



Anti-dumping case on Suspension-Poly Vinyl Chloride (S-PVC) from the United States of America (US)

Note to Public file

22 May 2024

Business Survey responses

The TRA conducted an online survey of downstream businesses, to help us understand the likely economic impacts on the UK S-PVC industry, if a measure were to be imposed on S-PVC imported from the US. This document sets out in a non-confidential format, the evidence received from this survey which was open from 20 March 2024 to 10 April 2024.

Number of responses and verification

We received 11 responses from 10 respondents who identified as downstream businesses. These were reviewed and the following were removed:

- Responses where the business started but did not complete the survey.

Duplicate responses received from the same business were also merged, resulting in a total of 8 responses from 8 respondents.

Downstream business responses (8 responses)

After checking, removing, and merging responses, 8 business responses remained. Those businesses ranged from small to large enterprises (between 40 and 3,500 employees). We have chosen not to disclose their identities because the information could be commercially sensitive. Their responses to the survey questions were as follows:

Q1. Where did you hear about this questionnaire?

Direct email	8
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Q2. What does your business do?

Manufacturer of S-PVC based goods	8
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Q3a. What sector/industry/business area does your company produce products for?

(multiple responses possible)

Window and/or door extrusions	4
Water Pipes and/or other PVC pipes	2
Medical supplies	2
Flooring	2
Other (please specify)	2

The two respondents that selected the 'Other' option in Q3 above, specified that the other business areas they produce products for are building, roofline, decking and rainwater.

Q4. Total number of employees in your business?

Between 40 and 3,500 employees [The names and exact number of employees for each downstream business were provided via the survey but these have not been disclosed for confidentiality].

Q5. Number of employees working directly on S-PVC based products.

Between 20 and 1,800 employees, representing between 4% and 100% of the total number of employees in these companies. [The business names and exact number of employees working directly on S-PVC based products for each downstream business were provided via the survey, but these have not been disclosed for confidentiality].

Q6. Geographical location of employees working directly with Suspension-Poly Vinyl Chloride (S-PVC) based products (nearest town(s), or postcode(s)). Please list all locations where you have employees working directly with S-PVC based products.

All businesses have sites within the UK. Some also had sites located in other countries within the EU. [The exact locations were provided via the questionnaire but has not been disclosed for confidentiality.]

Q7. Please provide the turnover of your business from the most recent financial year and state the accounting period for this turnover.

Responses ranged between £20 million to £365 million for individual businesses with a total turnover of £1.74 billion for all responding businesses. [The exact value for each business was provided via the survey but has been shown as a range for confidentiality.]

Q8. What percentage of this turnover from the above year was for products made using S-PVC?

Over 10% up to 20%	1
Greater than 20%	7

Q9. Approximately how much S-PVC do you buy each year (in metric tons)?

Responses ranged between 3,500MT to 50,000MT for individual businesses with a total volume of about 160,000MT for all responding businesses. [The names for these downstream businesses were provided via the survey but these have not been disclosed for confidentiality].

Q10. Where does your S-PVC come from, and how much do you buy a year (in metric tons)?

UK producer	7
US producer	5
Producer from another country	8

[The question allowed respondents to choose multiple options]

Q10a. *Where does your S-PVC come from, and how much do you buy a year (in metric tons)? - UK producer*

The responding businesses said they bought between 1,200 MT and 35,000 MT of S-PVC from UK producers. This is equivalent to 53% of the total annual volume of S-PVC purchased by these businesses [The business names and exact volume purchased were provided via the survey but have been shown as a range for confidentiality.]

Q10b. *Where does your S-PVC come from, and how much do you buy a year (in metric tons)? - US producer*

The responding businesses said they bought between 675MT and 8000MT of S-PVC from US producers. This is equivalent to 11% of the total annual volume of S-PVC purchased by these businesses. [The business names and exact volume purchased were provided via the survey but has been shown as a range for confidentiality.]

Q10c. *Where does your S-PVC come from, and how much do you buy a year (in metric tons)? - Producer from another country*

The responding businesses said they bought between 2000MT and 15,600MT of S-PVC from producers from another country. This is equivalent to 32% of the total annual volume of S-PVC purchased by these businesses. [The business names and exact volume purchased were provided via the survey but has been shown as a range for confidentiality.]

It should be noted that the respondents' breakdown by source did not account for the remaining 4% of the total annual volume of S-PVC purchased.

The remaining 4% of the total annual volume of S-PVC purchased by the respondents was not accounted for in the breakdown by source.

Q11. *If a tariff were applied to imports of S-PVC from the USA, how would this affect your business?*

Respondents answered:

- There will be reduced profits, increasing the risk of job losses.
- Imposing a tariff would negatively impact input costs, already low profit margins, as well as investments in plant and equipment.

- A tariff would allow UK producers to further increase their already high market price, resulting in product price increase, loss of revenue and reduction in investments in the S-PVC industry.
- Overall increase in prices of European resin leading to fewer producers, uncompetitive products, and a captive market.
- It would lead to a reduction in supply sources leaving businesses with more expensive alternatives.

Q12. Which region would you be most likely to buy S-PVC from if a tariff were applied to S-PVC from the US?

EU	3
UK	1
Rest of the world	3

Q13. Please explain your answer to the above question.

Respondents answered:

- S-PVC is a global commodity, and they would source it from countries with a lower cost of production.
- If imposing a tariff leads to an increase in prices as seen in 2022, they will source S-PVC from South America and Asia.
- They would broaden their supply base for S-PVC to European and non-European sources; subject to cost and product specification.
- Purchasing split (from UK producer, the US, and other countries) would remain similar, but product costs may be altered depending on cost and availability of the resin.

Q14. Please provide any information about the possible impacts on the UK if a tariff were introduced on S-PVC.

Respondents answered:

- They will not purchase S-PVC from the UK, if a tariff were introduced.
- The tariff will result in less profits and less investment in their UK plant, greater lead times, greater risk, and higher shipping costs of obtaining S-PVC from abroad.

- Reduced investment into new build construction and increased focus on recycling, as UK PVC price increases.
- Increased product prices will be passed on to consumers to maintain profit margins.
- Offshoring of UK production abroad resulting in reduced capacity and employment in UK plants, while increasing imports of finished goods from abroad.
- Reduced competitiveness of UK S-PVC compared to imports.

Annex A- Survey Questions

S-PVC - Downstream Questionnaire

Q1 Where did you hear about this questionnaire?

- British Plastics Federation (1)
- LinkedIn (2)
- TRA Twitter/X (3)
- Direct email (4)
- Other (please specify) (5) _____

Q2 What does your business do?

- UK producer of S-PVC (4)
- S-PVC converter (5)
- Manufacturer of S-PVC based goods (1)
- Sales of S-PVC based goods to end consumer (2)
- Other (please specify) (3) _____

If respondent chooses the UK producer of S-PVC in Q2 above.

Q This survey is intended for UK businesses who buy S-PVC. If you are a producer of S-PVC, please register for our [online platform Trade Remedies Service \(TRS\)](#) and submit a producer questionnaire.

If respondent chooses any of the other options apart from UK producer of S-PVC in Q2 above.

Q3 What sector/industry/business area does your company produce products for?

- Window and/or door extrusions (1)
 - Water Pipes and/or other PVC pipes (2)
 - Flooring (4)
 - Medical supplies (5)
 - Films (6)
 - Automotive (7)
 - Food and beverage packaging (8)
 - Other (please specify) (9)
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Q4 Total number of employees in your business?

Q5 Number of employees working directly on S-PVC based products?

Q6 Geographical location of employees working directly with Suspension-Poly Vinyl Chloride (S-PVC) based products (nearest town(s), or postcode(s)). Please list **all locations** where you have employees working directly with S-PVC based products.

Q7 Please provide the turnover of your business from the most recent financial year and state the accounting period for this turnover.

Q8 What percentage of this turnover from the above year was for products made using S-PVC?

- Less than 1% (4)
- Over 1% up to 10% (5)
- Over 10% up to 20% (6)
- Greater than 20% (7)
- Unsure (9)

Q9 Approximately how much S-PVC do you buy each year (in metric tons)?

Q10 Where does your S-PVC come from, and how much do you buy a year (in metric tons) ?

- UK producer (1) _____
- US producer (2) _____
- Producer from another country (4) _____

Q11 If a tariff were applied to imports of S-PVC from the USA, how would this affect your business?

Q12 Which region would you be most likely to buy S-PVC from if a tariff were applied to S-PVC from the US?

- UK (1)
- US (2)
- EU (3)
- Rest of the world (4)
- Don't know (5)

Q13 Please explain your answer to the above question.

Q14 Please provide any information about the possible impacts on the UK if a tariff were introduced on S-PVC.
