



Trade Remedies Authority

Dumping Investigation AD0086

Rutile Titanium Dioxide

Anti-dumping duties on rutile titanium dioxide from the People's Republic of China

Note to public file

09/09/2026

Business and consumer survey responses

The TRA conducted an online survey of consumers, upstream businesses and downstream businesses to help us understand the economic impacts of potential anti-dumping duties on rutile titanium dioxide from the People's Republic of China. The survey was open from 18 May 2026 to 15 June 2026. This document sets out the evidence received from this survey.

Number of responses and verification

We received 51 responses: 36 businesses, 7 consumers and 8 who did not complete this field. We reviewed these and removed:

- The 8 respondents who did not state whether they were a business or a consumer.
- 17 responses where the business identity could not be verified
- 4 duplicate responses; and
- 3 test responses

Once these responses were removed, there were 19 valid responses. 13 business responses and 6 consumer responses. All 13 valid business responses were from downstream businesses that use or sell TiO₂. The number answering individual questions varies because not every respondent answered every applicable question. Open-text responses are summarised or aggregated where necessary to avoid disclosing commercially sensitive information or revealing respondent identities.

Summary of responses

We have only listed questions where at least some answers were provided.

Business responses (13 responses)

Q1 How did you find out about this survey?

Response	Number of responses
Email from the TRA	6
TRA website	1
Other	6

The “Other” responses referred to the British Coatings Federation (BCF), a BCF email or another trade association route.

Q2 How does rutile titanium dioxide (TiO₂) relate to your business?

Response	Number of responses
We use/sell TiO ₂ in our business (downstream business)	13

No valid respondent identified as an upstream business, a UK producer, a foreign producer or “none of the above/unsure”.

Q11 Please describe what your business does.

Seven businesses submitted a response. They described activities including printing ink manufacture, industrial coatings and paints, masterbatch and plastic colourants, and

distribution of titanium dioxide. Three of the seven respondents described ink-manufacturing activities.

Q50 Which category or categories most closely match your business?

Selected category or combination	Number of responses
Manufacturer and/or retailer of ink	3
Manufacturer and/or retailer of coatings (paints)	3
Manufacturer and/or retailer of coatings (paints) and ink	1
Manufacturer and/or retailer of masterbatch	1
Manufacturer and/or retailer of specialty products containing TiO ₂	1
Distributor of rutile titanium dioxide	1
Coatings, specialty TiO ₂ products and TiO ₂ distribution	1

Eleven businesses answered this question. Four selected a category that included ink. The two specialty-product responses specified pigment blends and TiO₂ dispersions.

Q51 Approximately, what is the percentage cost of rutile titanium dioxide in the total cost to make the product you sell?

Ten businesses submitted a response. The answers were provided on different bases and varied substantially by product and formulation. Reported figures included around 3% to 5% for some coatings, around 4% to 5% for some inks, up to 78% for a TiO₂ concentrate

dispersion, and a range of 25% to 100% for pigment blends. One respondent did not know the figure.

Q12 Does your company import TiO₂?

Response	Number of responses
Yes, we import	6
Both import and buy from the UK	2
No, we buy from UK producers/retailers	2

Q12–Q14 Please name your supplier(s) and their country(ies).

Eight businesses provided supplier information through the relevant routing questions. Countries included China, Norway, Czech Republic and Finland. Business names are not disclosed because the information could be commercially sensitive or could reveal the identities of businesses that participated.

Q16 Please provide your company's approximate total sales revenue from the last financial year.

Nine businesses submitted a response. The answers ranged from £6m to £162m. Individual responses are not disclosed because the values could be commercially sensitive or could reveal respondent identities.

Q17 Approximately what percentage of your total sales revenue in the last financial year was from sales of products containing rutile titanium dioxide?

Nine businesses submitted a response. Reported shares ranged from 5% to 90%, with two respondents reporting 90%. Individual responses are not attributed to businesses because the information could be commercially sensitive or identifying.

Q18 Who do you sell to?

Nine businesses submitted a response. Respondents mainly sold business-to-business, including to printers and converters, packaging and plastics manufacturers, coatings and construction businesses, industrial customers, paint brands, applicators and line-marking contractors. One respondent referred to final consumers.

Q19 Approximately how many UK employees does your company have?

Nine businesses submitted a numeric response. Reported UK employment ranged from 15 to 568 employees. Individual figures are not shown to avoid revealing respondent identities.

Q20 If prices of TiO_2 were to increase, how would you respond?

Response	Number of responses
Purchase the same quantity of TiO_2	5
Reduce purchases of TiO_2	3
Purchase cheaper alternatives to TiO_2	1

Q21 Are your products ever used because of a protected characteristic?

Response	Number of responses
No	8
Yes	1

The respondent selecting “Yes” did not specify a protected characteristic.

Q22 Please tell us how a tariff on rutile titanium dioxide from the People’s Republic of China would affect your company and industry. What might change if a tariff were to come into effect?

Nine businesses submitted a response. Respondents referred to higher raw-material and production costs, pressure to pass costs on to customers and consumers, reduced margins and investment, lower competitiveness, and possible supply constraints. One respondent said production of white printing ink in the UK could become less competitive than production in the EU and referred to the possibility of relocating production. One respondent reported no current change.

Q23 In your experience, are there notable differences between TiO₂ from the People’s Republic of China and TiO₂ from other countries, including the UK?

Nine businesses submitted a response. Responses were mixed. Some described Chinese TiO₂ as competitively priced and of good or comparable quality, consistency and performance. Ink manufacturers emphasised that production process and grade are important, and that sulphate-process TiO₂ may be required for some printing inks because chloride-process material can cause technical issues. Other respondents said quality was similar across origins, that different grades are used for different performance requirements, or that they did not know of a difference. Some responses also referred to longer lead times and reduced European supply options.

Q24 Is there any other information you would like to provide to help us assess the potential effects of a tariff on the overall economic interest of the UK?

Eight businesses submitted a response. Comments referred to limited short-term substitution options, security of supply, insufficient UK or European production capacity, reduced supply flexibility, and the possibility of wider price increases across downstream supply chains. Respondents identified potential effects on coatings, construction, plastics, packaging and printing inks, and on manufacturers and end users. Some respondents also stressed the importance of TiO₂ to strategically important industrial customers and the risk that higher costs could reduce the competitiveness of UK manufacturing.

Ink-specific responses (4 responses)

Four respondents answered the ink-specific questions. These questions were shown to businesses that identified an ink-related activity.

Q54 Are there any ink products you produce which can only be manufactured with TiO₂ purchased from overseas exporters?

Response	Number of responses
Yes	3
No	1

Respondents answering “Yes” referred to the absence of suitable UK-manufactured grades, including highly opaque grades and sulphate-process TiO₂. They also described TiO₂ as technically important to white printing inks. The respondent answering “No” said it purchases a similar grade for its ink products and does not restrict particular inks to overseas TiO₂.

Q55 Is there a significant difference in price and/or quality between specialist TiO₂ for ink production and TiO₂ for other manufacturing purposes?

Four respondents answered. Responses emphasised quality and grade differences and the importance of TiO₂ quality to the performance of printing inks. One respondent reported that higher-quality ink grades could cost up to 50% more. One respondent did not know.

Q56 Is there a significant difference in price and/or quality between specialist TiO₂ from China and specialist TiO₂ from other overseas exporters?

Four respondents answered. Two indicated a difference, including one who considered Chinese material to be better than material from other overseas exporters. One described the difference as similar to that observed between specialist ink grades and TiO₂ used for other purposes. One respondent did not know.

Consumer responses (6 responses)

Six valid consumer responses were received (after one duplicate was removed). Three of these answered one or more of the substantive consumer questions; the remaining three did not provide answers to those questions. The tables below therefore show the number answering each question, rather than treating blank responses as a response category.

Q39 How did you find out about this survey?

Response	Number of responses
TRA website	2
Email campaign	1

Q40 What type of product containing TiO₂ do you own or would you consider owning?

Response	Number of responses
Paints or coatings	1
Plastics	1
Paints or coatings and plastics	1

Q41 Do you use products containing TiO₂ because of a protected characteristic?

Response	Number of responses
No	3

Q42 Rank the factors that apply when considering purchasing a product containing TiO₂.

One consumer completed the ranking question. That respondent ranked quality first, price second, TiO₂ content third, brand fourth, and “other” fifth. No text was provided for the “other” factor. Given that only one consumer answered, these rankings should not be treated as representative of all seven consumer respondents.

Q43 Would you buy a particular brand of product or go for the lowest-priced product that meets your requirements?

Response	Number of responses
Buy the lowest-priced product containing TiO ₂ that meets my requirements	2
Buy a particular brand of product containing TiO ₂	1

Q44 If the price of a product containing TiO_2 increased by 5%, what would you do?

Response	Number of responses
Buy a cheaper version of the same product containing TiO_2	2
Buy it regardless	1

Annex A: Survey Questions

Display this question:

If Business survey on Rutile Titanium Dioxide (TiO2) We are reviewing tariffs on Rutile Titanium Dio...
Displayed

Are you a business or a consumer?

☐ Business (1)

☐ Consumer (2)

End of Block: Business or consumer

Start of Block: Business

Name of person filling in the survey (For the purpose of this survey only, your information will not be published)

Name of business (For the purpose of this survey only, your information will not be published without your permission)

Business email address (For the purpose of this survey only, your information will not be published)

How did you find out about this survey?

- ☐ Social Media (2)
- ☐ Email from the TRA (3)
- ☐ TRA Website (4)
- ☐ News Story (5)
- ☐ Other (please specify) (6) _____
-

How does Rutile Titanium Dioxide (TiO₂) relate to your business?

- ☐ We sell to UK producers of TiO₂ (Upstream business) (1)
- ☐ We are a UK producer of TiO₂ (2)
- ☐ We are a foreign producer of TiO₂ (4)
- ☐ We use/sell TiO₂ in our business (Downstream business) (5)
- ☐ None of above or unsure (6)

End of Block: Business

Start of Block: Business - Upstream

Please describe what your business does.

To your knowledge, are any products sold by your company used in the manufacture of TiO₂?

☐ Yes (1)

☐ No (2)

Please provide your company's approximate total sales revenue (in pound sterling) from the last financial year.

Roughly what percentage of your total sales from the last financial year were to companies which produce TiO₂?

☐ Less than 1% (1)

☐ Over 1% up to 10% (2)

☐ Over 10% up to 20% (3)

☐ Greater than 20% (4)

☐ Unsure (5)

Approximately how many UK employees does your company have?

Please tell us how a tariff on Rutile Titanium Dioxide (TiO₂) from the People's Republic of China would affect your company and industry? What might change if a tariff were to come into effect?

Is there any other information you would like to provide to help us assess the effects of a proposed tariff on Rutile Titanium Dioxide (TiO₂) from China regarding the overall economic interest of the UK?

End of Block: Business - Upstream

Start of Block: Business - Downstream

Please describe what your business does.

Which of the following category(ies) most closely match your business?

- ☐ Manufacturer and/or retailer of coatings (paints) (1)
- ☐ Manufacturer and/or retailer of masterbatch (2)
- ☐ Manufacturer and/or retailer of plastics (3)
- ☐ Manufacturer and/or retailer of paper (writing or other) (4)
- ☐ Manufacturer and/or retailer of laminate coating or other coatings (please specify)
(5) _____
- ☐ Manufacturer and/or retailer of Ink (6)
- ☐ Manufacturer and/or retailer of Fibre (polyester, nylon, acrylic, spandex) (7)
- ☐ Manufacturer and/or retailer of Pharmaceuticals (please specify) (8)

- ☐ Manufacturer and/or retailer of specialty products containing TiO₂ (please specify)
(9) _____
- ☐ Distributor of rutile titanium dioxide (TiO₂) (10)
- ☐ Other (please specify) (11)

-

Approximately, what is the percentage cost of rutile titanium dioxide in the total cost to make of the product you sell?

Does your company import TiO2

- ☐ Yes, we import (1)
- ☐ No, we buy from UK producers/retailers (2)
- ☐ Both, import and buy from the UK (4)
-

Display this question:

If Does your company import TiO2 = Yes, we import

Please name your supplier(s) and their country(ies), (i.e. Company name, Country).

Display this question:

If Does your company import TiO2 = No, we buy from UK producers/retailers

Please name your supplier(s).

Display this question:

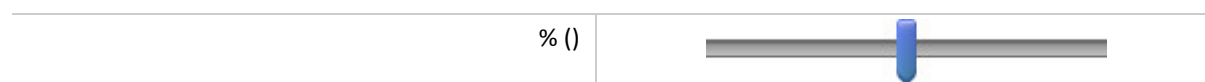
If Does your company import TiO2 = Both, import and buy from the UK

Please name your supplier(s) and their country(ies), (i.e. Company name, Country).

Please provide your company's approximate total sales revenue (in pound sterling) from the last financial year.

Approximately what percentage of your total sales revenue in the last financial year were from sales of products containing rutile titanium dioxide ?

0 10 20 30 40 50 60 70 80 90 100



Who do you sell to? (Other businesses/final consumers, etc.)

Approximately how many UK employees does your company have?

If prices of TiO₂ were to increase, how would you respond?

- ☐ Reduce purchases of TiO₂ (1)
- ☐ Purchase the same quantity of TiO₂ (2)
- ☐ Reduce purchases of other goods to maintain the quantity of TiO₂ used (3)
- ☐ Purchase cheaper alternatives to TiO₂ (4)

Are your products ever used because of a protected characteristic? Protected characteristics are; age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

☐ Yes, please specify the relevant protected characteristic(s). (1)

☐ No (2)

☐ Unsure (3)

Please tell us how a tariff on Rutile Titanium Dioxide (TiO₂) from the People's Republic of China would affect your company and industry? What might change if a tariff were to come into effect?

In your experience are there any notable differences in TiO₂ from the People's Republic of China compared to those from other countries including the UK (e.g. in terms of price, quality or characteristics)?

Is there any other information you would like to provide to help us assess the potential effects of a tariff on TiO₂ from the People's Republic of China regarding the overall economic interest of the UK?

End of Block: Business - Downstream

Start of Block: Unsure, if you are downstream or upstream business.

Please describe what your business does.

Does your company import Rutile Titanium Dioxide (TiO₂)?

- ☐ Yes, we import (1)
- ☐ No, we buy from UK producers/retailers (2)
- ☐ Both, import and buy from UK (3)

Display this question:

If Does your company import Rutile Titanium Dioxide (TiO₂)? = Yes, we import

Please name your supplier(s) and their country(ies), (i.e. Company name, Country).

Display this question:

If Does your company import Rutile Titanium Dioxide (TiO₂)? = No, we buy from UK producers/retailers

Please name your supplier(s).

Display this question:

If Does your company import Rutile Titanium Dioxide (TiO₂)? = Both, import and buy from UK

Please name your supplier(s) and their country(ies), (i.e. Company name, Country).

Please provide your company's approximate total sales revenue (in pound sterling) from the last financial year.

Approximately what percentage of your total sales revenue in the last financial year were from sales of TiO₂?

- ☐ Less than 1% (1)
 - ☐ Over 1% up to 10% (2)
 - ☐ Over 10% up to 20% (3)
 - ☐ Greater than 20% (4)
 - ☐ Unsure (5)
-

Who do you sell to? (Other businesses/final consumers, etc.)

Approximately how many UK employees does your company have?

If prices of TiO₂ were to increase, how would you respond?

- ☐ Reduce purchases of TiO₂ (1)
 - ☐ Purchase the same quantity of TiO₂ (2)
 - ☐ Reduce purchases of other goods to maintain the quantity of TiO₂ (3)
 - ☐ Purchase cheaper alternatives to TiO₂ (4)
-

Is TiO₂ ever used because of a protected characteristic? Protected characteristics are; age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

☐ Yes, please specify the relevant protected characteristic(s). (1)

☐ No (2)

☐ Unsure (3)

Please tell us how a tariff on Rutile Titanium Dioxide (TiO₂) from the People's Republic of China would affect your company and industry? What might change if a tariff were to come into effect?

In your experience are there any notable differences in TiO₂ from the People's Republic of China compared to those from other countries including the UK (e.g. in terms of price, quality or characteristics)?

Is there any other information you would like to provide to help us assess the potential effects of a tariff on TiO₂ from the People's Republic of China regarding the overall economic interest of the UK?

End of Block: Unsure, if you are downstream or upstream business.

Start of Block: Producer or Overseas Producer

This survey is intended for UK consumers of products containing TiO₂, UK businesses who buy TiO₂ or UK businesses who produce parts used in the manufacture of TiO₂. Please register for our online platform Trade Remedies Service (TRS) and submit a producer questionnaire. For additional information please email AD0086@traderemedies.gov.uk

End of Block: Producer or Overseas Producer

Start of Block: Consumer

How did you find out about this survey?

- ☐ Social Media (1)
 - ☐ Email Campaign (2)
 - ☐ TRA Website (3)
 - ☐ News Story (4)
 - ☐ Other (please specify) (5)
-

What type of product containing TiO₂ do you own or would you consider owning?

- ☐ Paints or coatings (1)
 - ☐ Plastics (2)
 - ☐ Paper (lamine coating) (3)
 - ☐ Ink (4)
 - ☐ Fibre (polyester, nylon, acrylic, spandex) (5)
 - ☐ Pharmaceutical (6)
 - ☐ Speciality (please specify) (7)

 - ☐ Other (please specify) (8)

-

Do you use products containing TiO₂ because of a protected characteristic? Protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

- ☐ Yes, please specify the relevant protected characteristic(s). (1)

 - ☐ No (2)
 - ☐ Unsure (3)
 - ☐ Not applicable (4)
-

Rank the order in which the following factors apply when considering purchasing a product containing TiO₂ (with the top being the most important and the bottom being the least important).

- _____ Price (1)
 - _____ Brand (2)
 - _____ Content levels of TiO₂ (3)
 - _____ Quality (4)
 - _____ Other (please specify) (5)
-

Would you buy a particular brand of product or go for the lowest priced product which meets your requirements?

- ☐ Buy a particular brand of a product containing TiO₂ (please specify) (1)

 - ☐ Buy the lowest priced product containing TiO₂ that meets my requirements (2)
 - ☐ Unsure (3)
-

If you were considering buying a product containing TiO₂ and the price of this product increased by 5% what would you do? (For example, a pot of white paint costing £20 which raised to £21.)

- ☐ Buy it regardless (1)
- ☐ Buy a cheaper version of the same product containing TiO₂ (2)
- ☐ Not buy it (3)

Use an alternative product (not containing TiO₂), please specify (4)