



# Provisional Affirmative Determination

INVESTIGATION No. SG0094

Safeguard investigation into imports of Poly(ethylene Terephthalate)



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## Section A: Introduction

1. This provisional affirmative determination (PAD) is made pursuant to paragraphs 9 and 11 of *Schedule 5 to the Taxation (Cross-border Trade) Act 2018* (the Act)<sup>1</sup>.
2. The PAD has been made based on the evidence before the Trade Remedies Authority (TRA) in accordance with paragraph 9(2) of Schedule 5 to the Act.
3. This report includes:
  - A summary of the facts considered during the investigation to date and an explanation of how the TRA has used the information supplied by interested parties and contributors in reaching its PAD and Recommendation.
  - Details of the analysis forming the basis of the PAD and Recommendation.
4. It should be read in conjunction with other public documents available for this case, which are available on the [public file](#).
5. This investigation covers the increased quantities of imports of Poly(ethylene Terephthalate) (PET) into the United Kingdom (UK). A full description of the goods subject to this PAD and Recommendation can be found in [Section E: The Goods](#).

### A1. Period of Investigation (POI)

6. The POI is 01 January 2021 to 31 December 2025.

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<sup>1</sup> [Taxation \(Cross-border Trade\) Act 2018](#), Schedule 5



## Section B: Executive summary

### B1. Preliminary Determination

7. Based on the evidence before it, and in accordance with paragraph 9(1) of Schedule 5 to the Act, the TRA has provisionally determined that:
  - a) The relevant goods, in relation to which this determination is made (as defined in [Section E2: Goods Concerned](#)) and defined in paragraph 11(2) of Schedule 5 to the Act, have been or are being imported into the UK in increased quantities; and
  - b) The importation of the goods in increased quantities has caused or is causing serious injury to UK producers of those goods.
8. As a result, the TRA has made a PAD in accordance with paragraph 9(2) of Schedule 5 to the Act.

### B2. Recommended tariff rate quota

9. In line with paragraph 11(3)(b) of Schedule 5 to the Act, the TRA recommends to the Secretary of State for Business, Innovation, Science and Trade (the Secretary of State) that all the relevant goods should be subject to a quota for a specified period, during which a lower rate of import duty should be applicable to imports of goods within the amount of the quota than is applicable to imports of goods outside the amount of the quota.
10. The TRA is satisfied that, in accordance with paragraph 11(5) of Schedule 5 to the Act, the provisional tariff rate quota is necessary to prevent serious injury, which it would be difficult to repair from being caused during the investigation to UK producers of the goods (defined in [Section F: the UK producers and market](#)).
11. The TRA has determined that the provisional tariff rate quota meets the economic interest test and advises the Secretary of State accordingly.
12. In accordance with paragraph 13 of Schedule 5 to the Act, where the TRA makes a recommendation regarding provisional tariff rate quotas, it must:
  - Specify the period referred to in paragraph 11(3)(b);
  - Specify the amount of the quota, how the quota should be allocated, and the rates of import duty that should be applied to the goods subject to the quota, and be satisfied that these are necessary to prevent serious injury which it would be difficult to repair from being caused during the investigation to UK producers of the goods; and
  - Consult with the Secretary of State before making a recommendation regarding the allocation of a quota.
13. In accordance with paragraph 13(2) of Schedule 5 to the Act, we recommend the application of the provisional tariff rate quota ends 200 days from the day after the date of publication of the Taxation Notice published under paragraph 14(4) of Schedule 5 to the Act, or when the definitive remedy is implemented, whichever is sooner.
14. The TRA recommends a provisional in-quota amount of 192,963 tonnes, and the methodology applied when determining this amount is specified in [Section J3: Amount of the provisional tariff rate quota](#).
15. We are also recommending that the provisional tariff rate quota is allocated as below:



| Table B1: Provisional Tariff Rate Quotas (tonnes) |            |                                   |                                   |
|---------------------------------------------------|------------|-----------------------------------|-----------------------------------|
| Country/Area                                      | Allocation | Q1: 01 Dec 2026 to<br>28 Feb 2027 | Q2: 01 Mar 2027 to 31<br>May 2027 |
| European Union                                    | 77.6%      | 36,926.83                         | 37,747.43                         |
| Mexico                                            | 5.4%       | 2,571.70                          | 2,628.85                          |
| Indonesia                                         | 3.7%       | 1,779.59                          | 1,819.13                          |
| Vietnam                                           | 3.1%       | 1,475.27                          | 1,508.06                          |
| Residual                                          | 10.2%      | 4,826.57                          | 4,933.82                          |

16. We are recommending the out-of-quota duty rate to be set at 65%, and the methodology applied when calculating this rate is specified in [Section H9: Provisional serious injury margin](#).
17. In accordance with paragraph 13(4) of Schedule 5 to the Act, the TRA has consulted with the Secretary of State on the proposed allocation of the quota.
18. We are satisfied that the recommendations above, are necessary to prevent serious injury which it would be difficult to repair from being caused during the investigation to UK producers of the goods.



## Section C: Next steps

19. The purpose of publishing this report is to enable consultations on the PAD, as set out in the WTO Agreement on Safeguards, before a decision to apply any provisional measure is taken.
20. It is also to explain to interested parties and contributors how the decision to make a PAD and recommend a provisional tariff rate quota were reached and allow interested parties and contributors to make submissions in response to the preliminary findings.
21. Interested parties and contributors are invited to make submissions in response to this report by **23:59 GMT on 22 November 2026**. Any submissions on this report prior to the deadline for submission of comments, will be considered and addressed in the Statement of Intended Final Determination (SIFD).
22. The TRA may consider submissions made after this date, but please note that it is not obliged to do so if it would cause an unnecessary delay in the preparation of the SIFD. Where the TRA rejects information for any reason, it will publish the reasons for rejection in the SIFD.
23. Submissions should be sent via the TRA's [Trade Remedies Service](#). Submissions should be accompanied by a non-confidential version<sup>2</sup>, which will be made available to other parties on the [public file](#).
24. If the TRA's Recommendation is accepted, the Secretary of State will publish a Taxation Notice, in accordance with paragraph 14(4)(c) of Schedule 5 to the Act. This will give effect to the imposition of the provisional tariff rate quota.

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<sup>2</sup> [The TRA's investigation process - GOV.UK](#) – Guidance on providing confidential information and non-confidential summaries



## Section D: Background

### D1. Initiation

25. On 19 June 2026, the TRA received an application<sup>3</sup> lodged by ALPEK Polyester Limited (ALPEK) (“the Applicant”) alleging there were increased quantities of imports of Poly(ethylene Terephthalate) (PET) into the UK, which have been and are causing serious injury to UK producers of the goods.
26. The Applicant claimed to be the sole UK producer of virgin produced PET “vPET”. The TRA identified that there are UK producers of recycled PET “rPET”. However, no UK rPET producer registered an interest in the investigation or provided information to the TRA. Therefore, as the Applicant has a collective output which constitutes at least 25% of the total production in the UK of the like goods, the requirement under paragraph 7(1)(a)(i) of Schedule 5 to the Act and regulation 23(2) of the Trade Remedies (Increase in Imports Causing Serious Injury to UK Producers) (EU Exit) Regulations 2019 (“the Regulations”)<sup>4</sup> was met.
27. The TRA was satisfied that the application contained sufficient evidence that the goods have been or are being imported into the UK in increased quantities, and the increased imports have caused or are causing serious injury to UK producers of the goods. Therefore, the requirement under paragraph 7(1)(b) of Schedule 5 to the Act was met.
28. As per the requirements of regulation 22 of the Regulations, the Applicant producer has a share of the market for like goods for consumption in the UK which was sufficient to justify initiation of the investigation. Therefore, the market share requirement under paragraph 7(1)(c) of Schedule 5 to the Act was met.
29. The TRA was satisfied that the application was accompanied by a preliminary adjustment plan. Therefore, the requirements under regulation 32 of the Regulations and paragraph 7(1)(d) of Schedule 5 to the Act were met.
30. The safeguard investigation was initiated by the TRA on 05 August 2026, and the [Notice of Initiation](#) was published on that date.

### D2. Participation

31. The World Trade Organisation (WTO) Committee on Safeguards, relevant Free-Trade Agreement partners with obligations regarding safeguard notification provisions, the Applicant and known interested parties and contributors were notified accordingly and invited to register on the [Trade Remedies Service](#) to participate in the investigation. The Secretary of State was also notified accordingly.
32. A full list of all registrations and submissions made, can be found in [Annex 1](#).

### D3. Authentication

33. This PAD and Recommendation is based on information available to the TRA at the time of drafting, and has not been authenticated although the TRA deemed this information verifiable and sufficient to reach a provisional determination and to make a recommendation.

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<sup>3</sup> [Trade Remedies Authority | SG0094 Non-Confidential Application](#)

<sup>4</sup> [The Trade Remedies \(Increase in Imports Causing Serious Injury to UK Producers\) \(EU Exit\) Regulations 2019](#)



## Section E: The Goods

### E1. Legislative Framework

34. The TRA refers to the goods it investigates as the “goods concerned” as defined by regulation 2 of the Regulations.
35. In accordance with paragraph 11(2) of Schedule 5 to the Act, the goods concerned which are the subject of a PAD are ordinarily referred to as “relevant goods”. Since the goods subject to this PAD and Recommendation are the same goods as defined in [Section E2: Goods Concerned](#), this PAD and Recommendation will hereafter only refer to the “goods concerned”.
36. In accordance with paragraph 4 of Schedule 5 to the Act, for the purposes of the PAD and Recommendation, the TRA refers to “like goods” as those which are like the goods concerned in all respects or, if there are no such goods, goods that have characteristics which closely resemble them.
37. In accordance with regulation 2 of the Regulations, for the purposes of the PAD and Recommendation, the TRA refers to “directly competitive goods” as those which are produced in the UK, which are directly competitive with the goods concerned.

### E2. Goods Concerned

38. The investigation is in respect of PET products imported into the UK, described in the [Notice of Initiation](#) as:

*Poly(ethylene Terephthalate) resin, whether virgin produced poly(ethylene terephthalate) ("vPET") having a viscosity number of 74 ml/g or higher or recycled poly(ethylene terephthalate) ("rPET") of the same viscosity range.*

39. The goods concerned are currently classifiable within the following commodity codes. These commodity codes are only given for information:

3907 6100

3907 6900

40. The TRA received a number of comments concerning the scope of the investigation, including submissions relating to the treatment of rPET and certain specialised PET products. These comments are considered further in section E3 below.
41. The goods concerned are therefore PET products imported into the UK. Similar goods sold on overseas markets and goods produced by the UK producers are described as “like goods” if they meet the definition in paragraph 38 above. Similar goods if produced by UK producers which are not necessarily like the goods concerned, but compete directly with them, are described as “directly competitive goods”.

### E3. Like Goods

42. In assessing whether the goods produced by the UK producers are like the goods concerned in all respects or with characteristics closely resembling them, the TRA has considered:
- a) Physical likeness, including physical characteristics;
  - b) Commercial likeness, including competition and distribution channels;
  - c) Functional likeness, including end-use or interchangeability of the goods;



- d) Similarities in production, including method of production and inputs;
  - e) Other relevant characteristics.
43. The TRA has found that imported vPET and UK-produced vPET are substantially identical in their physical, chemical and technical characteristics, end uses and production processes.
44. We received submissions from several interested parties arguing that rPET should be excluded from the scope of the investigation and should not be considered like goods to vPET. These parties submitted that rPET differs from vPET in terms of feedstocks, production processes, pricing, market dynamics, and the role of regulatory and sustainability requirements in driving demand. Several parties also argued that the Applicant does not produce rPET and that recycled PET serves distinct environmental and circular economy objectives.
45. We also received submissions from a number of interested parties, including overseas producers and exporters of PET, supporting the scope of the investigation and agreeing that products falling within the description of the goods concerned share similar physical, commercial and functional characteristics and compete within the same UK market.
46. The TRA has provisionally assessed the evidence provided by interested parties and continues to consider that imported rPET falls within the scope of the goods concerned as described in the [Notice of Initiation](#). Whilst the TRA acknowledges submissions that rPET differs from vPET in terms of feedstocks, production processes, pricing and market dynamics, the evidence available at this stage of the investigation indicates that imported rPET and imported vPET share the same essential polymer structure, possess closely resembling physical and technical characteristics, serve overlapping end uses and compete within the same UK market.
47. The TRA therefore provisionally concludes that UK-produced vPET is like the imported goods concerned, namely both imported virgin PET and imported recycled PET, for the purposes of paragraph 4 of Schedule 5 to the Act.

## **E4. Directly Competitive Goods**

48. The TRA considered whether there are goods produced by UK producers that are directly competitive with, but not like, the goods concerned.
49. We did not identify any goods produced by UK producers that are directly competitive with the goods concerned and distinct from the like goods identified in Section E3.
50. Accordingly, the TRA has not identified a separate category of directly competitive goods for the purposes of this investigation.



## Section F: UK producers

### F1. UK producers

51. In accordance with paragraph 3(1) of Schedule 5 of the Act, UK producers are defined as:
  - a) All the producers in the UK of like goods and all the producers in the UK of directly competitive goods; or
  - b) Those of them whose collective output of like goods and directly competitive goods constitutes a major proportion of the total production of those goods in the UK.
52. In its application,<sup>5</sup> ALPEK stated that it was the sole UK producer of vPET in the UK. No interested party or contributor challenged this claim. The TRA also undertook its own desk-based research and did not identify any other UK producers of vPET.
53. The TRA identified that there are UK producers of rPET. In its application, the applicant identified several UK rPET producers, including Clean Tech UK (Plastipak), Esterpet (Biffa) and Jayplas and referred to additional UK rPET production facilities. However, no UK rPET producer registered an interest in the investigation or provided information to the TRA.
54. As set out in Section E3, the TRA has determined that UK-produced vPET constitutes the like goods to the goods concerned, comprising imported vPET and imported rPET.
55. Based on the information provided by the Applicant and the information otherwise available to the TRA, the Applicant accounts for a major proportion of UK production of the like goods.
56. Therefore, for the purpose of this investigation, we have defined the Applicant and estimated rPET as the “UK producers”, meeting the requirement of paragraph 7(1)(a)(i) of Schedule 5 to the Act and regulation 23(2) of the Regulations.

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<sup>5</sup> [Trade Remedies Authority | SG0094 Non-Confidential Application](#)



## **Section G: Provisional findings on increased quantities of imports**

### **G1. Legal framework**

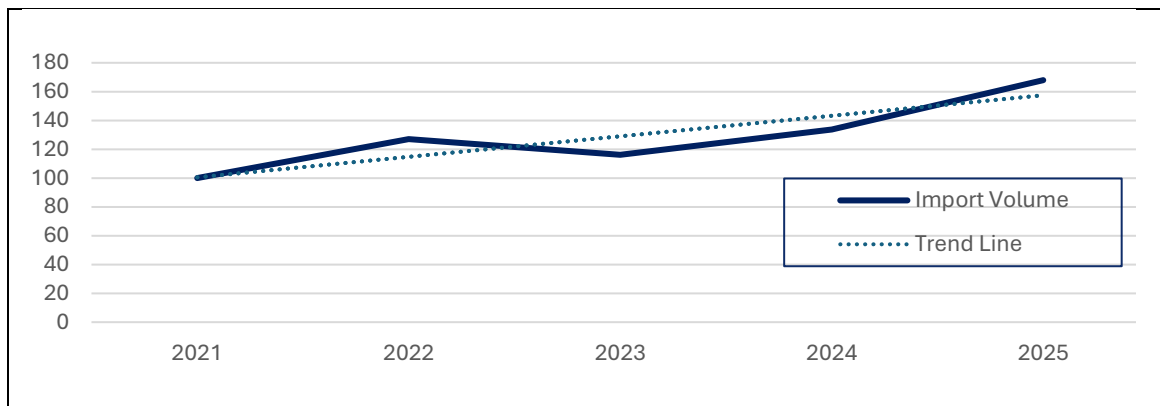
57. In accordance with paragraph 1(1) of Schedule 5 to the Act, goods are imported into the UK in “increased quantities” if:
  - a) The volume of imports of the goods increases, whether in absolute terms or relative to the total production in the UK of like goods and directly competitive goods; and
  - b) That increase is significant.
58. The TRA has assessed whether the goods concerned are being imported into the UK in increased quantities in accordance with paragraphs 1(1) and 6(1)(a) of Schedule 5 to the Act.
59. Regulations 4 and 5 of the Regulations make provisions for how the TRA determines:
  - a) Whether or not there has been an increase in the volume of imports;
  - b) The amount of the increase; and
  - c) Whether that increase is significant.
60. Regulation 6 of the Regulations provides factors the TRA may consider when assessing the foreseeability of the importation of the goods concerned in increased quantities.

### **G2. Volume analysis**

61. As per regulation 4(1) of the Regulations, the TRA must assess whether the goods concerned have been or are being imported into the UK in increased quantities. Regulation 4(2) of the Regulations states that for this purpose, the TRA must consider whether there has been an absolute increase in the import volume of the goods concerned, or a relative increase in the import volume of the goods concerned.
62. In determining whether goods are being imported into the UK in increased quantities, the TRA relied on 10-digit country of despatch HMRC UK trade information, confidential HMRC raw customs declaration data, and confidential registration form data in order to assess total imports into the UK market. We also relied upon the confidential UK producer questionnaire response, in order to assess the volume of imports relative to UK production.
63. HMRC data shown in Graph G1 below, confirms that imports of PET increased overall during the POI by 68%. Although import volumes declined between 2022 and 2023, import volumes remained above their 2021 level throughout the remainder of the period and increased substantially between 2024 and 2025. The overall trend in imports was therefore upward.



**Graph G1: Import Volume of the goods concerned (indexed)**



Source: HMRC customs declarations data

## G2.1 Volume of goods concerned imported in absolute terms

**Table G1: Volumes of imports of goods concerned (indexed)**

| Year              | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------------|------|------|------|------|------|
| Total PET Imports | 100  | 127  | 116  | 134  | 168  |

Source: HMRC raw customs declarations data

64. As noted in Table G1 and demonstrated in Graph G1, imports of the goods concerned to the UK experienced some year-on-year variation during the POI, but the overall trend was upward. Import volumes remained above the 2021 baseline in each subsequent year of the POI and, by 2025, were 68% greater than at the start of the period.
65. The magnitude of this increase, together with the fact that import volumes remained elevated throughout the POI despite annual fluctuations, supports a finding that imports of the goods concerned increased significantly in absolute terms during the POI, pursuant to regulation 4(2)(a) of the Regulations.

## G2.2 Volume of goods concerned imported relative to domestic production

**Table G2: Volumes of imports of goods concerned relative to domestic production (indexed)**

| Year                                      | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------------------------------------|------|------|------|------|------|
| UK Production                             | 100  | 88   | 72   | 63   | 59   |
| Total PET imports as a % of UK production | 100  | 144  | 162  | 213  | 284  |

Source: HMRC raw customs declarations data, UK producer questionnaire response.

66. As noted in Table G2, UK production experienced a 41 point decrease across the POI.
67. As shown in Table G2, the volume of imports of the goods concerned relative to domestic production increased throughout the POI. The index of total imports as a percentage of UK production increased from 100 in 2021 to 284 in 2025, representing an increase of 184 index points over the period.



68. The increase in imports relative to domestic production indicates that imports expanded at a considerably faster rate than domestic production. Indeed, while import volumes increased over the POI, UK production contracted substantially. Consequently, the volume of imports became progressively larger in comparison with the output of UK producers, reaching its highest level relative to domestic production in 2025.
69. The magnitude and sustained nature of the increase in imports relative to domestic production support a finding that imports of the goods concerned increased significantly, relative to domestic production during the POI, pursuant to regulation 4(2)(b) of the Regulations.

### **G3. Significant increase in the importation of the goods concerned**

70. In accordance with regulation 5 of the Regulations, where the TRA has assessed that there has been an increase in the volume of goods concerned imported into the UK, the TRA must determine whether that increase has been significant. Regulation 5(2) of the Regulations sets out what the TRA must consider when making that determination.
71. In determining whether the increase in imports of the goods concerned is significant, the TRA has considered the rate and amount of the increase in imports, as well as whether the increase was foreseeable. The TRA considers the increase to be significant, having regard to the substantial growth in import volumes shown in table G1. The evidence also indicates that the increase resulted from developments that could not reasonably have been foreseen, including changes in Asian production capacity and access to sanctioned raw materials, as discussed in Sections G2 and G3.2.

#### **G3.1 The rate and volume of imports of the goods concerned into the UK**

72. The compound annual growth rate (CAGR) of imports of the goods concerned over the POI was 13.84%, indicating a sustained and significant increase in import volumes over the period. This CAGR was calculated from HMRC import data across the POI.
73. Excluding the period between 2021 and 2022, during which traditional trade flows were affected by the COVID-19 pandemic and associated disruptions, the largest year-on-year increase in imports occurred between 2024 and 2025. During this period, the volume index increased from 134 to 168 and the value index increased from 134 to 165, as shown in Table G1. Imports therefore reached their highest level during the POI in both volume and value terms, providing further evidence of the significant increase in imports of the goods concerned into the UK.
74. The sharp rate of increase observed between 2024 and 2025 is particularly notable given that it occurred from an already elevated level of imports. Taken together with the overall upward trend observed during the POI, the evidence demonstrates a recent and substantial increase in both the volume and value of imports of the goods concerned into the UK.

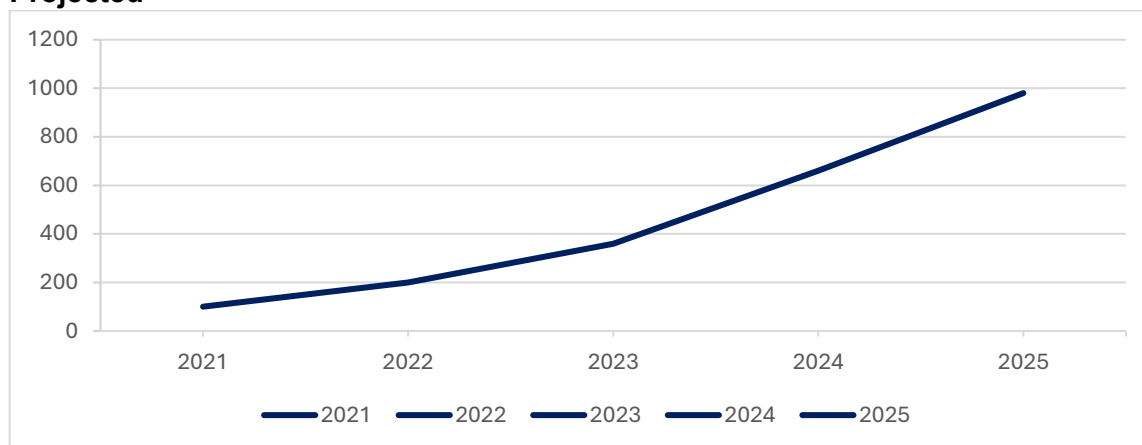


## G3.2 The foreseeability of the importation of the goods concerned in increased quantities

### G3.2.1 Increase in global production capacity and exports from the PRC

75. Regulation 5(2)(b) of the Regulations requires the TRA to consider whether the increase in imports resulted from developments which could not reasonably have been foreseen. The evidence indicates that a combination of significant capacity expansion, increasing global oversupply, changing international trade flows, trade diversion arising from trade defence measures in other jurisdictions, and changes in access to raw materials following sanctions on Russia contributed to an unforeseen increase in imports of the goods concerned into the UK.
76. The TRA has seen data from a Wood Mackenzie Capacity Report which indicates that global production capacity has expanded significantly faster after 2021 than had been anticipated. The report suggests that prior forecasts were based on the CAGR observed between 2018 and 2021, which implied a far more gradual increase in capacity across the POI. However, actual post-2021 developments show that capacity growth unexpectedly accelerated well beyond those expectations. However, we are unable to disclose the specific data due to confidentiality.

**Graph G2: Divergence between Global PET Production Capacity, Actual vs Projected**



Source: Wood Mackenzie Capacity Report

77. Data from Wood Mackenzie further indicates that Asia is a key contributor to global oversupply. Post-2021 capacity growth has substantially exceeded the rate implied by the 2018-2021 CAGR, demonstrating a significant acceleration in production capacity expansion across the region. Open-source reporting indicates that substantial new production capacity was commissioned across the region during this period.<sup>67</sup>
78. The significance of these developments extends beyond the countries in which the new capacity was installed. PET is a globally traded commodity and pricing is influenced by conditions in the international market. Consequently, the addition of substantial new production capacity in Asia increased the volume of PET available to

<sup>6</sup>[China, SE Asia PE outlook for 2025: Oversupply dilemma deepens with new capacity surge | ChemOrbis](#)

<sup>7</sup>[Asian PET market faces uncertainty as demand recovery lags | S&P Global](#)



world markets, placing downward pressure on prices and intensifying competition amongst producers globally. The effects of this additional capacity were therefore transmitted through international trade flows and affected exporting and importing countries beyond the region in which the capacity expansion occurred.

79. The People's Republic of China (PRC) was a particularly significant contributor to this expansion. Significant capacity additions resulted in supply growth materially outpacing domestic demand growth, contributing to conditions of industrial overcapacity recognised by the PRC authorities themselves.<sup>8</sup> These developments, accelerated a structural shift within the PRC's PET industry from predominately serving domestic demand to targeting export markets, including the UK. Consequently, the PRC accounted for an estimated 35-45% of global traded PET volumes in 2025, up from around 23% in 2020.<sup>9</sup> Industry sources indicate that PRC-origin PET typically trades at a discount of 50 to 150 USD per tonne compared with European spot prices, increasing its competitiveness in international markets and contributing to downward pressure on UK producers.<sup>10</sup>
80. The increase in exports from the PRC occurred within a broader context of increasing global trade flows and intensifying competition in international PET markets. As production capacity expanded more rapidly than demand in a number of markets, producers increasingly sought export opportunities to maintain utilisation rates and market share. The resulting imbalance between supply and demand increased competition across exporting countries and altered established trading patterns.
81. These developments were further compounded by the introduction and maintenance of trade defence measures against other states in several jurisdictions, including the European Union, Canada, and the United States. Combined, these jurisdictions represent a significant portion of global PET import demand and demonstrate that major import markets have already resorted to trade-defence action.
82. UK import data, as shown in Graph G3 below, demonstrates a substantial increase in imports from the PRC between 2024 and 2025, with imports from the PRC recording the largest increase of any individual exporting country during the period. Asia as a whole accounted for the largest increase in UK imports, with imports from the PRC representing a significant proportion of that growth. The evidence therefore indicates that expanding global production capacity and the redirection of exports across markets contributed materially to the increase in imports into the UK.

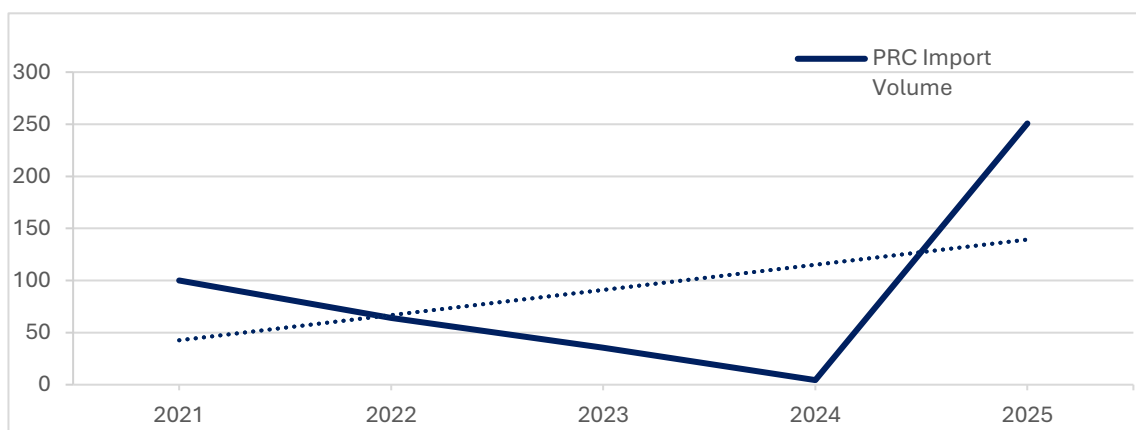
**Graph G3: PRC import volume of the goods concerned (indexed)**

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<sup>8</sup> [China aims to tackle over-capacity in some plastic and fibre petrochemicals | Reuters](#)

<sup>9</sup> [China Increasingly Dominates PET Trade – China's Exports Accounted for 45% of the Total Volume of PET Traded Globally in 2025, Up From 23% in 2020 | International Trader Publications Blog](#)

<sup>10</sup> [China PET Expansion Pressures Global Producers | CZ app](#)



Source: HMRC raw customs declarations data

### G3.2.2 Access to raw materials

83. Further market distortions arose following sanctions imposed on Russian oil exports after Russia's invasion of Ukraine. While several jurisdictions, including the UK, restricted imports of Russian oil and related products, the PRC continued to import substantial volumes of Russian crude.<sup>11</sup> This provided access to lower-cost feedstocks used in the production of petrochemical products, including the upstream inputs required for PET production.<sup>12</sup>
84. Access to discounted raw materials has had two notable effects on the global PET market. First, lower input costs enhanced the competitiveness of PRC PET producers at a time when domestic production capacity was expanding more rapidly than domestic demand. This increased the incentive and ability of overseas producers to place greater volumes on export markets, thus contributing to an unforeseeable and significant increase in exports to the UK. Secondly, the PRC exported significant volumes of PET feedstocks, including Mono-ethylene Glycol (MEG) to other PET-producing countries, who subsequently exported their end product (the goods concerned) to export markets such as the UK.

**Table G3: Indexed import volumes of the goods concerned and unit prices by region/country (2021 = 100)**

| Region / Country | Import Volume (2021) | Import Volume (2025) | Unit Price (2021) | Unit Price (2025) |
|------------------|----------------------|----------------------|-------------------|-------------------|
| Asia             | 100                  | 368                  | 100               | 97                |
| Europe           | 100                  | 117                  | 100               | 107               |
| Vietnam          | 100                  | 2,182                | 100               | 95                |

Source: HMRC raw customs declarations data

85. The evidence suggests that certain Asian producers benefited from access to lower-cost feedstocks following 2022. Imports of the goods concerned from Asia increased substantially during the POI, with the volume index increasing from 100 in 2021 to 368 in 2025. Over the same period, the value index increased from 100 to 359, whilst the

<sup>11</sup> [Beijing's Bargain with Moscow Is Built on Plastic | by Brian Iselin | The Geopolitical Economist | Medium](#)

<sup>12</sup> [Kazakh, Chinese and Russian Companies Unite on Polyethylene Production Plant - The Times Of Central Asia](#)



unit price index declined from 100 to 97. This indicates that Asian exporters were able to significantly expand export volumes to the UK alongside declining average prices.

86. By contrast, imports from Europe exhibited a markedly different pattern. Between 2021 and 2025, the volume index increased from 100 to 117 and the value index increased from 100 to 136, whilst the unit price index increased from 100 to 107. The comparatively modest increase in volumes, coupled with prices remaining above their 2021 level, suggests that European producers did not experience the same cost advantages observed among certain Asian exporters.
87. The experience of Vietnam provides a further example of this trend. Between 2021 and 2025, the volume index of imports from Vietnam increased from 100 to 2,182, whilst the value index increased from 100 to 1,747. Over the same period, the average unit price declined from index 100 to 95. The ability of exporters to significantly increase sales volumes whilst maintaining lower prices is consistent with improved cost competitiveness arising from access to lower-cost production inputs.
88. Taken together, the unprecedented expansion of global and Asian PET production capacity, the emergence of significant overcapacity within the PRC, changes in international trade flows, trade diversion arising from trade defence measures in third-country markets, and the enhanced competitiveness arising from access to lower-cost feedstocks constitute developments which could not reasonably have been foreseen. The TRA therefore considers that the increase in imports of the goods concerned satisfies the requirement in regulation 6 of the Regulations.

### **G3.3 Other factors considered relevant**

89. In accordance with, regulation 5(c) of the Regulations, the TRA considered whether there were any other factors which may have contributed to the increase in the quantity of imports of the goods concerned. Having reviewed the information available to us at this stage of the investigation, the TRA has not identified any additional factors which materially alter its assessment of the unforeseen developments described above.

## **G4. Conclusion**

90. Reviewing the evidence available to the investigation, we conclude that:
- a) The volume of imports of the goods concerned have increased in absolute terms during the POI;
  - b) The volume of imports of the goods concerned have increased in relative terms to UK domestic production during the POI;
  - c) The rate and volume of increase was significant; and
  - d) The increase resulted from unforeseen developments.



## Section H: Provisional findings on serious injury

### H1. Legal framework

91. Serious injury is the term used when there is evidence of UK producers being impaired by the importation of the goods concerned in increased quantities. Paragraph 2 of Schedule 5 to the Act defines 'serious injury' to UK producers in the goods, as:
  - a) A significant overall impairment to their position, or
  - b) The threat of such impairment.
92. In accordance with regulation 7 of the Regulations, as the TRA has provisionally determined that goods concerned have been or are being imported into the UK in increased quantities, it must consider whether those goods have caused or are causing serious injury to UK producers.
93. In line with regulation 8 of the Regulations, to determine whether UK producers have suffered or are suffering serious injury from the increased quantity of imports of the goods concerned, the TRA has examined four factors:
  - a) The rate and volume of increase of the importation of the goods concerned into the UK, in absolute or relative terms;
  - b) The export capacity of the goods concerned in foreign countries or territories and the likelihood that the capacity will be exported to the UK;
  - c) The share of the domestic market in the UK taken by the importation of the goods concerned in increased quantities; and
  - d) Changes in the UK producers' level of: sales; productivity; production; capacity utilisation; profits and losses; and employment.
94. In accordance with regulation 9 of the Regulations, the TRA has also examined price effects and whether any known factors other than the importation of the goods concerned in increased quantities into the UK has caused or is causing serious injury to UK producers.

### H2. Volume analysis - Rate and volume of increase in absolute or relative terms

| Table H1: Rate of increase in the imports of goods concerned (indexed) |      |      |      |      |      |
|------------------------------------------------------------------------|------|------|------|------|------|
|                                                                        | 2021 | 2022 | 2023 | 2024 | 2025 |
| Total import market                                                    | 100  | 127  | 116  | 134  | 168  |
| Imports relative to UK production                                      | 100  | 144  | 162  | 213  | 284  |

Source: HMRC raw customs declarations data, UK producer questionnaire response

95. Table H1 shows that imports of the goods concerned increased over the POI by 68 index points. Whilst imports declined slightly in 2023 compared with the preceding year, the overall trend throughout the period was upward.
96. The rate of increase in imports varied throughout the POI. Imports increased by 27% between 2021 and 2022 before declining by 9% in 2023. This decline was followed by further increases of 16% in 2024 and 25% in 2025. The evidence therefore indicates that import growth resumed following the temporary reduction observed in 2023, with imports reaching their highest level during the POI in 2025.



97. The TRA found that the goods concerned were imported into the UK in increased quantities during the POI, as established in [Section G](#). The import data demonstrates a substantial increase in the volume of imports in absolute terms, with imports in 2025 being approximately 68% higher than in 2021.
98. The increase in imports is particularly significant when assessed relative to UK production. As shown in Table H1, imports as a proportion of UK production increased from an index of 100 in 2021 to 284 in 2025. This demonstrates that import volumes increased significantly relative to domestic production during the POI, resulting in imports accounting for a progressively larger volume relative to the output of the UK producers.
99. The TRA therefore considers both the absolute increase in imports and the increase in imports relative to UK production to be significant. This factor supports a finding that UK producers experienced serious injury during the POI.

### H3. Export capacity analysis - Global export capacity and likelihood of exports to the UK

100. The TRA examined the export capacity of producers of the goods concerned in foreign countries and territories, and the likelihood that such capacity may be exported to the UK. For this assessment the TRA reviewed evidence submitted by the Applicant and interested parties relating to global production capacity, demand, capacity utilisation and trade flows in the global PET market, and where necessary, relied on facts available.
101. As discussed in [Section G3.2](#), the evidence indicates that global PET production capacity increased substantially during the POI, and much of that growth occurred in Asia.
102. The TRA reviewed evidence submitted by the Applicant and interested parties relating to global PET capacity,<sup>13</sup> demand and capacity utilisation. The Applicant submitted that Asian capacity additions between 2021 and 2025 exceeded growth in demand by approximately 6 to 8 million tonnes. Whilst Asian demand increased over the period, the additional production capacity substantially outpaced this growth, resulting in significant excess production capacity in Asia, which contributed to wider global overcapacity in the PET market.<sup>14</sup>

| Table H2: Excess capacity relative to UK demand |                         |
|-------------------------------------------------|-------------------------|
| Metric                                          | Value                   |
| Additional Asian capacity 2021-2025             | Between 11mmt and 12mmt |
| Increase in Asian demand 2021-2025              | Between 4mmt and 5mmt   |
| Excess capacity generated                       | Between 6mmt and 8mmt   |
| Excess capacity as multiple of UK demand        | >14x                    |
| Asian imports to UK 2021-2025 (index)           | 100 → 368               |
| Asian share of UK imports 2021-2025 (index)     | 100 → 219               |

Source: Wood Mackenzie report, HMRC raw customs declarations data & UK producer questionnaire response

<sup>13</sup> [Reuters – China tackling over capacity of PET](#) – accessed 21/08/26

<sup>14</sup> [Global Print Monitor – Asia PET capacity](#) – accessed 21/08/26



103. The TRA finds that significant export capacity exists in foreign countries producing the goods concerned. The evidence further indicates that substantial excess capacity remains available and that producers continue to have commercial incentives to export.
104. The findings in [Section G3.2](#) also demonstrate that the UK was an established and accessible destination for the goods concerned. The evidence concerning actual trade flows, import prices and the increasing volumes directed towards the UK indicates that overseas producers had both the ability and commercial incentive to supply the UK market. The TRA considers that these observed trade flows provide evidence that the available capacity was not merely theoretical but was increasingly being directed towards the UK during the POI.
105. Following the end of the POI, the Republic of Türkiye imposed a safeguard measure on imports of certain PET resin. Although this measure did not cause the increase in UK imports observed during the POI, it further restricts access to a major alternative market and may increase the likelihood of PET being redirected towards other accessible markets, including the UK.<sup>151617</sup>

## H4. Market share analysis – UK market share and increased imports

| Table H3: UK consumption and market shares |      |      |      |      |      |
|--------------------------------------------|------|------|------|------|------|
| Year                                       | 2021 | 2022 | 2023 | 2024 | 2025 |
| UK consumption                             | 100  | 107  | 94   | 101  | 102  |
| Total import share                         | 35%  | 42%  | 44%  | 47%  | 58%  |
| UK producer share                          | 65%  | 58%  | 56%  | 53%  | 42%  |

Source: HMRC raw customs declarations data, UK producer questionnaire response.

106. The TRA examined the share of the domestic market in the UK taken by imports of the goods concerned during the POI.
107. For the purposes of estimating total UK consumption, and in the absence of cooperation from UK rPET producers, the TRA estimated that vPET represented 56% of UK PET sales and rPET represented the remaining 44%. The 56% estimate was based on the most recent data available to the TRA and updated the 59% estimate derived from information used in case TS0060.<sup>1819</sup> The applicant's sales volumes were therefore scaled to estimate sales of the wider UK producers of rPET and vPET. Total UK consumption was then estimated as the sum of imports and estimated domestic industry sales.
108. The TRA considers that this approach provides the best estimate available of total UK rPET and vPET consumption. Whilst precise industry wide sales data is not available, the value is consistent with findings made in case TS0060 and was applied consistently throughout the POI.

<sup>15</sup> [European Commission – Turkey Safeguard PET resin case](#) – accessed 04/08/2026

<sup>16</sup> [World Trade Organization - Türkiye launches safeguard investigation on polyethylene terephthalate resin](#) – accessed 04/08/2026

<sup>17</sup> [CCFGroup – Impact of Turkey's final safeguard tariff](#) – accessed 04/08/26

<sup>18</sup> [TS0060 – PET from India TRA case](#) – accessed 04/08/2026

<sup>19</sup> [ResourceMedia – rPET capacity](#) – accessed 21/09/2026



109. Table H3 shows that total UK consumption remained broadly stable throughout the POI. Whilst consumption fluctuated between years, the UK consumption index stood at 102 in 2025 compared with 100 in 2021. The evidence therefore indicates that the size of the UK market remained relatively unchanged over the POI.
110. The evidence indicates that imports accounted for an increasing share of UK consumption over the POI. Import penetration increased from 35% in 2021 to 58% in 2025. Over the same period, the share of the UK market supplied by UK producers declined from 65% to 42%.
111. The increase in import share occurred despite UK consumption remaining broadly stable throughout the POI. This indicates that imports gained market share primarily at the expense of UK producers, rather than as a result of growth in the overall market. As imports captured an increasing proportion of UK demand, the share supplied by UK producers declined correspondingly.
112. The TRA therefore finds that imports of the goods concerned substantially increased their share of the UK market during the POI. The simultaneous decline in the market share of UK producers indicates that imported goods displaced domestic production in the UK market.

## H5. Economic factor analysis

### H5.1 Sales

| Table H4: UK producers' domestic sales volume & value (indexed) |      |      |      |      |      |
|-----------------------------------------------------------------|------|------|------|------|------|
| Year                                                            | 2021 | 2022 | 2023 | 2024 | 2025 |
| Domestic sales volume                                           | 100  | 95   | 82   | 82   | 66   |
| Domestic sales value                                            | 100  | 150  | 102  | 95   | 68   |

Source: UK Producer questionnaire response.

113. Table H4 shows that the UK producer's sales volume and value deteriorated over the POI. Domestic sales volume declined from an index value of 100 in 2021 to 66 in 2025, representing a sustained downward trend throughout the period. The decline was particularly pronounced between 2024 and 2025, when domestic sales volume index fell by 16 index points to its lowest level during the POI.
114. The decline in domestic sales volume occurred despite overall UK consumption remaining broadly stable throughout the POI as discussed in section H4. The decline in domestic sales volumes therefore cannot be explained by a significant contraction in the size of the UK market.
115. Domestic sales value increased in 2022 before declining in each subsequent year. The indexed data shows that domestic sales value increased to 150 in 2022 before falling to 68 in 2025. By the end of the POI, domestic sales value had declined by 82 index points from its 2022 peak and was substantially below its 2021 level.

### H5.2 Production

| Table H5: UK producers' output by volume & value (indexed) |      |      |      |      |      |
|------------------------------------------------------------|------|------|------|------|------|
| Year                                                       | 2021 | 2022 | 2023 | 2024 | 2025 |
| Output by volume                                           | 100  | 88   | 72   | 63   | 59   |
| Output by value                                            | 100  | 129  | 93   | 75   | 64   |



*Source: UK producer questionnaire response.*

116. Table H5 shows that the domestic industry's production volume deteriorated significantly over the POI. Production volume declined in each year of the POI, falling from an index value of 100 in 2021 to 59 in 2025. This represents a sustained downward trend throughout the period, with production reaching its lowest level in 2025. The decline in production was continuous, and no recovery was observed over the POI.
117. By 2025, production volume was approximately 41% lower than the level recorded at the beginning of the POI, indicating a substantial reduction in domestic production activity.
118. The deterioration in production occurred despite UK consumption remaining broadly stable throughout the POI as discussed in section H4. The reduction in production volumes therefore cannot be explained by a significant contraction in the size of the UK market.

### H5.3 Capacity utilisation

**Table H6: UK producers' capacity utilisation (indexed)**

| Year                 | 2021 | 2022 | 2023 | 2024 | 2025 |
|----------------------|------|------|------|------|------|
| Capacity Utilisation | 100  | 88   | 72   | 63   | 59   |

*Source: UK producer questionnaire response.*

119. Table H6 shows that the domestic industry's capacity utilisation deteriorated significantly over the POI. Capacity utilisation declined from an index of 100 in 2021 to 59 in 2025, representing a decrease of 41 index points over the period.
120. The domestic industry's production capacity remained unchanged throughout the POI. The decline in capacity utilisation therefore reflects lower production volumes rather than any changes to the installed production capacity. As production volumes fell, a progressively smaller proportion of the domestic industry's available capacity was utilised.
121. The reduction in capacity utilisation was sustained throughout the POI, with the index declining in each year and reaching its lowest levels in 2025. This indicates that the domestic industry was increasingly unable to utilise its available production capacity effectively.

### H5.4 Profits and losses

**Table H7: UK producers' profits and losses (indexed)**

| Year               | 2021 | 2022 | 2023 | 2024 | 2025 |
|--------------------|------|------|------|------|------|
| Profits and losses | 100  | 100  | -91  | -48  | -128 |

*Source: UK producer questionnaire response.*

122. Table H7 shows that the domestic industry's profitability deteriorated significantly over the POI. The indexed profitability data remained at 100 between 2021 and 2022 before becoming negative in 2023 and remaining in a loss-making position for the remainder of the POI.
123. The profitability index fell from 100 in 2022 to -91 in 2023, reflecting a substantial deterioration in the domestic industry's financial performance. Profitability remained



negative and deteriorated further to an index of -128 in 2025, the lowest level recorded during the POI.

124. The deterioration in profitability coincided with declines in other economic indicators over the POI, including sales, productivity, production and capacity utilisation. Taken together, these trends indicate a substantial weakening of the domestic industry's financial performance.

## H5.5 Employment and productivity

**Table H8: UK producers' employment (indexed)**

| Year                                              | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------------------------------------------|------|------|------|------|------|
| FTE for like goods and directly competitive goods | 100  | 101  | 100  | 100  | 95   |

Source: UK producer questionnaire response.

125. Table H8 shows that employment associated with the domestic industry's production of the like goods and directly competitive goods remained broadly stable between 2021 and 2024 before declining in 2025. By the end of the POI, the employment index had fallen from 100 to 95.
126. Although the decline in employment was less pronounced than that observed in other economic indicators, the evidence indicates that the domestic industry reduced its workforce at the end of the POI. This reduction occurred alongside declines in sales, productivity, production, capacity utilisation and profitability.

**Table H9: UK producers' productivity (indexed)**

| Year                                                                           | 2021 | 2022 | 2023 | 2024 | 2025 |
|--------------------------------------------------------------------------------|------|------|------|------|------|
| Average output in volume per FTE for like goods and directly competitive goods | 100  | 87   | 71   | 63   | 62   |

Source: UK producer questionnaire response.

127. Table H9 shows that the domestic industry's productivity deteriorated over the POI. Average output per FTE declined throughout the period, with the productivity index falling from 100 in 2021 to 62 in 2025. Productivity was at its lowest level at the end of the POI.
128. The decline in productivity was sustained throughout the POI, with the productivity index decreasing each year. The reduction in output per FTE primarily reflects declining production volumes whilst employment levels remained comparatively stable. As a result, fewer units of the like goods and directly competitive goods were produced per employee during the latter part of the POI.
129. The deterioration in productivity is significant when considered alongside employment trends. Although the domestic industry reduced its workforce by the end of the POI, productivity continued to decline. This indicates that the reduction in employment was insufficient to offset the fall in production volumes, resulting in lower output per employee and highlighting the severity of the deterioration experienced by the domestic industry.



## H5.6 Summary of UK producers' economic factors

130. The TRA examined the economic factors for UK producers. The factors assessed were sales, productivity, production, capacity utilisation, profits and losses, and employment. The evidence indicates that all these indicators deteriorated over the POI.
131. Taken together, the evidence indicates that the domestic industry experienced significant deterioration across all the economic indicators examined. The TRA therefore provisionally finds a significant overall impairment in the position of the UK producers of the like goods and directly competitive goods.

## H6. Price effects

### H6.1 Price effects – Depression

**Figure H1: Price Depression, UK domestic sales price and average landed import price, indexed**



Source: HMRC raw customs declarations data and UK producer questionnaire response.

132. The TRA examined whether increased imports of the goods concerned resulted in price depression within the UK market by placing downward pressure on the UK producer's domestic sales prices.
133. The domestic sales price index fell from 157 in 2022 to 103 in 2025. Although the domestic sales price remained slightly above its 2021 level at the end of the POI, the sustained decline from 2022 indicates price depression during the latter part of the period.
134. Average landed import prices also declined in each year after 2022, from an index of 146 in 2022 to 98 in 2025. In absolute terms, average landed import prices remained above the UK producer's domestic sales price. The simultaneous decline in import and domestic prices, together with the increase in import volumes and import market share, indicates that the UK producer faced increasing competitive pressure as import prices fell.
135. The TRA also considered whether the decline in the UK producer's domestic sales price could be explained by changes in its costs. The UK producer's cost to make



declined after 2022, which would be expected to account for part of the reduction in its sales price. However, the domestic sales price declined more sharply than the cost to make over the same period, while imports increased their share of a broadly stable UK market.

136. The TRA therefore considers that reductions in production costs contributed to the decline in domestic sales prices, but do not fully explain the observed price trend. The evidence indicates that falling import prices, increasing import volumes and increasing import penetration also placed downward pressure on the UK producer's domestic sales price during the latter part of the POI.
137. The TRA finds that the domestic sales price was depressed during the latter part of the POI and that increased imports contributed to that price depression.

## H6.2 Price effects – Suppression

138. The TRA examined whether increased imports suppressed domestic prices by constraining the UK producer's ability to achieve a price sufficient to recover the costs of producing and selling the like goods and obtain a reasonable rate of profit.

**Figure H2: Price Suppression, UK Domestic Sales Unit Price and Target Price Index**



Source: UK producer questionnaire response.

139. Figure H2 compares the indexed average domestic sales price of the UK producer with its indexed target price. The target price was calculated using the cost to make, administrative, selling and general expenses and a reasonable rate of profit.
140. Assessing the absolute values shows that the target price was above the domestic sales price throughout the POI. Both the domestic sales price and target price declined after 2022, reflecting in part the reduction in the UK producer's cost to make. However, the domestic sales price remained below the target price and the difference widened by the end of the POI. This indicates that the UK producer was unable to achieve a sales price sufficient to recover its costs and obtain the reasonable rate of profit included in the target price.
141. The increase in import volumes and market share coincided with a corresponding loss of UK producer market share in an otherwise broadly stable market. Imports from Asia



were priced below the UK producer in 2023 and 2024, constraining its ability to raise prices while remaining competitive.

142. The TRA finds that increased imports contributed to price depression and price suppression during the latter part of the POI.

## H7. Causation and non-attribution

143. In sections H2 to H6, the TRA provisionally found that imports of the goods concerned increased significantly during the POI, both in absolute terms and relative to UK production. Over the same period, the UK producers experienced deterioration across all economic indicators, including sales, market share, production, capacity utilisation, profitability, employment and productivity.
144. The evidence indicates that increased imports were associated with adverse price effects within the UK market through price depression and price suppression. The TRA therefore considered the findings in sections H2 to H6 collectively to determine whether the increased imports caused the serious injury experienced by the UK producers.
145. The TRA also considered whether any other known factors contributed to the serious injury and, where relevant, whether injury caused by those factors was attributable to the increased imports.

### H7.1 Causation - Increased imports and market displacement

146. As discussed in section H4, imports of the goods concerned substantially increased their share of the UK market during the POI, whilst the share supplied by the UK producer declined. The TRA found that import penetration increased from 35% in 2021 to 58% in 2025, whilst the UK producer's share declined from 65% to 42%.
147. The increase in import penetration occurred within a market whose overall size remained broadly stable throughout the POI. This indicates that imports gained market share primarily at the expense of the UK producer, rather than being due to growth in overall UK demand.
148. The TRA considers this displacement to be an important element of the causal relationship between increased imports and the serious injury experienced by the UK producers.

### H7.2 Holistic assessment of causation

| <b>Table H10: Imports and selected injury indicators (indexed)</b> |      |      |      |      |      |
|--------------------------------------------------------------------|------|------|------|------|------|
| Year                                                               | 2021 | 2022 | 2023 | 2024 | 2025 |
| Import volume                                                      | 100  | 127  | 116  | 134  | 168  |
| UK producer sales                                                  | 100  | 95   | 82   | 82   | 66   |
| UK producer production                                             | 100  | 88   | 72   | 63   | 59   |
| UK producer capacity utilisation                                   | 100  | 88   | 72   | 63   | 59   |
| UK producer profitability                                          | 100  | 100  | -91  | -48  | -128 |

Source: HMRC raw customs declarations data and UK producer questionnaire response.



149. Table H10 brings together the findings on increased imports in section H2 and the selected serious injury indicators assessed in section H5. Import volumes increased from an index of 100 in 2021 to 168 in 2025. Over the same period, UK producer sales declined to 66, production and capacity utilisation declined to 59, and profitability deteriorated from an index of 100 in 2021 to -128 in 2025, its lowest level during the POI.
150. The timing and direction of these movements support the existence of a causal relationship. Although the indicators did not move uniformly in every year, the overall increase in import volumes coincided with a sustained deterioration in the condition of the UK producers. This relationship was particularly evident during the latter part of the POI, when import volumes increased from an index of 116 in 2023 to 168 in 2025, whilst sales, production and capacity utilisation declined further and profitability remained negative.
151. The circumstances surrounding the increase in imports are further explained by the findings in section H3. Global and Asian production capacity expanded substantially during the POI, whilst increasing volumes of exports were directed towards the UK. The evidence concerning available export capacity, conditions in alternative export markets and observed trade flows indicates that overseas producers had both the ability and commercial incentive to increase exports to the UK, adding to the competitive pressure experienced by the UK producers.
152. As established in section H4, the increase in import volumes was accompanied by imports capturing a growing share of an otherwise broadly stable UK market, whilst the share supplied by UK producers declined. Considered alongside the deterioration identified in section H5, this demonstrates a timely coincidence between increasing import volumes and market share, the displacement of UK producer sales and the deterioration in the UK producers' economic indicators.
153. This assessment is supported by the price effects examined in section H6. The TRA found that increased imports contributed to price depression and suppression during the latter part of the POI and constrained the UK producer's ability to achieve its target price. These findings provide an additional mechanism through which increased imports adversely affected the UK producers, alongside the more significant effects of increasing import penetration and market displacement.
154. The evidence demonstrates a timely coincidence between the significant increase in import volumes and market share and the deterioration in the UK producers' economic indicators. This relationship is supported by the displacement of UK producer sales within a broadly stable market and is further supported by the findings on export capacity and trade flows in section H3 and the price depression and suppression identified in section H6.
155. On the basis of a holistic assessment of the findings in sections H2 to H6, the TRA provisionally finds that increased imports caused serious injury to UK producers during the POI given the evidence of substantial import growth, market displacement, price depression and price suppression, and the corresponding deterioration in the UK producers' economic indicators.



### H7.3 Non-attribution

156. The TRA considered whether factors other than increased imports caused or contributed to the injury suffered by the domestic industry.
157. The data used by the TRA does not indicate that demand contraction caused the observed deterioration. UK consumption remained relatively stable from an index value of 100 in 2021 to 102 in 2025. The applicant also states that the reduction in domestic industry sales could not be attributed to demand contraction.
158. The TRA received information from interested parties noting that force majeure events and production outages affected the UK producer's performance during the POI. Such events temporarily restricted the UK producer's output and ability to supply customers. The TRA therefore considered the timing and duration of the events, the production volumes affected and the economic indicators that may have been influenced by them. However, the deterioration in sales, production, capacity utilisation and profitability occurred over several years of the POI, rather than solely during the periods affected by the reported events.
159. The TRA considered whether the Plastic Packaging Tax (PPT) and recycled-content requirements shifted demand from vPET towards rPET during the POI. As the UK producer manufactures only vPET, this shift may have contributed to its performance. However, the tax applies irrespective of the origin of the PET and does not inherently favour imports. The available data do not distinguish between vPET and rPET imports, so the effect cannot be quantified. The TRA considers that this factor may have contributed to the UK producer's injury but does not explain the wider increase in imports and market displacement or break the causal link with serious injury.
160. The TRA considered whether changes in feedstock and raw-material costs contributed to the deterioration in the UK producer's position. As discussed in section G3.2, certain Asian producers may have benefited from access to lower-cost feedstocks. The UK producer's cost to make increased in 2022 before declining thereafter, which contributed to movements in its domestic sales price and profitability. However, sales, market share, production and capacity utilisation continued to deteriorate as the cost to make declined, while import volumes and import penetration increased.
161. The TRA has not identified any additional known factors which, either individually or collectively, caused the significant overall impairment in the position of the UK producer of the like goods and directly competitive goods without breaking the causal link.

### H8. Conclusion

162. Reviewing the evidence available to the investigation, we conclude that:
- a) Imports of the goods concerned increased in absolute terms and relative to UK production;
  - b) Significant export capacity exists in foreign countries and territories and is likely to be directed towards the UK;
  - c) Imports substantially increased their share of the UK market, while the share supplied by the UK producer declined;
  - d) The UK producers experienced significant deterioration in sales, productivity, production, capacity utilisation, profitability and employment;



- e) The TRA found that increased imports contributed to price depression and price suppression;
  - f) Increased imports gained market share and displaced UK producer sales in a broadly stable market, supporting a causal relationship between increased imports and serious injury; and
  - g) Although other known factors may have contributed to aspects of the UK producer's performance, they did not individually or collectively explain the sustained deterioration or break the causal link between increased imports and serious injury.
163. Based on the evidence available at this stage of the investigation, the TRA provisionally finds that increased imports of the goods concerned caused significant overall impairment in the position of UK producers of the like goods and directly competitive goods.

## **H9. Provisional serious injury margin**

### **H9.1 Determination of the normal rate of profit**

164. In order to determine the serious injury margin, the TRA first established a reasonable rate of profit for UK producers of the like goods.
165. The TRA considered information provided by the UK producers and other available evidence, including historic profitability achieved before the serious injury identified, relating to the profitability that could reasonably be expected under normal conditions of competition.
166. Having regard to that evidence, the TRA provisionally determined that a profit mark-up of 15% on the cost of production and AS&G costs was reasonable for the purpose of establishing the normal rate of profit as suggested by applicant. The TRA identified the period suggested by the applicant as representative of conditions before the full impact of the increase in imports had materialised. The TRA concluded that a profit rate of 15% represented a reasonable benchmark for sustainable commercial operations and therefore applied this rate in calculating the target price.

### **H9.2 Target price**

167. The target price represents the price that UK producers of the like goods would be expected to achieve in the absence of the increased quantity of imports of the goods concerned found to be causing serious injury.
168. The TRA calculated the target price using the UK producer's 2025 costs of production and AS&G costs for the like goods and applied the reasonable profit mark-up determined in H9.1. To reflect the composition of UK supply, the TRA adjusted the target price by reference to the estimated proportion of rPET supplied by UK producers and the price premium for rPET relative to vPET.

### **H9.3 Landed price**

169. The landed price represents the price of the goods concerned when they enter the UK market, including any applicable customs duties and other costs associated with importation.



170. The TRA determined the landed price using HMRC trade data, confidential customs declaration data, and information submitted by interested parties during the investigation.
171. For the purpose of calculating the serious injury margin, the TRA selected the 2025 average landed price of imports from the most injurious source expected to access the residual quota. The TRA considered this benchmark appropriate because it reflected prices in the most recent year of the POI and the pricing of imports most likely to become subject to the out-of-quota duty.

#### **H9.4 Calculation of serious injury margin**

172. The serious injury margin measures the minimum increase in the import price required to prevent or remedy the serious injury identified. The TRA calculated the serious injury margin using an underselling methodology.
173. The TRA calculated the serious injury margin by comparing the 2025 adjusted target price with the 2025 benchmark landed price.
174. The difference between those prices was expressed as a percentage of the benchmark landed price.
175. The TRA considered that this approach provided an appropriate measure of the increase in the benchmark landed price required to reach the adjusted target price and thereby remedy the serious injury identified in this provisional determination.
176. Based on this assessment, the TRA provisionally determined a serious injury margin of 65% as shown in Table H11 below:

| <b>Table H11: Provisional serious injury margin</b> |                              |
|-----------------------------------------------------|------------------------------|
| <b>Country or territory</b>                         | <b>Serious injury margin</b> |
| <b>All countries and/or territories</b>             | <b>65%</b>                   |



## **Section I: Preliminary adjustment plan**

### **I1. Legal framework**

177. In accordance with paragraph 7(1)(d) of Schedule 5 to the Act, the TRA may only initiate a safeguarding investigation where the application is accompanied by a preliminary adjustment plan.
178. Regulation 32(2) of the Regulations makes provisions for what a preliminary adjustment plan may contain, which includes but is not limited to:
- a) How UK producers intend to adjust to the importation of the goods concerned in increased quantities as appropriate;
  - b) Potential innovation, research and development initiatives to improve the competitiveness of UK producers; and
  - c) Changes which UK producers intend to make to improve efficiency, including workforce effectiveness and investing in new or different machinery.

### **I2. Assessment of preliminary adjustment plan**

179. The Applicant submitted a preliminary adjustment plan in support of its application. The plan sets out a range of proposed measures intended to improve the competitiveness, efficiency, resilience and long-term sustainability of the UK producers in response to increased imports of the goods concerned.
180. The proposed measures include initiatives relating to operational performance, production capability, productivity, technological development and competitiveness. The plan also identifies a number of intended investments and improvement programmes designed to support the UK producers' future viability and ability to compete within the market.
181. The TRA has completed a preliminary assessment of the adjustment plan against the requirements of regulation 32(2) of the Regulations. Due to the commercially sensitive nature of the information provided, further details of the proposed measures cannot be disclosed.

### **I3. Conclusion**

182. Having examined the information provided, the TRA provisionally determined that the adjustment plan contains sufficient evidence to show how UK producers intend to adjust to import competition and improve its competitiveness.



## **Section J: Form of provisional measure**

### **J1. Legal framework**

183. Pursuant to paragraph 11(3)(b) of Schedule 5 to the Act, the TRA may recommend that the goods concerned are made subject to a tariff rate quota (TRQ).
184. In accordance with paragraph 13(3)(a) of Schedule 5 to the Act, a recommendation for a provisional tariff rate quota must specify:
- a) The amount of the quota;
  - b) How the quota should be allocated; and
  - c) The rates of import duty that should apply to goods imported outside the quota.
185. Regulation 10(4) of the Regulations further requires the TRA to consider the desirability of maintaining traditional trade flows when determining the level of which such a provisional tariff rate quota should be set.
186. In determining the appropriate form and design of the provisional measure, the TRA has considered:
- a) The need to prevent further serious injury during the investigation;
  - b) The desirability of maintaining traditional trade flows;
  - c) The UK market's continued reliance on imports alongside domestic virgin and recycled PET supply;
  - d) The need to maintain an appropriate degree of security of supply for downstream users; and
  - e) The requirement that the measure should not exceed what is necessary to address the serious injury provisionally identified.
187. These considerations informed both the TRA's choice of a tariff rate quota as the appropriate form of provisional measure and its design, including the amount and allocation of the quota and the applicable out-of-quota duty.

### **J2. Form of provisional measure**

188. Having provisionally determined that imports of the goods concerned are being imported into the UK in increased quantities and that those imports have caused serious injury to UK producers, the TRA considered that a provisional tariff rate quota is the most appropriate form of provisional measure.
189. The TRA considered that a TRQ would allow continued security of supply to the UK market – acknowledging that the UK market continues to rely on imports alongside domestic supplies of virgin and recycled PET – whilst providing relief to the UK producers from the recent surge in imports identified during the POI.
190. The TRA further considers that a TRQ is capable of maintaining traditional trade flows whilst preventing additional serious injury, which would be difficult to repair.

### **J3. Amount of the provisional tariff rate quota**

191. In determining the appropriate level of the provisional tariff rate quota, the TRA considered import volumes during a period it considered representative of traditional trade flows prior to the increase in imports identified during the investigation.



192. The TRA considered that the period from 2017 to 2019 was representative of traditional trade flows. The period from 2020 onwards was not considered representative because it was characterised by significant disruptions to global trade and market conditions. These disruptions included, most notably, the COVID-19 pandemic and associated impacts on demand, production, logistics, purchasing and stockholding patterns, as well as subsequent changes in global trade flows and market conditions affecting the PET sector. The period from 2022 to 2025 also captures the increase in imports that forms the basis of this investigation. Using these years would therefore risk setting the quota by reference to temporary market distortions or to the import surge that the provisional measure is intended to address. By contrast 2017-2019 preceded these developments and therefore provided the most appropriate basis for identifying established trade flows under normal market conditions.
193. The TRA calculated the average annual volume of imports during the representative period as the starting point for setting the quota. It then assessed whether those volumes remained sufficient in light of current UK demand and the volume that could reasonably be supplied by UK producers.
194. That assessment indicated that retaining the unadjusted 2017 to 2019 average would not provide sufficient in-quota imports to complement available domestic supply and meet current UK demand. The TRA therefore made an upward adjustment to the representative period volume. This preserves the 2017 to 2019 trade flows as the basis of the quota, while reflecting present market requirements and reducing the risk that the measure would create an avoidable shortfall in supply for downstream users.
195. The TRA therefore recommends a provisional in quota amount of 192,963 tonnes.

#### **J4. Developing country exemption**

196. In determining the allocation of the provisional tariff rate quota, the TRA first identified the relevant developing country Members of the WTO (from among the developing countries set out in the [Notice of Initiation](#)) and then assessed whether imports from developing country Members qualified for exclusion from the measure in accordance with regulation 43 of the Regulations and Article 9.1 of the WTO Agreement on Safeguards.
197. The TRA assessed the import shares of developing country members and found that imports from countries qualifying for exclusion did not collectively exceed the threshold established by regulation 43 of the Regulations.
198. The TRA further found that Indonesian and Vietnamese imports exceeded the relevant individual thresholds of 3% and therefore did not qualify for exclusion from the proposed measure.
199. Developing country Members qualifying for exclusion from the proposed measure are listed in [Annex 2](#).
200. UK Economic Partnership Agreement countries eligible for Multilateral Safeguard Exemptions from the proposed measure are listed in Annex 3.



## J5. Allocation of the provisional tariff rate quota

201. Regulation 10(4) of the Regulations provides that the TRA must consider the desirability of maintaining traditional trade flows when determining the allocation of a tariff rate quota.
202. The TRA considers this desirable because it preserves established supply relationships and continued access to imports on which the UK market relies, while avoiding unnecessary disruption for downstream users. It also ensures that the allocation addresses the recent increase in imports without unduly displacing the established trade patterns that existed before that increase.
203. The TRA therefore examined the share of imports accounted for by exporting countries and territories during the representative period.
204. We identified the principal traditional suppliers of the goods concerned and considered that country-specific quota allocations for those suppliers would best maintain established trade patterns. We also considered that a residual quota should remain available to other countries and territories subject to the measure.
205. On that basis, the TRA has allocated quotas as shown in Table J1 below:

| <b>Table J1: Allocation of provisional tariff rate quota</b> |                       |                              |
|--------------------------------------------------------------|-----------------------|------------------------------|
| <b>Country / territory</b>                                   | <b>Share of quota</b> | <b>Quota amount (tonnes)</b> |
| European Union                                               | 77.6%                 | 149,758.81                   |
| Mexico                                                       | 5.4%                  | 10,429.67                    |
| Indonesia                                                    | 3.7%                  | 7,217.22                     |
| Vietnam                                                      | 3.1%                  | 5,983.06                     |
| Residual                                                     | 10.2%                 | 19,574.41                    |
| <b>Total</b>                                                 | <b>100%</b>           | <b>192,963.17</b>            |

## J6. Out-of-quota import duty

206. The TRA must also determine the rate of import duty applicable to imports exceeding the quota allocation.
207. In determining the appropriate rate, the TRA considered the level of relief necessary to prevent further serious injury to UK producers during the course of the investigation.
208. The TRA assessed the extent to which imports of the goods concerned were underselling the UK producers' prices and considered the level of duty required to address that underselling.
209. Accordingly, the proposed out-of-quota duty rate has been established by reference to the provisional serious injury margin calculated in [Section H9](#).
210. The TRA therefore recommends that imports of the goods concerned entering the UK outside the quota allocation be subject to an ad valorem duty of **65%**, equivalent to the provisional serious injury margin.

## J7. Conclusion

211. The TRA considers that the proposed tariff rate quota:
- Maintains traditional trade flows to the greatest extent possible;
  - Allows continued access to imported PET from traditional suppliers;



- c) Reflects current market conditions;
  - d) Prevents additional serious injury which would be difficult to repair during the course of the investigation; and
  - e) Does not exceed what is necessary to address the serious injury identified in this provisional determination.
212. The TRA therefore recommends the imposition of the provisional tariff rate quota described above for a period not exceeding 200 days, or until a definitive measure is implemented, whichever occurs sooner.



## Section K: Economic Interest Test

### K1. Introduction

213. In accordance with paragraph 11(3)(b) of Schedule 5 to the Act, the TRA may recommend to the Secretary of State that all the relevant goods should be subject to a quota for a specified period during which a lower rate of import duty should be applicable to imports of goods within the amount of the quota than is applicable to imports of goods outside the amount of the quota.
214. In accordance with paragraph 11(8A) the TRA may only make a recommendation under sub-paragraph (3), only if it is satisfied that making relevant goods subject to a provisional tariff rate quota meets the economic interest test (EIT).
215. The EIT is set out in paragraph 23 of Schedule 5 to the Act and is met in relation to the application of a safeguarding remedy if the application of the remedy is in the economic interest of the UK.
216. In line with paragraph 23 of Schedule 5 to the Act, the TRA has taken account of the following factors in conducting the EIT:
- The serious injury caused by the importation of the goods in increased quantities to UK producers of those goods and the benefits to UK producers in removing that injury;
  - The economic significance of affected industries and consumers in the UK;
  - The likely impact on affected industries and consumers in the UK;
  - The likely impact on particular geographic areas, or particular groups, in the UK;
  - The likely consequences for the competitive environment, and for the structure of markets for like goods, in the UK; and
  - Such other matters as the TRA considers relevant.
217. As this is a provisional determination, only the period from the imposition of a provisional tariff rate quota until the final determination will be considered for assessing any impacts. In this assessment, the TRA has considered the potential impacts of imposing provisional measures for 200 days or two consecutive quarters. Longer term impacts that may result from the imposition or non-imposition of a final measure will be addressed in the Statement of Intended Final Determination (SIFD).

#### K1.1. Evidence Base

218. The TRA has supplemented evidence submissions with background research and collated additional information from UK government data sources, and recognised market data providers. The TRA has also conducted desk research related to businesses across the UK PET supply chain that have not participated in this investigation.

### K2. Serious injury caused by increased imports and benefits to UK producer in removing injury

219. In [Section H: Provisional findings on serious injury](#), the TRA found serious injury to the UK producer of PET due to the importation of the goods concerned in increased quantities.



220. This finding is supported by evidence of rising import volumes, significant overseas export capacity likely to be directed towards the UK market, a loss of domestic market share to imports, and deterioration in the UK producer's performance across key indicators, including sales, production, capacity utilisation, profitability, productivity, and employment.
221. The injury assessment concluded there would be further serious injury to the UK producer were a provisional tariff rate quota not imposed. It is expected that the provisional tariff rate quota will prevent serious injury to the UK producers of the goods. The EIT explores the likely impacts to the UK producers and the rest of the UK supply chain from imposing this provisional measure.

### K3. Economic significance of affected industries and consumers in the UK

222. The TRA identified the following groups to be potentially affected by the proposed measure:
- **Upstream businesses:** suppliers of raw materials and inputs to produce PET.
  - **UK producers of PET:** including producers of vPET and rPET.
  - **Importers and downstream businesses:** manufacturers that use PET as an input in the production of end goods and retailers of goods made from PET.
  - **Consumers:** end-users of PET products.
223. . Given the significant overlap between UK importers and downstream businesses, the TRA has treated them as a single group to avoid double counting.
224. We identified businesses in each of these groups and selected a subset for further assessment. For each selected business, the TRA looked at the four most recent published accounts, where available.

#### K3.1. Upstream businesses

225. The main feedstock in the production of PET are monoethylene glycol (MEG) and terephthalic acid (PTA); but we are not aware of any UK producers of these products. We also did not receive any submissions from upstream businesses. However, from the UK producer questionnaire response, we identified five UK-based upstream businesses supplying other raw materials used in the production of PET, from which we selected one for our analysis.
226. According to the available data obtained from the most recent published accounts, the selected business employed around 7 staff, with an annual turnover of approximately £11m and an estimated Gross Value Added (GVA) of approximately £0.7m per year. Our analysis shows that the company appears moderately vulnerable to economic shocks due to declining sales revenue and persistently weak profitability.
227. The available evidence suggests that sales to the UK producer account for around 2% of the turnover of this business. On this basis, we consider PET to be **somewhat important** to the business.



### K3.2. UK producers

228. There is only one known producer of vPET in the UK, ALPEK Polyester Ltd, that submitted a producer questionnaire. We also identified three UK producers of rPET through desk research, however, none of these registered their interest to participate in the investigation.
229. Based on the five most recently published accounts, ALPEK employed between 80 to 120 staff directly involved in the production of PET, generated an average annual turnover of approximately around £150m to £180m and achieved an estimated GVA of around £5m to £11m. During the POI, the producer experienced a decline in both revenue and profitability, suggesting a degree of vulnerability to economic shocks. The available evidence also suggests that PET is **very important** to the producer, accounting for a substantial proportion of its annual turnover.

### K3.3. Importers and downstream businesses

230. From our desk research, we are aware of over 140 businesses which either import PET or operate downstream using PET as an input in the manufacture of their products across a range of industries, including food and beverage packaging, household products, and other consumer goods. The TRA received submissions from five such businesses.
231. For our analysis, we selected ten businesses which, based on HMRC raw declarations data, accounted for approximately 40% of total imports under commodity codes 390761 and 390769. Several of these businesses also represented a substantial proportion of the UK producer's PET sales, collectively accounting for over 60% of its PET purchases.
232. The four most recently published accounts for the ten selected businesses revealed that they employed about 4,500 staff across the UK, with a combined turnover of approximately £2.4bn. We estimate their combined GVA to be around £624m. Our analysis suggests that PET is **somewhat important** to the sampled businesses.
233. Furthermore, these businesses generally appear to have low to moderate vulnerability to economic shocks. Although several businesses demonstrated stable growth and profitability, others experienced fluctuating or declining financial performance, suggesting varying levels of resilience across importers and downstream businesses.

### K3.4. Consumers

234. PET is not an end-consumer good. It is widely used in the manufacture of goods which are then purchased by consumers. This group of the supply chain has not been included in our economic significance analysis or impacts analysis.



### K3.5. Summary table

**Table K1: Significance metrics for affected industries**

|                                                                                      | Upstream businesses                                                      | UK producers                                                         | Importers and downstream                                                                                                                     |
|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Total known businesses                                                               | 5                                                                        | 4                                                                    | Over 140                                                                                                                                     |
| Total selected                                                                       | 1                                                                        | 1                                                                    | 11                                                                                                                                           |
| Estimated importance of PET for this group                                           | <b>Somewhat important</b> (sales to ALPEK vs upstream business turnover) | <b>Very important</b> (PET sales revenue vs whole business turnover) | <b>Somewhat important</b> (value of imports of PET vs importer turnover) and (UK producer PET sales revenue vs downstream business turnover) |
|                                                                                      |                                                                          |                                                                      |                                                                                                                                              |
| Total employment of selected businesses                                              | 7                                                                        | 80 to 120                                                            | 4,500                                                                                                                                        |
| Total GVA of selected businesses                                                     | Around £0.7m                                                             | £5m to £11m                                                          | £624m                                                                                                                                        |
| Total turnover of selected businesses                                                | £11m                                                                     | £150m to £180m                                                       | £2,416m                                                                                                                                      |
| Average EBITDA margin for selected businesses                                        | 2%                                                                       | 0% to 5%                                                             | 13%                                                                                                                                          |
| Estimated relative economic significance when compared to other supply chain groups. | Lower                                                                    | Middle                                                               | Higher                                                                                                                                       |
| Vulnerability to negative economic impacts                                           | <b>Medium</b> – declining revenue and weak profitability                 | <b>High</b> – declining revenue and profitability                    | <b>Low to medium</b> – mix of stable growth and profitability, with declining revenues across the selected businesses.                       |

Sources: Questionnaire responses, HMRC raw customs declarations data, Companies House, and Dun & Bradstreet. Methodology: The importance of PET to each of the groups was estimated using the comparison metrics set out in brackets for each group. GVA was estimated by summing operating profits, employment costs, depreciation, and amortisation. Average EBITDA margin was estimated by dividing the sum of operating profit, depreciation, and amortisation by turnover. The assessment of vulnerability to negative economic impacts was made by looking at financial data from the most recent years.



## **K4. Likely impact on affected industries and consumers**

235. In this section, the TRA assesses the overall impact that the proposed tariff rate quota might have on the identified affected groups. We consider how prices and quantities of PET might change (i) if a provisional tariff rate quota were to be imposed, and (ii) if it was not imposed. We then qualitatively assess the likely effects of these changes across the supply chain: upstream, producers, importers and downstream businesses.

### **K4.1 Prices and quantities should a provisional tariff rate quota be imposed**

236. We expect the domestic price of PET would likely increase if a provisional tariff rate quota were imposed. While prices may remain broadly unchanged if import volumes stay within the quota, the application of the out-of-quota tariff to imports exceeding the quota would increase import costs, which may in turn place upward pressure on prices in the UK market.
237. The imposition of a provisional tariff rate quota is likely to reduce the volume of PET supplied to the UK from other countries especially if the imports quota is exhausted during the 200-day period and the out-of-quota tariff increases the cost of further imports. However, given that demand for PET is considered relatively inelastic due to no close substitutes, we do not expect a significant reduction in the overall quantity of PET supplied to the UK market.
238. Although we expect that a reduction in quantities could potentially lead to UK producers increasing production levels and domestic sales, we do not expect that this increase would result in any material expansion in domestic supply beyond capacity utilisation limits during the period of the provisional measure.

### **K4.2 Prices and quantities should a provisional tariff rate quota not be imposed**

239. If no provisional tariff rate quota is imposed, we expect prices and quantities of PET in the UK to remain broadly unchanged. However, evidence from the UK producer indicates serious injury will continue as a result, making it difficult for UK producers to recover

## **K4.3 Likely impact on affected industries of the provisional tariff rate quota**

### **K4.3.1 UK producers**

240. The UK producers' (vPET and rPET) prices and quantities are expected to remain stable with the imposition of a provisional tariff rate quota. The measure is likely to benefit UK producers by reducing pressure from imports, enabling them to raise prices, market share and potentially profits, particularly if the quota is exhausted. Evidence submitted by ALPEK indicates that their capacity utilisation declined substantially over the POI, suggesting there is a possibility for them to raise output should the provisional measure be



imposed. However, we do not expect significant increases in UK production during the 200 days of the provisional measure.

#### K4.3.2 Upstream businesses

241. Upstream businesses which supply UK producers are likely to benefit as a result of the provisional tariff rate quota. If the measure reduces imports and results in UK producers increasing production, then the demand for upstream inputs such as raw materials, energy and other inputs would likely increase. Impacts however are likely to be small, given the short-term nature of the provisional tariff rate quota. This means that demand for the raw materials that are used in production is unlikely to increase significantly in the short-term.

#### K4.3.3 Importers and downstream businesses

242. PET importers and downstream producers that use PET as an input could be negatively impacted by the provisional tariff rate quota, particularly if the quota is exhausted. Submissions by these businesses suggest that a TRQ measure could increase import and input costs, reduce sourcing flexibility, create supply constraints and hinder their ability to meet recycled-content requirements. They also indicated that any resulting cost increases would be passed on through the supply chain to customers, subject to contractual pricing and market constraints.

243. However, the extent of these impacts is likely to depend on whether the quota is exhausted. The provisional tariff rate quota would continue to allow imports of PET up to the quota volume without the application of the out-of-quota tariff, ensuring an adequate supply to the UK market. As such, the cost increases and supply constraints identified by stakeholders are more likely to arise if import volumes exceed the quota and become subject to the out-of-quota tariff.

#### K4.3.4 Summary

244. Table K2 provides a summary of the expected impacts from the provisional tariff rate quota.

| Table K2: Summary of Impacts           |                                                                                                                                                                              |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group                                  | Expected impacts                                                                                                                                                             |
| UK producers                           | <b>Positive impacts</b> – import restriction is expected to reduce injury from import surges.                                                                                |
| Upstream                               | <b>No change to small positive impacts</b> – any increase in domestic PET production could lead to a small increase in demand for raw materials and other production inputs. |
| UK importers and downstream businesses | <b>No change to negative impacts</b> – higher costs and potential supply constraints, if quota is exhausted.                                                                 |



## **K5. Likely impact on particular geographic areas, or particular groups, in the UK**

245. This section explores how impacts of the proposed measure are likely to be geographically distributed and whether any particular groups might be disproportionately impacted.

### **K5.1. Likely impact on particular geographic areas**

246. We have assessed geographic impacts, using employment and indicators of deprivation at the level of Travel to Work Areas (TTWAs), for the affected groups.

247. The data used for the geographic significance analysis were sourced through questionnaire submissions, Dun & Bradstreet business directory and the ONS estimates of working age population by TTWA. To estimate employment by sites, we identified all known immediate subsidiaries of the selected businesses alongside their registered office address and known employment. Where sites were listed without employment figures, we assumed total employees were distributed equally between all sites.

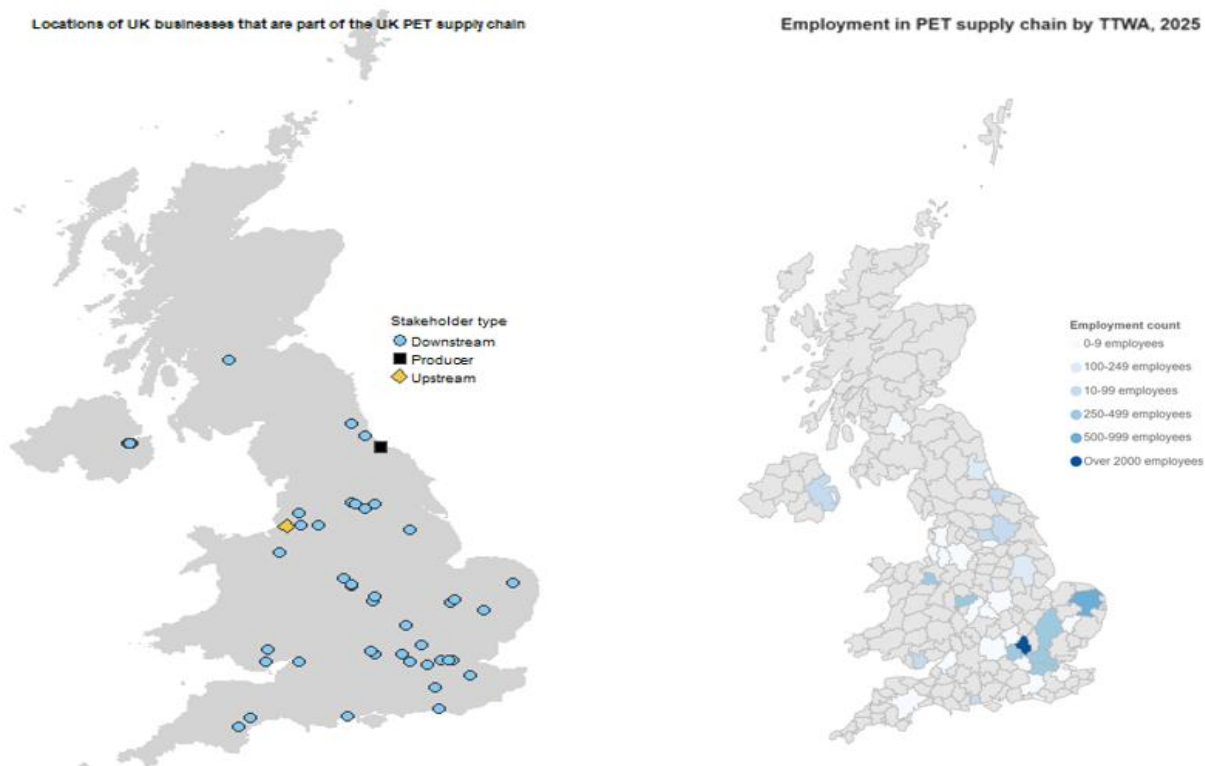
248. We assessed the geographic significance by exploring the employment of affected businesses as a proportion of employment in each TTWA. Where employment accounts for less than 1% of the working age population within a TTWA, we conclude that a disproportionately negative geographic impact is unlikely. However, we did not find any areas where the estimated employment for affected groups constituted a significant portion of the working age population of any TTWA.

249. Although we did not find significant employment in the Middlesbrough and Stockton TTWA where the domestic producer (and Applicant) ALPEK is located, we note that the area is economically deprived with low job density, below-average levels of higher qualifications and earnings. This suggests that employment opportunities are relatively limited and that workers may face greater challenges in finding alternative employment should job losses occur.

250. The maps below in Figure K1 show that businesses operating within the UK PET supply chain are located throughout the UK, although there is a concentration of businesses and employment in the South East of England. The highest employment category is associated with a single business employing over 2,000 staff. However, our analysis found that PET purchases account for only a small proportion of that business's total revenue. Generally, PET-related activity represents a limited share of employment in most affected TTWAs.

251. The TRA therefore considers that any impacts arising from the imposition of a provisional tariff rate quota are unlikely to have a significant effect on employment or economic activity at the local level.

**Figure K1: Geographic map of Travel to Work Areas**



## K5.2. Likely impact on particular groups

252. The TRA considered the likely impact on particular groups including those with protected characteristics as defined by the Equality Act 2010. The TRA has found no evidence to suggest that any particular groups would be disproportionately affected by the measure.

## K6. Likely consequences for the competitive environment, and for the structure of the market, in the UK

253. The assessment of the likely consequences for the competitive environment and structure of the UK market considers four factors:

- The impact on the number or range of suppliers.
- The impact on the ability of suppliers to compete.
- The impact on the incentives to compete vigorously; and
- The impact on the choices and information available to consumers.

254. As described in [Section F](#), the UK PET market comprises one UK producer of vPET, an unknown number of rPET producers and over 140 importers and downstream businesses operating within the supply chain.

255. The number or range of suppliers are likely to remain broadly unchanged while imports continue within the quota volume. The provisional tariff rate quota would allow imports



from a range of sources, helping to maintain supply via traditional trade flows. However, where suppliers are subject to the out-of-quota tariff, this may impact the ability of some suppliers to compete in the UK market.

- 256. Based on the available data, our Herfindahl Hirschman Index (HHI) analysis indicates that the imposition of a provisional tariff rate quota is unlikely to materially change the level of supplier concentration in the UK PET market. We have no evidence to suggest that the provisional measure would impact the ability of suppliers to compete.
- 257. There is no evidence to suggest that suppliers would face reduced incentives to compete vigorously with the imposition of a provisional tariff rate quota.
- 258. The TRA has no evidence that choices and information available to consumers would be significantly affected by the imposition of a provisional tariff rate quota.

## **K7. Such other matters as the TRA considers relevant**

- 259. As part of the EIT assessment, the TRA can consider any other factors that may be relevant in concluding whether the proposed provisional tariff rate quota is in the economic interest of the UK.
- 260. The TRA has considered the wider regulatory framework affecting the PET industry, including the Plastic Packaging Tax and the Extended Producer Responsibility requirements. Stakeholders submitted that a viable domestic PET industry is important for supporting investment in sustainability and recycled-content objectives. However, the TRA considers that the proposed measure is unlikely to materially affect these outcomes during the period in which the provisional measure is in place.

## **K8. Conclusions**

- 261. In accordance with paragraph 23 of Schedule 5 to the Act, the EIT is met in relation to the requirement of a provisional tariff rate quota if the application of the provisional tariff rate quota is in the economic interest of the UK.
- 262. In the injury section, the TRA determined that there is serious injury to UK producers due to surges from global PET imports. The injury assessment concluded that there would be further serious injury were a provisional measure not imposed.
- 263. The economic significance section assessed different groups that make up the supply chain for PET in the UK. We found that PET are very important to the UK producer; somewhat important to upstream businesses as well as to importers and downstream businesses.
- 264. In the impacts section the TRA found that imposing a provisional tariff rate quota would have a positive impact on UK producers and upstream businesses but likely to negatively impact importers and downstream businesses, where quota amounts are exhausted.
- 265. The TRA found no evidence of significant impacts on any particular geographic areas or groups.



266. In the competition section, the TRA determined that there is no evidence to suggest that the ability of suppliers to compete will be impacted with the imposition of provisional measure, given the range of suppliers from traditional supply sources are expected to be maintained within quota amounts based on PET recent historic trade flow patterns.
267. We have identified the following key positive impacts of the provisional tariff rate quota:
- The UK producer of PET is likely to benefit from reduced pressure from imports, which may support increased domestic production, market share and profitability.
  - The provisional tariff rate quota may help prevent further serious injury to the UK producer during the safeguard investigation. We have found the UK producer as vulnerable to economic shocks, suggesting that the measure may provide some short-term support to its operations.
  - Upstream businesses may benefit from any increase in domestic PET production. However, we do not expect a significant increase in UK production during the period in which the provisional measure is in place.
268. We have identified the following key negative impacts of the provisional tariff rate quota:
- PET importers and downstream businesses may incur higher import and input costs, particularly if the quota is exhausted and imports become subject to the out-of-quota tariff.
  - To the extent that higher costs cannot be absorbed by businesses, some of these costs may be passed through the supply chain to consumers.
269. Having considered the evidence submitted by interested parties and all the factors listed in the legislation, the TRA concludes that the negative impacts of imposing a provisional tariff rate quota on PET products are disproportionate to the benefits and, therefore, the EIT is met for the proposed requirement of the provisional tariff rate quota.



## Section L: Recommendation

### L1. Provisional findings

270. In accordance with paragraph 9 of Schedule 5 to the Act, the TRA has provisionally determined that:
- a) The goods concerned have been or are being imported into the UK in increased quantities; and
  - b) The importation of the goods concerned in increased quantities has caused or is causing serious injury to UK producers of those goods.
271. As set out in [Section G](#), the TRA has found that imports of the goods concerned have increased significantly, both in absolute terms and relative to domestic production/consumption, and could not reasonably have been foreseen.
272. In [Section H](#), the TRA has determined that UK producers are experiencing serious injury, evidenced by deterioration across a number of key economic indicators, including production, sales, market share, profitability, employment, and capacity utilisation. The evidence indicates that the increasing volume of imports is continuing to exert substantial competitive pressure on UK producers and that, absent provisional measures, this pressure is likely to persist during the remainder of the investigation.
273. Pursuant to paragraph 11(5)(a) of Schedule 5 to the Act, The TRA further considers that any additional injury arising during the investigation period would be difficult to repair. The evidence demonstrates that the financial and operational position of UK producers has already deteriorated materially during the POI. Continued import pressure risks further losses in sales, market share, profitability and production levels, which may lead to consequences such as reductions in investment, capacity, employment and productive capability. Such effects may not be capable of being reversed promptly, even if definitive safeguard measures were subsequently imposed.
274. The TRA is therefore satisfied that provisional measures are necessary to prevent serious injury that would be difficult to repair from being caused to UK producers pending completion of the investigation.
275. The TRA also considers, in accordance with paragraph 11(8A) of Schedule 5 to the Act that, the recommended provisional measure meets the economic interest test under paragraph 23 of Schedule 5 to the Act.

### L2. Recommendation

276. In line with paragraph 11(3)(b) of Schedule 5 to the Act, the TRA recommends to the Secretary of State that the goods concerned be made subject to a provisional tariff rate quota as set out in Table L1 below and paragraph 280.
277. In accordance with paragraph 13(2)(a) of Schedule 5 to the Act, the TRA recommends to the Secretary of State that the provisional tariff rate quota should be applied for a period



not exceeding 200 days, or whenever the definitive remedy is implemented, whichever is the sooner.

278. In line with paragraph 13(5) of Schedule 5 to the Act, the TRA's recommendation must be such as it is satisfied is necessary to prevent serious injury which it would be difficult to repair from being caused during the investigation to UK producers of the goods. The analysis and rationale for the recommended quota volume, allocation methodology and out-of-quota duty rate are set out in [Section J: Form of provisional measure](#).

279. The recommended provisional tariff rate quota is set out in Table L1 below.

| Table L1: Provisional Tariff Rate Quotas (tonnes) |                                |                                |
|---------------------------------------------------|--------------------------------|--------------------------------|
| Country/Area                                      | Q1: 01 Dec 2026 to 28 Feb 2027 | Q2: 01 Mar 2027 to 31 May 2027 |
| European Union                                    | 36,926.83                      | 37,747.43                      |
| Mexico                                            | 2,571.70                       | 2,628.85                       |
| Indonesia                                         | 1,779.59                       | 1,819.13                       |
| Vietnam                                           | 1,475.27                       | 1,508.06                       |
| Residual                                          | 4,826.57                       | 4,933.82                       |

280. Imports of the goods concerned entering the UK in excess of the applicable quota allocation should be subject to an ad valorem duty of **65%**, equivalent to the provisional serious injury margin established in [Section H9](#).

281. The commodity codes and detailed description of the goods concerned are set out in [Section E2: Goods Concerned](#).



## Annex 1: Summary of submissions on the public file

282. Table AA1 below lists the information submitted to the TRA by interested parties and contributors to date.

| Table AA1: Summary of submissions on the public file |                                                      |                                                      |                                   |                              |
|------------------------------------------------------|------------------------------------------------------|------------------------------------------------------|-----------------------------------|------------------------------|
| No.                                                  | Party name                                           | Abbreviation                                         | Information received              | Status                       |
| 1                                                    | Alpek Polyester UK Limited                           | ALPEK                                                | <a href="#">Application</a>       | Applicant / UK Producer      |
| 2                                                    |                                                      |                                                      | <a href="#">Registration Form</a> |                              |
| 3                                                    |                                                      |                                                      | <a href="#">Questionnaire</a>     |                              |
| 4                                                    | Bantam Materials Ltd                                 | Bantam Materials                                     | <a href="#">Registration Form</a> | UK Importer                  |
| 5                                                    | Beverage Plastics Ltd                                | Beverage Plastics                                    | <a href="#">Registration Form</a> | UK Importer                  |
| 6                                                    | Esterform Packaging Ltd                              | Esterform Packaging                                  | <a href="#">Registration Form</a> | UK Importer                  |
| 7                                                    | Shepley Spring                                       | Shepley Spring                                       | <a href="#">Registration Form</a> | UK Importer                  |
| 8                                                    | Circular Plastics Vietnam                            | Circular Plastics Vietnam                            | <a href="#">Registration Form</a> | Overseas Exporter (Vietnam)  |
| 9                                                    | Duy Tan Plastic Recycling Corporation                | Duy Tan Plastic Recycling                            | <a href="#">Registration Form</a> | Overseas Exporter (Vietnam)  |
| 10                                                   | Equipolymers GmbH                                    | Equipolymers                                         | <a href="#">Registration Form</a> | Overseas Producer (Germany)  |
| 11                                                   | Far Eastern Polytex (Vietnam) Limited                | Far Eastern Polytex                                  | <a href="#">Registration Form</a> | Overseas Producer (Vietnam)  |
| 12                                                   | FE Green PET (M) SDN. BHD.                           | FE Green PET (M) SDN. BHD.                           | <a href="#">Registration Form</a> | Overseas Producer (Malaysia) |
| 13                                                   | Formosa Industries Corporation                       | Formosa                                              | <a href="#">Registration Form</a> | Overseas Producer (Vietnam)  |
| 14                                                   | Indorama Polyester Industries Public Company Limited | Indorama Polyester Industries Public Company Limited | <a href="#">Registration Form</a> | Overseas Producer (Thailand) |
| 15                                                   | Indorama Polymers Public Company Limited             | Indorama Polymers Public Company Limited             | <a href="#">Registration Form</a> | Overseas Producer (Thailand) |
| 16                                                   | Indorama Ventures Çorlu PET Sanayi A.Ş.              | Indorama Ventures Çorlu                              | <a href="#">Registration Form</a> | Overseas Exporter (Türkiye)  |
| 17                                                   | INTCO Malaysia SDN BHD                               | INTCO                                                | <a href="#">Registration Form</a> | Overseas Producer (Malaysia) |
| 18                                                   | Koksan (Nantong) New Material Co.,                   | Koksan (Nantong)                                     | <a href="#">Registration Form</a> | Overseas Producer (China)    |



|    |                                                                                 |                                 |                                   |                                 |
|----|---------------------------------------------------------------------------------|---------------------------------|-----------------------------------|---------------------------------|
|    | Ltd                                                                             |                                 |                                   |                                 |
| 19 | Koksan PET VE Plastik Ambalaj SAN. VE TIC. A.S                                  | Koksan A.S.                     | <a href="#">Registration Form</a> | Overseas Producer (Türkiye)     |
| 20 | Korteks A.S.                                                                    | Korteks                         | <a href="#">Registration Form</a> | Overseas Producer (Türkiye)     |
| 21 | Morssinkhof Plastics Zeewolde B.V.                                              | Morssinkhof                     | <a href="#">Registration Form</a> | Overseas Producer (Netherlands) |
| 22 | PT. Indo-Rama Synthetics Tbk                                                    | PT. Indo-Rama Synthetics Tbk    | <a href="#">Registration Form</a> | Overseas Producer (Indonesia)   |
| 23 | SASA DIS Ticaret A.S.                                                           | SASA                            | <a href="#">Registration Form</a> | Overseas Exporter (Türkiye)     |
| 24 | SK Chemicals Co., Ltd                                                           | SK Chemicals                    | <a href="#">Registration Form</a> | Overseas Exporter (South Korea) |
| 25 | Sumilon Eco PET SARL                                                            | Sumilon                         | <a href="#">Registration Form</a> | Overseas Producer (Morocco)     |
| 26 | TPT Petrochemicals Public Company Limited                                       | TPT                             | <a href="#">Registration Form</a> | Overseas Producer (Thailand)    |
| 27 | Alpla UK Limited                                                                | Alpla UK                        | <a href="#">Registration Form</a> | UK Downstream User              |
| 28 | Chemical Industries Association                                                 | Chemical Industries Association | <a href="#">Registration Form</a> | Trade Association (UK)          |
| 29 | China Chamber of Commerce of Metals, Minerals & Chemicals Importers & Exporters | CCCMC                           | <a href="#">Registration Form</a> | Trade Association (PRC)         |
| 30 | Coca Cola European Partners Great Britain Ltd                                   | Coca Cola                       | <a href="#">Registration Form</a> | UK Downstream User              |
| 31 | Embassy of the Republic of Lithuania to the UK                                  | Government of Lithuania         | <a href="#">Registration Form</a> | Foreign Government (Lithuania)  |
| 32 | Environmental Services Association                                              | ESA                             | <a href="#">Registration Form</a> | Trade Association (UK)          |
| 33 | Directorate-General for Trade and Economic Security, European Union             | EU                              | <a href="#">Registration Form</a> | Foreign Government (EU)         |
| 34 | Faerch A/S                                                                      | Faerch A/S                      | <a href="#">Registration Form</a> | UK Downstream User              |
| 35 | Government of India                                                             | Government of India             | <a href="#">Registration Form</a> | Foreign Government (India)      |
| 36 | Government of                                                                   | Government of                   | <a href="#">Registration</a>      | Foreign Government              |



|    |                                                                                                 |                             |                                       |                                                     |
|----|-------------------------------------------------------------------------------------------------|-----------------------------|---------------------------------------|-----------------------------------------------------|
|    | Korea, MOTIR<br>(Ministry of Trade,<br>Industry &<br>Resources)                                 | South Korea                 | <a href="#">Form</a>                  | (South Korea)                                       |
| 37 | Ingka Investments<br>B.V.                                                                       | Ingka Investments           | <a href="#">Registration<br/>Form</a> | Contributor<br>(Netherlands)                        |
| 38 | Ministry of<br>Commerce -<br>Government of the<br>PRC                                           | Government of the<br>PRC    | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(PRC)                         |
| 39 | Ministry of Economy<br>- Government of<br>Mexico                                                | Government of<br>Mexico     | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Mexico)                      |
| 40 | Ministry of Foreign<br>Trade & Tourism of<br>Peru                                               | Government of<br>Peru       | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Peru)                        |
| 41 | Ministry of<br>Investment, Trade &<br>Industry (MITI)                                           | Government of<br>Malaysia   | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Malaysia)                    |
| 42 | Ministry of the<br>Republic of Türkiye                                                          | Government of<br>Türkiye    | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Türkiye)                     |
| 43 | Plastics Recyclers<br>Europe                                                                    | Plastic Recyclers<br>Europe | <a href="#">Registration<br/>Form</a> | Trade Association (EU)                              |
| 44 | International Trade<br>Administration,<br>Ministry of<br>Economic Affairs,<br>Taiwan Government | Government of<br>Taiwan     | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Taiwan)                      |
| 45 | The North East of<br>England Process<br>Industry Cluster<br>Limited                             | NEPIC                       | <a href="#">Registration<br/>Form</a> | Trade Association (UK)                              |
| 46 | Trade Interest &<br>Remedies Division<br>Thailand Ministry of<br>Commerce                       | Government of<br>Thailand   | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Thailand)                    |
| 47 | Trade Remedies<br>Authority of Viet<br>Nam                                                      | Government of<br>Vietnam    | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Vietnam)                     |
| 48 | Trade Remedies<br>Sector representing<br>the Government of<br>Egypt                             | Government of<br>Egypt      | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(Egypt)                       |
| 49 | United States of<br>America,<br>Department of<br>Commerce                                       | Government of the<br>USA    | <a href="#">Registration<br/>Form</a> | Foreign Government<br>(United States of<br>America) |
| 50 | Veolia UK                                                                                       | Veolia UK                   | <a href="#">Registration<br/>Form</a> | Contributor (UK)                                    |



## Annex 2: Developing Country Exemption (DCE) list

283. [Annex 1 to the Notice of Initiation](#) set out the list the TRA would use to identify WTO developing country Members eligible for consideration under regulation 43 of the Regulations and Article 9.1 of the WTO Agreement on Safeguards. After identifying the relevant WTO developing country Members in this list, the TRA carried out the analysis described in [Section J4](#) and determined that Indonesia and Vietnam exceeded the relevant import-share threshold and therefore do not qualify for the developing country exemption. Table AA2 below lists those WTO developing country Members countries that qualify for the exemption from the proposed measure.

**Table AA2: DCE list**

|                                  |                  |
|----------------------------------|------------------|
| Afghanistan                      | Liberia          |
| Angola                           | Madagascar       |
| Bangladesh                       | Malawi           |
| Benin                            | Mali             |
| Bolivia                          | Mauritania       |
| Burkina Faso                     | Mongolia         |
| Burundi                          | Morocco          |
| Cambodia                         | Mozambique       |
| Cameroon                         | Myanmar          |
| Cape Verde                       | Namibia          |
| Central African Republic         | Nepal            |
| Chad                             | Nicaragua        |
| Comoros                          | Niger            |
| Congo, Rep.                      | Nigeria          |
| Côte D'Ivoire                    | Pakistan         |
| Democratic Republic of the Congo | Papua New Guinea |
| Djibouti                         | Philippines      |
| East Timor                       | Rwanda           |
| Egypt                            | Senegal          |
| Eswatini                         | Sierra Leone     |
| Gambia                           | Solomon Islands  |
| Ghana                            | Sri Lanka        |
| Guinea                           | Tajikistan       |
| Guinea-Bissau                    | Tanzania         |
| Haiti                            | Togo             |
| Honduras                         | Tunisia          |
| India                            | Uganda           |
| Jordan                           | Vanuatu          |
| Kenya                            | Yemen            |
| Kyrgyz Republic                  | Zambia           |
| Laos                             | Zimbabwe         |
| Lesotho                          |                  |



## Annex 3: Multilateral Safeguard Exemptions under Economic Partnership Agreements (EPAs)

284. Table AA3 contains countries that benefit from active Multilateral Safeguard Exemptions as part of their EPAs with the UK, and will be exempted from the proposed provisional measure.

| Table AA3: EPA Multilateral Safeguard Exemption List                                                                                                                                                                                                   |                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Agreement                                                                                                                                                                                                                                              | Multilateral safeguard exemption |
| UK – CARIFORUM EPA (Antigua and Barbuda, Barbados, Belize, the Bahamas, Dominica, Dominican Republic, Grenada, Guyana, Jamaica, Saint Christopher (Kitts) and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, and Trinidad and Tobago) | Active                           |
| SACUM-UK EPA (Botswana, Eswatini, Lesotho, Namibia, South Africa and Mozambique)                                                                                                                                                                       | Active                           |