Australian Government
Department of Industry, Science and Resources

Anti-Dumping Commission

ANTI-DUMPING NOTICE NO 2026/127

Customs Act 1901 – Part XVB

Zinc coated (galvanised) steel

Exported from the Republic of India, Malaysia and the Socialist Republic of Vietnam

Initiation of a Continuation Inquiry No 716 into Anti-Dumping Measures

Notice under section 269ZHD(4) of the Customs Act 1901

I, Isolde Lueckenhausen, Acting Commissioner of the Anti-Dumping Commission (Commissioner),[1] have initiated an inquiry into whether the continuation of anti-dumping measures in respect of zinc coated (galvanised) steel (the goods) exported to Australia from the Republic of India (India), Malaysia and the Socialist Republic of Vietnam (Vietnam) is justified (the anti-dumping measures). The anti-dumping measures are in the form of a dumping duty notice applying to goods exported to Australia from India, Malaysia and Vietnam, and a countervailing duty notice applying to goods exported to Australia from India.[2]

The anti-dumping measures are due to expire on 16 August 2027 (specified expiry day).[3]

1. The goods

The goods subject to the anti-dumping measures and this inquiry are:

> *Flat rolled iron or steel products (whether or not containing alloys) that are plated or coated with zinc exported to Australia from India, Malaysia and Vietnam. These goods are generically called 'galvanised steel'. Galvanised steel of any width is included in this application.*

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[1] References in this document to individuals holding positions within the Anti-Dumping Commission (the commission) are references to whoever occupies the position at the time. This includes when the position is held in an acting capacity.

[2] The dumping duty notice does not apply to goods exported to Australia from Vietnam by Hoa Sen Group and Nam Kim Steel Joint Stock Company.

[3] On and from 17 August 2027, i.e. the day after the specified expiry day, if not continued, the anti-dumping measures would no longer apply.

These goods do not include painted galvanised steel, pre-painted galvanised steel, electro-galvanised steel, corrugated galvanised steel or zinc alloy coated or plated steel.

Additional information

The goods include the same categories of goods as identified in Trade Measures Report No. 190 and 193, however, this application also includes goods that are alloyed (i.e. with minor additions, e.g. boron, chromium, etc). The goods the subject of this application include all zinc coated product options, including all grades/models of zinc coated steel, all coating mass classes and all surface treatments.

Trade or further generic names often used to describe the goods the subject of the application include:

- *"GALVABOND®" steel*
- *"ZINCFORM®" steel*
- *"GALVASPAN®" steel*
- *"ZINCHITEN®" steel*
- *"ZINCANNEAL" steel*
- *"ZINCSEAL" steel*
- *Galv*
- *GI*
- *Hot Dip Zinc coated steel*
- *Hot Dip Zinc/Iron alloy coated steel*
- *Galvanneal*

The amount of zinc coating on the steel is described as its coating mass and is nominated in grams per meter squared (g/m²) with the prefix being Z (Zinc) or ZF (Zinc converted to a Zinc/Iron alloy coating). The common coating masses used for zinc coating are: Z350, Z275, Z200/Z180, Z100, and for zinc/iron alloy coatings are ZF100, ZF80 and ZF30 or equivalents based on international standards and naming conventions.

Surface treatments can include but not be limited to; passivated or not passivated (often referred to as chromated or unchromated), oiled or not oiled, skin passed or not skin passed, phosphated or not phosphated (for zinc iron alloy coated steel only).

There are a number of relevant International Standards for zinc coated products that cover their own range of products via specific grade designations, including the recommended or guaranteed properties of each of these product grades. These relevant standards are noted below in Table 1.

International Standards	Product Grade Names
General and Commercial Grades	
AS/NZS 1397	G1, G2
ASTMA 653/A 653M	CS type A, B and C
EN 10346	DX51D, DX52D
JIS 3302	SGCC, SGHC
Forming, Pressing & Drawing Grades	
AS/NZS 1397	G3
ASTMA 653/A 653M	FS, DS type A and B
EN 10346	DX53D, DX54D
JIS 3302	SGCD, SGCDD
Structural grades	
AS/NZS 1397	G250, G300, G350, G450, G500, G550

International Standards	Product Grade Names
ASTMA 653/A 653M	33 (230), 37 (255), 40 (275), 50 (340), 55 (380), 80 (550)
EN 10346	S220GD, S250GD, S280GD, S320GD, S350GD, S550GD
JIS 3302	SGC340, SGC400, SGC440, SGC490, SGC570, SGH340, SGH400, SGH440, SGH490, SGH570

Table 1: Relevant International Standards for zinc coated steel

There are also current exemption notices applying to the goods. Further details of the exempt goods and the relevant exemption notices are available on the Dumping Commodity Register (DCR)[4] for the goods.

The goods are generally, but not exclusively, classified to the following tariff subheadings (Table 2, below) of Schedule 3 to the *Customs Tariff Act 1995*:[5]

Tariff Subheading	Statistical Code	Description
7210	FLAT-ROLLED PRODUCTS OF IRON OR NON-ALLOY STEEL, OF A WIDTH OF 600 mm OR MORE, CLAD, PLATED OR COATED	
7210.49.00	55	Of a thickness of less than 0.5 mm
	56	Of a thickness of 0.5 mm or more but less than 1.5 mm
	57	Of a thickness of 1.5 mm or more but less than 2.5 mm
	58	Of a thickness of 2.5 mm or more
7212	FLAT-ROLLED PRODUCTS OF IRON OR NON-ALLOY STEEL, OF A WIDTH OF LESS THAN 600 mm, CLAD, PLATED OR COATED	
7212.30.00	61	- Otherwise plated or coated with zinc
7225	FLAT-ROLLED PRODUCTS OF OTHER ALLOY STEEL, OF A WIDTH OF 600 mm OR MORE:	
7225.92.00	38	-- Otherwise plated or coated with zinc
7226	FLAT-ROLLED PRODUCTS OF OTHER ALLOY STEEL, OF A WIDTH OF LESS THAN 600 mm:	
7226.99.00	71	-- Other

Table 2: General tariff classification for the goods

2. Background to the anti-dumping measures

The anti-dumping measures were initially imposed by public notice on 16 August 2017 by the then Assistant Minister for Industry, Innovation and Science and Parliamentary Secretary to the Minister for Industry, Innovation and Science.[6] This followed their consideration of the Commissioner's recommendation in *Anti-Dumping Commission Report No 370* (REP 370)[7] as a result of Investigation 370 (the original investigation).

The anti-dumping measures are in the form of a dumping duty notice for India, Malaysia and Vietnam[8] and a countervailing duty notice for India only.

[4] A list of excluded goods is available on the commission's DCR.

[5] These tariff classifications and statistical codes may include goods that are both subject and not subject to the anti-dumping measures. The listing of these tariff classifications and statistical codes are for convenience or reference only and do not form part of the goods description. Please refer to the goods description for authoritative detail regarding goods subject to the anti-dumping measures.

[6] Anti-Dumping Notice (ADN) No 2017/99 refers.

[7] Electronic Public Record (EPR) 370, item 106

[8] Nam Kim Steel Joint Stock Company and Hoa Sen Group from Vietnam are exempt exporters

The original investigation and the imposition of the anti-dumping measures resulted from an application made under section 269TB of the *Customs Act 1901*[9] by BlueScope Steel Limited (BlueScope), the sole member of the Australian industry producing like goods to the goods subject to the anti-dumping measures.

On 19 March 2021, the then Minister for Industry, Science and Technology altered variable factors relevant to the determination of duty under the dumping duty and countervailing notices for the goods exported from India, Malaysia and Vietnam, resulting from their findings in relation to Review of Measures 521.[10]

On 28 July 2022, the then Minister for Industry and Science continued the anti-dumping measures for a further 5 years to 16 August 2027 in response to the findings of Continuation Inquiry 592 (CON 592).[11]

Further details on the goods and existing measures are available on the Dumping Commodity Register on the Anti-Dumping Commission's (commission) website (www.adcommission.gov.au).

3. Application for continuation of the anti-dumping measures

Division 6A of Part XVB sets out, among other things, the procedures to be followed in dealing with an application for the continuation of anti-dumping measures.

In accordance with section 269ZHB(1), I published a notice[12] on the commission's website on 16 June 2026. The notice invited the following persons to apply for the continuation of the anti-dumping measures:

- the person whose application under section 269TB resulted in the anti-dumping measures (section 269ZHB(1)(b)(i)), or
- persons representing the whole or a portion of the Australian industry producing like goods to the goods covered by the anti-dumping measures (section 269ZHB(1)(b)(ii)).

On 17 August 2026, an application for the continuation of the anti-dumping measures was received from BlueScope. A non-confidential version of the application is available on the commission's electronic public record (EPR). Having regard to the application and the original investigation, I am satisfied that BlueScope is the person under section 269ZHB(1)(b)(i) because its application under section 269TB resulted in the existing anti-dumping measures.

4. Consideration of application under section 269ZHD(1)

Pursuant to section 269ZHD(1), I must reject an application for the continuation of anti-dumping measures if I am not satisfied of one or more of the matters referred to in section 269ZHD(2). These are:

- the application complies with section 269ZHC (section 269ZHD(2)(a)), and
- there appear to be reasonable grounds for asserting that the expiration of the anti-dumping measures to which the application relates might lead, or might

[9] All legislative references in this notice are to the *Customs Act 1901,* unless otherwise stated.

[10] ADN No 2021/012 and Anti-Dumping Commission Report No 521 (REP 521) refer.

[11] ADN No 2022/063 and Anti-Dumping Commission Report No 592 (REP 592) refer.

[12] ADN No 2026/065 refers.

be likely to lead, to a continuation of, or a recurrence of, the material injury that the measures are intended to prevent (section 269ZHD(2)(b)).

5. Assessment under section 269ZHD(2)(a) - compliance with section 269ZHC

I consider that the application complies with the requirements of section 269ZHC because it is in writing, in a form approved by me for the purposes of this section, contains the information that the form requires, is signed in the manner indicated by the form, and was lodged in a manner approved under section 269SMS, being by email to the commission's email address provided in the instrument under section 269SMS.[13]

6. Assessment under section 269ZHD(2)(b) – reasonable grounds

<u>Applicant's claims</u>

In its application, BlueScope claimed that the expiry of the measures would lead, or would be likely to lead, to a continuation of, or a recurrence of, the dumping and/or the subsidisation and the material injury that the anti-dumping measures are intended to prevent.

BlueScope made the following claims that:

- exports are likely to continue or recur, given that:
    - the absence of exports from India and Malaysia, and the negligible volume from Vietnam since the last continuation inquiry, reflect the effects of the measures and do not indicate that the risk of exports from the subject countries has ceased
    - exporters from the subject countries have historical commercial and distribution links with the Australian market that could be readily re-established in the absence of measures
    - Australia remains an attractive and accessible market for exports from the subject countries given the trade defence measures in other jurisdictions.
- exports are likely to recur or continue to be dumped and subsidised as:
    - dumping and subsidisation (India only) was found in the original investigation
    - based on its own calculations, exports between 1 July 2025 and 30 June 2026 from Vietnam were at dumped prices
    - exporters are affected by global steel overcapacity and trade distortions caused by trade measures in other jurisdictions provide an environment in which the goods are more likely to be exported at dumped prices
    - based on information published by the OECD and others, producers of the goods in India likely continue to benefit from substantial subsidies.
- material injury is likely to continue or recur as:

[13] A copy of the instrument can be found on the commission's website at www.adcommission.gov.au.

  - the commission found previously that the Australian industry suffered material injury from dumped and subsidised imports, including price depression, reduced profits and loss of market share
  - subject countries will likely resume or increase exports of dumped and/or subsidised goods in the absence of measures
  - subject-country imports would likely undercut Australian prices and cause price suppression and price depression
  - the Australian market is price-sensitive, and the goods exported from subject countries are highly substitutable with Australian like goods
  - increased imports from the subject countries would likely result in reduced market share, lost sales volume, price depression and suppression, reduced sales revenue, lower profits and profitability, and reduced return on investment and capacity utilisation.

In support of its claims, BlueScope provided:

- data indicating that the subject countries have not exported the goods to Australia and exports of the goods from countries other than the subject countries have continued
- an estimate of the dumping margin for the goods exported from Vietnam in the period July 2025 to June 2026
- information concerning steel production overcapacity in the subject countries and globally, including that in China and its effects on steel trade in the region
- information on the government policy environment in India relating to the facilitation and development of its steel industry
- information on the relative size of the Australian market for galvanised steel
- information on the forms of material injury that may continue or recur if the measures expire.

7. The commission's consideration

The commission considered whether the expiry of the anti-dumping measures is likely to lead to a continuation or recurrence of the dumping and material injury that the measures are intended to prevent. The commission's assessment is that, based on the information contained in the application, there are reasonable grounds for the applicant to claim this may be the case.

In assessing the applicant's claims, I have considered the information obtained from the Australian Border Force (ABF) import database, the findings in REP 592 and other information relevant to the application.

<u>Continuation or recurrence of exports</u>

The commission examined information from the ABF import database and found that exports of the goods from Vietnam continued following the imposition of the anti-dumping measures. No exports from Malaysia were identified in the period, while some exports from India were identified, the volumes were small.

The continued exportation of the goods from Vietnam, and to a lesser extent India, demonstrates that limited distribution links with the Australian market have been maintained. While exports from India were small, their continued presence shows that some commercial links remain. The commission considers distribution links may be readily re-established noting the accessibility of the Australian market and trade defence measures in other jurisdictions. The absence of exports from Malaysia provides limited evidence of ongoing distribution links with the Australian market.

Having regard to the information identified above, I consider that there appears to be a reasonable basis for BlueScope's claim that exporters from the subject countries have maintained or may readily re-establish distribution links with the Australian market if the measures expire.

<u>Continuation or recurrence of dumping and/or subsidisation</u>

In its application, BlueScope provided estimated dumping margins to support its claim that dumping by Vietnamese exporters is likely to continue or recur in the absence of measures. The commission examined BlueScope's methodology and considered that BlueScope's approach to constructing normal values and export prices, including adjustments, appears reasonable given the limited publicly available information. Based on BlueScope's estimated dumping margins, there appear to be reasonable grounds for asserting that exports from Vietnam may continue or recur at dumped prices in the absence of measures.

In relation to India and Malaysia, the application relies primarily on the commission's findings in the previous continuation inquiry, evidence of historical dumping and information concerning global steel market conditions. The commission observed that exports from India were negligible and no exports from Malaysia were identified during the inquiry period proposed by the applicant. Nonetheless, the information provided to the commission reasonably supports BlueScope's claim that dumping may continue or recur if the measures expire. In relation to the continued subsidisation of exports from India, the application relies primarily on findings from the previous continuation inquiry and contains limited additional evidence to support the claim. Nevertheless, the material provided reasonably supports BlueScope's claim that subsidisation may continue or recur if the measures expire.

Having regard to the information available to BlueScope, I consider that there appear to be reasonable grounds for asserting that dumping of exports from the subject countries may continue or recur if the measures expire. I also consider that there appear to be reasonable grounds for asserting that subsidisation of exports from India may continue or recur if the measures expire.

<u>Continuation or recurrence of material injury</u>

BlueScope claims that, if the measures were to expire, imports of dumped goods from the subject countries would likely increase and contribute to price depression and price suppression in the Australian market. BlueScope also submitted that the Australian industry's unit selling prices have been depressed and suppressed relative to costs throughout the analysis period, resulting in declining profits and profitability. BlueScope claimed that its narrow net sales margins make it particularly vulnerable to further price declines and that any additional downward pressures on prices would adversely affect returns, profits and profitability.

In relation to material injury, the application relies substantially on the commission's findings in the previous continuation inquiry, together with information concerning current market conditions, trade patterns, excess capacity in the subject countries and confidential information concerning the Australian industry's performance. While the assessment of future injury is necessarily prospective, the information provided reasonably supports BlueScope's claim that material injury to the Australian industry may continue or recur if the measures expire.

Having regard to the information available to BlueScope, I consider that there appear to be reasonable grounds for asserting that material injury to the Australian industry may continue or recur if the measures expire.

8. Conclusion

Having regard to the application, BlueScope's claims and other relevant information set out in this notice, I am satisfied that, in accordance with section 269ZHD(2)(b), there appear to be reasonable grounds for asserting that the expiration of the anti-dumping measures might lead, or might be likely to lead, to a continuation of, or a recurrence of, the material injury that the measures are intended to prevent.

Based on the above findings, I have therefore decided to not reject the application.

9. This continuation inquiry

For the purpose of this inquiry, the commission will examine the period from 1 July 2025 to 30 June 2026 (the inquiry period) to determine whether dumping and subsidisation have occurred and whether the variable factors relevant to the determination of duty have changed.

Following the inquiry, the Commissioner will recommend to the Minister for Industry and Innovation and Minister for Science (the Minister), whether the notices should:

(i) remain unaltered, or

(ii) cease to apply to a particular exporter or to a particular kind of goods, or

(iii) have effect in relation to a particular exporter or to exporters generally, as if different variable factors had been ascertained, or

(iv) expire on the specified expiry day.

10. Exporter questionnaires

Exporters of the goods to Australia are invited to participate in this inquiry by completing the exporter questionnaire and the associated spreadsheets by 16 October 2026.

The exporter questionnaire and the associated spreadsheets are available under the case information for case number 716.[14] Alternatively, exporters can email investigations@adcommission.gov.au to request the exporter questionnaire and spreadsheets for completion.

11. Proposed model control code structure

The commission undertakes model matching using a Model Control Code (MCC) structure to identify key characteristics that will be used to compare the goods exported to Australia and the like goods sold domestically in the country of export.[15]

The table below outlines the commission's proposed MCC structure for this inquiry.

[14] EPR 716

[15] Guidance on the commission's approach to model matching is in the Dumping and Subsidy Manual, available at www.adcommission.gov.au.

Item	Category	Sub-Category	Identifier	Sales Data	Cost Data
1	Alloy content	Alloy	A	Mandatory	N/A
		Non-alloy	NA		
2	Prime	Prime	P	Mandatory	N/A
		Non-prime	N		
3	Steel Base	Hot Rolled	H	Mandatory	Mandatory
		Cold Rolled	C		
4	Coating Type	Zinc Coated (Z)	Z	Mandatory	Mandatory
		Zinc / Iron Alloy Coating (ZF / F)	F		
5	Coating Mass	<= 100 g/m2	1	Mandatory	Mandatory
		>100 g/m2 to ≤ 220 g/m2	2		
		> 220 g/m2 to ≤ 300g/m2	3		
		> 300 g/m2 to ≤ 400 g/m2	4		
		> 400 g/m2	5		
6	Steel Grade	G2 / SGCC / SGHC	A	Mandatory	Mandatory
		G3 / SGCD	B		
		G250 / SGC 340 / SGHC 340	C		
		G300 / G350 / SGC 400 / SGHC 400 / SGC 440 / SGCH 440 / SGC 490 / SGHC 490	D		
		G450 / G500	E		
		G550 / SGC 570	F		
		Other	G		
7	Base Metal Thickness	< 0.40 mm	1	Mandatory	Mandatory
		≥ 0.40 mm to < 0.50 mm	2		
		≥ 0.50 mm to < 0.75 mm	3		
		≥ 0.75 mm to < 1.00 mm	4		
		≥ 1.00 mm to < 1.50 mm	5		
		≥ 1.50 mm to < 2.00 mm	6		
		≥ 2.00 mm to < 2.50 mm	7		
		≥ 2.50 mm	8		
8	Width	< 600 mm	A	Mandatory	Optional
		≥ 600 mm to ≤ 1220 mm	B		
		> 1220 mm	C		
9	Form	Coil	C	Mandatory	Optional
		Sheet	S		

Table 3: Proposed MCC structure

Proposals to modify the proposed MCC structure should be raised as soon as is practicable, but no later than **16 October 2026**.

Interested parties are encouraged to make a submission on whether any proposed modifications to the MCC structure should be accepted by the commission. Any changes to the MCC structure will be considered by the commission and reported in verification reports or in the statement of essential facts (SEF).

12. Public record

The commission must maintain a public record for this inquiry. The EPR hosted on the commission's website (www.adcommission.gov.au) contains, among other things, a copy of all non-confidential submissions from interested parties. Documents hosted on the EPR can be provided upon request to interested parties.

Interested parties can subscribe to the commission's *Weekly Update*, which provides weekly notifications on updates to this case, other cases and notices published on the commission's website.

13. Submissions

Interested parties, as defined in section 269T(1), are invited to lodge written submissions concerning the continuation of the measures, no later than the close of business on **16 October 2026**, being 37 days after publication of this notice. The commission's preference is to receive submissions by email to investigations@adcommission.gov.au.

Submissions may also be addressed to:

The Director, Investigations
Anti-Dumping Commission
GPO Box 2013
Canberra ACT 2601

Interested parties wishing to participate in the inquiry must ensure that submissions are lodged promptly. Interested parties should note that the Commissioner is not obliged to have regard to a submission received after the date indicated above if to do so would, in the Commissioner's opinion, prevent the timely placement of the SEF on the public record.

Interested parties claiming that information contained in their submission is confidential, or that the publication of the information would adversely affect their business or commercial interests, must:

(i) provide a summary containing sufficient detail to allow a reasonable understanding of the substance of the information that does not breach that confidentiality or adversely affect those interests, or

(ii) satisfy the Commissioner that there is no way such a summary can be given to allow a reasonable understanding of the substance of the information.

Submissions containing confidential information must be clearly marked "OFFICIAL: Sensitive". Interested parties must lodge a non-confidential version or a summary of their submission in accordance with the requirement above (clearly marked "PUBLIC RECORD").

14. Statement of essential facts

The dates specified in this notice for lodging submissions must be observed to enable the Commissioner to report to the Minister within the legislative timeframe. The Commissioner will place the statement of essential facts (SEF) on the public record on or before **4 January 2027**, that is, the first business day after 110 days from the publication of this notice[16], or by such later date as the Commissioner may allow in accordance with section 269ZHI(3). The SEF will set out the essential facts on which the Commissioner proposes to base a recommendation to the Minister concerning the continuation of the anti-dumping measures.

Interested parties are invited to lodge submissions in response to the SEF within 20 days of the SEF being placed on the public record. Submissions received in response to the SEF within 20 days of the SEF being placed on the public record

[16] The date that is 110 days after the publication is **28 December 2026**, which is within the commission's Annual Closedown period, so the commission will publish the SEF on the next business day, being 4 January 2027 – ADN 2024/075 refers.

will be taken into account in completing the Commissioner's report and recommendation to the Minister.

15. Report to the Minister

The Commissioner will make a recommendation to the Minister in a report on or before **11 February 2027**, that is, within 155 days after the date of publication of this notice, or such later date as the Commissioner may allow in accordance with section 269ZHI(3).[17]

The Minister must make a declaration within 30 days after receiving the report, or if the Minister considers there are special circumstances, such longer period, ending before the specified expiry day, as the Minister considers appropriate. If the Minister receives the report less than 30 days before the specified expiry day, the Minister must make the declaration before that day.

16. The commission contact

Enquiries about this notice may be directed to the Case Manager via email at investigations@adcommission.gov.au.

Isolde Lueckenhausen
Acting Commissioner
Anti-Dumping Commission

9 September 2026

[17] The Minister's powers under section 269ZHI were delegated to the Commissioner by the *Anti-Dumping Delegation 2017*. ADN No 2017/10 refers.