



3rd October 2025

Customer Communication:

This communication is intended for Sasol's customers to assist them in planning their polymer supply positions through the indicated period.

Southern African Supply Status: C2 Value Chain – PVC Supply October - December 2025

Dear Customer,

The following PVC supply guidance is provided based on the latest plant status reports governing the current statutory maintenance shutdown on the VCM/PVC value chain. Our previous communication of 18th July 2025 also refers.

- The maintenance shutdown of the VCM/PVC units has been extended by approximately 6 days to cater for additional scope of work required on the VCM Oxy reactor.
- In addition, the value chain will require further down time during October / November to effect repairs on a hydrogen chloride feed line. The extent of these repairs may take the value chain down for a period of up to 15 days.

Impact on PVC supply:

1. October allocations as previously communicated to customers remain applicable and will be executed through the month.
2. For November, Sasol will not make any PVC volume offers to customers, nor take any forecasts for the month of November as a result of limited inventory coverage and the extended outages required on the plant. Inventory recovery will commence in the 2nd half of November once the safe start-up and stable operations of the value chain have been achieved.
3. From December onwards we expect inventory cover to be replenished as the market closes down for the holiday period. The standard forecasting approach will be in effect for the month of December and onwards into 2026.

Should there be any positive movement on the duration of the plant outages and the PVC plant is able to resume operations earlier than expected, Sasol will advise customers and provide updates as to November material supply opportunities. Please discuss with your Sasol Chemicals Account Manager should you require any further clarification or assistance.

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Thank you for your understanding and cooperation.

Yours sincerely,



Gerome Marrian
Head Sales Materials Portfolio
Chemicals Africa



Brian Sole
Senior Marketing Manager Polymers
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All demand forecasts and where applicable planned allocations are subject to actual production taking place as planned and apply only to the month in question. No rolling of untaken allocation volumes into future months, or bringing allocation volumes forward can be allowed from month to month should Sasol not be able to execute on these. Customers are reminded that supply forecasts and allocations, like customer demand forecasts, are planning tools used to provide some guidance to both Sasol and its customers. However, the actual 'contract of sale' as per the General Terms and Conditions of Sale ("GTOS") as signed by both parties arises once Sasol has confirmed delivery against accepted orders placed by customers.