and piston rods: Total pistons and piston rods costs	Share of value	***	***	***	***	***
Other parts: Internally produced costs COGS	Share of value	***	***	***	***	***
Other parts: Purchased/imported domestic costs COGS	Share of value	***	***	***	***	***
Other parts: Purchased/imported subject costs COGS	Share of value	***	***	***	***	***
Other parts: Purchased/imported nonsubject costs COGS	Share of value	***	***	***	***	***
Other parts: Purchased/imported costs COGS	Share of value	***	***	***	***	***
Other parts: Total other parts costs COGS	Share of value	***	***	***	***	***
Direct labor costs and other factory costs of cylinder assembly activities	Share of value	***	***	***	***	***
Total COGS of hydraulic cylinders	Share of value	100.0	100.0	100.0	100.0	100.0

Table continued.

Table F.1 (Continued) Hydraulic cylinders: U.S. producers' COGS by raw material category, origin, and period

Unit value in dollars per pound; interim is January through March

Raw material type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Cylinder barrels: Internally produced costs COGS	Unit COGS	***	***	***	***	***
Cylinder barrels: Purchased/imported domestic costs COGS	Unit COGS	***	***	***	***	***
Cylinder barrels: Purchased/imported subject costs COGS	Unit COGS	***	***	***	***	***
Cylinder barrels: Purchased/imported nonsubject costs COGS	Unit COGS	***	***	***	***	***
Cylinder barrels: Purchased/imported costs COGS	Unit COGS	***	***	***	***	***
Cylinder barrels: Total cylinder barrel costs COGS	Unit COGS	***	***	***	***	***
Pistons and piston rods: Internally produced costs COGS	Unit COGS	***	***	***	***	***
Pistons and piston rods: Purchased/imported domestic costs COGS	Unit COGS	***	***	***	***	***
Pistons and piston rods: Purchased/imported subject costs COGS	Unit COGS	***	***	***	***	***
Pistons and piston rods: Purchased/imported nonsubject costs COGS	Unit COGS	***	***	***	***	***
Pistons and piston rods: Purchased/imported costs COGS	Unit COGS	***	***	***	***	***
Pistons and piston rods: Total pistons and piston rods costs	Unit COGS	***	***	***	***	***
Other parts: Internally produced costs COGS	Unit COGS	***	***	***	***	***
Other parts: Purchased/imported domestic costs COGS	Unit COGS	***	***	***	***	***
Other parts: Purchased/imported subject costs COGS	Unit COGS	***	***	***	***	***
Other parts: Purchased/imported nonsubject costs COGS	Unit COGS	***	***	***	***	***
Other parts: Purchased/imported costs COGS	Unit COGS	***	***	***	***	***
Other parts: Total other parts costs COGS	Unit COGS	***	***	***	***	***
Direct labor costs and other factory costs of cylinder assembly activities	Unit COGS	***	***	***	***	***
Total COGS of hydraulic cylinders	Unit COGS	***	***	***	***	***

Table continued.

Table F.1 (Continued) Hydraulic cylinders: U.S. producers' COGS by raw material category, origin, and period

Ratio in percent; interim is January through March

Raw material type	Measure	2023	2024	2025	Interim 2025	Interim 2026
Cylinder barrels: Internally produced costs COGS	Ratio to NS	***	***	***	***	***
Cylinder barrels: Purchased/imported domestic costs COGS	Ratio to NS	***	***	***	***	***
Cylinder barrels: Purchased/imported subject costs COGS	Ratio to NS	***	***	***	***	***
Cylinder barrels: Purchased/imported nonsubject costs COGS	Ratio to NS	***	***	***	***	***
Cylinder barrels: Purchased/imported costs COGS	Ratio to NS	***	***	***	***	***
Cylinder barrels: Total cylinder barrel costs COGS	Ratio to NS	***	***	***	***	***
Pistons and piston rods: Internally produced costs COGS	Ratio to NS	***	***	***	***	***
Pistons and piston rods: Purchased/imported domestic costs COGS	Ratio to NS	***	***	***	***	***
Pistons and piston rods: Purchased/imported subject costs COGS	Ratio to NS	***	***	***	***	***
Pistons and piston rods: Purchased/imported nonsubject costs COGS	Ratio to NS	***	***	***	***	***
Pistons and piston rods: Purchased/imported costs COGS	Ratio to NS	***	***	***	***	***
Pistons and piston rods: Total pistons and piston rods costs	Ratio to NS	***	***	***	***	***
Other parts: Internally produced costs COGS	Ratio to NS	***	***	***	***	***
Other parts: Purchased/imported domestic costs COGS	Ratio to NS	***	***	***	***	***
Other parts: Purchased/imported subject costs COGS	Ratio to NS	***	***	***	***	***
Other parts: Purchased/imported nonsubject costs COGS	Ratio to NS	***	***	***	***	***
Other parts: Purchased/imported costs COGS	Ratio to NS	***	***	***	***	***
Other parts: Total other parts costs COGS	Ratio to NS	***	***	***	***	***
Direct labor costs and other factory costs of cylinder assembly activities	Ratio to NS	***	***	***	***	***
Total COGS of hydraulic cylinders	Ratio to NS	***	***	***	***	***

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

Note: Shares/ratios and unit values, shown as "0.0" or "0.00" represent values greater than zero, but less than "0.05" or "0.005", respectively.

