Impact of WTO Rules on UK Supply Chain Companies
Summary

Introduction

Typically, mechanical and electronic engineering companies supply the hardware, software and services that other manufacturing end user sectors use to make their goods. As a result, they are key players in UK supply chains, both nationally and internationally. The aim of this survey is shed some light on what Brexit might mean for those supply chain companies and to produce a positive agenda that works round the problems Brexit raises for the companies.

The companies and their performance

This report is based on the views of 144 companies. The results have been segmented by size (micro, small medium and large) and by activity: companies deriving 50% of more of their turnover from exports, super exporters (SEs), the same for importers, super importers (SIs) and firms that regularly both import and export (ExIms). For more data please see annex D.

The report models an approximation of each firm's financials (Micro (£0.75m), Small (£4.75m), Medium (£24m) and Large (£125m)) to produce a picture of turnover, export and import performance for the whole cohort and the various company size and activity segments.

Out of a total turnover of £4.7 billion, exports are estimated at £1.1 billion and imports at £1.6 billion.

The size and shape of the EU in our supply chains

- EU trade accounts for 31% of sector turnover: exports 10%, imports 21%. That's the crude data impact. But there are three other basic benefits to consider with regard to EU membership.
- The Single Market. It's the UK's frictionless domestic market, all 550 million consumers of it, that makes it easier for UK companies to gain economies of scale in production by successfully marketing their goods in the world's largest unified market. (Given the UK's overall export intensity in different markets, a 5% loss in the EU would require a 25% gain in its BRIC market share just to offset it.[1])
- IP and technology. Mechanical and electronic engineering are core European (including the UK) industrial strengths, exported all over the world. UK companies, including leaders in their own fields, have access to this IP and the ability to work collaboratively with these leading high technology companies and organisations in commercial and innovation ventures
- Further frictionless competition pushes good performers to excel and in doing so to gain wider markets.
- There's plenty of supply chain cross national border trade to produce the products (see Annex A for a list of the sample products and B for where the products fit in the supply chain).
    - Specialist Exporters (SEs) estimate the UK content of their exports at 60% and imported content at 33%.
    - For all companies' exports, average domestic content across the survey is somewhat lower (51%) and higher for imported components (45%)
    - Specialist Importers (SIs) estimate their imported content on goods re-exported at 77% and UK content at 18%.

Confidence – Business gain/loss probabilities for EU and UK markets in next three years

- Companies were asked to rate the likelihood over the next three years of their winning and losing business in the EU and the UK as high, medium and low.
    - Overall, more than half the companies think they are likely to gain EU business (probability score 1.7 -- 52% high/medium likelihood).
    - A big majority (65%) rate the likelihood of their losing EU business low (probability score 1.5)
    - The most positive activity group on EU business are the ExIms (probability score 2.0 on gains, and 1.6 on losses).
    - The scores are generally more bullish for UK business over the next three years (overall gains 1.9 and losses 1.5).
    - The activity groups either equal or improve on this (e.g. ExIms 2.1 gains, 1.5 losses). The same applies to the size segments, except for large companies.
- Large companies rate their gain and loss probabilities almost equally whether it's for EU or for UK business (EU gain 1.8, EU loss 1.7; UK gain 1.7, UK loss 1.6).

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[1] Sir Simon Fraser: Tacitus Lecture, February 2017

On-going trading environment

- Companies are dealing with a trading environment which is becoming increasingly uncertain, as the outcomes are going to be politically determined, not based on rational economic considerations.
- Big companies are drawing their own conclusions, putting in contingency plans in place.
- Smaller companies don't have the same scope.
- UK's export performance is crucially dependent on large and medium size companies.
- Large companies also play a key role in UK's imports so do small firms (e.g. as sales offices).

Impact likely changes under WTO rules

- Many companies will want to keep selling into the EU markets (proximity, established record, part of an international supply chain). In order to do so they will have to continue to meet certain standards. These companies don't expect less specification (e.g. regulation on emissions) than in the past.
- High tech companies see conformity to agreed standards as helpful in developing and sustaining frictionless trade.
- RoW export procedures are much more complex than what's needed to trade from one EU member state to another. Companies estimate the extra costs involved compared to EU procedures at between 3-10%.
- If RoW procedures have to be implemented for all in-coming trade from EU member states, UK Customs transaction clearances will need to rise from the current 90 million clearances a year to an estimated 390 million[2].
- French, Belgian and other customs services in near neighbour nation ports will also face a significant increase in the number of UK goods to be processed speedily and efficiently.
- Companies assessed the likely impact of WTO rules on their trade flows in five key areas: trade tariffs, rules of origin, delivery times, cross frontier admin and non-tariff barriers.
    - Very few companies indeed see positives coming from the changes in any of these trade associated activities. Some changes will affect specific types of activity more than others.
    - All receive negative scores, as well as a neutral rating from a third or more of participants.
    - ***Trade Tariffs***: A third rate outcomes as very and another third as fairly negative (-64% for a -0.9 score). SIs (-1.2) and ExIms (-1.0) are particularly concerned.
    - ***Rules of Origin***: Half of respondents expect little or no change, but over half of ExIms, companies that are likely to have to deal with it on a regular basis given their import/export role rate it negatively with one in seven voting very negative.
    - ***Delivery Times***: Almost no one expects delivery times to improve, half expect no change and the other half a fairly or very negative impact.
    - ***Cross Frontier Admin***: Two-thirds expect the changes to be negative (two in five expect them to be very negative), which isn't surprising given the size of the task facing customs services handling UK trade. Medium (-1.0) and large (-1.1) companies score Cross Frontier impact higher than the overall average of -0.9.
    - ***Non-Tariff Barriers***: This is the one area where there are more than a couple of companies expecting something positive from the changes (9%). 48% foresee little or no change but the 43% who rate it negatively include 60% of the participating large firms rating -0.7 compared to the -0.4overall score.

Ten agenda items for the future

1. It is the uncertainty that will potentially be damaging over the next few years. Businesses are going to find it difficult to plan, for example not knowing if they will be able to retain employees from other EU countries. Trade bodies and others, including Government should focus where they can to help firms manage and plan through that uncertainty.
2. The UK, whether in or out of the EU, will still be located immediately adjacent to the world's largest single market. UK-based companies selling into the EU will have to comply with the relevant regulations in much the same way UK companies do at the moment when selling into the USA.
3. In the new relationship with the EU it will be important for UK companies to have direct routes to collaborate with companies, organisations and institutions in commercial projects as well as in innovation and research and development in all countries.
4. UK companies, organisations and trade bodies to maintain and develop their participation in European standards working groups and expert groups that advise on EU policy.

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[2] Home Affairs Select Committee 25 January 2017 open session "Impact of UK's departure from EU Customs Union"

5. How to help Government policy forming circles develop a greater and livelier recognition of the significance and of the standards framework as a social amenity and the underpinning role standards play in new trade development.
6. HMG to develop a clear trading policy framework on tariffs, non-tariff barriers, IP protection and rules of origin that underpins international mutual recognition of standards for frictionless trade.
7. Exports to the rest of the world (RoW) require significantly more paperwork, e.g. certificates of origin, and conformity requirements as well as the use of freight forwarders and paying customs charges at the point of entry. There are no such requirements for goods originating in the UK and shipping to other EU member states. If shipping to the EU becomes as costly as it is to RoW companies estimate the extra cost at 3-10% of current trading costs.
8. Government policy could usefully focus more on medium sized companies as lynchpins for further dynamic productivity growth. They are central to a sustained UK export effort as well as playing key roles in innovation and development.
9. Some companies do expect/hope for some regulatory simplification, e.g.: Intrastat monthly data, simpler arrangement for employing non-EU citizens, increased trade with Commonwealth countries, and less petty health and safety and money laundering regulations.
10. If immigration controls tighten, UK manufacturers may decide they need to invest in capital plant/mechanisation which could well have a very positive impact on their productivity.

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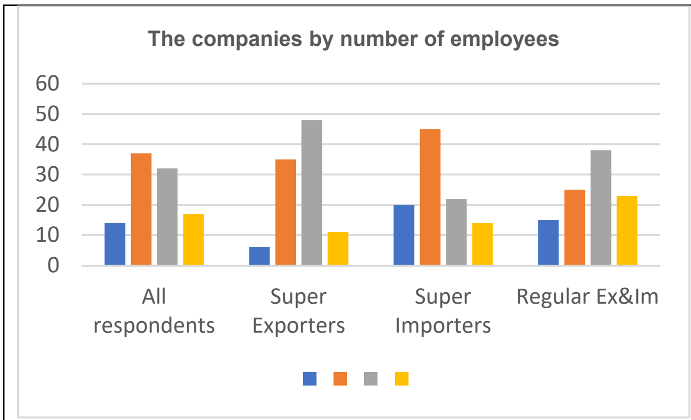
Graphs and Tables



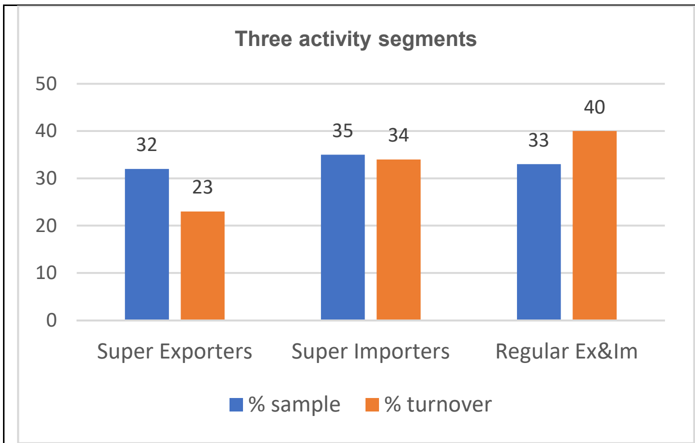
144 companies took part in the survey:

- 69% are small or medium sized
- 14% are micro businesses
- 17% are large companies

There are three segmented groups by activity:

- 46 firms export 50% of more (Super Exporters, SEs)
- 51 firms import 50% or more (Super Importers, SIs)
- 48 companies are regular both exporters and importers (Regular Ex&Im, ExIms)
- Half of SEs (48%) are medium size firms
- Two-thirds of SIs (65%) are micros or large businesses
- A similar proportion of ExIms (61%) are medium or large companies

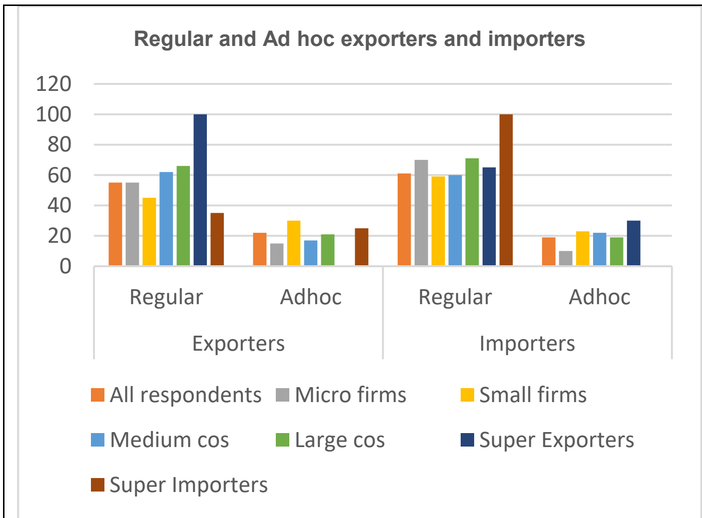
Some companies are in more than one segment.



Nearly one in four ExIms are large companies. As a result, the ExIm segment accounts for 40% of respondents' turnover, substantially more than its share of companies (33%).

The reverse applies to SEs. They have the smallest proportion of large firms (one in ten) and account for a quarter (23%) of all turnover whereas they make up a third (32%) of all companies surveyed.

SIs' ratios are more evenly spread, 35% share of companies and 34% share of turnover. A fifth of SIs are micro businesses (compared with 6% of SEs)



Amongst all respondents:

- 55% are regular exporters
- 61% are regular importers

Super Exporters (SEs)

- 65% are also regular importers
- 30% Ad hoc importers

Super Importers (SIs)

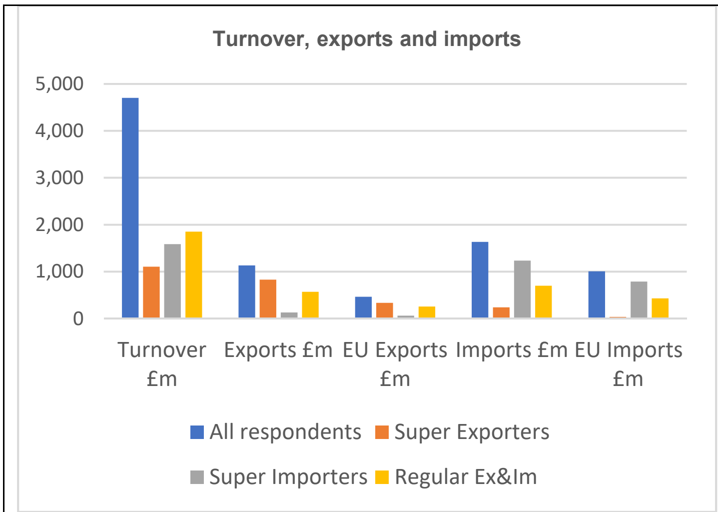
- 35% are also regular exporters
- 25 Ad hoc exporters

Around two-thirds of medium size firms (62%) and large companies (66%) export regularly. In addition, a further 17% and 21% export on an ad hoc basis, making 79% and 87% exporting respectively.

Seven in ten micro and large businesses are regular importers. Six in ten small and medium companies are regular importers

To model an approximation of the companies' performance and the impact on the supply chain we applied the following average turnovers for each company according to its size: Micro (£0.75m), Small (£4.75m), Medium (£24m) and Large (£125m) which gives the following results:

	Turnover £m	Exports £m	EU Exports £m	Imports £m	EU Imports £m
All	4,702	1,133	£464	1,634	1,008
SEs	1,107	831	335	239	35
SIs	1,587	133	63	1,237	790
ExIm	1,853	570	256	701	430
Micro firms	*37*	*3*	*1*	*26*	*24*
Small cos	*465*	*77*	*33*	*317*	*214*
Medium cos	*1,402*	*423*	*149*	*485*	*241*
Large cos	*2,798*	*630*	*281*	*806*	*529*



The 51 SIs make 76% of total imports and 12% of total exports

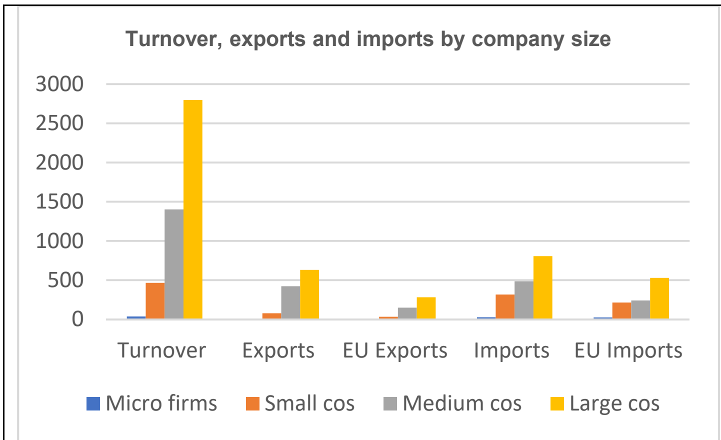
- Imports are 78% of SIs' turnover
- EU imports are 50% of SIs' turnover

The 46 SEs account for 73% of total exports and 15% of imports

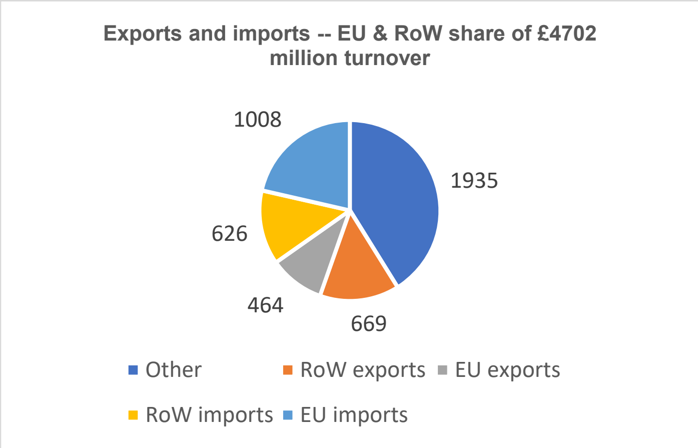
- Exports account for 75% of SEs turnover
- EU exports are 40% of SE exports
- EU imports are 15% of SE imports

The 48 ExIms make 50% of all exports and 43% of all imports.

- Exports are 31% of ExIms' turnover
- EU exports 14%
- Imports are 38% of ExIms' turnover
- EU imports 23%



- Large companies, only 17% of firms nonetheless dominate the survey (60% of turnover, 56% of exports and 49% of imports)
- Medium sized firms cover 37% of exports and 30% of imports in line with their 32% overall participation.
- Small firms make up over a third (37%) of the survey and account for just 7% of exports and 19% of imports.
- Micros are 14% of the survey by number of firms, less than one percent by turnover and exports and 2% by imports.



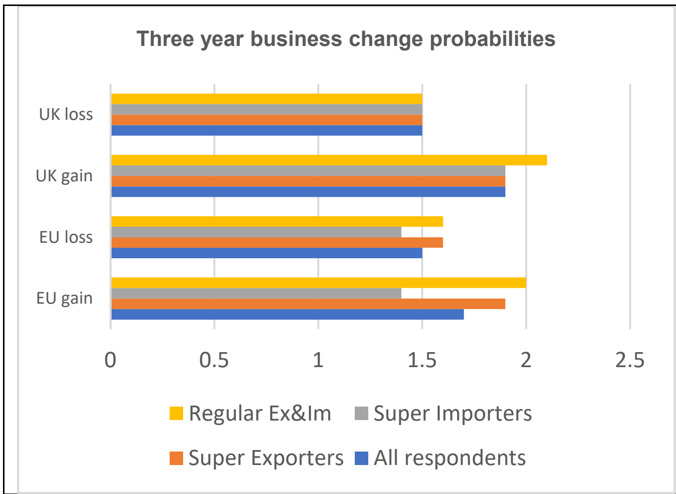
Exports are £1.1 billion, 24% of turnover.

- EU exports are 41% of all exports
- EU exports are 10% of turnover
- RoW exports are 14% of turnover

Imports are £1.6 billion or 35% of turnover

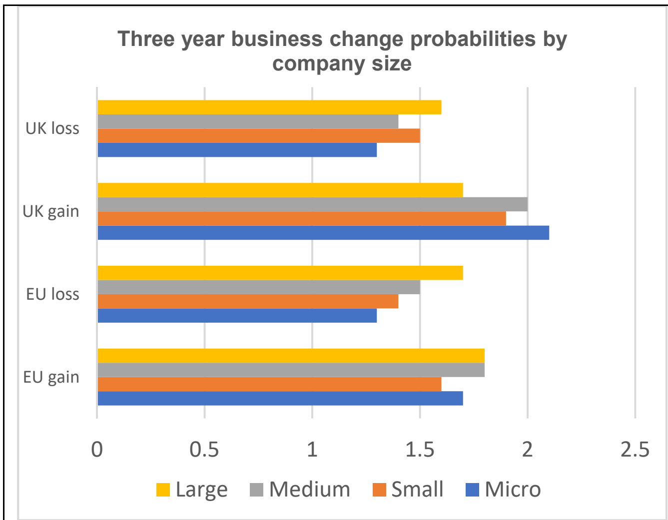
- EU imports are 21% (£1.0 billion) of turnover
- EU imports are 62% of total imports
- RoW imports are 13% of turnover

EU exports are less than half (46%) of UK's EU imports



On EU business, ExIms are more confident of making gains over the next three years and SIs generally less so. SEs are more finely balanced, with a relatively bullish attitude on gains countered by a fifth saying there is a highish probability they'll lose EU business over the next three years.

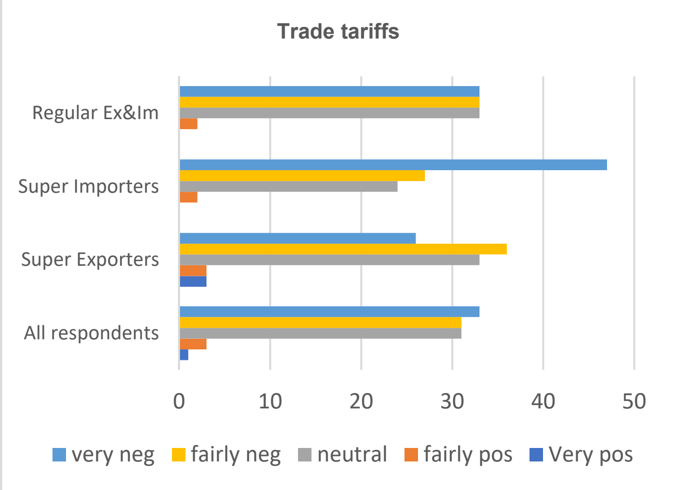
On UK business, all segments are bullish, particularly ExIms with over a third giving gains a high probability over the three years. In terms of losing business all segments appear cautiously optimistic, albeit one in eight SEs assign a high probability to some UK business loss.



Large companies assess their probabilities about future business in much narrower bands between gains and losses, whether it's EU or UK business: EU gain 1.8, EU loss 1.7; UK gain 1.7, UK loss 1.6.

Medium companies show similar appetite for EU business gains (1.8) but also more confidence about potential EU losses (1.5), a pattern repeated reference the UK: gains 2.0, losses (1.4).

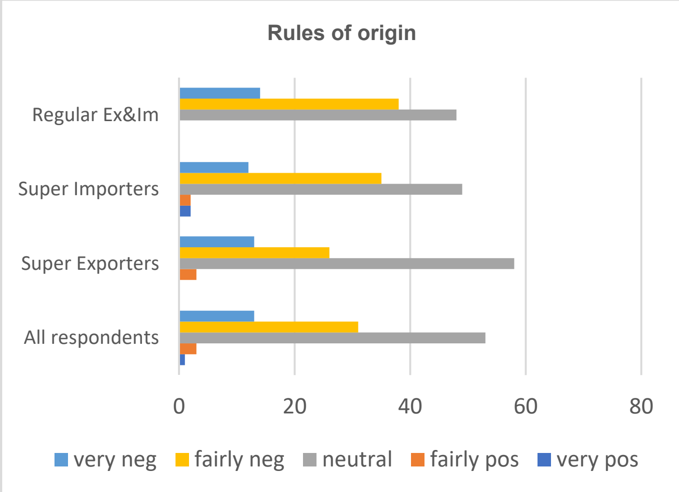
Small and micro firms are similarly confident about gains in UK business (1.9 and 2.1 respectively) but not so bullish when it comes to EU business (1.6 and 1.7 for small and micro companies.)



Overwhelming majority of companies in each segment expect trade tariffs changes to have a negative impact.

Only 4% of all respondents expect something positive.

In summary, approximately a third in each group look for a neutral impact, while two-thirds expect it to be very or fairly negative (i.e. SIs 47% very negative)

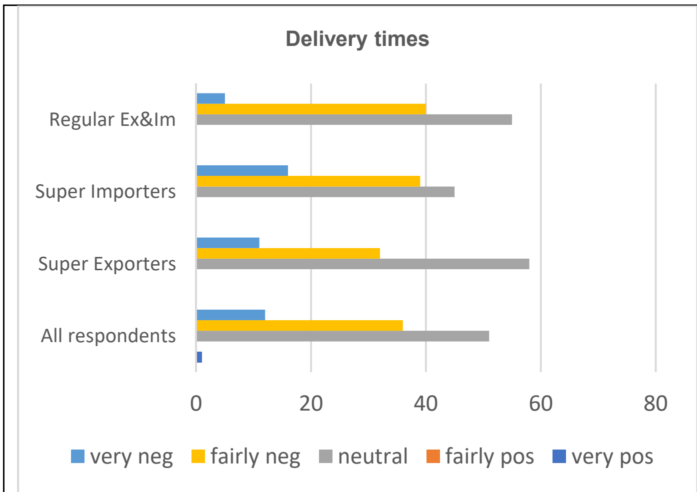


Leaving the EU is expected to affect Rules of Origin for some companies much more markedly than for others.

Around half of companies expect little or no effect.

Nonetheless, over half of ExIms (52%) and 47% of SIs think the impact will be fairly or very negative.

Almost two-thirds of large companies (62%) expect the impact to be fairly or very negative (medium companies 42% negative), whereas micros and small firms are more relaxed about the impact on their businesses, perhaps reflecting their businesses greater focus on importing into the UK.

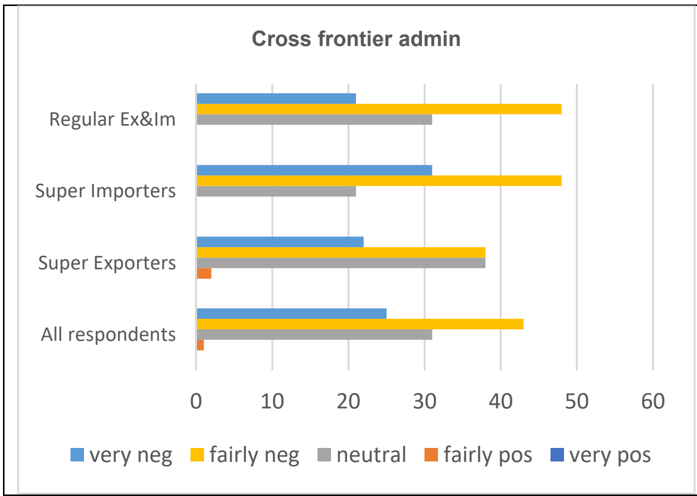


Almost no one expects changes to delivery times to be improved as a result of leaving the EU.

Majorities, 45-58% depending on the segment, think there'll be little or no change. But the remainder all expect a negative hit.

In the case of the SIs, 16% expect it to be very negative which doesn't augur well for UK-based supply chains.

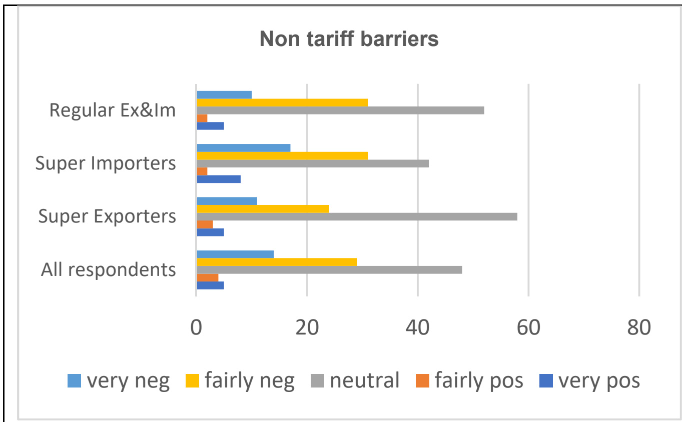
Half of all firms except amongst micros (31%) see delivery times being fairly or very negatively affected as a result of leaving the EU.



Although nearly four in ten SEs expect little or no change, 60% do think it will have a negative impact (over a fifth very negative, 22%) with nearly half of SIs and ExIms expressing similarly negative views (21-31% very negative) and 48% fairly negative.

Nine in ten large and seven in ten medium size companies expect the fall-out to be negative (a fifth or more very negative).

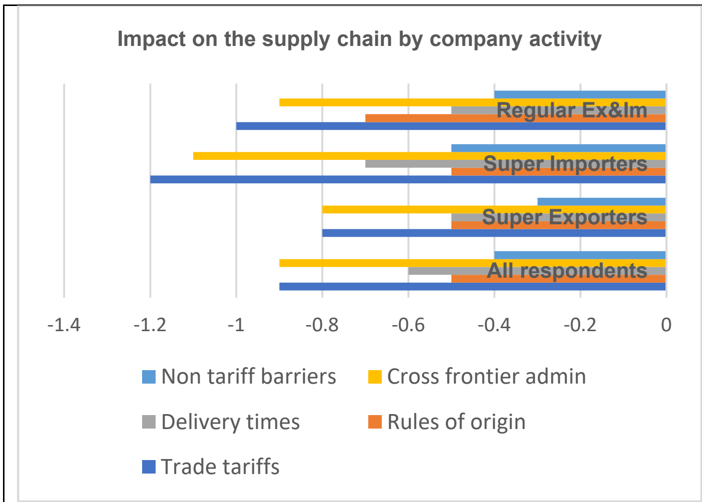
Even though the small and micro business segments are generally less involved in both exporting and importing six in ten firms believe changes in cross frontier admin will have a negative impact, with a quarter of them very negative.



One in ten firms expect some improvement and around half (42-58%) of firms depending on their core activities expect the effects to be muted or insignificant.

Even so, a third of companies still think they will be negatively affected in this area.

It's the company segments where exporting and importing are more common where non-tariff barrier problems are more clearly expected (large companies 60% negative, medium firms 48% negative).

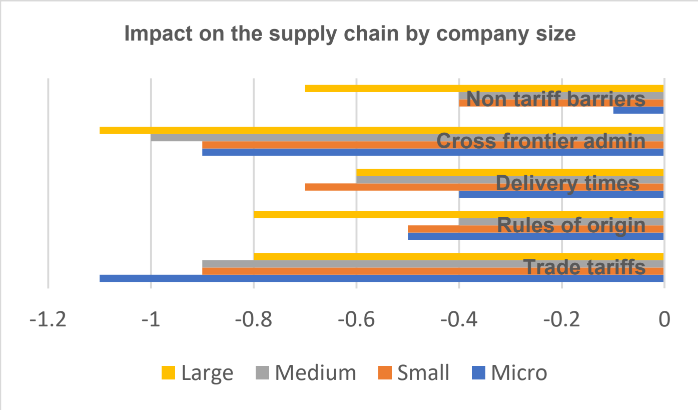


None of the constraints on frictionless trade are expected to become simpler/easier to deal with when the UK leaves the EU. In all cases, there is a general expectation that the fall-out will be negative, and by implication make it more difficult to trade from a UK base.

As the foregoing charts show there are a few companies that do have a positive outlook on some issues (e.g. on non-tariff barriers)

Trade tariffs, cross border admin and delivery times are the issues with the highest negative scores.

But a third or more of companies expect to suffer under rules of origin (44%) and non-tariff barriers (33%).



All segments coalesce round Brexit fall-out affecting trade tariffs and cross frontier admin as the two biggest issues.

The results round the other three issues aren't so clear cut, because the changes won't affect all players equally.

Companies importing can see difficulties round rules of origin and delivery times.

Companies with IP, prioritising international collaboration or innovation to develop, introduce and maintain new offerings in current and new markets see the interference that's likely to result from non-tariff barriers.

All the issues could hobble UK companies' competitive potential for lack of a valued replacement for the frictionless trading environment.

Annex A
Sample Products

CNC controls, bed carcasses
Tooling, machinery.
Tooling and accessories
Machine tools from Spain and Taiwan
Engineering machine tools
Ancillary Units such as Coolant Systems from India or China.
Cutting tools
machine tools and parts
Cutting tools from USA
Cutting tools
Cutting tools
Precision Grinding machines
Beacons and sounders
machined parts from China
electronics and raw material
cable
gauges for calibration, some new for resale
inspection microscope
electronic control stems, bearings and linear guides
measuring equipment
Filter system
mould tool parts
Optical CMM
plastics
Mould tool components
Mould bolster
Mould components and tool steel
Raw materials
Steel from group production mills
Control system, bearings
plastics material
Shower oscillators
Motors, drives, gearboxes, bearings
Print finishing machines
Gold plating and tungsten filaments
booklet maker
booklet makers
printing forms
omega 400 chillers
finishing equipment and spares for graphics industry
centrifugal fan
drives, PLCs, ancillary components
digital microscope
castings and forgings
chain
pressure vessels for Romania
vacuum coning systems US/gravimetric feeders EU
metal casting
raw magnets
Outer cases for HV Insulation Testers
Variable speed drives
Energy management systems to our design
Underfloor Heating related goods: Manifolds, Pipework and Thermostats
Industrial automation products
EXd Indicator
Industrial components
Consumables and equipment and plastic raw materials
Electrical/Electromechanical drives and Automation
Circuit Breaker
equipment enclosures for industry, process, infrastructure & IT
automation
Industrial Software
Media Preparator
Gas Fired boilers
Ind.plugs & sockets Lighting, MCB, MCCB
Distribution equipment
TV's
Electrical Switchboards
smart meter, electricity and gas meters, system solutions
dirt and air filtration units for heating and cooling systems
Electronic components, CCSP box build.
Relays, SCR
Variable Speed Drive
software/hardware subsystems
Industrial automation products
All Group components manufactured in EU
Electrical connector
Industrial Automation
Electronic Components
Control and Measurement Products
Laboratory and process instrumentation
Process Automation Hardware/Software
Scientific Equipment
Laboratory & veterinary diagnostic equipment
Variable Speed Drive
Sheet Metal fabrications, electronic assemblies, plastic mouldings, cable assemblies
Oxygen cells

Annex B
Where the product fits in supply chain

Capital equipment
End user, manufacturers.
Capital equipment for engineering based manufacturers
Direct sales to end user engineering companies and education establishments in the UK
Engineering production
OEM and 1st tier
Consumables for manufacturing
End user - Tooling manufacturer
Front line manufacturing
incorporated into tier 2 product
part finished
advanced manufacturing systems for aerospace, automotive medical et al
capital goods
all manufacturing facilities connected with auto, aero et al
End user production
part of mould tool
European resins 100% of product
at the beginning
first stage manufacture of components and tools
primary
first tier automotive
spare parts or components added to UK engineered products
used in manufacture of paper board and textiles
print finishing
sold direct to UK end customers
component sold to end user

dealer and end user
1st tier supplier to major construction OEMs
one step up from raw material
part of almost every product range
processing equipment
base raw material

Annex C -- Comments

Fewer regulations

1. Anybody's guess, but the perception that Brexit will result in less regulation is 'hogwash'. UK Governments and the UK civil service are obsessive and compulsive regulators in their own right. The PM's recent promise to reduce regulations is the latest in a long line of Government promises to do the same that have all been completely valueless.
2. Of far more significance to our company is reform to the finance area than reform of the export/ import regulations/ tariffs etc
3. If you can't get finance support to export it frankly doesn't matter what tariffs you face
4. It is the uncertainty which will potentially be so damaging over the next few years. Businesses cannot effectively plan for the future whilst not even knowing if they will be able to retain employees from other EU countries
5. Anticipating improved trading conditions between UK and commonwealth countries, especially Australia, New Zealand, Canada and India
6. We will always need to comply with EU technical regulations. Extra costs could arise if we have to comply with a divergent set of UK tech regs.
7. We import, export Japanese machinery which is already subject to EU tariffs. Brexit will not change this.
8. The collapse of Sterling will make these products more expensive for UK customers which could have a negative impact for us.
9. If Brexit leads to less immigration firms will need to mechanise which could have a positive impact
10. Our customers require that we comply with EU and USA regulations therefore the changes will have little material impact
11. rest outside UK and are expected to be based on political, rather than economic, considerations.
12. I do not believe we will benefit from any freedoms as EU regulations like ATEX are compulsory for and demanded by the customer. Regardless of the UK status in the EU we will still have to comply with these regulations.

EU and RoW Export procedures

1. RoW exports require significant extra paperwork vs EU cost of approx £50 per shipment. Average EU 4 shipments a week1
2. Customs clearance procedures. EU documentation is minimal. Non-EU documentation is much more demanding, certificates of origin and conformity requirements
3. EU business treated same as domestic business, home market paperwork and duties
4. Considerably more paperwork to export to RoW. EU is no different from any location in the UK, simple. We would have to employ additional people if shipping to the EU becomes as complex as to RoW
5. Increased complexity in certain RoW country specific destinations
6. It is significantly easier to process and order going to an EU destination with 3-5% less admin and onward freight costs
7. Export documentation is different. Engineering standards are also different. Many of our export markets require engineering more aligned to US codes and standards.
8. Depends on contract! Import duty, Letters of credit, Currency, Shipping Payment terms. I'm guessing but risk is higher plus at least 5-10%.
9. Rest of World requires the use of freight forwarders and paying customs charges at point of entry. Currently there are no such requirements for goods originating in the UK and shipping to other EU Member States. Therefore, transportation costs to EU are less and delivery times are faster. It is difficult for me to quantify the cost differences as it can differ from product to product and country to country.
10. We don't really have or need processes (other than logistics) to export to the EU.
11. Rest of world exports require increased paperwork ranging from basic production of shipping invoices to more complex licencing, Chamber of Commerce legalised and authorised paperwork, and pre-shipment inspections. The requirement for this paperwork increases the time it takes for an export to be completed, and where legalised documents and inspections are required, there is also a cost involved. As a comparison, a stock order can be prepared and shipped to an EU country as quickly as the day the order is received meaning the customer receives the goods within 1-2 days, a rest of world shipment can take a number of weeks depending on the complexity of paperwork required.
12. No additional documentation required for EU Exports. EU Sales list needs to be completed quarterly. For RoW, duplicate Invoicing required, also there can be additional requirements depending on the country, for example some customers require certificates of origin. There can also be delays at customs. Typically, this adds 3% to our costs for Rest of the world compared to EU

Other comments

1. It's impossible to predict how business may evolve. Too many factors including FX and of course the exact nature of the Brexit deal.
2. Like many UK companies, we are a sales subsidiary of a European parent company. Our products are typically made in Germany 60%, UK 35% and other EU 5%. We do not export directly but our customers often do. Some of these customers are UK subsidiaries of global

businesses, who have the choice as to which factories they build in. For example, our customers may choose whether to build in the UK, or Poland etc. Local costs, trade barriers and FX all can have a bearing on where they chose to assemble.

3. Not just the type of regulations but the constant moving target means we are unable to plan our business in the medium to long term.
4. Prolonged uncertainty & freedom of movement issues are huge concerns in our client base.
5. Outside of Ireland the EU is quite a difficult market for us due to unofficial non-tariff barriers around standards and regulations for pressure vessels. Overall Brexit will not really make it more difficult than it already is.
6. We only export in the EU to Ireland. There is some common sense in the other countries in that the French buy French Germans buy German, Italians buy Italian and so on, the Brits are the only ones who scour the EU for lower priced product when we should be buying British and more has to be done to help British manufacturing benefit from Brexit even if just from the UK market.
7. Get on with Brexit as soon as possible
8. We consider the Brexit vote to have an extreme effect on our business. We represent many rest of world manufacturers as a master distributor, and manage networks of European distributors on their behalf. Our position of providing easy access to EU markets for those manufacturers will be greatly weakened by exiting the EU. In addition to this, we will see increased costs in terms of staffing to manage the increased requirements for export processes. The exchange rates have been detrimental to our pricing this year. In an effort to overcome these challenges we are in the early stages of scoping a relocation of many services to a site within the EU which would ultimately lead to job loses here in the UK.

Annex D -- Data tables

	No of Companies	% sample	Number of employees				Size by turnover				Exporters		Importers	
			Micro <10	Small 10-49	Medium 50-249	Large 250+	Micro <£1.5 m	Small £1.5-8m	Medium £8-40m	Large £40+m	Regular	Adhoc	Regular	Adhoc
All respondents	144	100	14	37	32	17	14	35	32	19	55	22	61	19
Super Exporters	46	32	6	35	48	11	11	43	35	11	100		65	
Super Importers	51	35	20	45	22	14	6	35	43	16	35	25	100	
Regular Ex&Im	48	33	15	25	38	23	11	30	35	23	100		100	
Micro											55	15	70	10
Small											45	30	59	23
Medium											62	17	60	22
Large											66	21	71	19

	Turnover £m	Exports £m	% of Turnover	EU Exports £m	% Turnover	Imports £m	% Turnover	EU Imports £m	% Turnover
All respondents	4,702	1,133	24	£464	10	1,634	35	1,008	21
Super Exporters	1,107	831	75	335	30	239	22	35	3
Super Importers	1,587	133	8	63	4	1,237	78	790	85
Regular Ex&Im	1,853	570	31	256	14	701	38	430	23
Micro	37	3	8	1	3	26	69	24	64
Small	465	77	17	33	7	317	68	215	46
Medium	1,402	423	30	149	11	485	35	241	17
Large	2,798	630	23	281	10	807	29	529	19

	Exports % value		Imports	Exports to			Re-exporting to		
	UK	Import	UK % value	EU	RoW	Different procedures %	EU	RoW	Different procedures %
All respondents	60	37	10	91	88	40	53	54	33
Super Exporters	60	33	35	98	98	39	87	93	33
Super Importers	18	77	5	83	82	35	38	36	38
Regular Ex&Im	41	52	20	93	85	39	84	77	46
Micro	35	54	26	92	82	63	43	43	56
Small	58	38	18	91	85	42	45	48	27
Medium	50	41	39	91	91	30	60	60	27
Large	45	58	22	88	89	43	69	69	36

	Will gain EU biz in three years				Will lose EU biz in three years				Will gain UK biz in three years				Will lose UK biz in three years			
	High	Medium	Low	Score	High	Medium	Low	Score	High	Medium	Low	Score	High	Medium	Low	Score
All respondents	19	33	48	1.7	10	25	65	1.5	25	41	34	1.9	8	30	62	1.5
Super Exporters	21	44	35	1.9	19	25	56	1.6	28	34	38	1.9	13	25	62	1.5
Super Importers	16	11	73	1.4	6	26	68	1.4	26	37	37	1.9	10	33	57	1.5
Regular Ex&Im	33	36	31	2	14	36	50	1.6	35	38	27	2.1	8	32	60	1.5
Micro	20	27	53	1.7	0	29	71	1.3	39	33	28	2.1	0	27	73	1.3
Small	14	34	52	1.6	12	14	74	1.4	22	42	36	1.9	12	29	59	1.5
Medium	18	42	40	1.8	8	32	60	1.5	24	48	28	2	3	31	66	1.4
Large	33	14	53	1.8	19	29	52	1.7	20	33	47	1.7	14	33	53	1.6

	Trade Tariffs						Rules of Origin					
	VP	FP	N	FN	VN	Score	VP	FP	N	FN	VN	Score
All respondents	1	3	31	31	33	-0.9	1	3	53	31	13	-0.5
Super Exporters	3	3	33	36	26	-0.8	0	3	58	26	13	-0.5
Super Importers	0	2	24	27	47	-1.2	2	2	49	35	12	-0.5
Regular Ex&Im	0	2	33	33	33	-1.0	0	0	48	38	14	-0.7
Micro	0	0	38	19	43	-1.1	0	0	69	13	18	-0.5
Small	2	2	33	30	33	-0.9	2	0	54	29	15	-0.5
Medium	0	0	36	33	31	-0.9	0	8	50	34	8	-0.4
Large	0	18	12	41	29	-0.8	0	0	38	50	12	-0.8

	Delivery Times						Cross Frontier Admin					
	VP	FP	N	FN	VN	Score	VP	FP	N	FN	VN	Score
All respondents	1	0	51	36	12	-0.6	0	1	31	43	25	-0.9
Super Exporters	0	0	58	32	11	-0.5	0	2	38	38	22	-0.8
Super Importers	0	0	45	39	16	-0.7	0	0	21	48	31	-1.1
Regular Ex&Im	0	0	55	40	5	-0.5	0	0	31	48	21	-0.9
Micro	0	0	69	25	6	-0.4	0	0	38	37	25	-0.9
Small	0	0	49	37	14	-0.7	0	2	37	35	26	-0.9
Medium	3	0	47	36	12	-0.6	0	0	29	46	25	-1.0
Large	0	0	50	44	6	-0.6	0	0	7	73	20	-1.1

	Non-Tariff Barriers					
	VP	FP	N	FN	VN	Score
All respondents	5	4	48	29	14	-0.4
Super Exporters	5	3	58	24	11	-0.3
Super Importers	8	2	42	31	17	-0.5
Regular Ex&Im	5	2	52	31	10	-0.4
Micro	13	6	49	19	13	-0.1
Small	4	2	57	20	17	-0.4
Medium	6	6	40	37	11	-0.4
Large	0	7	33	47	13	-0.7