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CENTRE FOR DOMESTIC ECONOMY POLICY RESEARCH



Impact of Anti-Dumping Duties in India

A report on impact of Anti-dumping duties on downstream cost, inflation, MSMEs, domestic capacity and investments

Executive Summary

Anti-dumping duties (ADD) are WTO-compliant trade-remedy instruments designed to offset injurious dumping. Dumping occurs when a product is exported at a price lower than its normal value, which is the price at which the same product is sold in the exporter's domestic market under ordinary commercial conditions. The dumping margin is the difference between the normal value and the export price. For instance, if a chemical is sold domestically in China for $100 per metric ton but exported to India at $70 per metric ton, the dumping margin is $30 per metric ton, or 30%.

In India, the Directorate General of Trade Remedies (DGTR), functioning under the Ministry of Commerce and Industry, conducts investigations into alleged dumping as a quasi-judicial authority. Between 1991 and mid-2020, the Ministry of Finance implemented approximately 99.5% of DGTR recommendations.

However, a notable shift has emerged in recent years in the implementation pattern of DGTR recommended Anti Dumping Duties. While India historically implemented nearly 99.5% of DGTR's anti-dumping duty recommendations until 2020, rejection and non-implementation rates have risen sharply in selected periods after (refer Figure 1). During the same period, imports from China increased significantly across several industrial sectors (refer Figure 2). This trend is important because prolonged non-application of trade remedies in sectors with existing domestic capacity can increase import dependence and weaken domestic manufacturing utilisation.

This report analyses the impact of such a policy change on the ground and its impact on domestic manufacturing and the economy at large.

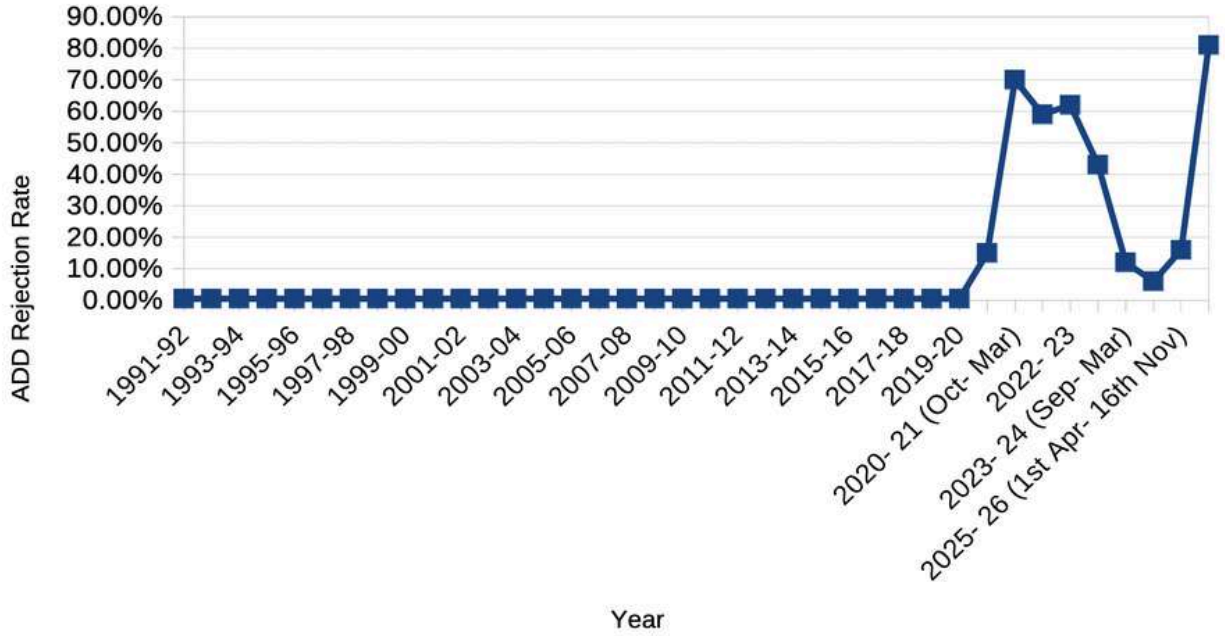


Figure 1: Rate of Non-implementation of Anti-dumping duty recommendations of DGTR

This report presents five key findings:

First, the imposition of anti-dumping duty has a negligible impact on downstream consumer prices. Analysis of 56 DGTR-recommended cases[1] where duties were not implemented shows a median estimated effect on final consumer prices of just 0.023%.

[1] https://www.dgtr.gov.in/

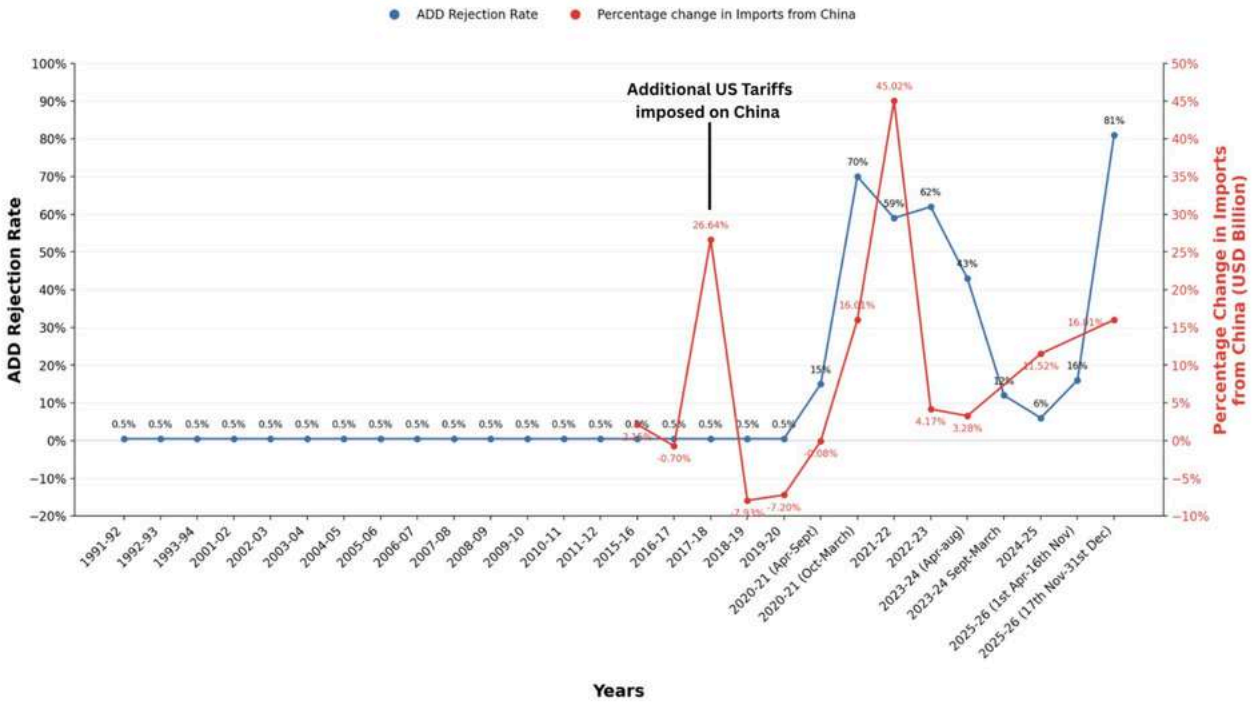


Figure 2: Correlation of increase in imports from China with Non-implementation of DGTR-recommended anti-dumping duties

In over 82% of cases, the price impact would have been below 0.05%, while in over 91% of cases, the impact is below 0.10%. These figures confirm that, in most instances, imposition of anti-dumping duty would leave consumer prices effectively undisturbed (refer Annexure B).

Second, the inflation impact of anti-dumping duties appears inconsequentially negligible (less than 0.009522 percentage). This report examines 21 products where DGTR has already completed its investigation and issued recommendations, and where the final implementation decision is now pending with the Ministry of Finance.

Most of these cases concern intermediate inputs, industrial chemicals, fibres, polymers, and feedstocks. Such products generally have low direct weight in the CPI basket, and any cost increase is further diluted through downstream processing, logistics, distribution margins, taxes, and substitution possibilities. The analysis finds that even under a 50% cost pass-through assumption, the collective contribution of these 21 products to headline inflation is only in fractions of a basis point.

Third, anti-dumping duties strengthen MSMEs and enhance supply-chain resilience. Anti-dumping duties provide MSMEs with a level playing field against predatory pricing by importers, enabling them to compete fairly and sustain operations. Non-implementation of these duties results in higher imports, contributing to downward pressure on the rupee and exposing MSMEs to avoidable reliance on imported inputs. Historical evidence shows that the application of anti-dumping duties has helped stabilise MSMEs across sectors such as cable ties, fishnets, ceramic ware, vacuum flasks, and PVC flex films, protecting domestic production, attracting new investments and strengthening resilient supply chains (refer Annexure F).

[1] https://www.dgtr.gov.in/

Fourth, the economic loss and drain on forex due to the substitution of domestic capacities with imports. The non-implementation of anti-dumping duties on 56 DGTR-recommended products has resulted in an annual economic loss of INR 11,938 crore to the domestic industry. Whereas, imposition of DGTR-recommended anti-dumping duty could additionally generate approximately INR 28,540 crore (USD 3 billion) in annual foreign exchange savings by enabling domestic manufacturers to meet domestic demand instead of imports (refer Annexure I).

In addition, committed domestic investment currently totals **INR 1.25 lakh crore**, with an additional **INR 1.0 lakh crore** required by 2030 to fully meet forecast demand, bringing total projected investment to **INR 2.3 lakh crore**, underscoring the strategic importance of safeguarding domestic capacities [2].

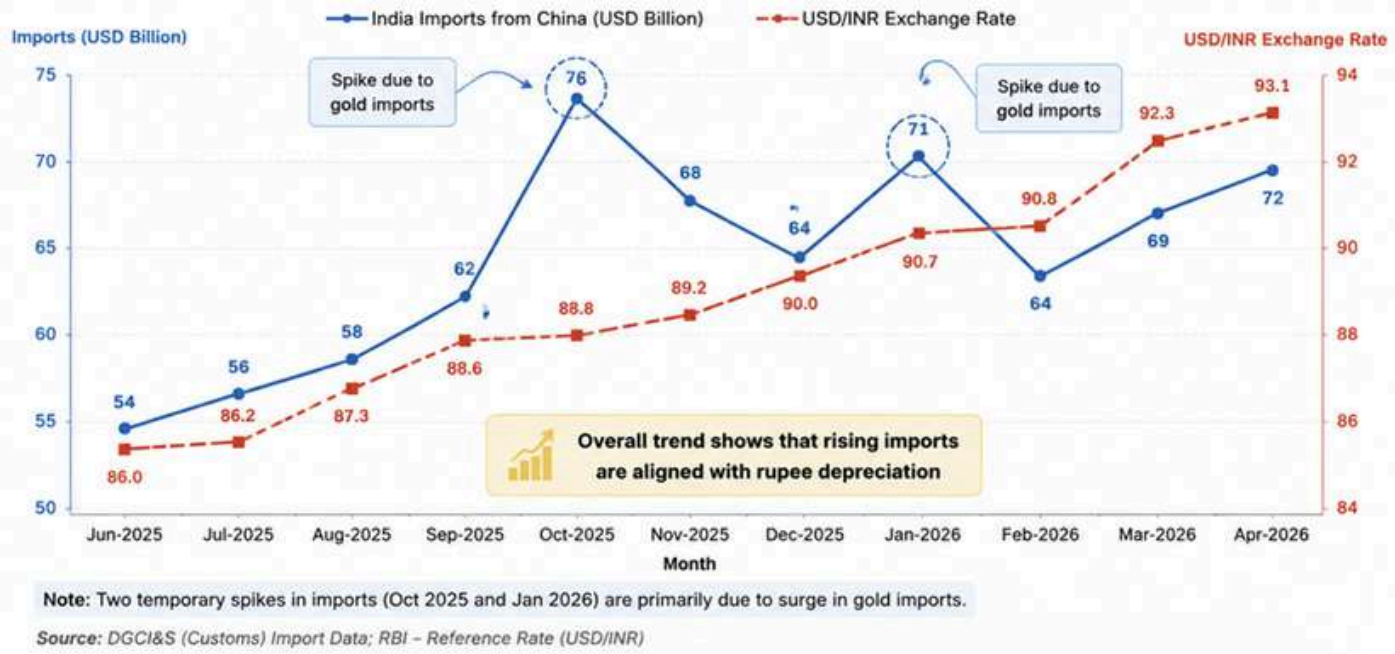


Figure 3: Strong correlation of increase in imports with Rupee depreciation

Fifth, India is a comparatively restrained user of trade remedies. WTO data show that India's average anti-dumping duty duration, across the case set reviewed, is 6.97 years, against a global average of 11.19 years (refer Annexure C). The United States and Japan maintain longer durations and undertake more frequent sunset review renewals. Duty Quantum also differs remarkably: Between 2024 and 2025, the United States imposed an anti-dumping on Melamine[3], from India at 513–632%, and China applied a 166% duty on Cypermethrin [4].

In contrast, India's average anti-dumping duties typically fall in the 5–12% range, reflecting a measured and restrained trade-remedy posture by international standards. During the review period, the United States frequently imposed triple-digit anti-dumping duty rates, China imposed several high duties, including rates above 100%, while India's anti-dumping duty rates remained largely in the single-digit to low double-digit range.

[2] Compiled from industry consultations

In most major jurisdictions, the determination of dumping by the investigating authority is followed either by the imposition of measures. Where the government determines that public-interest considerations justify departing from a DGTR recommendation, such a decision should be supported by a clear, evidence-based, and publicly accessible rationale.

Such a process aligns with the practices of all other jurisdictions globally, including the European Union and the US. A transparent public-interest assessment strengthens institutional predictability, reinforces investor confidence, and ensures that India's trade-remedy framework maintains credibility and consistency.

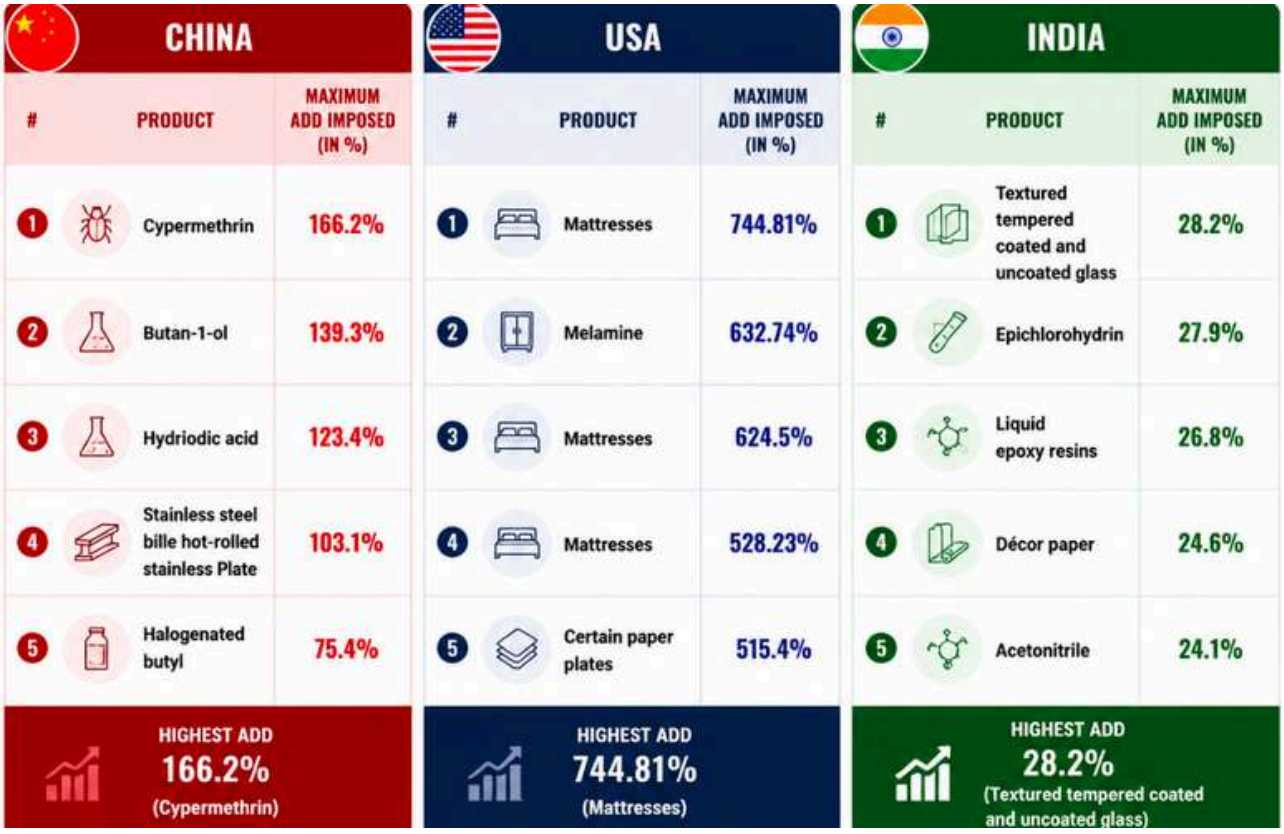


Figure 4: Comparative overview of maxium Anti-dumping duty imposed

[2] Compiled from industry consultations

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About the Research Institutions

The Centre for WTO Studies (CWS), established in 1999, serves as a permanent repository of knowledge and documentation on WTO negotiations. It operates under the Centre for Research in International Trade (CRIT) and has played a pivotal role in shaping India's trade policy discourse.

Over the years, CWS has developed a robust research program, producing a series of analytical papers covering key areas of interest at the WTO. The Centre is frequently called upon by the Government of India to provide independent research and analytical inputs, assisting in the formulation of India's positions in various trade negotiations—both within the WTO and in Free Trade Agreements (FTAs), Preferential Trade Agreements (PTAs), and Comprehensive Economic Cooperation Agreements (CECAs).

Beyond research, CWS actively engages with industry, government bodies, and other stakeholders through its Outreach and Capacity-Building Programs, which include seminars, workshops, and subject-specific consultations. Through these initiatives, the Centre facilitates consensus-building between policymakers and stakeholders, ensuring that trade policy decisions are well-informed and reflective of national priorities. Additionally, CWS collaborates with international institutions, offering expertise in conducting training programs and specialised studies in global trade policy. Its contributions have reinforced India's trade strategy while strengthening institutional capacities in trade policy formulation.

The Centre for Domestic Economy Policy Research (C-DEP), established in 2009, is an independent think tank dedicated to analysing policy issues critical to India's domestic economy. With a strong focus on technology-driven economic growth and trade remedy policies, C-DEP undertakes rigorous research and policy analysis to support evidence-based decision-making and ensure a level playing field for domestic players.

C-DEP's primary objective is to foster the development of non-discriminatory, progressive, and industry-supportive policies that enhance India's economic resilience and competitiveness. By engaging with leading academics, industry experts, and international trade specialists, C-DEP formulates strategic policy recommendations that address challenges at the intersection of technology, trade, and industrial policy.

As a key knowledge partner, C-DEP collaborates with global thought leaders, policymakers, and government institutions to sensitise stakeholders, provide analytical insights, and contribute to India's positioning as a leading global player in the evolving digital and trade ecosystem.

1. Introduction

India's trade-remedy debate is often framed through two competing viewpoints. One view holds that anti-dumping duties are necessary to preserve domestic manufacturing capacity and strengthen industrial resilience. The other argues that such measures increase costs for consumers and downstream industries. The evidence examined in this report suggests that the reality is more nuanced. Anti-dumping duties are not protectionist measures, and their economic impact varies depending on the product involved, the structure of the domestic market, the extent of import dependence, and the predictability and timing of government action.

Against this backdrop, the report evaluates the economic impact of anti-dumping duties in India across 5 key areas. It examines their effect on final consumer prices and inflation, assesses the implications for MSMEs, analyses supply-demand gaps and indicative 2030 scenarios, studies their influence on investment decisions, and reviews sectors where trade remedies appear to have supported domestic capacity creation and industrial expansion. The report also places India's trade-remedy framework in an international context, particularly in relation to the implementation and duration of anti-dumping measures across major jurisdictions.

The analysis is based on a combination of statutory, macroeconomic, and empirical evidence.

The report draws upon publicly available material from institutions including the WTO, DGTR, RBI, CBIC, MoSPI, PIB, the World Bank, the U.S. Federal Register, MOFCOM, and the European Commission. Quantitative assessments are based on compilations derived from public case files, WTO trade-remedy datasets, macroeconomic data releases and data collated from industry.

2. Methodology and Framework

The report relies on three categories of evidence. First, it uses WTO agreements, statutory and procedural documents, DGTR documents, and foreign trade-safeguard rules. Second, it draws on macroeconomic and market data, including the Wholesale Price Index (WPI) methodology, merchandise import trends, and exchange-rate data. Third, it uses analytical compilations prepared from public case files and published datasets, including case-wise downstream-price effects, DGTR anti-dumping duty recommendations, and their implementation status and empirical data collated from industry.

The downstream-price analysis is a conservative directional pass-through estimate. It assesses how much the affected imported input contributes to the value of the downstream product. Since most anti-dumping duty cases concern industrial intermediates rather than final consumer goods, the results should not be read as actual retail inflation.

The inflation assessment uses official product weights or the closest available CPI/WPI proxies. It applies a 50% pass-through assumption to estimate whether pending anti-dumping duties could materially affect aggregate inflation. The exercise is intended to test macroeconomic significance, not predict exact price changes.

The 2030 demand scenario is a stress test. It examines what may happen if domestic demand continues to grow while dumped imports keep displacing domestic production in sectors where India already has installed capacity. In addition, it is estimated that the impact of ongoing committed and future investments in the given sectors.

The scenario estimates how this could affect import dependence, capacity utilisation, and economic loss by 2030. Its purpose is to show that non-application of trade remedies, such as anti-dumping duty, can convert today's underutilised capacity into a demand-supply gap and therefore tomorrow's supply-chain dependency on imports.

3. Areas of impact analysis

3.1 Impact on price of the final consumer product

A common objection to anti-dumping duties is that they increase prices for final consumers. Analysis of 56 DGTR-recommended cases where duties were not implemented shows a median estimated effect on final consumer prices would have been just 0.0096%, while the average is 0.0463%.

The average is slightly higher because a few products show relatively larger effects, but the overall distribution remains concentrated at very low levels. More than 80% of the cases show an estimated price impact below 0.05%, and more than 90% are below 0.10%. (Refer Annexure B)

This limited impact is explained by the nature of most anti-dumping cases. They usually concern intermediate inputs such as chemicals, fibres, solvents, polymers, paper intermediates, and speciality materials, rather than directly consumed retail goods. Even where a duty increases the landed cost of an imported input, that input often forms only a small share of the final product's value. The final price is also shaped by domestic processing, logistics, packaging, retail margins, and taxes, which further dilute the pass-through of the duty.

Therefore, the practical conclusion is that broad claims of large consumer-price harm from anti-dumping duties are not supported by the case-set evidence. Duties can have a more visible effect in specific products where the affected input has a large share in the final value or where the downstream market is concentrated. However, in most cases examined here, the estimated price effect is too small to create meaningful pressure on final consumer prices.

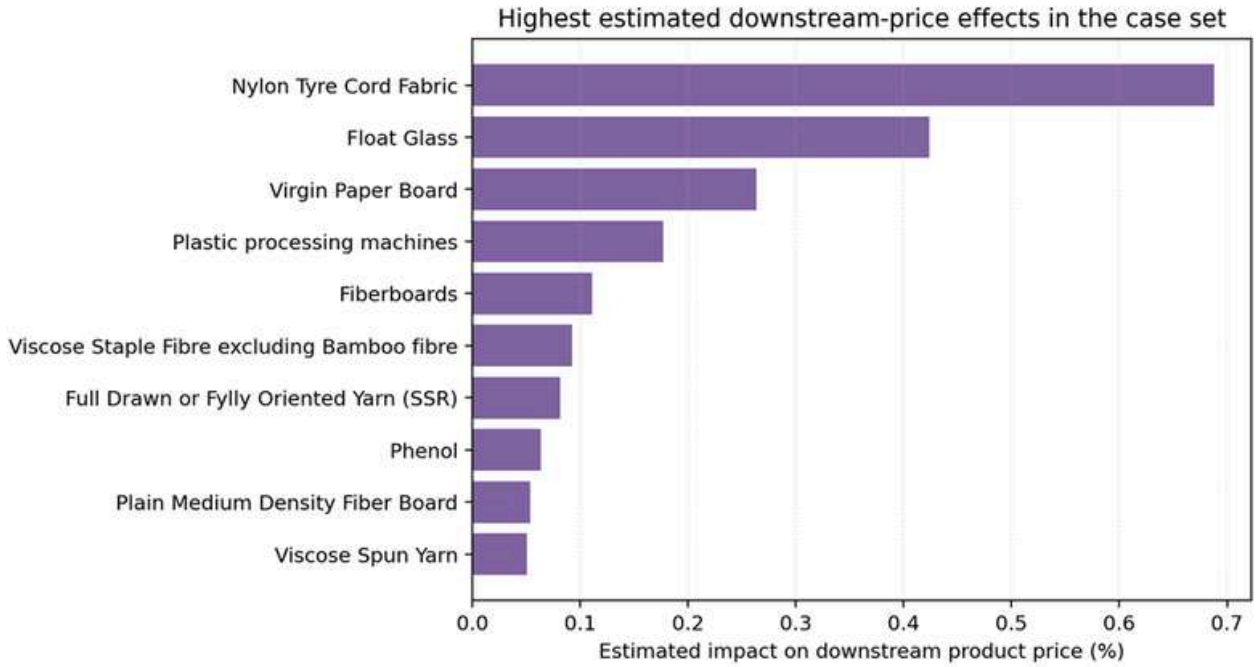
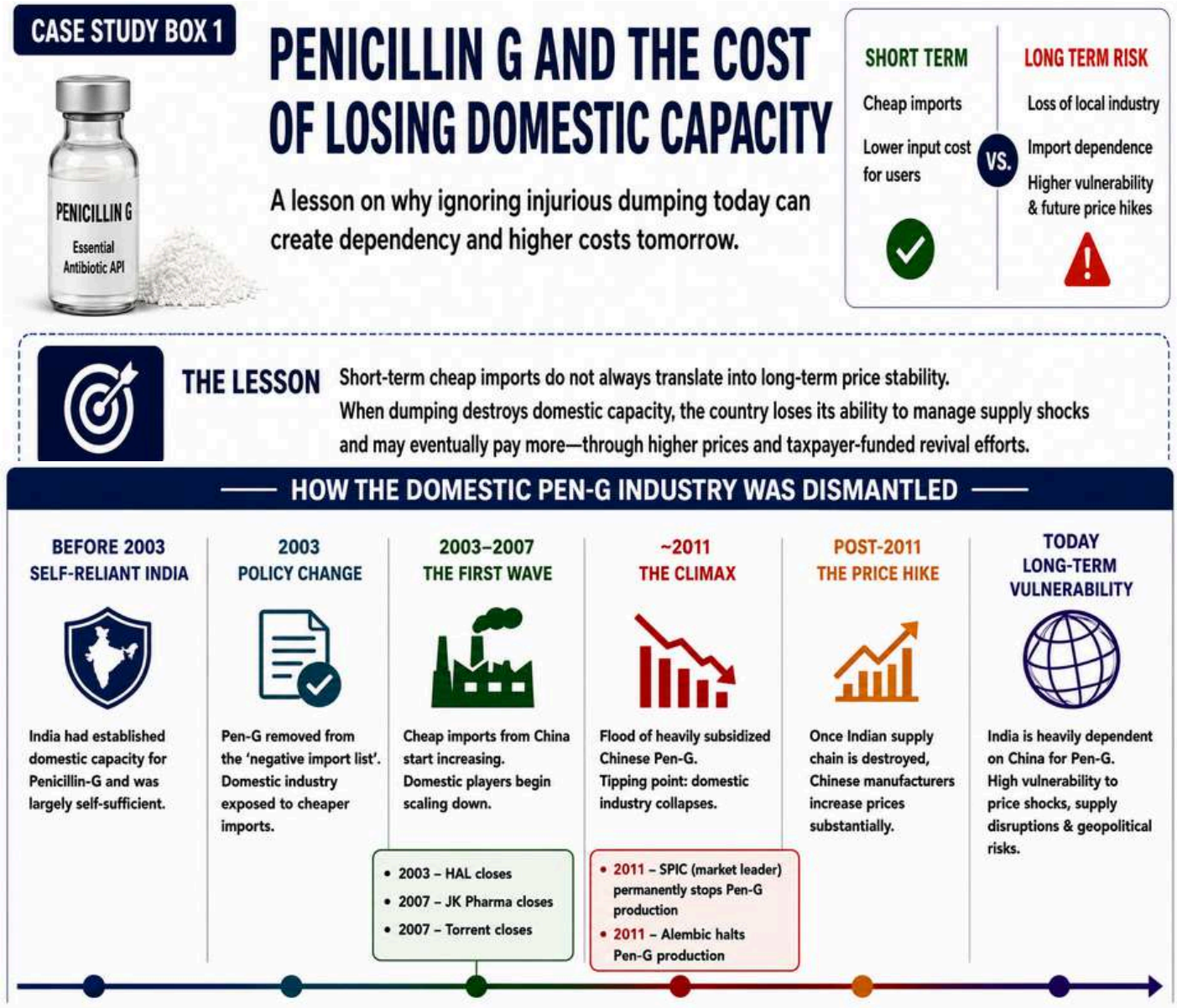


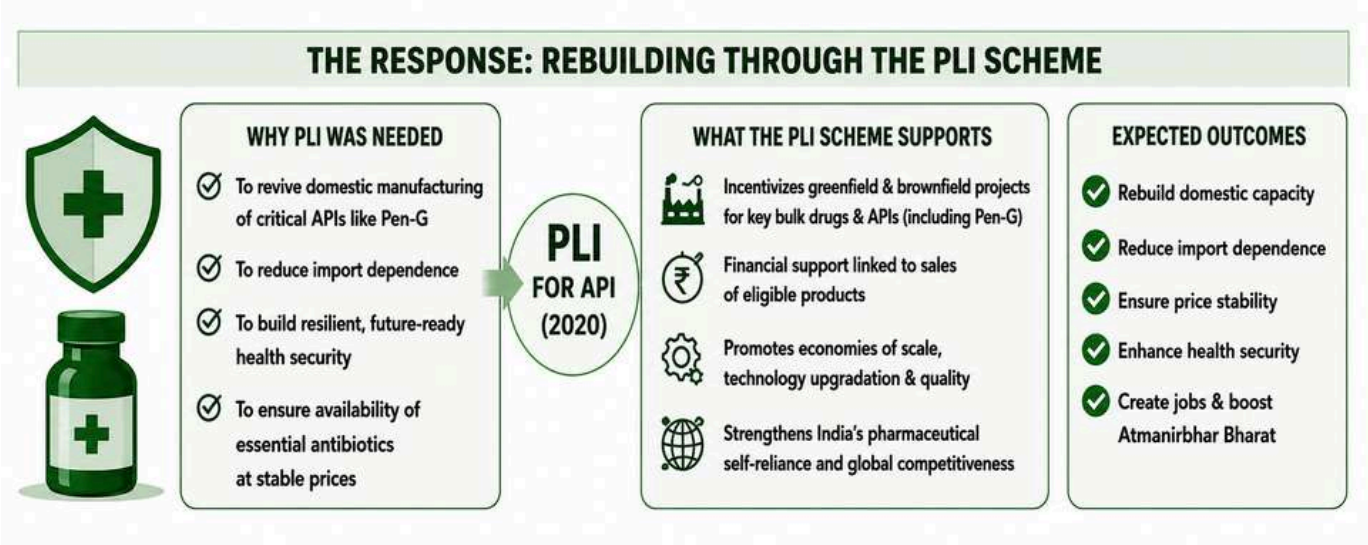
Figure 5: Highest estimated downstream-price effects in the case set



What happened to India's Penicillin G capacities:

- In 2011, China flooded the Indian market with heavily subsidised, cheap Penicillin G (Pen-G). This aggressive dumping decimated local capacity and led to the closure of major indigenous facilities.
- **Strategic Exposure:** Following the removal of Pen-G from the "negative import list" in 2003, domestic producers were increasingly exposed to cheaper imports. Firms slowly scaled down, with HAL closing in 2003, followed by **JK Pharma and Torrent in 2007, and Southern Petrochemical Industries Corporation Ltd (SPIC)**, once an Indian market leader, permanently discontinued Pen-G production due to competition from cheap Chinese imports, high input costs, and the absence of protective anti-dumping duties. Alembic also halted Pen-G production in the same year.
- **Price Increase:** Once the domestic supply was destroyed, Chinese manufacturers substantially increased prices.
- **Long-Term Vulnerability:** India shifted from self-sufficiency in essential APIs to increased dependence on China for foundational antibiotics.

[5] https://indianexpress.com/article/explained/explained-health/india-to-restart-penicillin-g-manufacture-why-it-stopped-9199850/



3.2 Impact on inflation

The inflation impact of anti-dumping duties is related to, but distinct from, the question of final consumer prices. Inflation is measured through broad basket-based indices, and a duty on a limited set of industrial products can materially affect headline inflation only if the affected products carry significant weight in the WPI basket or if the cost increase is transmitted rapidly and extensively into widely consumed goods. The evidence examined in this report suggests that neither condition is generally present.

Most pending anti-dumping cases fall in the category of intermediate goods, such as industrial chemicals, such as Phthalic Anhydride, fibres, polymers, rubber chemicals, speciality materials, and industrial inputs. These products usually account for only a small share of the value of final consumer products. Their impact is further diluted by downstream processing, logistics, packaging, distribution margins, taxes, and substitution possibilities.

Methodology for Inflation Impact Assessment

The inflation impact assessment was conducted using a product-level pass-through framework to estimate the potential contribution of pending anti-dumping duties to aggregate inflation. The methodology was designed to provide a macroeconomic estimate.

The assessment was carried out using the following methodology:

- Product weights were mapped using publicly available Government of India data sources, including the Wholesale Price Index (WPI) framework and commodity classifications published by the Office of the Economic Adviser, DPIIT. Where direct product-level weights were unavailable, the closest relevant commodity category or proxy was used.

- The study covered all products for which the DGTR had recommended anti-dumping duties, but final implementation was pending at the time of this analysis. The number of products that were analysed was 21.

- Estimated duty-induced price increases were derived using the proposed anti-dumping duty level as a proportion of the landed CIF value of imports.

- A pass-through assumption was applied to estimate how much of the increase in input cost would be transmitted downstream. For this assessment, a conservative 50% pass-through assumption was used to avoid understating inflationary effects.

- The inflation contribution of each product was then estimated by multiplying:
  (a) the relevant WPI proxy weight,
  (b) the estimated duty-related price increase, and
  (c) the assumed pass-through factor.

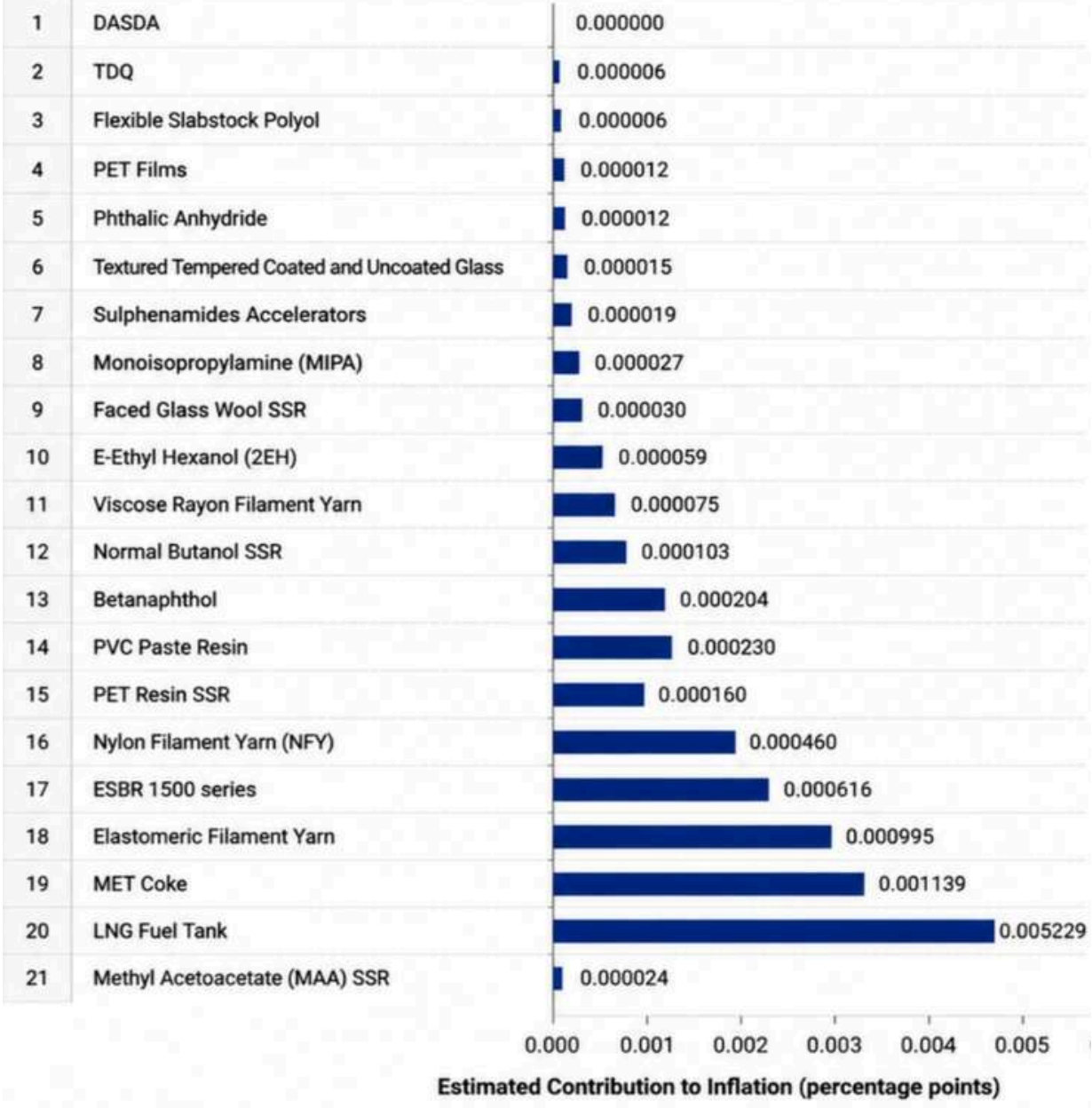
- The cumulative inflation impact was calculated by aggregating the estimated contribution across all 21 products.

- Since many anti-dumping cases relate to industrial intermediates rather than directly consumed retail goods, the methodology recognises that downstream dilution occurs through domestic processing, logistics, distribution margins, taxation, and substitution possibilities.

Even under the assumption of 50% pass-through of duty-induced cost increases, the combined estimated contribution of all 21 products to inflation remains insignificant (below 0.001%)

In most individual cases, the contribution is measured only in fractions of a basis point. For example, products such as Monoisopropylamine (MIPA), Phtalic Anhydride, TDQ, PET Film, Sulphenamide Accelerators, and Viscose Rayon Filament Yarn show extremely small estimated inflation contributions despite assumed duty-related price increases. Even products with relatively higher estimated pass-through, such as LNG fuel tanks or PVC paste resin, remain insignificant in macroeconomic terms because of their weight within the overall inflation basket (refer Annexure G). Therefore, the inflation impact of implementing anti-dumping duties in core commodities is almost nil and insignificant.

S. No.	Product (21 pending ADD recommendations)	Estimated Inflation Contribution (percentage points)
1	DASDA	0.000000
2	TDQ	0.000006
3	Flexible Slabstock Polyol	0.000006
4	PET Films	0.000012
5	Phthalic Anhydride	0.000012
6	Textured Tempered Coated and Uncoated Glass	0.000015
7	Sulphenamides Accelerators	0.000019
8	Monoisopropylamine (MIPA)	0.000027
9	Faced Glass Wool SSR	0.000030
10	E-Ethyl Hexanol (2EH)	0.000059
11	Viscose Rayon Filament Yarn	0.000075
12	Normal Butanol SSR	0.000103
13	Betanaphthol	0.000204
14	PVC Paste Resin	0.000230
15	PET Resin SSR	0.000160
16	Nylon Filament Yarn (NFY)	0.000460
17	ESBR 1500 series	0.000616
18	Elastomeric Filament Yarn	0.000995
19	MET Coke	0.001139
20	LNG Fuel Tank	0.005229
21	Methyl Acetoacetate (MAA) SSR	0.000024



Source: Based on Office of the Economic Adviser, DPIIT, WPI Data (Base year 2011-12)

Figure 6: Estimated inflation contribution of 21 products pending notification of anti-dumping duty

This does not imply zero inflation effect in every case. Sector-specific pressures may arise, particularly when an anti-dumping duty affects an input used intensively in a small set of products. But the evidence does not support the claim that anti-dumping duties are a major driver of inflation in India. A more plausible concern is the reverse one: prolonged import displacement of domestic manufacturing can widen the trade deficit and intensify currency pressure, which affects inflation through the exchange rate.

3.3 Impact on MSMEs

MSMEs occupy both sides of the anti-dumping debate. Some are downstream users of imported inputs, and others are domestic manufacturers in upstream segments and are directly injured by dumped imports. The policy challenge is to distinguish between a narrow short-run benefit from dumped imports and a strategic loss from weakened domestic ecosystems.

When dumped imports suppress prices for a sustained period, MSME manufacturers face three interlocking pressures: lower price realisation, lower capacity utilisation, and deferred investment. Those effects are visible in multiple sectoral notes and stakeholder submissions, especially in chemicals, fibres, sublimation paper, mobile covers, polymers, and engineering products. Once local producers scale down or shut down, downstream MSMEs often lose a nearby, reliable supplier base and become more exposed to external shocks, quality variation, and currency weakness.

The exchange-rate channel is especially relevant. MSMEs that rely on imported feedstocks can be harmed by rupee depreciation even if they initially benefited from low-priced imports. The more India imports goods that it already has the capacity to produce, the greater the structural pressure on external balances and the more vulnerable domestic firms become to USD/INR (rupee depreciation) pass-through. This means that non-application of trade remedies can hurt MSMEs indirectly by raising the domestic-currency cost of indispensable imports in other parts of their production process.

Case-study box 2. Stakeholder-reported shutdowns in NFY and sublimation paper

Industry compilations reviewed for this report identify multiple shutdowns in Nylon Filament Yarn (NFY) and sublimation-transfer paper segments under sustained import pressure. In the NFY list, publicly available capacity figures add up to 29,450 MT across six units, with additional closed units listed where capacity is not publicly available. These lists are reproduced in Annexure F as illustrative evidence of industrial erosion under prolonged dumped import pressure.

Source: stakeholder compilation with public-capacity figures where available; Annexure F

3.4 Impact on supply-demand gap and the situation in 2030

A central theme in the public economic-loss study is that injury from dumped imports should not be assessed only in terms of current profits. It should also be assessed as lost opportunity to meet domestic demand using already-installed capacity. In the 33-product case set used by that study, domestic installed capacity exceeded domestic sales by a wide margin even as imports continued to rise. The result is a structural mismatch: India has production resources that are not being fully utilised, while domestic demand is being met increasingly through imports.

The 2030 scenario should be read as an indicative stess test as it examines what could happen if India's demand continues to grow while dumped imports keep displacing domestic production in sectors where capacity already exists or can be expanded.

Under this scenario, cumulative economic loss rises from about ₹1.54 lakh crore in the current case set to nearly ₹2.68–2.70 lakh crore by 2030, with jobs at risk increasing materially as well. [6] Demand-supply gap would not be the result of natural scarcity. It would be the result of viable domestic capacity being displaced over time, creating avoidable import dependence in sectors where India could have produced more domestically.

The policy concern is supply-chain resilience. If unfairly priced imports keep suppressing domestic sales and investment, India may enter 2030 with higher demand but weaker domestic capacity. Such a demand-supply gap would not be the result of natural scarcity. It would be the result of viable domestic capacity being displaced over time, stifling domestic investments, creating avoidable import dependence in sectors where India could have produced more domestically.

3.5 Impact of Anti dumping duty on investments and domestic capacity

Investment is one of the clearest channels through which anti-dumping policy affects long-term industrial outcomes. When markets are flooded with underpriced imports, domestic firms lose access to their own domestic markets, capacity utilisation falls, and expected returns on fresh capacity, modernisation and R&D become uncertain. This affects investment decisions more deeply than the immediate price effect of a duty.

Such an outcome assumes greater importance in the context of India's ambition to become a USD 7 trillion economy by 2030. Industrial capacity cannot be created overnight. In many manufacturing sectors, the period between investment decision, plant setup, trial production and commercial output can take three to four years. Therefore, if India wants the domestic industry to meet rising demand by 2030, the investment environment needs to be stabilised now. Delayed action can create a future demand-supply gap, where domestic capacity is either inadequate or underutilised, and India becomes more dependent on imports despite having the potential to produce domestically.

A CDEP Research study on the economic benefits of trade remedies documents large post-measure investments across ceramic tiles, tyres, caustic soda, fibreboards, methylene chloride, alloy wheels, PTFE, PVC flex film and related sectors. The report attributes nearly ₹73,775 crore of industrial investment across 11 sectors to trade-remedy-supported stabilisation of market conditions [7]. A second study estimates that over ₹1 lakh crore of fresh domestic investment is needed to cater to the forecasted demand for 2030.

Timely safeguards, combined with support for domestic capacity creation, can encourage firms to invest ahead of demand, prevent future import dependency, and strengthen supply-chain resilience.

[6] https://c-dep.org/reports/detail/?id=d4loe1bmeheyqhn77rqaw48q
[7] https://c-dep.org/reports/detail/?id=bd5a5778wn8idyk3xkedmqqn

At the same time, not every application of anti-dumping duties produces a transformative industrial outcome. Trade remedies work best where domestic firms are efficient enough to respond with capacity, technology, and market discipline. ADD is therefore best seen as a corrective instrument that restores the possibility of fair competition; it is not a substitute for competitiveness itself.

S.NO	Product	Past investments by domestic industry (in INR Cr)	Investigation status	Average Dumping Margin
1	Beta Napthol	~100	ADD* recommended by DGTR	36%
2	TDQ (rubber chemicals)	~200	ADD recommended by DGTR	25%
3	PET Resin	~8200	ADD recommended by DGTR	10%
4	Emulsion Styrene Butadiene Rubber	~2000	ADD recommended by DGTR	12.50%
5	DASDA	~150	ADD recommended by DGTR	25%
6	Phtalic Anhydride	~4500	ADD recommended by DGTR	38%

Table 1: Sector-wise Overview of Key **Chemicals and Petrochemical Products** with DGTR-Recommended Anti-Dumping Duties.

*Anti-Dumping Duty

S.NO	Product	Past investments by domestic industry (In INR cr)	Average Dumping Margin
1	Nylon Filament Yarn	~1564	67.50%
2	DASDA	~150	25%
3	LFT Tank	~40	50-60%

Table 2: Sector-wise overview of **Textiles Products and Green Energy Equipment** with DGTR recommended Anti-Dumping Duties.

S.NO	Product	Past investments by domestic industry (In INR cr)	Investigation status
1	Propylene Glycol	~250	DGTR ADD* investigation ongoing
2	PX -13	~600	DGTR ADD investigation ongoing
3	Sublimation Paper	~275	DGTR ADD investigation ongoing
4	PET Film	~9000	DGTR ADD investigation ongoing
5	Mobile covers	~150	DGTR ADD investigation ongoing
6	Belting Fabric (Technical Textile)	~200	DGTR ADD investigation ongoing

Table 3: Sector-wise overview of **Textiles Products and Green Energy Equipment** with DGTR-recommended Anti-dumping duties.

At the same time, not every application of anti-dumping duties produces a transformative industrial outcome. Trade remedies work best where domestic firms are efficient enough to respond with capacity, technology, and market discipline. ADD is therefore best seen as a corrective instrument that restores the possibility of fair competition; it is not a substitute for competitiveness itself.

S.NO	Product	Past investments by domestic industry (In INR cr)	Average Dumping Margin
1	Sublimation Paper (MSME led industry)	~275	DGTR ADD* investigation ongoing
2	DASDA	~150	25%
3	Mobile covers (MSME led industry)	~150	DGTR ADD* investigation ongoing

Table 4: Sector-wise overview of cases where the majority of the players are **MSME industries**

4. International practice and India's trade-remedy track record

The WTO Anti-Dumping Agreement gives governments discretion on whether to impose duties after dumping, injury and causal link are established. However, international practice shows that once a competent investigating authority reaches an affirmative finding on illegal dumping, major jurisdictions generally proceed to impose measures unless a clearly defined public-interest test justifies otherwise. The European Union, for instance, follows a structured "Union interest" assessment before withholding duties. This makes non-implementation of the recommended anti-dumping duty an exception, not the normal outcome. A predictable trade-remedy system, therefore, requires that any departure from an affirmative finding be supported by a transparent, reasoned and evidence-based assessment.

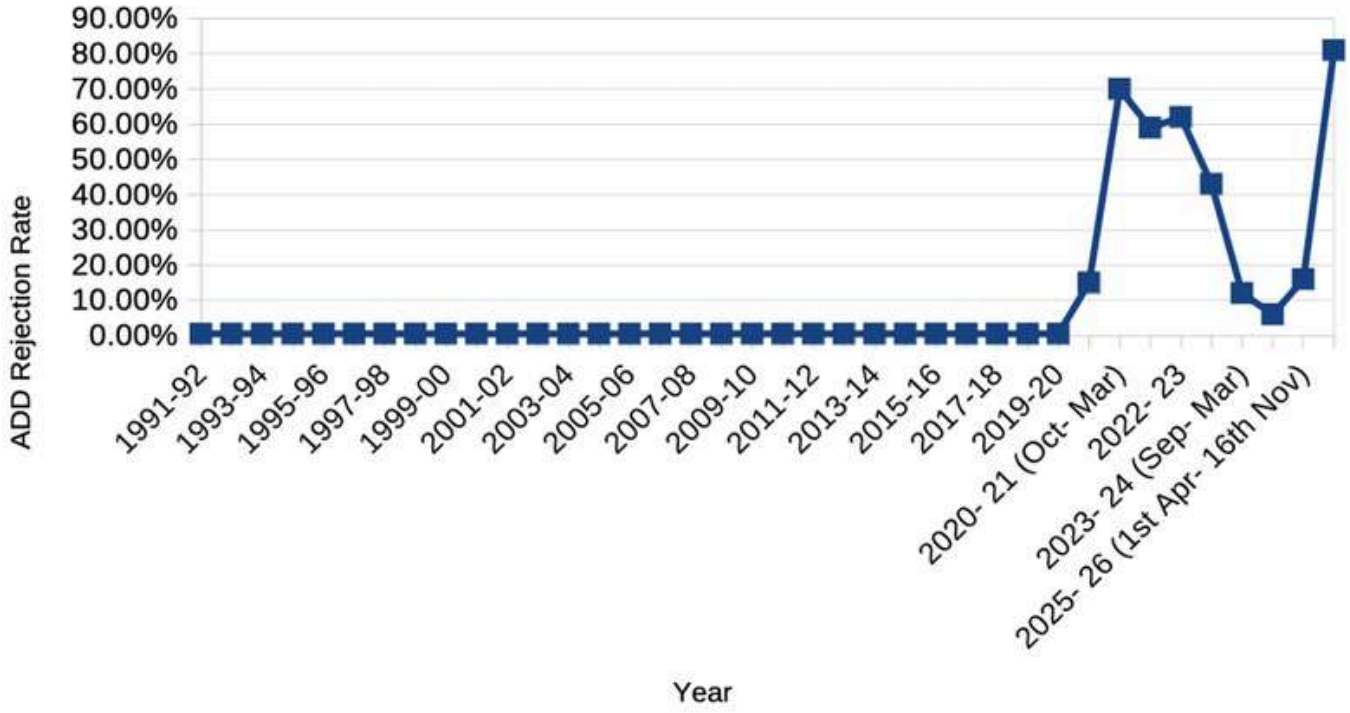


Figure 7: Rate of Non-implementation of anti dumping duty recommendations of DGTR

India's own historical track record also points towards predictability. The anti-dumping duty implementation ratio table in Annexure A, compiled from DGTR and customs-notification records, indicates that from 1991 to mid-2020, about 99.5% of DGTR anti-dumping recommendations were implemented. Rejection rates then rose sharply in selected subsequent periods. The economic significance of this shift is less about any single product/industry and more about the uncertainty in the implementation of WTO-compliant anti-dumping duty safeguards, even when illegal dumping is established by DGTR.

International comparison suggests that India has been a relatively mild user of anti-dumping duties. Data from the WTO reveals that India is among the more restrained users relative to the United States, Japan, and even the European Union, particularly when compared by average duration and frequency of sunset-review extensions. As shown in Annexure C, the **average duration of India's anti-dumping duties** is 6.97 years, compared with a global average of 11.19 years (excluding India), underscoring India's measured and calibrated trade-remedy application.

Comparison of Duty Magnitudes: The contrast in duty levels is also noteworthy. In 2025, the United States imposed anti-dumping and countervailing duties on melamine from India, with anti-dumping margins exceeding 600%. Similarly, China has applied high trade-remedy rates on selected products and intermediates through MOFCOM announcements. By contrast, India adheres consistently to the lesser-duty principle, calibrating duties to the level of injury rather than the full dumping margin (refer figure 9)

It is important to note that India's use of anti-dumping duties is moderate and measured, and should not be characterised as unusually aggressive or exceptional when compared with prevailing international practices in other major jurisdictions

DGTR Credibility: The **Directorate General of Trade Remedies (DGTR)** credibility is globally recognised as its anti-dumping duty recommendations have never been overturned in a WTO dispute, unlike the anti-dumping duty recommendations by the US, the EU, Mexico and many others. This underscores the procedural rigour of India's anti-dumping framework and the institutional weight that should be accorded to DGTR findings.

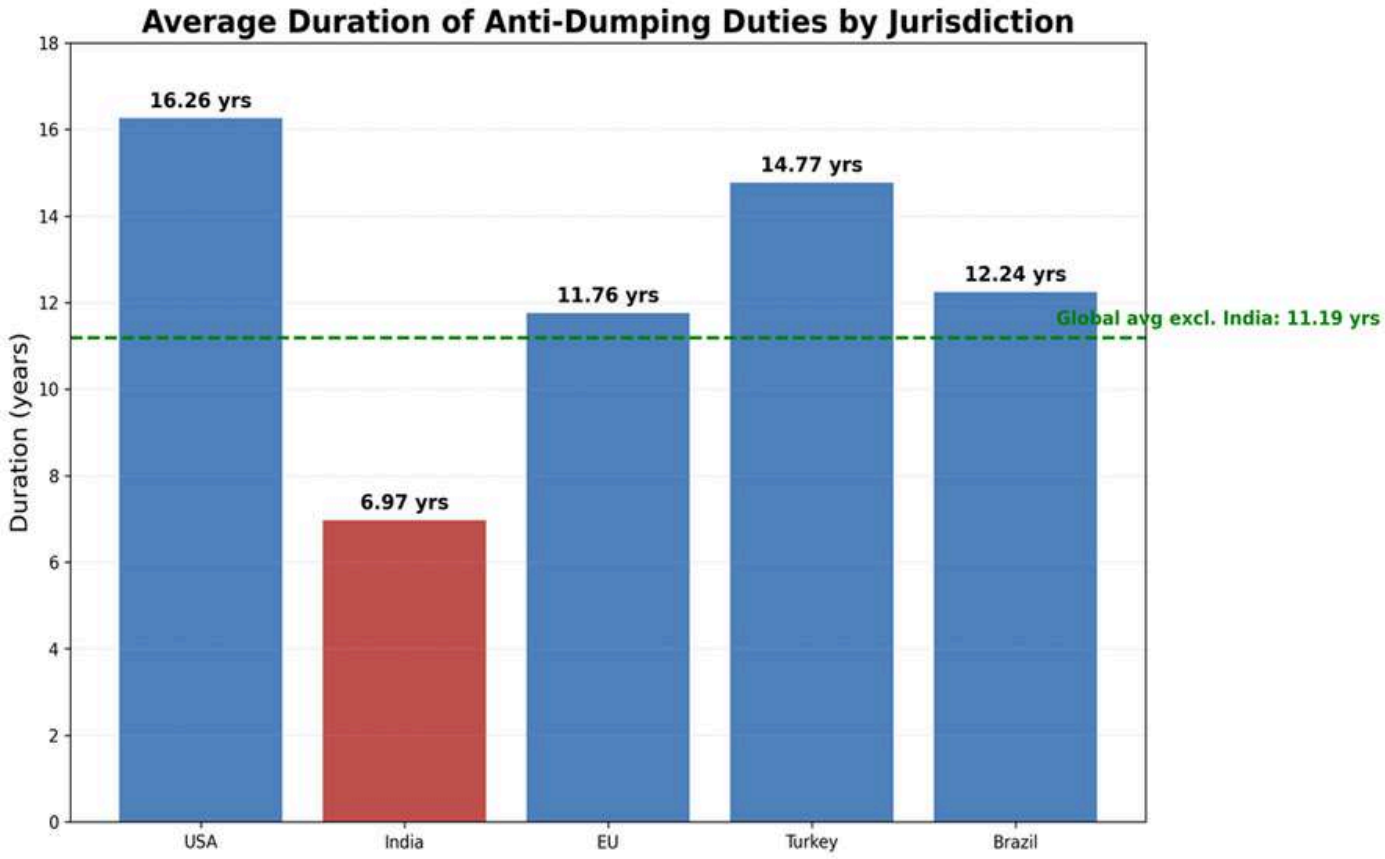


Figure 8: India's average duration of anti-dumping duties by jurisdiction is significantly lower than other major jurisdiction reflecting India's restrained approach

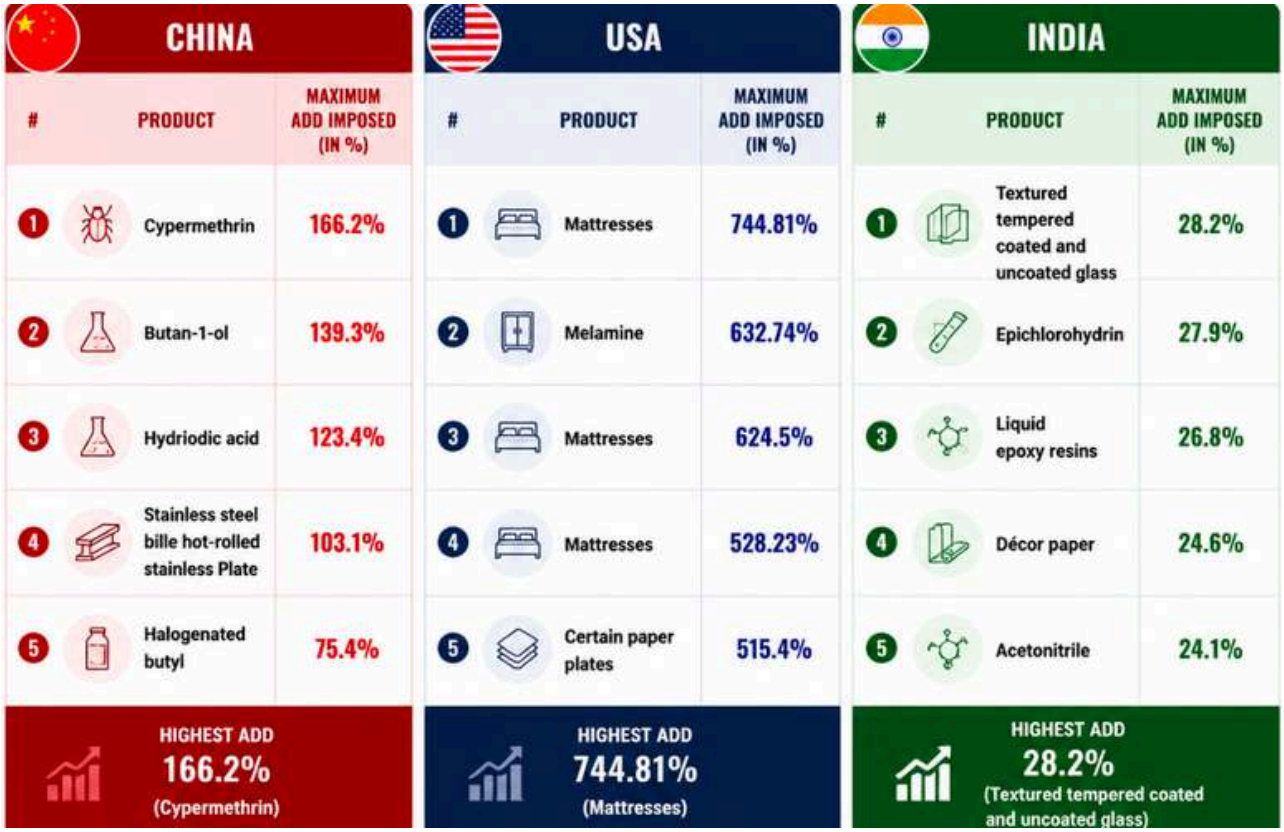


Figure 9: Comparative overview of maxium Anti-dumping duty imposed

5. Exchange-rate pressure, imports, and MSME feedstock cost

Increasing imports widen the trade deficit and increase demand for foreign currency, exerting downward pressure on the rupee. In **2024–25**, India's trade deficit with China reached **USD 99.1 billion***, highlighting the strategic importance of reducing imports where domestic capacity exists. While the exchange rate is influenced by multiple macroeconomic factors, including capital flows, crude oil prices, interest-rate differentials, global risk sentiment, and monetary policy, sustained high merchandise imports have a significant impact on the trade balance and the domestic currency. Moreover, a weaker rupee translates into higher input costs for MSMEs relying on imported machinery, chemicals, intermediates, or specialised components.

This highlights a critical policy distinction. Imports that are unavoidable due to the absence of domestic capacity are fundamentally different from imports in sectors where India already has adequate domestic production. **Prioritising domestically produced goods in such sectors reinforces the Atmanirbhar Bharat vision and mitigates avoidable external vulnerability.**

The monthly series in Annexure D shows a relationship between increased imports and a weaker USD/INR reference rate during June 2025–April 2026.

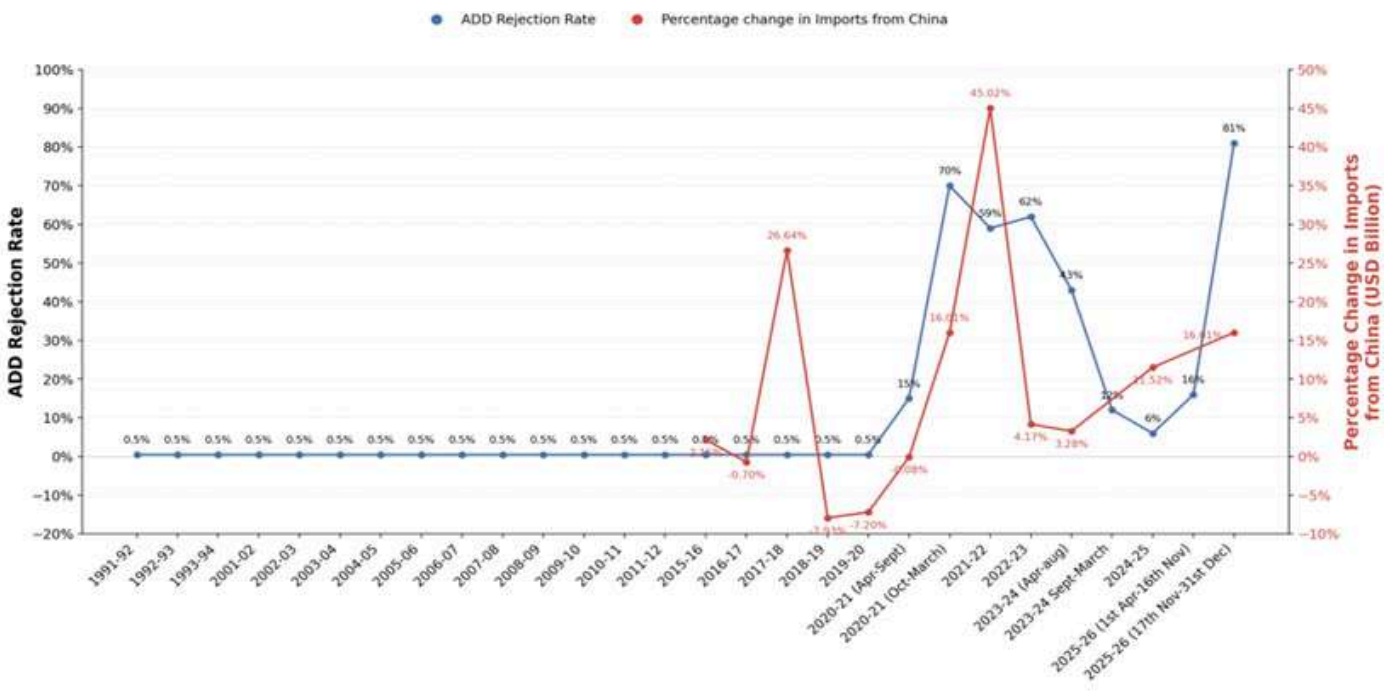


Figure 10: Non-implementation of DGTR's Anti-dumping duty recommendations and their relation with Chinese imports.

*https://eoibeijing.gov.in/eoibejing_pages/MjQ,

This reinforces the point that anti-dumping duties should not be evaluated solely through the narrow lens of immediate input costs. Where predatory imports suppress domestic capacity, the downstream effect can be a less resilient rupee environment and higher feedstock costs for MSMEs across multiple sectors, amplifying economic exposure.

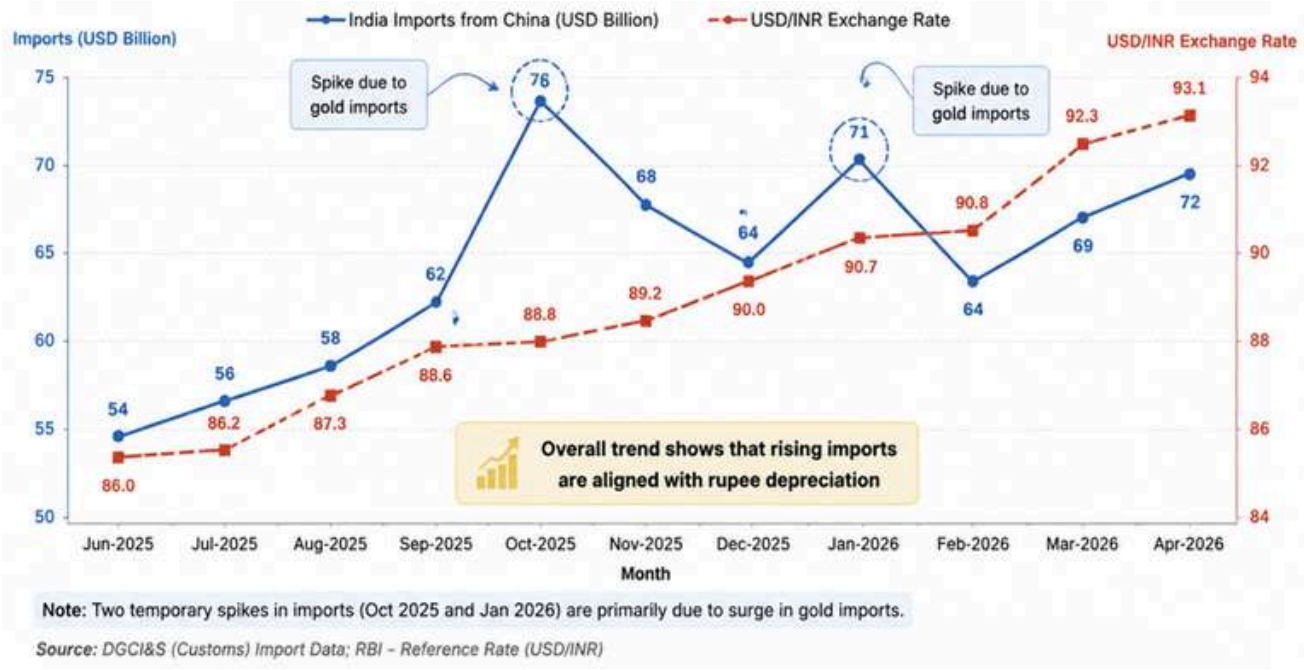


Figure 11: Strong correlation of increase in imports with Rupee depreciation

6. Conclusion and Policy Recommendations

The evidence reviewed in this report demonstrates the following key points regarding anti-dumping duties (ADD) in India:

- **Anti-Dumping Duty has a negligible impact on downstream costs and an immeasurable impact on inflation:** Analysis of 56 DGTR-recommended cases where duties were not implemented shows a median effect on final consumer prices of just 0.023%, with over 91% of cases below 0.10%. At the time of this study, 21 products with pending DGTR recommendations have a combined estimated inflation impact of less than **0.0096%,** even under a conservative 50% pass-through. This confirms that anti-dumping duty on industrial intermediates leaves consumer prices and aggregate inflation effectively undisturbed.

- **Non-implementation of Anti-dumping duty has a significant influence on investment and capacity:** Non-implementation of anti-dumping duties reduces domestic capacity utilisation, thereby significantly dampening committed and new investments, leading to weakening of long-term industrial resilience and increasing the supply-demand gap in the economy.

- **Anti-dumping duties strengthen MSMEs and increase supply-chain resilience:** Anti-dumping duties strengthen MSMEs by providing them with a level playing field against predatory pricing by importers. Non-imposition of anti-dumping duties leads to increase in imports, which in turn leads to rupee depreciation as well as exposing MSMEs to avoidable reliance on imported inputs. Timely application of trade remedies such as anti-dumping duties has historically helped stabilise MSMEs across sectors such as cable ties, ceramic ware, vacuum flasks, and PVC flex films, safeguarding domestic production and supporting resilient supply chains.

- **India's measured use of Anti-Dumping Duties:** India has not misused anti-dumping duties. In fact, its approach is restrained and calibrated. In contrast, countries such as the United States and China impose duties at much higher levels and for longer durations, with U.S. anti-dumping duties on certain imports exceeding 600% and Chinese duties on some intermediates reaching over 160%. This highlights that India's trade-remedy application is measured, targeted, and fully consistent with international best practices.

- **DGTR credibility globally:** India's Directorate General of Trade Remedies (DGTR) has established a strong international reputation for procedural rigour. Notably, all of DGTR's anti-dumping duty recommendations that have been challenged at the WTO have been upheld, underscoring the robustness of its investigation process. In comparision several other jurisdictions, such as the United States, the European Union, and Mexico, have occasionally withdrawn anti-dumping measures.

- **Need for immediate imposition of anti-dumping duty critical for meeting domestic demand of 2030, when GDP will be an estimated USD 7 trillion:** Non-imposition of anti-dumping duties has curtailed the committed immediate investments. Investments into manufacturing capacities now will lead to the capacities coming on-stream in the next 3-4 years. If the investments do not fructify now, India will face a shortage of manufacturing capacities in the next 3-4 years, thereby significantly increasing the demand-supply gap in 2030. This will push India into a greater dependence on imports, which are now increasingly coming from China. Such a situation will also have strategic ramifications.

- **Mitigation of currency and import pressures:** Avoidable imports in sectors with adequate domestic production exert unnecessary pressure on the rupee and increase costs for essential inputs, including for MSMEs. Optimising domestic capacity can result in substantial forex savings and support macroeconomic stability.

- **Potential forex savings:** The implementation of pending DGTR anti-dumping duty recommendations is estimated to yield approximately INR 28,540 crore (USD 3 billion) in annual foreign exchange savings. This reflects the economic benefits of enabling domestic manufacturers to service domestic demand currently served by avoidable imports. (refer Annexure I)

Policy recommendations

Based on the findings in this report, it would be judicious to consider the following recommendations for providing a level playing field to the domestic industry:

- **Notification of anti-dumping duties that DGTR's final findings have recommended:** The domestic industry urgently requires a level playing field, in the absence of which, the domestic industry, including MSMEs, will be decimated due to dumping. Since dumping has been determined in multiple products through DGTR's investigations, it would therefore be prudent to notify the anti-dumping duties for these products, to provide the domestic industry with a level playing field.

- **Establishing a transparent, reasoned, and publicly documented process for any non-implementation:** Where the government determines that public-interest considerations justify departing from a DGTR recommendation, such a decision should be supported by a clear, evidence-based, and publicly accessible rationale. Such a process aligns with the practices of all other jurisdictions globally, including the European Union and the US. A transparent public-interest assessment strengthens institutional predictability, reinforces investor confidence, and ensures that India's trade-remedy framework maintains credibility and consistency.

- **Prioritising domestic capacity utilisation in sectors where adequate supply exists:** In sectors where domestic capacities can meet domestic demand, domestically manufactured products need to be prioritised. Substituting domestic production with imports represents a direct drain on foreign exchange reserves and contributes to rupee depreciation. Reducing such imports is also important for meeting the objectives of Atmanirbhar Bharat, strengthening supply-chain resilience, and reducing India's vulnerability to the real risk of supply-chain coercion that COVID and subsequent global conflicts have demonstrated.

- **Preventing a structural demand-supply Gap by 2030:** Non-implementation of anti-dumping duties risks suppressing domestic investment today, which could translate into a substantial structural demand-supply gap by 2030. Industrial capacity cannot be expanded overnight. In many manufacturing sectors, the period between investment decisions and commercial production spans three to four years. Continued exposure to dumped imports may leave India reliant on foreign suppliers in sectors where domestic capacity exists. Timely and WTO-compliant implementation of anti-dumping duties provides a direct mechanism to stabilise investment expectations, safeguard existing capacities, and ensure that the domestic industry can meet projected demand, supporting India's trajectory toward a Viksit and Sashakt Bharat.

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Annexure A

Ratio of Non-Implementation of DGTR recommended Anti-dumping duties since 1991

Period	Accepted	Rejected	Total	Rejection ratio (%)
1991–2020	1047	5	1052	0.5
Apr 2020– Sep 2021	11	2	13	15
Oct 2020– Mar 2021	10	23	33	70
2021–22	24	34	58	59
2022–23	13	21	34	62
Apr 2023– Aug 2024	4	3	7	43
Sep 2023– Mar 2024	15	2	17	12
2024–25	31	2	33	6
Apr 2025– Nov 2025	21	4	25	16
Nov 2025 - Apri 2026	3	13	16	81

Source: https://www.dgtr.gov.in/

Annexure B

Product-wise downstream cost impact of non-implementation of Anti-dumping duties on 56 products that DGTR has recommended

S.No	Product	Domestic Sales (INR crore)	Imports from Subject Country (in MT)	Lowest ADD (%)	Revenue Loss to Domestic Industry due to non-implementation of Anti-dumping duty (INR crore)	Downstream impact if Anti-dumping duty had been imposed (%)
Total					**11,938**	**0.023% (average)**
1	Pneumatic Radial Tyre	483,059	22,158	60	1,347	0.014
2	Cold Rolled Stainless Steel	439,957	66,339	37	439	0.005
3	Hot Rolled Flat Stainless Steel-304 grade	122,957	9,100	3	163	0.003
4	Viscose Spun Yarn	107,491	40,185	80	525	0.05
5	Copper & Copper Alloy Flat Rolled Products	19,312	7,040	2	14	0.002
6	Ceftriaxon Sodium Sterile	537	74	0	0	0

B[9] based on independent study by C-DEP

7	Hydrogen Peroxide	85,426	15,403	3	56	0.004
8	Caustic Soda	1,530,136	114,741	20	581	0.024
9	Phenol	243,642	40,216	201	559	0.063
10	Glass Fibre & Articles thereof	45,547	35,378	16	30	0.006
11	Newsprint	268,376	911,585	37	33	0.023
12	Polyester Spun Yarn	57,397	51,591	2	7	0.001
13	Halobutyl-Rubber (HIIR)	14,992	41,521	71	26	0.012
14	Ammonium Nitrate	269,217	110,339	15	36	0.005
15	Low Density Polyethylene (LDPE)	449,919	115,398	61	77	0.004
16	Monoisopropylamine (MIPA)	2,216	4,202	10	5	0.002
17	Styrene Butadiene Rubber (SBR)	5,370	2,716	22	57	0.007
18	PTFE	4,119	3,645	84	95	0.018
19	Viscose Filament Yarn (VFY)	19,689	25,587	79	76	0.015
20	Soda Ash	3,232,259	894,630	121	438	0.028
21	Anti-Oxidants	3,639	8,275	73	114	0.009

22	Resorcinol	1,454	4,458	37	12	0.006
23	PVC Suspension	481,280	2,323,183	408	215	0.041
24	Acrylic Fibre	19,235	6,366	9	30	0.005
25	Nylon Tyre Cord Fabric	71,542	29,656	90	391	0.688
26	Carbon Black	393,322	74,053	21	189	0.004
27	Fiberboards	372,690	295,472	35	76	0.111
28	Plain Medium Density Fiber Board	203,953	26,326	2	51	0.054
29	Rubber Chemical PX-13	8,716	9,511	33	44	0.039
30	1,1,1, Tetrafluoroethane	4,564	1,309	13	44	0.047
31	Certain Rubber Chemicals	5,648	2,567	4	19	0.012
32	Pre Vulcanized Inhibitors (PVI)	724	1,054	9	6	0.008
33	N-Cyclohexyl-2-benzothiazoles	1,939	359	10	7	0.009
34	Azo Pigments	7,657	2,137	9	120	0.043
35	Fluoroelastomers (FKM)	1,160	608	5	10	0.006

36	Melamine	26,193	39,101	37	25	0.009
37	Acetone	83,134	36,510	23	53	0.008
38	Caprolactam	58,764	65,814	32	29	0.006
39	Choline Chloride	16,617	899	1	11	0.006
40	Vitamin C	1,127	868	20	26	0.011
41	Copier Paper	432,972	1,522	0	10	0.003
42	Methylene Chloride	99,988	63,197	8	24	0.004
43	Flexible Slabstock Polyol	17,204	27,004	102	65	0.033
44	Grinding Media Ball	42,637	52	0	129	0.01
45	Thiram	357	810	5	3	0.003
46	Virgin Paper Board	1,142,659	33,401	106	1,212	0.264
47	Phthalic Anhydride	228,046	5,732	7	0	0.036
48	Viscose Staple Fibre	660,000	15,129	12	544	0.093
49	Aluminium Foil	34,813	20,651	35	53	0.022
50	Ofloxacin	620	77	0	4	0.003
51	Persulphate	5,370	2,716	3	6	0.003
52	Dimethyl Formamide	10,000	1,094	38	10	0.024

53	Full Drawn or Fully Oriented Yarn	71,500	4,622	0	406	0.081
54	Float Glass	-	21,830	789	3,447	0.424
55	Elastomeric Filament Yarn	11,241	2,377	13	4	0.006
56	Plastic Processing Machines	1,674	229	62	734	0.177

Annexure C

Comparative table of the average duration of Anti-dumping duties imposed by major economies

SN	Country	Number of products	Average duration of Anti-dumping duties (number of years)
1	USA	274	16.26
2	India*	196	6.97
3	EU	108	11.76
4	Turkey	79	14.77
5	Brazil	90	12.24
6	Global average excluding India	1,456	11.19

*India has the least average duration of imposition of the Anti-dumping Duties

Number of Anti-dumping duties against Indian products, applied by other jurisdictions	189
Average duration of the Anti-dumping duties against Indian products	**11 years**
Total duration of Anti-dumping duties against Indian products that is currently in force	1757 years
Number of Anti-dumping duties against Indian products that is **currently in force**	164
Average duration of Anti-dumping duties against India **which are in force**	**11 years**

The above table demonstrates (a) the competitiveness of the Indian industry, (b) high tariff barriers being faced by Indian exports and (c) simultaneously, being subjected to a different yardstick in the domestic market, where trade safeguards are being diminished, contrary to what the rest of the world is doing.

Annexure D

Depreciation of Rupee with increasing imports, impacting MSME competitiveness

Month	Imports (USD bn)	USD/INR
Jun 2025	53.9	87.02
Jul 2025	56	86.61
Aug 2025	58.2	87.97
Sep 2025	61.5	88.79
Oct 2025	76.1	89.16
Nov 2025	68.4	89.34
Dec 2025	63.6	91.05
Jan 2026	71.2	91.02
Feb 2026	63.7	91.5
Mar 2026	69.5	93.08
Apr 2026	72	94.2

Source: Import data - https://trade-analytics.commerce.gov.in/
USD/INR rate - https://www.cbic.gov.in

Annexure E

High quantum of Anti-dumping duties imposed by the USA and by China on India*

Jurisdiction	Number of ADD entries reviewed	Average maximum ADD imposed	Median maximum ADD imposed	Highest ADD imposed	Share of entries above 100%	Key observation
United States	81	188.50%	149.30%	744.80%	71.60%	The United States used **very high ADD rates** during the review period. Nearly three-fourths of the listed entries were above 100%.
China	30	59.60%	43.30%	166.20%	13.30%	China's ADD rates were lower than the United States but still **materially higher than India**. Over 43% of China's listed entries were above 50%.
India	45	12.20%	9.90%	28.20%	0%	India's ADD rates were **significantly restrained.** None of the listed Indian entries crossed 100%, and 60% were at or below 12%.

*Anti-dumping duties imposed in the period April 2024 - December 2025.

Annexure F

Domestic industries shut down due to dumping by China

F 1 Nylon Filament Yarn manufacturing units reported closed

S. No.	Name of company	Capacity in 2004–05 (MT)
1	Modipon Fibres Company	9,000
2	JCT Limited	10,000
3	Shree Synthetics	2,500
4	BRC/Others	1,050
5	GNL	5,500
6	SRF	1,400

Source: stakeholder-reported and industry-compiled evidence reviewed for this report. Capacity figures are shown where publicly available. is not an exhaustive list of units closed. It is a compilation of publicly reported information.

Reported total loss of domestic capacity: 29,450 MT.

Additional Nylon Filament Yarn manufacturing units reported closed where capacity is not publicly available

S. No.	Name of company
1	GSFC
2	Gupta Synthetics
3	Paras Petrofils
4	Prafull Overseas Limited

F.2 Sublimation Paper: Status of domestic MSME manufacturing due to dumping by China

S. No.	Enterprise / unit name	Product / activity	MSME status / indication	Reported operational status
1	Shivanjali	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
2	Devika	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
3	Silver Industries	Sublimation paper / transfer paper	MSME (stakeholder-reported)	Reportedly shut down
4	Krishna Enterprise	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
5	Kashish Metallics	Transfer paper / metallized paper-linked activity	MSME (stakeholder-reported)	Reportedly shut down
6	Rangoli Texturizers Pvt. Ltd.	Sublimation paper / textile printing material	MSME (public listing indicates Surat-based unit)	Reportedly shut down
7	Mitshu	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
8	Mitsu Inks	Sublimation inks and paper-linked	MSME (stakeholder-reported)	Reportedly shut down
9	Hot Fix	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
10	Ginni Shree	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down

11	Papyrus	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
12	Shree Shayam Converters	Paper conversion / sublimation paper-linked	MSME (stakeholder-reported)	Reportedly shut down
13	Anmol Global	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
14	V Replica Sublimation Paper	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
15	J & P Enterprise	Sublimation transfer paper	MSME (stakeholder-reported)	Reportedly shut down
16	JV Enterprise	Sublimation paper-linked	MSME (stakeholder-reported)	Reportedly shut down
17	Digitex Paper	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
18	KMB Papers	Sublimation paper	MSME (stakeholder-reported)	Reportedly shut down
19	M/s Hi Tech Papers	Sublimation paper	UDYAM-GJ-22-0028683	Currently operating under distress
20	M/s GT Papers	Sublimation paper	UDYAM-GJ-22-0049404	Currently operating under distress
21	M/s Zibo Papers	Sublimation paper	UDYAM-GJ-25-0001967	Currently operating under distress
22	Navco Industries Pvt. Ltd.	Sublimation paper	UDYAM-TS-02-0003080	Currently operating under distress

Annexure G

Estimated Inflation Impact Assessment of Anti-dumping duty recommendations for products that are pending notification at the time of analysis of this report

S. No.	Product	WPI proxy used	WPI weight (%)	Estimated duty-induced input price increase (%)	Assumed pass-through	Estimated inflation contribution (percentage points)
1	Monoisopropylamine (MIPA)	Amine	0.05566	9.6	50%	0.0027
2	Methyl Acetoacetate (MAA) SSR	Organic chemicals	0.04383	11.1	50%	0.0024
3	Textured Tempered Coated and Uncoated Glass	Toughened glass	0.02939	10.1	50%	0.0015
4	Faced Glass Wool SSR	Fibre glass incl. sheet	0.03063	19.6	50%	0.003
5	DASDA	Dye intermediates and pigments/colours	0.22821	Not available	50%	0.0
6	Flexible Slabstock Polyol	Other petrochemical intermediates	0.00684	18.1	50%	0.0006
9	TDQ	Rubber chemicals	0.00748	16.3	50%	0.0006

10	LNG Fuel Tank	Parts/accessories for motor vehicles	2.36827	45	50%	0.5329
11	2-Ethyl Hexanol	Alcohols	0.12767	9.3	50%	0.0059
12	Betanaphthol	Dye intermediates and pigments/colours	0.22821	17.9	50%	0.0204
13	ESBR 1500 series	Plastic and synthetic rubber in primary form	1.00082	12.3	50%	0.0616
14	PET Films	Polyester film, non-metalized	0.01969	12.5	50%	0.0012
15	PVC Paste Resin	Poly Vinyl Chloride (PVC)	0.08347	55.1	50%	0.023
16	Sulphenamides Accelerators	Rubber chemicals	0.00748	51.8	50%	0.0019
17	Viscose Rayon Filament Yarn	Viscose yarn	0.09019	16.7	50%	0.0075
18	PET Resin SSR	Polyester/PET chips	0.14608	21.9	50%	0.016
19	Normal Butanol SSR	Alcohols	0.12767	16.1	50%	0.0103
20	MET Coke	Coking coal	0.64703	35.2	50%	0.1139
21	Phthalic Anhydride	Phthalic anhydride	0.0191	12.7	50%	0.0012
	Total estimated impact					**0.0092%**

Source: Calculations are based on Office of the Economic Adviser, DPIIT, WPI data (Base Year 2011–12), available at https://eaindustry.nic.in/download_data_1112.asp

Each product has been mapped to the closest available WPI commodity category; exact product-level weights have been used where available, and proxy categories have been used where direct weights are not separately reported. The table covers 21 products for which DGTR recommendations were pending final implementation by the Ministry of Finance at the time of analysis.

Annexure H

Strengthening of MSMEs where Anti-Dumping Duties were applied

Product / Sector	Nature of MSME relevance	Illustrative MSME entities / Udyam references	Impact observed after ADD intervention
Cable ties	Small plastic-processing units and component manufacturers	Accord Plastics (UDYAM-GJ-20-0007184); Balaji Inmould Enterprise (UDYAM-GJ-20-0025451); H & K Cover (UDYAM-GJ-20-0102338)	The sector reportedly expanded from 3–4 producers to more than 15 producers after ADD created more stable market conditions. Stakeholders indicate that the industry is again facing pressure from dumped imports priced below raw-material cost.
Ceramic ware	MSME manufacturing clusters, especially small ceramic units	Sectoral cluster-driven MSME ecosystem	ADD helped domestic ceramic units compete against underpriced imports and supported continued production across MSME-led clusters.
Fishnets	Micro and small producers in coastal and polymer-based manufacturing clusters	Micro fishnet manufacturing units	ADD helped small fishnet producers sustain operations against dumped imports and maintain their participation in the domestic market.
PVC flex film	MSME converters, printers and flexible packaging-linked units	Printing and flexible-packaging MSMEs	ADD enabled domestic producers to stabilise operations and encouraged new capacity creation in India.

Pyrazolone	Chemical intermediate manufacturers	Panchamrut Chemicals Pvt Ltd (UDYAM-GJ-17-0001433); Oric Organic Chemicals Pvt Ltd (UDYAM-MH-19-0022711)	ADD supported fresh investment in domestic production capacity by reducing the injury caused by dumped imports.
Sulphur black	Small dye and chemical producers	Swati Petro Products Pvt Ltd (UDYAM-MH-33-0076655)	The sector has several small producers. ADD helped maintain domestic production and prevented further displacement by dumped imports.
Vacuum flasks	MSME and mid-sized consumer goods manufacturers	Jenil Techno Industries (UDYAM-GJ-22-0026063); Kiara Slides India Pvt Ltd (GJ20B0055298); Slide Tech Industries (UDYAM-GJ-20-0032640); Suketu Enterprise (UDYAM-GJ-01-0177326); Vinayak International (HR05B0001984)	ADD contributed to new domestic production capacity being established in India and supported import substitution in household goods.
Vitrified tiles	MSME-heavy ceramic cluster ecosystem	Morbi and Gujarat-linked MSME tile clusters	ADD supported the expansion of domestic manufacturing from a small producer base to a much larger cluster-driven industry. India subsequently became one of the major global producers of vitrified tiles.
Plastic processing machines	MSME machinery manufacturers and upstream suppliers	Plastic-processing and tooling MSMEs	ADD helped maintain fair market conditions for domestic machinery manufacturers and supported MSME-linked suppliers in the engineering value chain.

Annexure I

Potential forex savings from avoidable imports (in INR cr.)

S No	Product	Anti Dumping Duty Status	Year 1	Year 2	Year 3	Year 4
1	Beta Napthol	MoF* Pending	153.41	206.4	168.68	157.72
2	PET Resin	MoF Pending	537.88	246.43	435.57	1,774.63
3	PAN	MoF Pending	503.8	384.19	854.71	436.04
4	LFT	MoF Pending	-	0.42	2.94	0.71
5	DASDA	MoF Pending	44.36	112.76	15.14	32.85
6	TDQ	MoF Pending	34.02	87.53	88	58.12
7	Sulphenamides Accelerators	MoF Pending	244.5	260.45	267.33	232.2
8	Metcoke	MoF Pending	2,844.76	9,197.40	8,445.14	10,009.45
9	MIPA	MoF Pending	35.77	9.41	24.1	78.59
10	PVC Paste	MoF Pending	73.18	13.07	-	22.18
11	VFY	MoF Pending	360.38	351.73	397.77	380.94
12	FSB	MoF Pending	216.29	172.96	128.9	327.6
13	MAA	MoF Pending	186.02	113.79	70.2	51.92
14	2 EH	MoF Pending	161.23	159.48	18.64	192.13

*Duty to be notified by the Ministry of Finance

15	NBA	MoF Pending	302.01	234.03	185.3	204.02
16	ESBR	MoF Pending	333.83	539.16	943.08	296.1
17	PET Flims	MoF Pending	30.51	55.73	211.88	526.93
18	NFY	MoF Pending	995.98	840.46	939.71	884.96
Sub-total in INR cr.			**7,057.94**	**12,985.42**	**13,197.07**	**15,667.10**
19	Nylon 6	Finding by Sep-end	572.3	509.69	451.66	493
20	TiO2	Finding by Sep-end	623.49	678.01	881.49	825.52
21	PTBP	Finding by Sep-end	166.5	1.96	50.06	13.67
22	UV770	Finding by Sep-end	-	16.79	54.34	93.62
23	Melamine	Finding by Sep-end	37.91	75.99	100.07	102.06
24	EDA	Finding by Sep-end	137.62	9.94	172.16	174.25
25	PX-13	Finding by Sep-end	351.93	334.54	307.27	303
26	4ADPA	Finding by Sep-end	95.64	245.83	208.08	173.37
27	R32	Finding by Sep-end	208.95	82.38	233.08	64.53
28	HFC Blend	Finding by Sep-end	20,386	63.38	77.37	16.76
29	R125	Finding by Sep-end	1.6	2.56	95.72	105.3
30	HIIR	Finding by Sep-end	314	642.4	665.69	528.82

31	Sublimation Paper	Finding by Sep-end	10.37	51.03	393.29	331.79
32	Nylon Chips	Finding by Sep-end	398.36	365.39	391.69	341.46
33	PVC Suspension	Finding by Sep-end	376.92	914.22	649.85	581.98
34	Aluminium Foil	Finding by Sep-end	360.38	351.73	397.77	380.94
35	Phosphonates	Finding by Sep-end	92.57	42.22	19.8	22.28
36	CR SS	Finding by Sep-end	1,977.72	4,686.02	5,389.57	5,205.38
37	Rubber Gloves	Finding by Sep-end	-	28.67	69.57	55.84
38	DINP	Finding by Sep-end	162.83	281.15	340.53	264.68
39	DOTP	Finding by Sep-end	100.02	229.35	410.28	475.52
40	Seamless Pipes	Finding by Sep-end	1,457.75	2,497.46	1,841.73	1,647.12
41	Belting Fabric	Finding by Sep-end	23.71	6.65	40.58	58.73
42	Borosilicate	Finding by Sep-end	-	-	-	91.49
43	MICA Pigment	Finding by Sep-end	62.4	38.4	44.67	36.08
44	VPB	Finding by Sep-end	0.74	14.18	3.18	422.06
45	Mobile Cover	Finding by Sep-end	17.17	6.38	63.38	63.61
Sub-Total in INR cr			**7,754.74**	**12,176.32**	**13,352.89**	**12,872.87**
Total in INR cr			**14,812.68**	**25,161.74**	**26,549.97**	**28,539.97**

Methodology:

1.Case where Domestic Capacity is greater than Domestic Demand

Imports beyond the quantity that domestic producers can supply are treated as avoidable. These imports represent potential foreign exchange savings, since they could have been replaced by domestic production.

2. Case where Domestic Capacity is less than Domestic Demand

In sectors where domestic capacity exists but is underutilised due to dumped imports, the portion of imports exceeding domestic capacity is treated as avoidable. This also represents potential foreign exchange savings, as the unused domestic capacity could have met part of the demand.







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