

FOREIGN PRODUCERS'/EXPORTERS' QUESTIONNAIRE
CERTAIN HOT-ROLLED FLAT-ROLLED CARBON-QUALITY STEEL PRODUCTS FROM
BRAZIL, JAPAN, AND RUSSIA

Return completed questionnaire to:

UNITED STATES INTERNATIONAL TRADE COMMISSION
Office of Investigations, Room 615
500 E Street, SW, Washington, DC 20436

So as to be received by the Commission by no later than January 14, 2005

The information called for in this questionnaire is for use by the United States International Trade Commission in connection with its five-year reviews concerning hot-rolled steel from Brazil, Japan, and Russia (invs. Nos. 701-TA-384 and 731-TA-806-808 (Review)). The information requested in the questionnaire is requested under the authority of the Tariff Act of 1930, title VII.

Name of firm _____

Address _____

World Wide Web address _____

Has your firm produced or exported hot-rolled steel (as defined in the instruction booklet) since January 1, 1999?

NO (Sign the certification below and promptly return only this page of the questionnaire to the Commission)

YES (Read the instruction booklet carefully, complete all parts of the questionnaire, sign the certification, and return the entire questionnaire to the Commission)

CERTIFICATION

I certify that the information herein supplied in response to this questionnaire is complete and correct to the best of my knowledge and belief and understand that the information submitted is subject to audit and verification by the Commission.

By signing this certification I also grant consent for the Commission, and its employees and contract personnel, to use the information provided in this questionnaire and throughout these reviews in any other import-injury investigations or reviews conducted by the Commission on the same or similar merchandise. (If you do not consent to such use, please note the certification accordingly.)

I acknowledge that information submitted in this questionnaire response and throughout these reviews may be used by the Commission, its employees, and contract personnel who are acting in the capacity of Commission employees, for developing or maintaining the records of these reviews or related proceedings for which this information is submitted, or in internal audits and investigations relating to the programs and operations of the Commission pursuant to 5 U.S.C. Appendix 3. I understand that all contract personnel will sign non-disclosure agreements.

Name and Title of Authorized Official

Date

Signature of Authorized Official

() _____
Phone

() _____
Fax

E-mail address

PART I.--GENERAL QUESTIONS

The questions in this questionnaire have been reviewed with market participants to ensure that issues of concern are adequately addressed and that data requests are sufficient, meaningful, and as limited as possible. Public reporting burden for this questionnaire is estimated to average 30 hours per response, including the time for reviewing instructions, searching existing data sources, gathering the data needed, and completing and reviewing the questionnaire. Send comments regarding the accuracy of this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the Office of Investigations, U.S. International Trade Commission, 500 E Street, SW, Washington, DC 20436.

I-1a. Please report below the actual number of hours required and the cost to your firm of preparing the reply to this questionnaire and completing the form.

_____ hours _____ dollars

I-1b. We are interested in any comments you may have for improving this questionnaire in general or the clarity of specific questions. Please attach such comments to your response or send them to the above address.

I-2. Provide the name and address of establishment(s) covered by this questionnaire (see pages 6 and 7 of the instruction booklet for reporting guidelines). If your firm is publicly traded, please specify the stock exchange and trading symbol.

I-3. Please provide the names and addresses of the **FIVE** largest U.S. importers of your firm's hot-rolled steel since 1999.

PART I.--GENERAL QUESTIONS--Continued

I-4. In Parts II and III of this questionnaire we request a copy of your company's business plan. Does your company or any related firm have a business plan or any internal documents that describe, discuss, or analyze expected future market conditions for hot-rolled steel (including, by way of example reports or studies relating to contemplated investments, plant closings or shutdowns for maintenance or any other reasons; budgets or forecasts of economic activity)?

- No Yes--Please provide the requested documents. If you are not providing the requested documents, please explain why not.

I-5. Does your firm or any related firm produce, have the capability to produce, or have any plans to produce hot-rolled steel in the United States or other countries?

- No Yes--Please name the firm(s) and country(ies) below and, if U.S. producer(s), ensure that they complete the Commission's producer questionnaire (contact Dana Lofgren, Investigator (202-205-3185 or dana.lofgren@usitc.gov), for copies of that questionnaire).

I-6. Does your firm or any related firm import or have any plans to import hot-rolled steel into the United States?

- No Yes--Please name the firm(s) below and ensure that they complete the Commission's importer questionnaire (contact Dana Lofgren, Investigator (202-205-3185 or dana.lofgren@usitc.gov), for copies of that questionnaire).

PART II.--TRADE AND RELATED INFORMATION

II-1. Has your firm experienced any plant openings, relocations, expansions, acquisitions, consolidations, closures, or prolonged shutdowns because of strikes or equipment failure; curtailment of production because of shortages of materials or other reasons including revision of labor agreements (including pension or health care obligations for retirees or current employees); or any other change in the character of your operations or organization relating to the production of hot-rolled steel since 1999?

No Yes--Supply details as to the time, nature, and significance of such changes.

II-2. Does your firm anticipate any changes in the character of your operations or organization (as noted above) relating to the production of hot-rolled steel in the future?

No Yes--Supply details as to the time, nature, and significance of such changes and provide underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue. **Include in your response a specific projection of your firm's capacity to produce hot-rolled steel (in short tons) for 2005 and 2006.**

II-3. Would your firm anticipate any changes in the character of your operations or organization (as noted above) relating to the production of hot-rolled steel in the future if the subject countervailing duty order (Brazil), antidumping duty orders (Brazil and Japan), and suspension agreement (Russia) on hot-rolled steel were to be revoked?

No Yes--Supply details as to the time, nature, and significance of such changes and provide underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

PART II.--TRADE AND RELATED INFORMATION--Continued

II-4. Does your firm have any plans to add, expand, curtail, or shut down production capacity and/or production of hot-rolled steel in Brazil, Japan, and/or Russia in the future?

No

Yes--Please describe those plans, including planned dates and capacity/production quantities involved, and the reason(s) for such change(s). If the plans are to add or expand capacity or production, list (in descending order of importance) the markets (countries) to which such additional capacity or production would be directed. Provide relevant portions of business plans or other supporting documentation that address this issue.

II-5. Describe the production technology used in the production of hot-rolled steel in Brazil, Japan, and/or Russia and identify major production inputs. Also discuss any significant changes in production technology since 1999.

II-6. Has your firm since 1999 produced, or does your firm anticipate producing in the future, other products (such as cut-to-length plate or alloy hot-rolled steel) or downstream products (such as cold-rolled or coated steel) on the same equipment and machinery and/or using the same production and related workers employed to produce hot-rolled steel?

No

Yes--List the following information and report your firm's **combined** production capacity and production of these products and hot-rolled steel in the periods indicated.

Basis for allocation of capacity and employment data (indicate if different):

PART II.--TRADE AND RELATED INFORMATION--Continued

II-6. Continued

<i>(Quantity in short tons)</i>						
Product/Item	1999	2000	2001	2002	2003	2004
Raw Steel:						
Average Production Capacity						
Production						
Cold-Rolled Steel Sheet and Strip:						
Average Production Capacity						
Production						
Coated Steel Sheet and Strip:						
Average Production Capacity						
Production						
Cut-to-Length Plate:						
Average Production Capacity						
Production						
Alloy/Other Nonsubject Hot-Rolled Steel:						
Average Production Capacity						
Production						

II-7. Please describe the constraints that limit your production capacity.

II-8. Please report your firm's 2004 steel melting capacity, steel casting capacity, and total hot-rolling capacity (in short tons); identify bottlenecks in your firm's production of hot-rolled steel; and describe your plans and efforts to alleviate any such bottlenecks.

PART II.--TRADE AND RELATED INFORMATION--Continued

II-9 Is your firm able to switch production between hot-rolled steel and other products in response to a relative hot-rolled steel price change vis-a-vis the price of other products including downstream products, using the same equipment and labor?

- No
- Yes--Please identify below the other products, the approximate time and cost involved in switching, and the minimum relative price change required for your firm to switch production to or from hot-rolled steel.

II-10. (a) Has your firm maintained any inventories of hot-rolled steel in the United States (not including inventories held by firms identified in questions I-3, I-5, or I-6 above¹) since 1999?

- No
- Yes--Report the quantity (in short tons) of such end-of-period inventories below.

1999	2000	2001	2002	2003	2004
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(b) Has any firm related to your firm or an affiliate of your firm or any other entity related to your firm maintained any inventories of hot-rolled steel in the United States (not including inventories held by firms identified in questions I-3, I-5, or I-6 above¹) since 1999? Please provide the names and addresses of these firms.

II-11. (a) Are your firm's exports of hot-rolled steel subject to tariff or non-tariff barriers to trade (for example, antidumping or countervailing duty findings or remedies, tariffs, quotas, or regulatory barriers) in any countries other than the United States?

- No
- Yes--List the products(s), country(ies), the year each such barrier was imposed, and the type of barrier.

Product	Country	Year imposed	Barrier (if tariff, give rate)
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>

¹ Such firms will report inventories in the Commission's importer or producer questionnaire.

PART II.--TRADE AND RELATED INFORMATION--Continued

(b) Are your firm's exports of hot-rolled steel subject to current investigations in any countries other than the United States that might result in tariff or non-tariff barriers to trade?

No Yes--List the products(s), country(ies), and type(s) of investigation(s).

Product	Country	Type of investigation
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

II-12. Identify and discuss export markets (other than the United States) that you have developed or where you have increased your sales of hot-rolled steel since 1999. Please discuss the factors leading to these export market developments and if possible document.

II-13. Describe the significance of the existing subject countervailing duty order (Brazil), antidumping duty orders (Brazil and Japan), and suspension agreement (Russia) on hot-rolled steel in terms of their effect on your firm's production capacity, production, home market shipments, exports to the United States and other markets, and inventories. Please compare your firm's operations before and after the imposition of the orders and agreement.

PART II.--TRADE AND RELATED INFORMATION--Continued

II-14. Would your firm anticipate any changes in its production capacity, production, home market shipments, exports to the United States and other markets, or inventories relating to the production of hot-rolled steel in the future if the subject countervailing duty order (Brazil), antidumping duty orders (Brazil and Japan), and suspension agreement (Russia) on hot-rolled steel were to be revoked?

No

Yes--Supply details as to the time, nature, and significance of such changes and provide underlying assumptions, along with relevant portions of business plans or other supporting documentation, for any trends or projections you may provide.

II-15. What percentage of your firm's total sales in its most recent fiscal year was represented by sales of hot-rolled steel?

_____ Percent

PART II.--TRADE AND RELATED INFORMATION--Continued

II-16. Please report production capacity, production, shipments, and inventories of hot-rolled steel produced by your firm in Brazil, Japan, or Russia in 1999-2004. **Report separately for each country listed below. Photocopy as many pages as you need and identify the country for which you are reporting.**

Brazil

Japan

Russia

<i>(Quantity in short tons, value in 1,000 U.S. dollars)</i>						
Item	1999	2000	2001	2002	2003	2004
AVERAGE PRODUCTION CAPACITY¹ <i>(quantity)</i>						
BEGINNING-OF-PERIOD INVENTORIES² <i>(quantity)</i>						
PRODUCTION³ (quantity)						
SHIPMENTS:						
Home market:						
Internal consumption/transfers <i>(Quantity)</i>						
Commercial shipments: <i>Quantity</i>						
<i>Value</i>						
Exports to--						
United States: ⁴ <i>Quantity</i>						
<i>Value</i>						
All other export markets: European Union: ⁵ <i>Quantity</i>						
<i>Value</i>						
China: <i>Quantity</i>						
<i>Value</i>						
Asia(other than China): ⁶ <i>Quantity</i>						
<i>Value</i>						
Other: ⁷ <i>Quantity</i>						
<i>Value</i>						
Subtotal, all other export markets: <i>Quantity</i>						
<i>Value</i>						
Total exports <i>(quantity)</i>						
Total shipments <i>(quantity)</i>						
END-OF-PERIOD INVENTORIES <i>(quantity)</i>						

¹ The production capacity (see definitions in instructions booklet) reported is based on operating _____ hours per week, _____ weeks per year. Please describe the methodology used to calculate production capacity, and explain any changes in reported capacity (use additional pages as necessary). _____

² Reconciliation of data.--Please note that the quantities reported above should reconcile as follows: beginning-of-period inventories, plus production, less total shipments, equals end-of-period inventories. Do the data reported reconcile?

Yes No--Please explain: _____

³ Please estimate the percentage of total production of hot-rolled steel in Brazil, Japan, and/or Russia accounted for by your firm's production in 2004: _____ Percent

⁴ Please estimate the percentage of total exports to the United States of hot-rolled steel from Brazil, Japan, and/or Russia accounted for by your firm's exports in 2004: _____ Percent

⁵ Identify principal *European Union* export markets. _____

⁶ Identify principal *Asian* export markets. _____

⁷ Identify principal *other* export markets. _____

PART II.--TRADE AND RELATED INFORMATION--Continued

II-17. Report and classify your firm's 2004 commercial shipments (home and export markets), of hot-rolled steel products by grade, pickling/oiling, temper rolling, and edge trim. **Report separately for each country listed below. Photocopy as many pages as you need and identify the country for which you are reporting.**

Brazil

Japan

Russia

(Share in percent)			
Grade	$\leq 0.080''$	<u>>0.080'' but</u> $\leq 0.187''$	$>0.187''$
ASTM A-1011 CS, A-1018 CS (or A-569) ¹			
ASTM A-1011 SS, A-1018 SS (or A-570) ¹			
ASTM A-1011 HSLA, A-1018 HSLA (or A-607) ¹			
All other grades ²			
Total (sum of <u>all</u> 12 grade cells should = 100)			
Pickling & Oiling	$\leq 0.080''$	<u>>0.080'' but</u> $\leq 0.187''$	$>0.187''$
Neither pickled nor oiled			
Pickled and/or oiled			
Total (sum of <u>all</u> 6 pickling & oiling cells should = 100)			
Temper Rolling	$\leq 0.080''$	<u>>0.080'' but</u> $\leq 0.187''$	$>0.187''$
Not temper rolled or skin passed			
Temper rolled or skin passed			
Total (sum of <u>all</u> 6 temper rolling cells should = 100)			
Edge Trim	$\leq 0.080''$	<u>>0.080'' but</u> $\leq 0.187''$	$>0.187''$
Mill edge (as rolled)			
Trimmed			
Total (sum of <u>all</u> 6 edge trim cells should = 100)			
¹ Or equivalent.			
² Please identify your firm's five most common grades constituting "all other grades": _____ _____ _____ _____ _____			

PART III.--MARKET FACTORS

Please note that the questions in this section refer to the entire period since 1999, unless otherwise specified. If your response to any question differs for different time periods since 1999, please note this in your response (identifying the month/year to which you are referring).

III-1. a) Approximately what share of your firm's sales of hot-rolled steel to U.S. customers in **2004** were on a (1) long-term contract basis (multiple deliveries for more than 12 months), (2) short-term contract basis (multiple deliveries up to 12 months), and (3) spot sales basis (for a single delivery)?

Type of sale	Share of sales (percent)
Long-term contracts	
Short-term contracts	
Spot sales	

b) Has the percentage of contract vs. spot sales increased, decreased, or stayed the same since 1999? If the percentage of contract vs. spot sales differed during the period (e.g., increased in 2002 but decreased in 2003), please identify all periods in which the percentage of contract vs. spot sales changed, indicating whether this percentage increased, decreased or stayed the same.

Increased Unchanged Decreased

III-2. If you sell on a long-term contract basis, please answer the following questions with respect to provisions of a typical long-term contract.

(a) What percentage of your long-term contracts is of each of the following durations?

1 year _____ Over 1 year _____

(b) Can prices be renegotiated during the contract period? _____

(c) Does the contract fix quantity, price, or both? _____

(d) Does the contract have a meet or release provision? _____

III-3. If you sell on a short-term contract basis, please answer the following questions with respect to provisions of a typical short-term contract.

(a) What percentage of your short-term contracts is of each of the following durations?

3 months _____ 6 months _____ 9 months _____

(b) Can prices be renegotiated during the contract period? _____

PART III.--MARKET FACTORS--Continued

III-3. (c) Does the contract fix quantity, price, or both? _____

(d) Does the contract have a meet or release provision? _____

III-4. a) What is the average lead time between a customer's order and the date of delivery for your firm's sales of hot-rolled steel?

Source	Share of 2004 sales	Lead time
From inventory		
Produced to order		
Total	100%	

b) Has the average lead time increased, decreased, or stayed the same since 1999? If changes in lead times differed during the period (e.g., increased in 2002 but decreased in 2003), please identify all periods in which lead times changed, indicating whether lead times increased, decreased, or stayed the same.

Increased Unchanged Decreased

III-5. To what extent have changes in the availability and prices of basic raw materials (e.g., coke, iron, steel scrap, or slab) affected your firm's production, delivery, inventory and selling prices for hot-rolled steel since 1999? Also discuss any anticipated changes in your raw material costs in the future, identifying the time period(s) involved and the factor(s) that you believe would be responsible for such changes. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

PART III.--MARKET FACTORS--Continued

III-6. Have any changes occurred in any other factors affecting supply (e.g., safeguard or other trade actions; changes in availability or prices of energy or labor; transportation conditions; production capacity and/or methods of production; technology; export markets; or alternative production opportunities) that affected the availability of Brazilian, Japanese, and/or Russian-produced hot-rolled steel in the U.S. market since 1999?

- No Yes--Please note the time period(s) of any such changes, the factors(s) involved, and the impact such changes had on your shipment volumes, prices, and overall operations.

III-7. (a) Do you anticipate any changes in terms of the availability of Brazilian, Japanese, and/or Russian-produced hot-rolled steel in the U.S. market?

- Increase No Change Decrease

(b) If you anticipate changes in availability, please identify the changes including the time period and the impact of such changes on shipment volumes and prices. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

III-8. Describe how easily your firm can shift its sales of hot-rolled steel between the U.S. market and alternative country markets. In your discussion, please describe any contracts, other sales arrangements, or other constraints (including any third-country trade barriers such as tariffs, quotas, or other non-tariff barriers) that would prevent or retard your firm from shifting hot-rolled steel between the U.S. and alternative country markets within a 12-month period. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

PART III.--MARKET FACTORS--Continued

III-9. Is the product range, product mix, or marketing of hot-rolled steel in your home market significantly different from the product range, product mix, or marketing of hot-rolled steel for export to the United States or to third-country markets? Have there been any significant changes in the product range, product mix, or marketing of hot-rolled steel in your home market, for export to the United States, or for export to third-country markets since 1999?

No Yes--Please describe and quantify if possible.

III-10. Please discuss any anticipated changes in terms of the product range, product mix, or marketing of hot-rolled steel in your home market, for export to the United States, or for export to third-country markets in the future, identifying the time period(s) involved and the factor(s) that you believe would be responsible for such changes. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

III-11. (a) Please list in order of importance any products that may be substituted for hot-rolled steel.

(1) _____ (2) _____ (3) _____

(b) For each possible substitute product, please give examples of applications and end uses for which they are substitutes.

PART III.--MARKET FACTORS--Continued

III-11 (c) Have changes in the prices of these products affected the price for hot-rolled steel?

- No Yes--To what degree do changes in their prices affect the price for hot-rolled steel? Does this effect have a time lag? If so, how long is the time lag for each substitute product? Does this vary by type of hot-rolled steel or final end use?

III-12. Have there been any changes in the number or types of products that can be substituted for hot-rolled steel since 1999?

- No Yes--Please explain.

III-13. Do you anticipate any changes in terms of the substitutability of other products for hot-rolled steel in the future?

- No Yes--Please describe. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

III-14. Is the hot-rolled steel produced by your firm and sold in its home market interchangeable (i.e., can be used in the same applications) with your firm's hot-rolled steel sold to the United States and/or to third-country markets?

- Yes No--Identify the market(s) and any differences in the products.

PART III.--MARKET FACTORS--Continued

III-15. Describe the end uses and end users of the hot-rolled steel that you manufacture and sell to your home market. If these end uses and end users differ from those of the hot-rolled steel you sell to the U.S. market or to third-country markets, explain.

III-16. Have there been any changes in the end uses of hot-rolled steel since 1999?

No Yes--Please describe.

III-17. Do you anticipate any changes in terms of the end uses of hot-rolled steel in the future?

No Yes--Please describe and identify the time period. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

PART III.--MARKET FACTORS--Continued

III-18. (a) How has demand in your home market changed since 1999?

Increased Unchanged Decreased

Other (describe) _____

What were the principal factors affecting changes in demand?

(b) How has demand within the United States for hot-rolled steel changed since 1999?

Increased Unchanged Decreased

Other (describe) _____

What were the principal factors affecting changes in demand?

(c) How has demand in the rest of the world, if known, for hot-rolled steel changed since 1999?

Increased Unchanged Decreased

Other (describe) _____

What were the principal factors affecting changes in demand?

III-19. Do you anticipate any future changes in hot-rolled steel demand in your home market and the United States and, if known, the rest of the world?

No Yes--Please describe and identify the time period. Provide any underlying assumptions, along with relevant portions of business plans or other supporting documentation, that address this issue.

PART III.--MARKET FACTORS--Continued

III-20. Please compare market prices of hot-rolled steel in your home market, the United States, and third-country markets, if known. Provide specific information as to time periods and regions for any price comparisons.

III-21. Describe briefly your home market for hot-rolled steel, including the number of, and competition between, producers.

III-22. Do you face competition from imports of hot-rolled steel in your home market?

No Yes--Please identify the country sources of any imports of hot-rolled steel into your home market.

III-23. Please provide as a separate attachment to this request any studies, surveys, etc. that you are aware of that quantify and/or otherwise discuss hot-rolled steel supply (including production capacity and capacity utilization) and demand in (1) the United States, (2) each of the other major producing/consuming countries, including Brazil, Japan, and Russia, and (3) the world as a whole. Of particular interest is such data from 1999 to the present and forecasts for the future.

PART III.--MARKET FACTORS--Continued

III-24. Does your firm sell hot-rolled steel over the internet?

- No Yes--Please describe, noting the estimated percentage of your firm's total sales of hot-rolled steel in 2004 accounted for by internet sales.

III-25. Has your firm refused, declined, or been unable to supply hot-rolled steel since 1999? (Examples include placing customers on allocation or "controlled order entry," declining to accept new customers or renew existing customers, delivering less than the quantity promised, unable to meet timely shipment commitments, etc.)

- No Yes--Please note and document the time period(s) (i.e., month and year), country of origin, and the customer involved; and the amount and type of product involved.
