



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. DOC Office of Critical Minerals and Metals Efforts to Support Resilient Supply Chains

PMI23 Manufacturing Success Conference

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October 25, 2023

U.S. Department of Commerce | International Trade Administration

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INTERNATIONAL
TRADE
ADMINISTRATION

The **International Trade Administration** is your U.S. government resource for competing in the global marketplace.

If you are looking to grow your business through exports, seeking market analysis, facing a trade issue, or pursuing an opportunity, we are here to help. Contact us:

www.trade.gov



Global Markets

We assist and advocate for U.S. businesses in international markets, and help global companies invest in the U.S. Services we offer include:

- Export Counseling
- Market Intelligence
- Business Matchmaking
- Commercial Diplomacy




Industry & Analysis

We produce in-depth trade analyses, and engage with industries on trade strategies, including:

- Manufacturing
- Services
- Textiles, Consumer Goods, **Materials, Critical Minerals and Metals**
- Travel and Tourism



Enforcement & Compliance

We work to ensure a level playing field for U.S. industries by defending against unfair trade and ensuring compliance with U.S. trade laws. Our focus:

- Antidumping/Countervailing Duty Laws (AD/CVD)
- Trade Agreements Compliance
- Foreign Trade Zones

2,200 Employees

Our trade experts and professional staff are positioned in more than **100 U.S. cities** and **80 international markets**.

42,000 Clients

In FY 2021, our assistance facilitated nearly **\$92 billion in U.S. exports and investment**, supporting **380,000 American jobs**.

\$172 Return on Investment

For every \$1 appropriated to ITA, our work assisting U.S. companies **returns \$172 back** to the U.S. economy.



Our Global Presence

The ITA creates jobs in the United States and strengthens U.S. economic and national security by promoting U.S. exports and ensuring market access and a level playing field in international trade for U.S. companies.

Strategically located in **106 U.S. and 122 foreign locations**, our global network of trade and investment professionals are well-positioned to help U.S. companies succeed internationally and ensure that U.S. businesses and commercial interests have a robust advocate and first line of defense against unfair foreign trade practices and market access barriers.

U.S. Dept. of Commerce ITA Offices Worldwide





“Building Resilient Supply Chains”

E.O. 14017 America's Supply Chains

- Sector by sector approach to supply chains
- 100-day reports on Critical Minerals, Semiconductors, Advanced Batteries, and Pharmaceuticals
- 100-day recommendations:
 - Rebuild production and innovation capacity
 - Support the resilience of markets at the company level
 - Leverage government purchasing and investment
 - Strengthen trade rules
 - Work with partners and allies
 - Monitor near term supply chain disruptions



Section 232 Investigations: The Effect of Imports on the National Security

- A Section 232 investigation is conducted under the authority of the **Trade Expansion Act of 1962**, as amended.
- The purpose of the investigation is to determine the effect of imports on the national security.
- Investigations may be initiated based on an application from an interested party, a request from the head of any department or agency or may be self-initiated by the Secretary of Commerce.
 - 1) Neodymium-Iron-Boron (NdFeB) Permanent Magnets
 - 2) Vanadium
 - 3) Titanium Sponge
 - 4) Uranium
 - 5) Aluminum
 - 6) Steel



SUPPLY CHAIN DISRUPTION TASKFORCE

Purpose: A whole-of-government effort to monitor and address transitory supply chain challenges. Address near-term supply/demand mismatches; convene stakeholders to surface solutions to help alleviate bottlenecks and supply constraints.

Leadership: Secretaries of Commerce, Transportation, and Agriculture

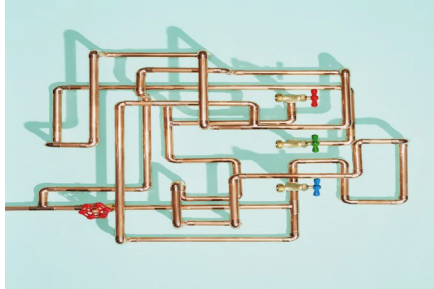
Focus Areas: Industries where there is a mismatch between supply and demand is evident. Examples include:

- Homebuilding and construction
- Semiconductors
- Transportation
- Agriculture and food

DOC Role: Lead a coordinated effort to bring together data from across the federal government to improve the federal government's ability to track supply and demand disruptions and facilitate information sharing between federal agencies and the private sector to more effectively identify near-term risks and vulnerabilities.

BIPARTISAN INFRASTRUCTURE LAW: EPA ADMINISTERED WATER INITIATIVES

The Bipartisan Infrastructure Law provides **over \$64 billion** in strategic water investments. The following three major water infrastructure programs are included in this funding and are administered by the Environmental Protection Agency:



Lead Service Lines (\$15 billion):

- Provides funding for lead service line replacement and activities associated with identification, planning, design, and removal
- Available through Drinking Water State Revolving Funds



Drinking Water and Clean Water State Revolving Funds (\$23.43 billion):

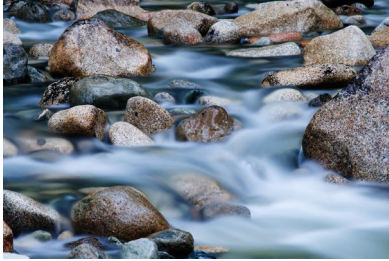
- Provides below market rate loans and grants for water infrastructure improvements to protect public health and the environment
- Split funding for the revolving funds 50/50



PFAS Emerging Contaminants (\$10 billion):

- Provides funding to States and water utilities for the treatment PFAS pollutants or any pollutant identified as a contaminant of concern.
- Available through the Emerging Contaminants in Small or Disadvantaged Communities Grant Program and Drinking Water and Clean Water State Revolving Funds

BIPARTISAN INFRASTRUCTURE LAW: ADDITIONAL WATER INITIATIVES



Indian Health Service Sanitation Facilities Construction (\$3.5 billion):

- Provides American Indian and Alaska Native homes and communities with essential water supply, sewage disposal, and solid waste disposal facilities
- Administered by the Indian Health Service



Western Water and Rural Water (\$8.3 billion):

- Funds projects for water storage and conveyance; water recycling and reuse; water desalination; watershed management; dam repair and replacement; aging infrastructure repair and replacement; WaterSMART grants; and rural water infrastructure
- Administered by the Department of the Interior



Water and Sewer Tax (\$1.25 billion):

- Excludes from taxable income any “contribution in aid of construction” or any other contribution for purposes of water storage



Indian Water Rights (\$2.5 billion):

- Satisfies Federal obligations under Indian water rights settlements enacted as of November 15, 2021.



U.S. Government Trade Agencies



U.S. TRADE POLICY AGENDA

7 Key Elements



- 1) Engaging with Key Trading Partners and Multilateral Institutions
- 2) Standing up for Workers' Rights
- 3) Accelerating Decarbonization and Promoting Sustainable Environmental Practices
- 4) Supporting U.S. Agriculture
- 5) Bolstering Supply Chain Resiliency
- 6) Re-aligning the U.S.-China Trade Relationship
- 7) Promoting Confidence in Trade Policy Through Enforcement
- 8) Advancing Equitable, Inclusive, and Durable Trade Policy and Expanding Stakeholder Engagement

U.S. – CHINA TRADE POLICY

The U.S. Government 4-Part Strategy Toward China

- 1) Make transformational investments in American innovation
- 2) Bolster and create domestic capabilities to prevent China from undermining our national security and democratic values
- 3) Partner with our allies in new ways to advance shared values and shape the strategic environment in which China operates
- 4) Advocate for U.S. trade and investment, as well as working with China to address transnational issues, such as climate change and global macroeconomic stability

Goal: The Biden Administration seeks healthy competition with China – with a level playing field that protects U.S. workers. The strategy is not intended to hinder China’s economic progress.

U.S. – China Trade Relations

Government-to-Government

DOC Secretary, Gina Raimondo, Visit to China (August 2023)

- Encouraged commercial sector cooperation based on shared interests
- Advocated for transparency and fair application of laws and regulations to ensure marketplace stability and predictability
- Reaffirmed commitment to taking actions necessary for U.S. national security

Presidents Biden and Xi are exploring the possibility of meeting on the margins of the upcoming APEC Leaders summit.

Relationship Characteristics

- The U.S. and China participate in \$700 billion in trade together.
- Secretary Raimondo recently acknowledged the profound importance of having a stable economic relationship with China.



INDUSTRY'S VOICE IN U.S. TRADE POLICY



- Since 1974, the U.S. Department of Commerce and the U.S. Trade Representative (USTR) have worked side-by-side with business leaders who serve as industry trade advisors to the U.S. Government.
- USTR/Commerce jointly administer the ITAC program to reflect today's U.S. economy & vision for the future.
- Currently, approximately 370 industry representatives serve as advisors to Commerce and USTR with a diverse representation of private industries ranging from small to large companies and from all U.S. geographic regions.
- Commerce and USTR consider the ITACs to be an integral part of the U.S. trade policy-making process. Advisors have direct access to policymakers and negotiators to offer industry positions on U.S. trade policy and negotiating objectives.

[INDUSTRY TRADE ADVISORY COMMITTEES \(ITAC\) COVERING THE PLUMBING PRODUCTS INDUSTRY:](#)

[ITAC 8 – FOREST PRODUCTS & BUILDING MATERIALS](#)

[ITAC 5 - CRITICAL MINERALS & NON-FERROUS METALS](#)

MARKET DEVELOPMENT COOPERATOR PROGRAM

FY2021-2023 Awards

18 Active Awards

Since FY2021, ITA has awarded 18 MDCP projects worth over \$4.3 million in federal funding with additional awards in the pipeline for FY2024.

Plumbing-Specific MDCP Project

From FY2021-FY2025, IAPMO is working with U.S. manufacturers to increase the flow of plumbing exports to Indonesia by removing technical barriers and increasing the competitiveness of U.S. products.

Promoting Trade through Public-Private Partnership



Promote U.S. Exports

Increase competitiveness abroad and remove trade barriers by providing technical assistance and up to \$300,000 in federal funding to non-profit industry group partners.



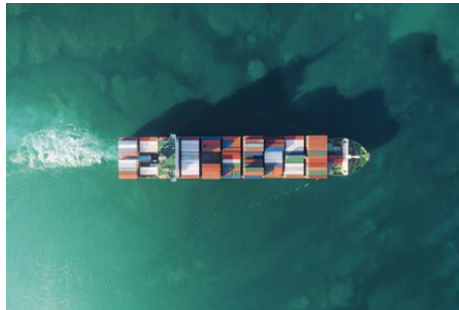
Provide Trade Expertise

Partnering with ITA provides access to more than 2,000 trade experts located around the globe in more than 75 international markets.



Deliver Return on Investment

Award recipients generate \$309 in exports for every \$1 of Commerce funding, have tallied \$12.6 billion of exports, and create or sustain 14,000 U.S. jobs annually.





U.S. BUILDING PRODUCTS TOTAL ANNUAL U.S. EXPORTS

2020: \$69 billion, 2021 \$80 billion, 2022 \$89 billion



Wood Products	
2020: \$3.5 billion	↑
2021: \$4.6 billion	
2022: \$4.9 billion	

Plumbing Products	
2020: \$1.1 billion	↑
2021: \$1.4 billion	
2022: \$1.5 billion	

Asphalt	
2020: \$520 million	↑
2021: \$614 million	
2022: \$645 million	



HVAC Equipment	
2020: \$15.9 billion	↑
2021: \$17.7 billion	
2022: \$20.6 billion	

Plaster & Gypsum Bd.	
2020: \$179 million	↑
2021: \$221 million	
2022: \$245 million	

Cement & Concrete	
2020: \$370 million	↓
2021: \$476 million	
2022: \$460 million	



Metal Products	
2020: \$18.5 billion	↑
2021: \$21.7 billion	
2022: \$25.8 billion	

Insulation	
2020: \$878 million	↓
2021: \$1.0 billion	
2022: \$813 million	

Masonry & Stone	
2020: \$183 million	↑
2021: \$212 million	
2022: \$227 million	



Electric Sys & Lighting	
2020: \$18.6 billion	↑
2021: \$21.2 billion	
2022: \$23.0 billion	

Appliances	
2020: \$2.9 billion	↑
2021: \$3.4 billion	
2022: \$3.5 billion	

Glass	
2020: \$690 million	↑
2021: \$799 million	
2022: \$943 million	



Paints, Adhesives Plastics	
2020: \$3.9 billion	↓
2021: \$4.4 billion	
2022: \$5.2 billion	

Doors & Windows	
2020: \$636 million	↑
2021: \$758 million	
2022: \$685 million	

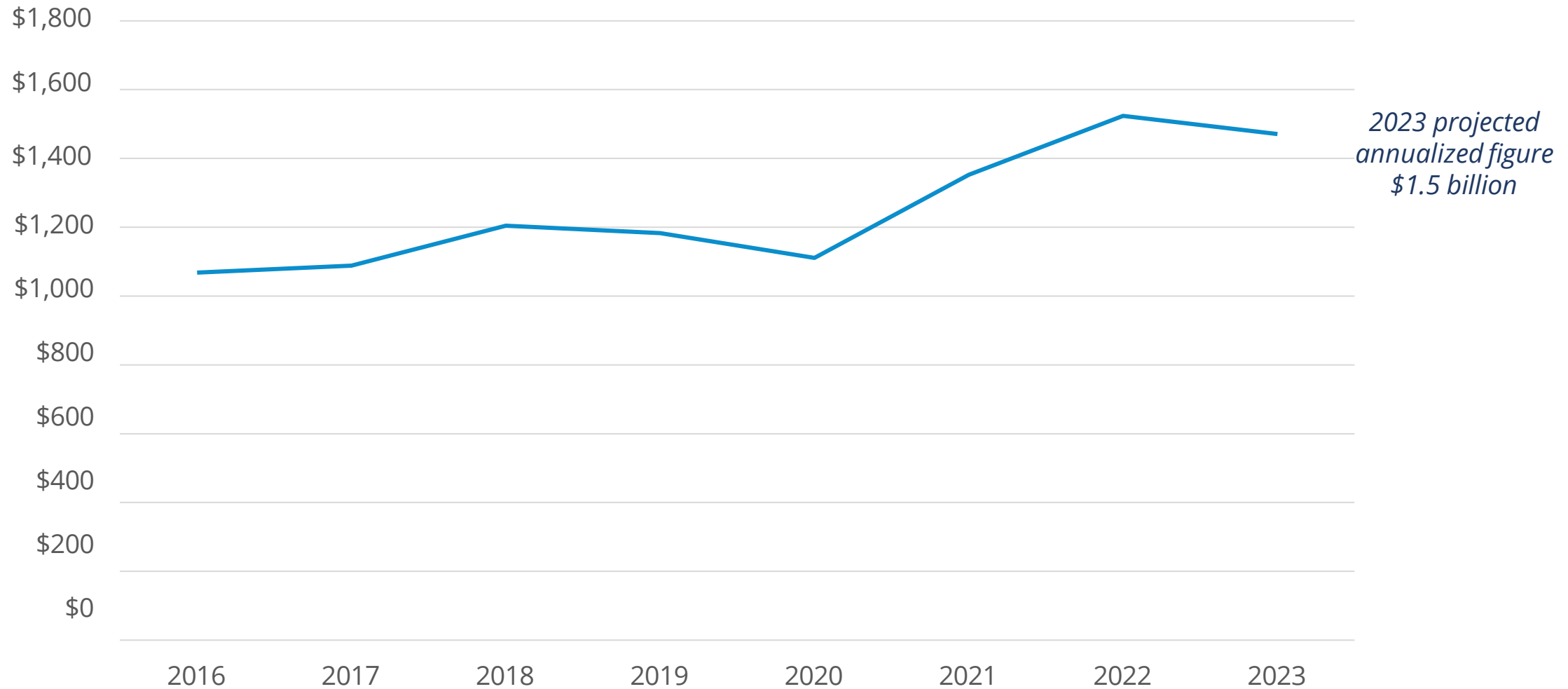
Tile	
2020: \$32 million	↑
2021: \$42 million	
2022: \$45 million	



Miscellaneous Other Building Products	
2020: \$961 million, 2021: \$1.2 billion, 2022: \$961 million	↓

U.S. PLUMBING PRODUCT EXPORTS TO WORLD

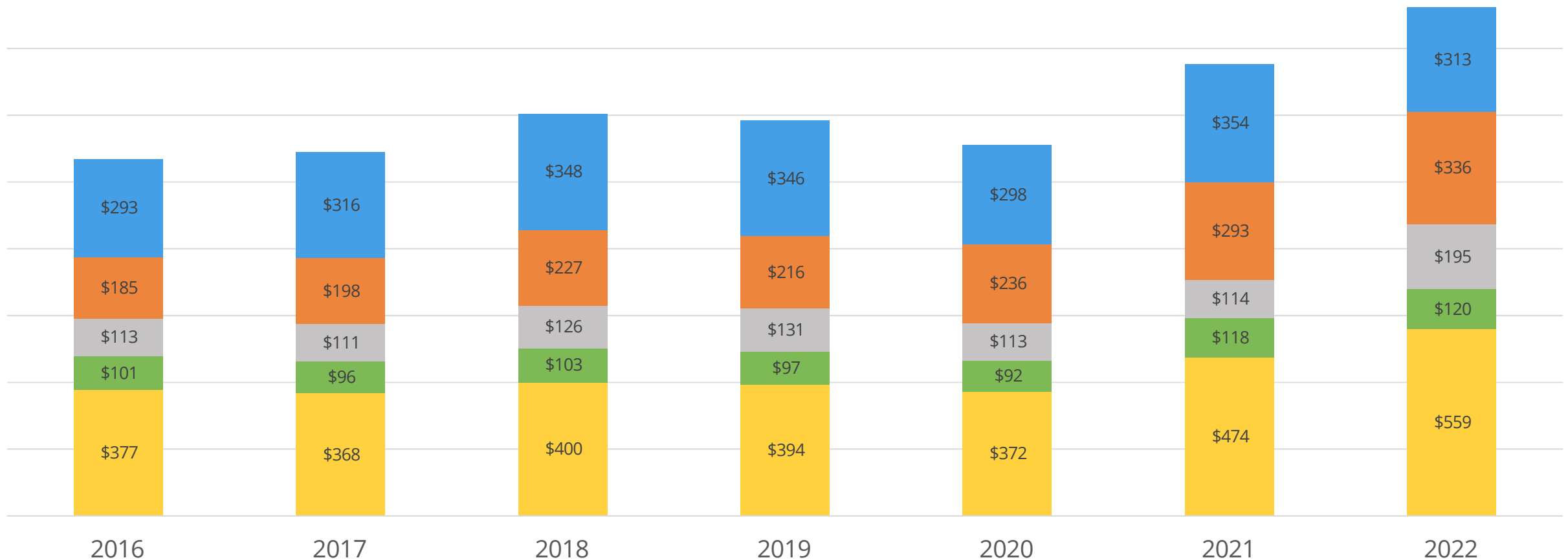
(IN MILLIONS)



U.S. PLUMBING PRODUCT EXPORTS BY TYPE

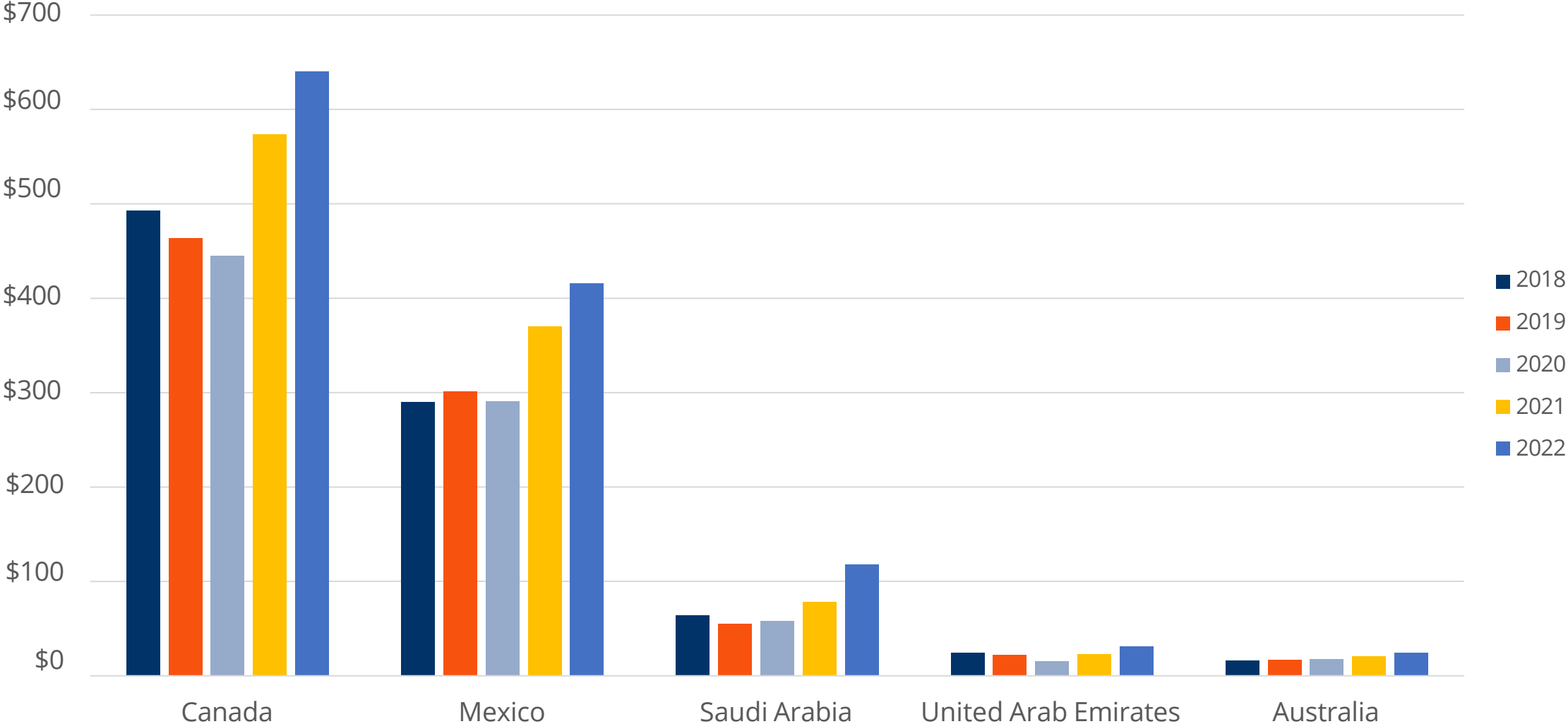
(IN MILLIONS)

■ Plastic Plumbing Fixtures
 ■ China Plumbing Fixtures
 ■ Enamled Metal Fixtures
 ■ Copper Rolling, Drawing & Extruding
 ■ Plumbing Fitting and Trims



U.S. PLUMBING PRODUCT EXPORTS, TOP 5 MARKETS

(IN MILLIONS)



U.S. PLUMBING PRODUCT EXPORT MARKET ANALYSIS

2022 Statistics			
Rank	Country	Total Export Value	% of Total Exports
1	Canada	\$640,391,158	42%
2	Mexico	\$415,446,466	27%
3	Saudi Arabia	\$117,521,278	8%
4	United Arab Emirates	\$31,438,822	2%
5	Australia	\$24,023,656	2%
	All Other Countries	\$295,149,824	19%
	TOTAL	\$1,524,971,204	100%

2023 Statistics (Annualized, Projected)			
Rank	Country	Total Export Value	% of Total Exports
1	Canada	\$591,156,789	40%
2	Mexico	\$413,550,555	28%
3	Saudi Arabia	\$133,016,799	9%
4	United Arab Emirates	\$32,697,015	2%
5	United Kingdom	\$18,982,493	1%
	All Other Countries	\$281,807,477	19%
	TOTAL	\$1,471,211,129	100%

U.S. Plumbing Export Market Share Changes from 2020 to 2022

- Saudi Arabia is the fastest growing market for U.S. Plumbing Products with a 3% increase in market share
- China is the fastest declining market for U.S. Plumbing Products with a 4% decrease in market share

Thank You.

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