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The Association for Packaging and Processing Technologies

Australian Packaging and Processing Machinery Association Limited

Italian Packaging Machinery Manufacturers Association

Guide to Global Markets

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2025
Guide to Global Markets

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INTRODUCTION

Welcome to the 2025 edition of PMMI's Annual Guide to Global Markets report!

The objective of the Guide to Global Markets is to offer an ample view of the top packaging and processing markets in the world, highlighting market size, global trends, duties and tariffs, import and export statistics, as well as shifts in packaging materials and formats. Many of the packaging trends and broader economic themes covered in this report should resonate with manufacturers. We have included detail on the top food and beverage products in absolute volume growth and compound annual growth where opportunities for investment in packaging and processing are more likely to occur.

A new section on Environmental, Social, and Governance (ESG) has been added to provide OEMs with guidance as sustainability standards become more prominent in our industry.

The section on import duties and taxes is especially critical as ongoing trade and tariff updates continue to be a prevalent challenge in today's global business environment. With so much uncertainty in today's landscape, it's crucial for businesses to stay up to date to help make strategic decisions in global trade.

This edition's report was done in collaboration with APPMA, Automate UK , JPMA, and UCIMA. We hope this guide will help in your efforts to find the right export market for your business.

GLOBAL PACKAGING TRENDS

This section is an excerpt from our 2025 Global Packaging Trends report. Data from this section of the report is from Euromonitor International. The reports explores **key trends driving development and innovation in packaging** and will seek to **identify hot spots** for packaging growth in all regions throughout the world. The full report can be found on PMMI's website.

KEY TRENDS

Sustainability practices are gaining traction across the globe

Circular economy

Regulations across the globe aim to implement sustainable practices through a product's entire lifecycle.

Flexible packaging

Flexible plastic continues to dominate the packaging industry due to its versatile, protective and cost-effective nature.

Global initiatives

Global leading companies have set sustainability goals they aim to accomplish though different innovative practices.

rPET bottles

Brands across categories are looking toward recycled PET bottle production to achieve sustainability targets.

Premiumization

Alternative materials to plastic such as metal, glass and carton are being leveraged to justify a higher price point.

Top consumer trends driving the industry's performance

Sustainability and Convenience

Environmental concerns have customers shifting away from flexible plastic in some categories and demanding sustainable practices from leading companies, driving both global and local brands to explore recyclable and plant-based alternatives.

Smaller Pack Sizes

Consumer preferences for smaller packaging solutions grew in 2024 across categories to meet different modern lifestyle demands such as affordability, on-the-go consumption, portion control, and a desire to reduce waste and storage issues.

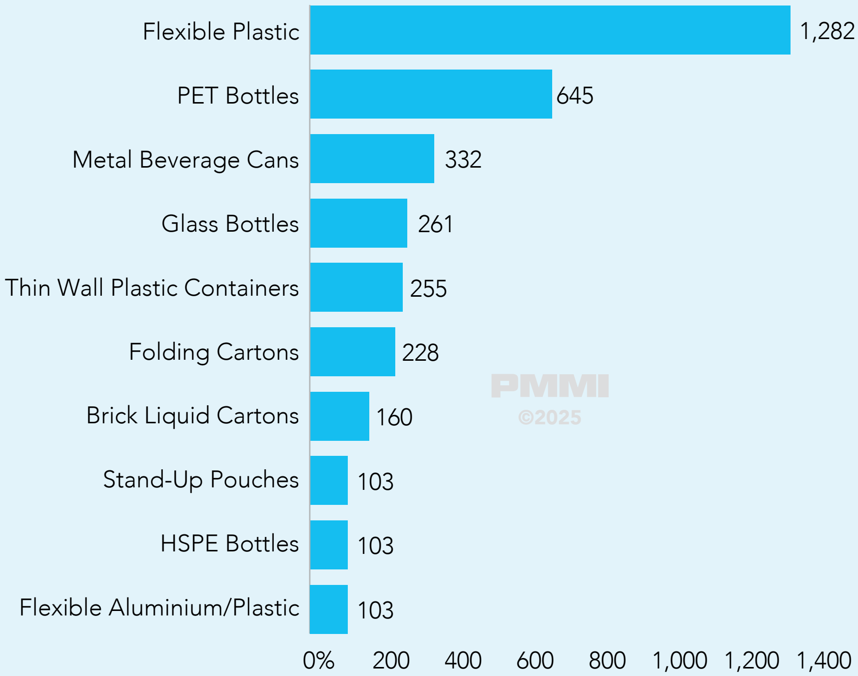
Packaging Innovation

Economic uncertainty and the rise of e-commerce has led to consumer demand for innovative packaging solutions that are eco-friendly, protective for shipping and transportation, as well as attractive and convenient

The Packaging Industry Grows, Exceeding 4 Trillion Packs in 2024

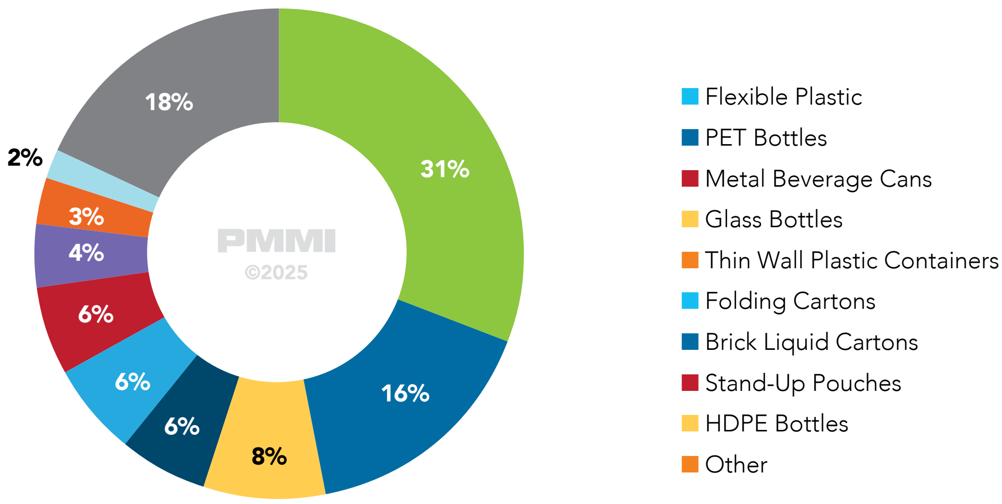
While flexible plastic dominates several industries due to its versatility and cost-effectiveness, PET bottles are being challenged by metal beverage cans in certain categories due to the latter's recyclability, lightweight nature and durability. However, PET bottles are still expected to grow above metal beverage cans to 2029 (FCAGR of 3.4% vs 2.8% respectively).

Global Top 10 Packtypes, 2024



Source: PMMI with data from Euromonitor International

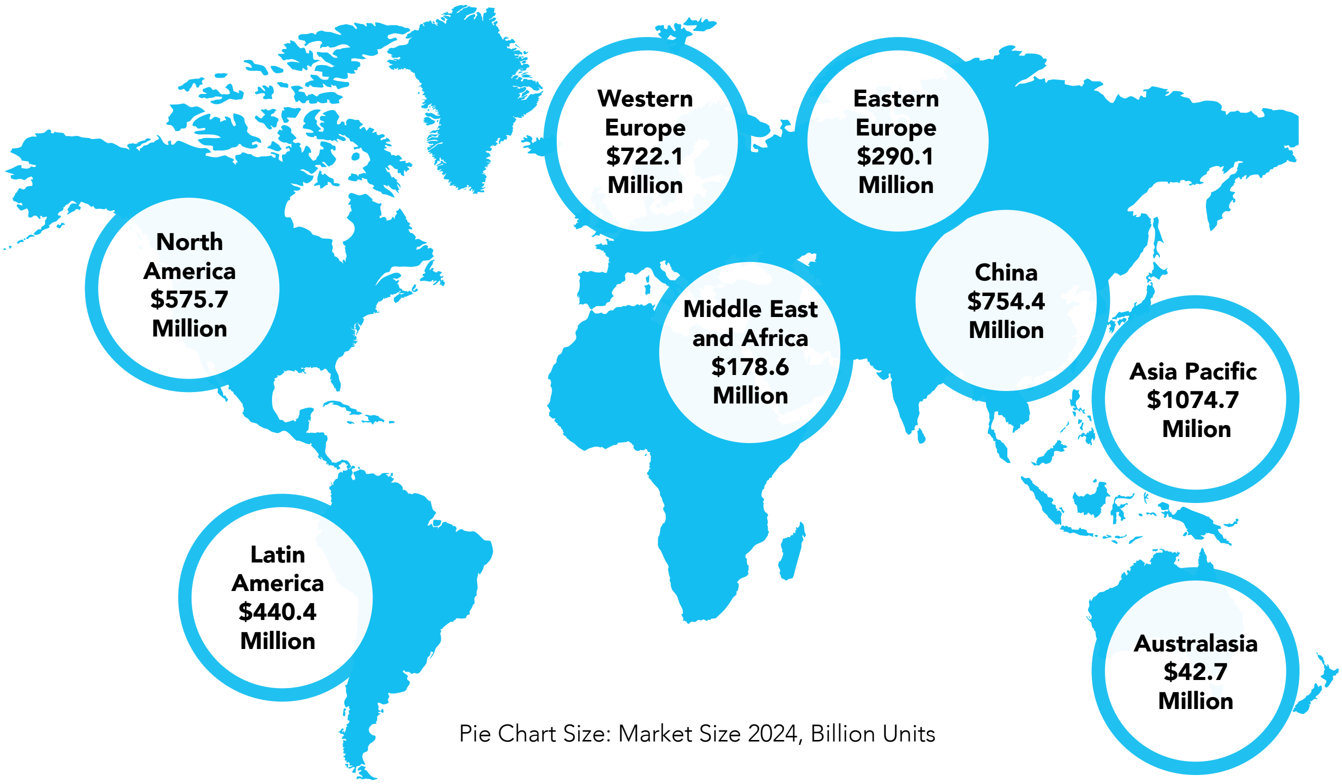
Global Volume Share of Top 10 Packtypes, 2024



Source: PMMI with data from Euromonitor International

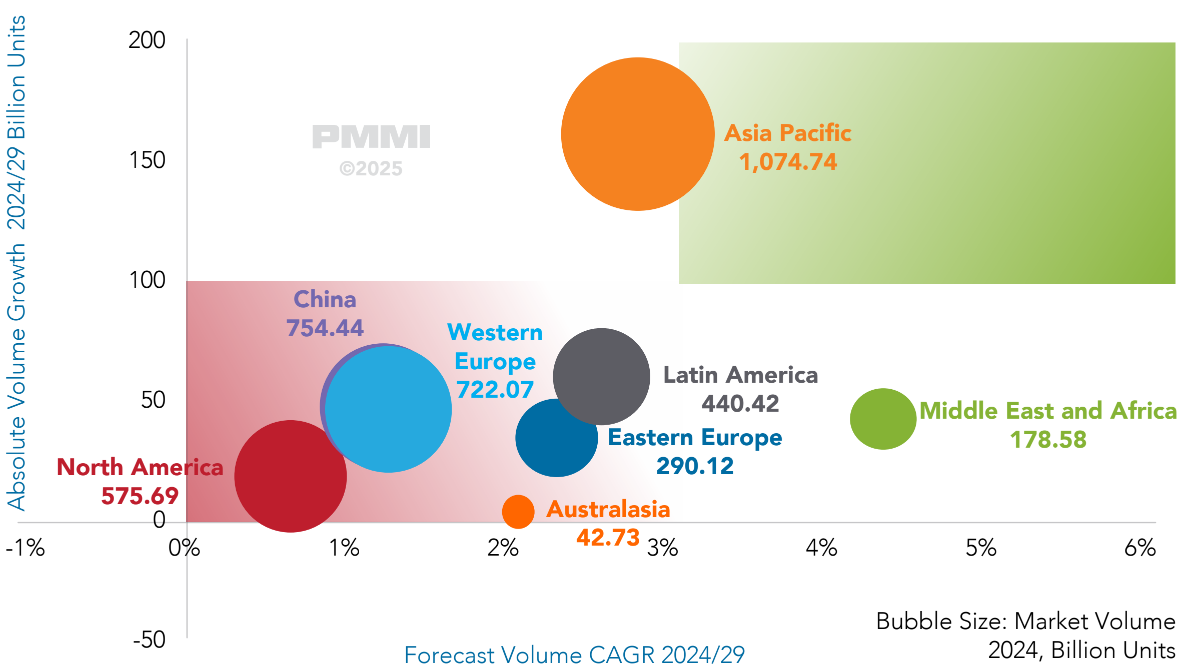
Packaging volume by region

Asia dominates forecast volume growth, led by India and China, while developed nations show slower expansion



Source: PMMI with data from Euromonitor International

Total Packaging by Regions, 24/29



Source: PMMI with data from Euromonitor International

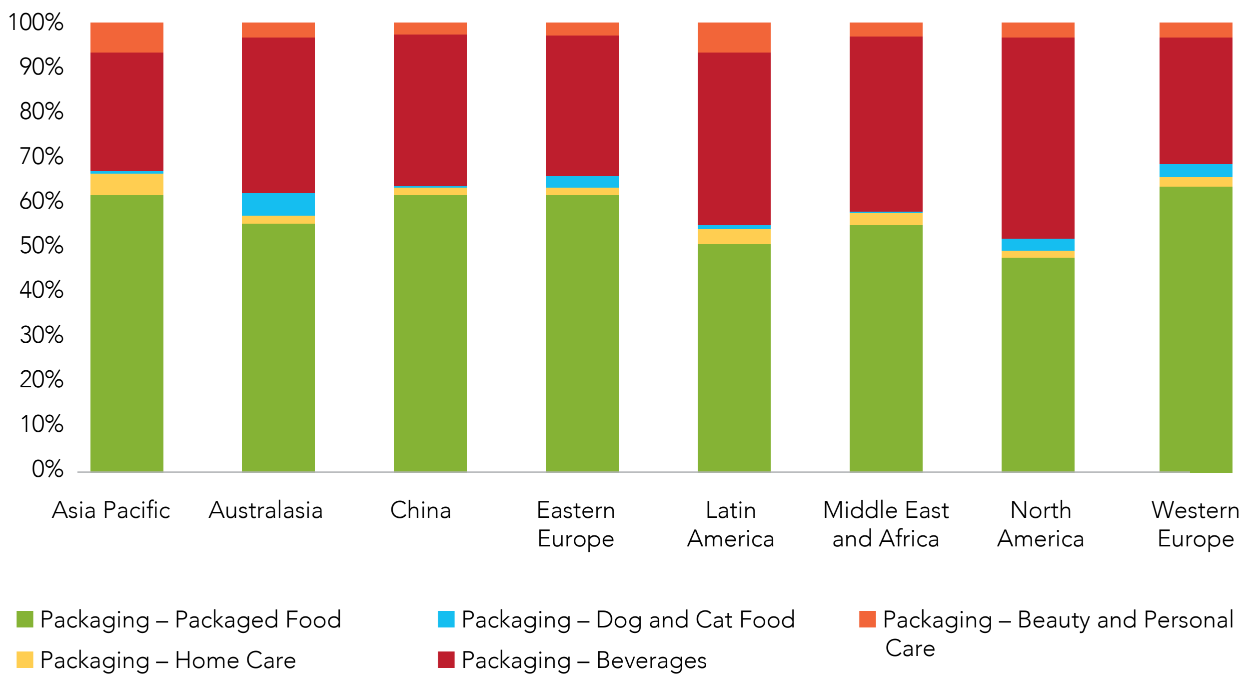
Consumer demand for packaging to 2029 will increasingly come from emerging economies. Fast-rising wealth in India makes it the stand-out for packaging volume gains, while the US will retain its developed market leadership. Population growth, particular to emerging markets, sets the tone as the source of packaging volume gains: India, Indonesia, China, the US and Brazil are the top five.

One third of consumer packaging sales are made in Western Europe and North America: the regions that struggle the most for growth as economic pressures on consumers linger. Falls in inflation and interest rates support a recovery in confidence, though this is proving slow to filter through in consumer spending.

Demand for Food and Drink Packaging is Shaped by Convenience and Sustainability Concerns

Food and drink packaging accounted for over 90% of global retail volume sales in 2024. Food packaging sales rose by 0.8% in 2024 to reach 2.4 trillion packs. Beverages saw a 2.3% rise in packaging retail volumes in 2024, driven by soft and hot drinks, while alcoholic drinks make a marginal recovery by 0.6% after falling in volume sales in 2023. Beyond the food and drink heavyweights, there is promise of good rates of packaging growth in beauty, home care and pet food.

Volume Share Split by Industry, by Region, 2024

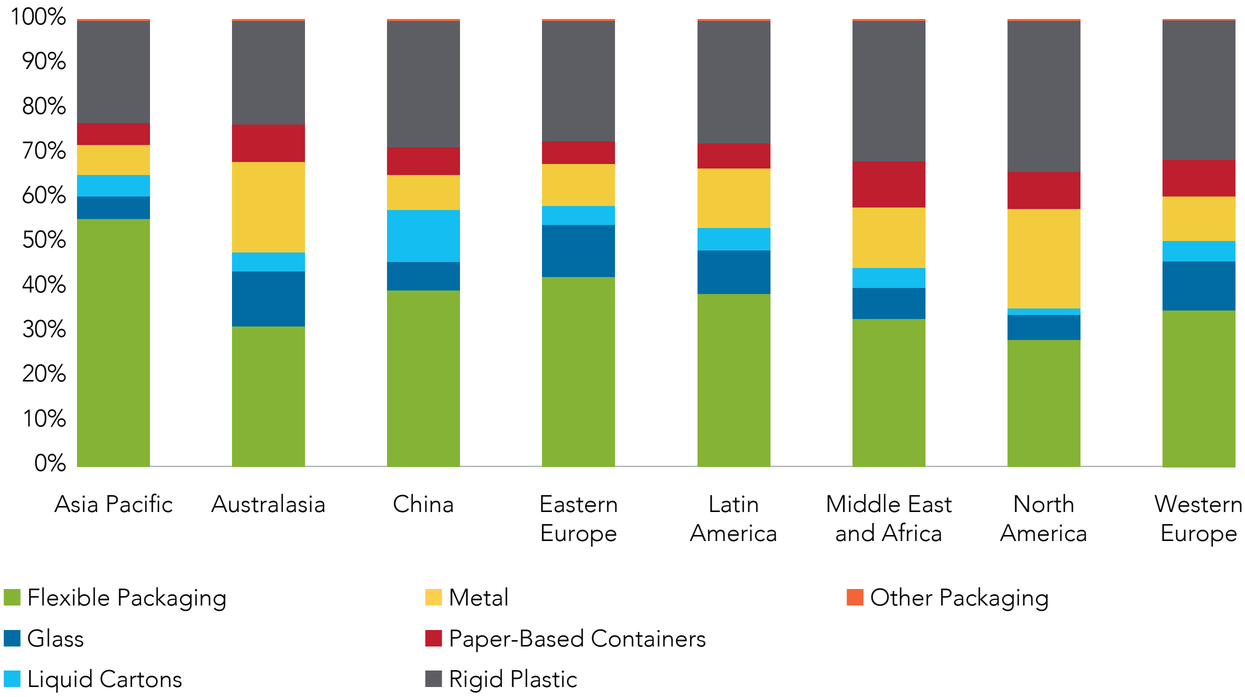


Source: PMMI with data from Euromonitor International

Flexible Packaging Leads Demand But Metal Brings Dynamism

Flexible packaging, in particular flexible plastic, leads global packaging, owing to its versatility, which leads to widespread category usage. Paper-based substrates and metal packaging hold lead roles as plastic replacement challengers, offering materials that enjoy strong collection and re-use rate. Regulatory intervention is set to propel action, targeting recyclability and re-use.

Volume Share Split by Pack Type, by Region, 2024



Source: PMMI with data from Euromonitor International

The packaging industry grows, exceeding 4 trillion packs in 2024

Asia Pacific

Asia Pacific is the leading region for packaging demand, accounting for 45% of global retail volume sales, and expected to grow at a forecast CAGR of 2.8% to 2029.

+161.3

Absolute Volume Growth, (2024/2029) bn units

PET Bottles

At 0.6 trillion packs in 2024, PET bottles accounted for 16% of global grocery packaging sales. PET is highly recyclable, but there remains a gap in collection that needs action on closing to improve the material's circularity.

+116.5

Absolute Volume Growth, (2024/2029) bn units

Bottled Water

Demand for on-the-go consumption and convenience, as well as health awareness, drives growth for bottled water across the world. Innovation in terms of packaging design and sustainability is expected in the category.

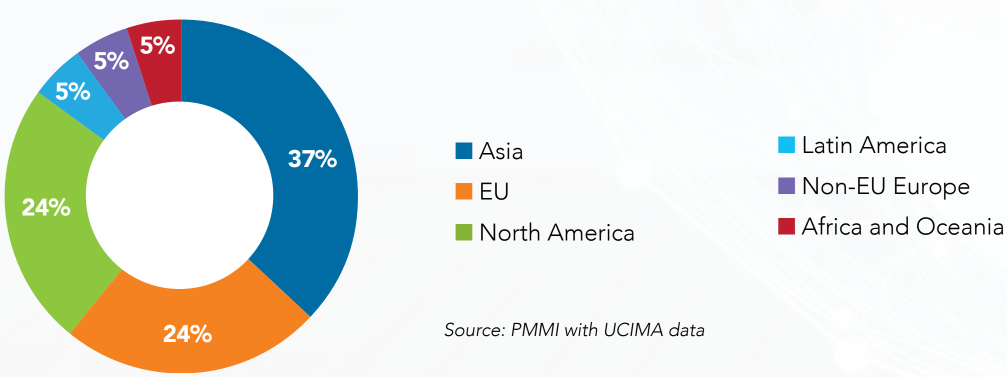
+ 81.6

Absolute Volume Growth, (2024/2029) bn units

GLOBAL PACKAGING MACHINERY MARKET

The data presented in this report was provided by UCIMA. For more information, please visit **https://www.mecs.org/it/demo/cubo.**

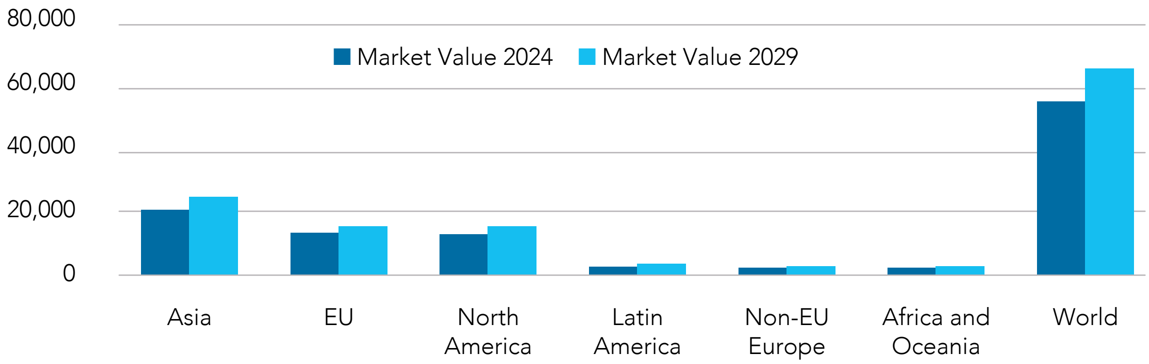
World Market share by Region 2024



Source: PMMI with UCIMA data

On a geographic level, Asia is the clear leader with a market value of €20.6 million in 2024, representing 37% of global demand. The European Union and North America are nearly tied at €13.2 million and €13.3 million, respectively, each holding close to a quarter of the market. While smaller in scale, Latin America (€3.1 million), Non-EU Europe (€2.7 million), and Africa & Oceania (€2.6 million) all play important roles and demonstrate growth potential. Latin America leads with a compound annual growth rate of 4.3%, followed by Africa & Oceania at 4.0%. Asia, despite already being the largest market, also grows at 4.0%, adding nearly €5 million in value by 2029. Altogether, the global packaging machinery market is expected to rise from €55.7 million in 2024 to €66.6 million in 2029, reflecting a solid CAGR of 3.64%.

World Market for Packaging Machinery Growth 2024 - 2029



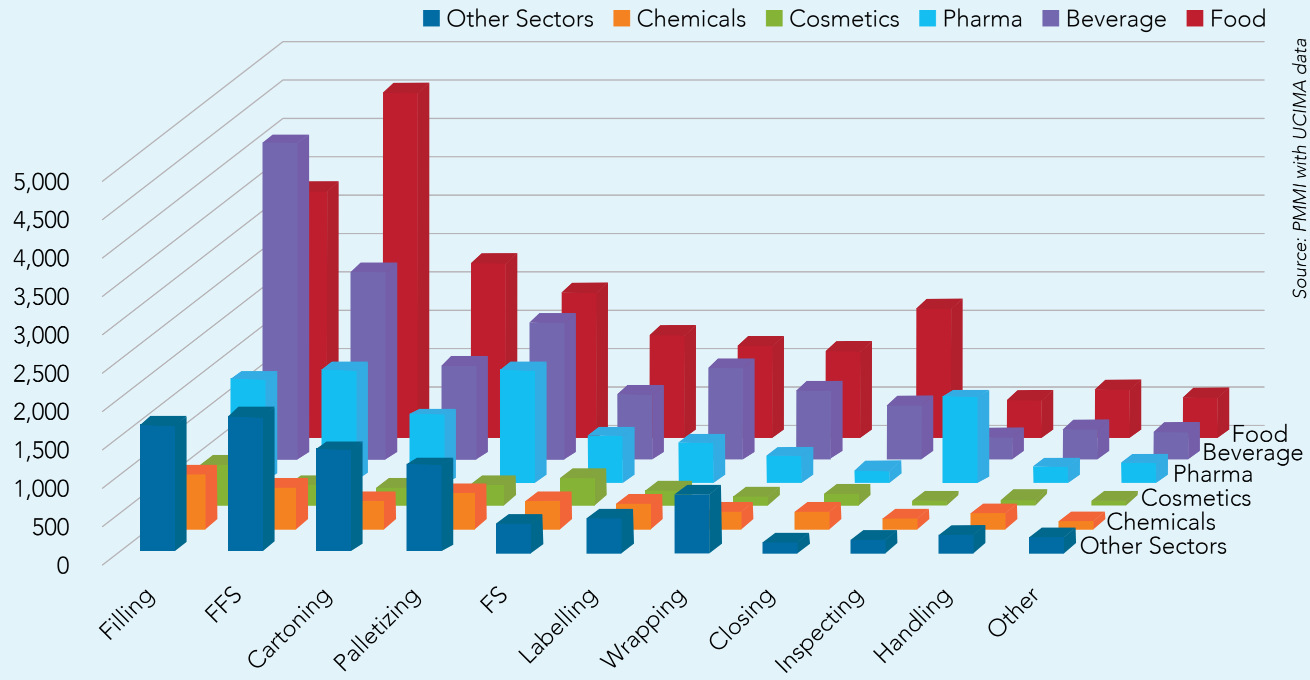
Source: PMMI with UCIMA data

World Market figures by macro-regions (data in EUR millions)

	Market Value 2024	Shares	CAGR 2025–2029	Market Value 2029
Asia	20,650.2	37.1%	4.0%	25,142.8
EU	13,246.3	23.8%	3.4%	15,646.5
North America	13,326.6	23.9%	3.3%	15,697.0
Latin America	3,127.9	5.6%	4.3%	3,864.5
Non-EU Europe	2,734.9	4.9%	2.5%	3,089.9
Africa and Oceania	2,606.3	4.7%	4.0%	3,166.3
World	**55,692.3**	**100.0%**	**3.6%**	**66,607.1**

Source: PMMI with UCIMA data

World Market by Sector and Technology 2024



In 2024, the global packaging machinery market is dominated by Filling and Dosing equipment and Form-Fill-Seal (FFS) systems, with each category generating over €11 million in value. Together, these two technologies account for nearly 40% of the total market. Cartoning (€6.4 million) and Palletizing (€6.2 million) also represent significant segments, reflecting widespread demand for secondary packaging and logistics solutions.

World Market 2024 (data in EUR million)

	Food	Beverage	Pharma	Cosmetics	Chemicals	Other	TOTAL
Filling	3,234.3	4,171.0	1,343.6	556.2	730.3	1,685.1	**11,720.6**
FFS	4,548.2	2,491.6	1,470.3	287.0	562.4	1,794.7	**11,154.2**
Cartoning	2,279.2	1,235.7	872.9	252.1	372.5	1,343.7	**6,356.1**
Palletizing	1,912.3	1,808.6	599.9	280.8	472.7	1,120.3	**6,194.6**
FS	1,353.6	867.6	625.8	364.9	375.6	383.2	**3,970.8**
Labelling	1,206.3	1,211.7	530.5	213.5	328.0	449.5	**3,939.5**
Wrapping	1,121.6	921.7	373.4	142.9	240.7	765.4	**3,565.7**
Closing	1,692.6	732.5	169.3	165.3	226.7	141.0	**3,127.5**
Inspecting	503.3	289.2	1,093.3	60.7	138.9	166.9	**2,252.3**
Handling	642.6	416.1	235.7	108.4	213.1	243.3	**1,859.2**
Other	524.0	370.7	262.9	75.4	122.3	196.3	**1,551.7**
Total	**19,018.0**	**14,516.4**	**7,577.6**	**2,507.2**	**3,783.2**	**8,289.4**	**55,692.2**

Source: PMMI with UCIMA data

By 2029, Filling and Dosing machinery remains the largest technology category, reaching €13.9 million across all sectors, followed closely by FFS systems at €13.4 million. Food continues to be the largest sector for nearly every technology, with strong contributions from Beverage and Pharma. Cosmetics, Chemicals, and Other Sectors, while smaller in absolute value, show notable growth compared to 2024.

World Market 2029 (data in EUR million)

	Food	Beverage	Pharma	Cosmetics	Chemicals	Other	TOTAL
Filling	3,820.3	4,919.1	1,653.7	650.6	878.2	2,016.5	13,938.4
FFS	5,427.3	3,018.3	1,780.0	336.3	667.6	2,175.9	13,405.4
Cartoning	2,683.4	1,472.9	1,045.2	306.4	443.9	1,647.8	7,599.6
Palletizing	2,294.6	2,214.7	717.2	339.0	566.5	1,360.2	7,492.2
FS	1,629.9	1,032.6	763.3	423.0	441.8	454.9	4,745.5
Labelling	1,430.0	1,441.2	633.8	256.2	397.3	540.8	4,699.3
Wrapping	1,333.3	1,078.0	437.4	172.6	290.6	938.1	4,249.9
Closing	1,996.7	891.5	202.9	199.3	272.9	168.4	3,731.7
Inspecting	603.5	344.6	1,266.5	73.2	166.6	199.0	2,653.5
Handling	775.2	498.8	287.2	133.6	257.6	284.8	2,237.3
Other	621.5	443.4	317.5	91.8	145.8	234.2	1,854.2
Total	**22,615.7**	**17,355.1**	**9,104.7**	**2,982.0**	**4,528.8**	**10,020.6**	**66,607.0**

Source: PMMI with UCIMA data

CAGR 25-29 (%)

	Food	Beverage	Pharma	Cosmetics	Chemicals	Other	TOTAL
Palletizing	3.7	4.1	3.6	3.8	3.7	4	3.9
Handling	3.8	3.7	4	4.3	3.9	3.2	3.8
FFS	3.6	3.9	3.9	3.2	3.5	3.9	3.7
Cartoning	3.3	3.6	3.7	4	3.6	4.2	3.6
Closing	3.4	4	3.7	3.8	3.8	3.6	3.6
FS	3.8	3.5	4.1	3	3.3	3.5	3.6
Labelling	3.5	3.5	3.6	3.7	3.9	3.8	3.6
Other	3.5	3.6	3.8	4	3.6	3.6	3.6
Wrapping	3.5	3.2	3.2	3.8	3.8	4.2	3.6
Filling	3.4	3.4	4.2	3.2	3.8	3.7	3.5
Inspecting	3.7	3.6	3	3.8	3.7	3.6	3.3
Total	**3.5**	**3.6**	**3.7**	**3.5**	**3.6**	**3.8**	**3.6**

Source: PMMI with UCIMA data

Looking ahead to 2025–2029, growth trends show steady expansion across most machinery types and industries. Palletizing equipment stands out with the strongest growth rate, ranging from 3.7% to 4.1% depending on the machinery type. Filling and FFS technologies are also expected to expand consistently.

A NOTE ON METHODOLOGY

By cross-referencing a wide range of different sources (Eurostat, OECD, IMF, WTO and World Bank for macroeconomic, household consump¬tion and country political/ institutional analyses; ITC for data on bilateral import-export flows of packaging machinery and spare parts to/from countries all over the world; consumption data on single Countries detai¬led by end goods (Food, Beverage, Pharma, Home and Personal Care, Chemicals) and by using a complex econometric estimating/calibration and calculation system, **the Cube offers a truly integrated short and medium-term forecasting system, in each market area in real value (inflation effect is not considered), for sales of packaging machinery**.

In particular, the scheme for evaluating the expected growth rates (in real value, inflation effect is not considered) in each market area, client sector and family of machines adopts the most suitable multi-equa¬tion time series model (chosen from Vector ARIMA and Vector ARMA classes as well as Vector ECM and other two-stage fitting methods) or, at least, single variable exponential smoothing, to predict packaging machinery exports based on growth rates of GDP, industrial GDP, mul¬tilateral exchange rates; end consumption of Food, Beverage, Pharma¬ceuticals, Cosmetics and Chemical goods in all Countries. Each of the exports series (20 years) of the six big international producer/exporter Countries (Italy, Germany, China, Japan, the USA and an aggregate entity called Rest of the World) are fitted/forecast over a matrix of up to 30,600 observations (11 time series by 139 Countries by 20 ye¬ars). Best estimates are then chosen on the best BIC (Schwarz's Baye¬sian Information Criterion) score. The emerging six estimated export growth rates forecasts are then inserted in the CUBE system, where forecasts are computationally merged with global marketing trends of Countries' sales by client sector and type of packaging machines.

A correction is then made based on the latest cyclical dynamics for the last four years and the last year of the estimate, after which the following factors are introduced: current international economic si¬tuation, country risk, monetary, currency and tariff policies; the real effective multilateral exchange rates, the changes in transaction co¬sts and international exchange regimes (regulatory, legislative and fiscal); and finally, the level of demographic and urban development and effective consumption of packaging at the individual country level.

A calibration was then carried out through **simple parameters' control methods** (estimates of the model parameters, followed by sensitivity tests performed backward i.e. model calibration).

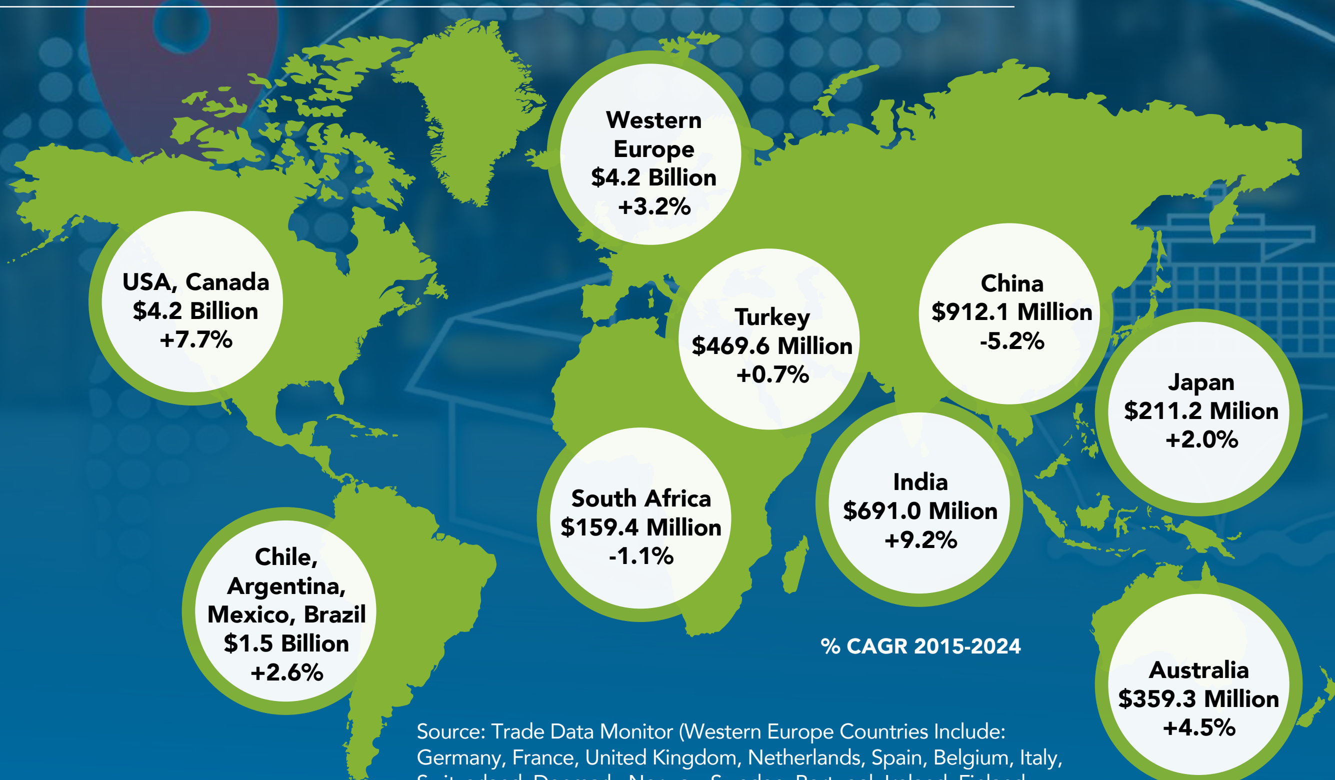
Beyond computational complexity, the unique value of the CUBE lies firstly in the methodological approach adopted, in which the fo-recasts are based on an integrated and coherent estimation/ calibration/ computation system using many different sour¬ces and secondly in the method used for weighting the three di¬mensions of the forecast. This weighting takes account of the real importance of the geographical region, client sector and type of machinery family in the typical production mixes obser¬ved amongst the industry-leading companies at a global level.

The CUBE output is twofold: a complete set of both 1) market values and 2) growth rates (CAGR) **over a range of 396 different segmen¬ts (6 client sectors by 11 types of machines by 6 macro-regions) and more than 4,620 growth rates when the analysis is conducted at the most detailed individual country level**. In both cases, the expected growth rates and market values are projected over a pe¬riod of four years (in this edition, the five-year period 2025-2029). Because these forecasts are differentiated over three dimensions in which each company can reference the expected sales of its own specific production/export mix, they are more accurate than indi¬vidual growth/ production trends in downstream end product seg¬ments, in the final demand of client sectors or in simple territorial growth of machinery exports' forecasts.

For more info: https://www.mecs.org/it/demo/cubo

Global Packaging Machinery Imports by Region

Value of Imports, 2024 with % CAGR 2015-2024



Source: Trade Data Monitor (Western Europe Countries Include: Germany, France, United Kingdom, Netherlands, Spain, Belgium, Italy, Switzerland, Denmark, Norway, Sweden, Portugal, Ireland, Finland, Iceland, Luxembourg)

PACKAGING & PROCESSING MACHINERY EXPORTS & IMPORTS

Top Packaging Machinery Importers

UDG: 8422.20 to 8422.40, Just Machinery

Annual Series: 2022 - 2024

Reporting Country	2022	2023	2024	% Change 2024/2023
United States	$3,165,464,957	$3,452,494,860	$3,740,257,932	8.3%
Mexico	$701,021,461	$883,554,770	$963,874,441	9.1%
China	$1,455,895,853	$1,080,651,074	$912,113,370	-15.6%
United Kingdom	$660,366,986	$690,492,779	$725,151,345	5.0%
India	$427,933,046	$641,045,053	$691,046,890	7.8%
Germany	$657,840,211	$697,781,698	$668,043,890	-4.3%
France	$567,078,157	$612,284,623	$618,262,313	1.0%
Canada	$509,956,031	$597,205,135	$515,194,789	-13.7%
Turkey	$247,633,621	$323,198,269	$469,653,242	45.3%
Indonesia	$360,707,974	$376,988,763	$413,780,381	9.8%
Brazil	$293,058,033	$293,665,485	$379,711,364	29.3%
Netherlands	$331,495,231	$336,635,555	$366,890,248	9.0%
Spain	$301,932,378	$348,039,812	$365,157,968	4.9%
Switzerland	$292,723,502	$354,570,429	$363,412,875	2.5%
Australia	$282,380,670	$299,077,936	$359,318,825	20.1%
Italy	$292,096,834	$344,856,985	$330,608,895	-4.1%
Thailand	$278,895,513	$288,671,630	$326,408,395	13.1%
Poland	$261,253,786	$270,302,928	$325,706,478	20.5%
Saudi Arabia	$132,928,801	$175,409,904	$274,305,572	56.4%
South Korea	$239,252,796	$302,974,404	$260,819,096	-13.9%
Japan	$220,283,154	$248,397,305	$211,168,492	-15.0%
Belgium	$229,316,445	$169,152,378	$180,179,417	6.5%
Uzbekistan	$78,380,099	$96,050,345	$179,214,976	86.6%
Austria	$157,952,970	$151,225,346	$178,874,421	18.3%
Romania	$88,743,551	$141,302,417	$171,179,507	21.1%
Other	$3,811,935,144	$4,008,763,207	$4,274,723,977	6.6%
World	**$16,046,527,204**	**$17,184,793,090**	**$18,265,059,099**	**6.3%**

Other includes South Africa, Malaysia, Iran, Sweden, Kazakhstan, Egypt, Chile, Morocco, Portugal, Israel, Greece, Hungary, Czech Republic, Colombia, Serbia, Taiwan, Nigeria, Argentina, Ukraine, Singapore, Bulgaria, Philippines, Denmark, Dominican Republic, Norway, Slovakia, Guatemala, New Zealand, Ireland, Slovenia, Jordan, Pakistan, Croatia, Zambia, Ecuador, Peru, Finland, Ethiopia, Hong Kong, Costa Rica, Armenia, Honduras, Georgia, Zimbabwe, Kenya, Sri Lanka, Cote d'Ivoire, Kosovo, Bosnia and Herzegovina, Lithuania, Iceland, Paraguay, Ghana, North Macedonia, El Salvador, Bolivia, Azerbaijan, Rep. of Moldova, Mongolia, Albania, Senegal, Panama, Estonia, Uruguay, Cambodia, Qatar, Namibia, Kyrgyzstan, Cyprus, Latvia, Mozambique, Mauritius, Madagascar, Montenegro, Luxembourg, Bahrain, Myanmar, Belize, Barbados, Botswana, Malta, Fiji, Guyana, Macao, Brunei Darussalam, Bermuda, Grenada

Top Packaging Machinery Exporters
UDG: 8422.20 to 8422.40, Just Machinery

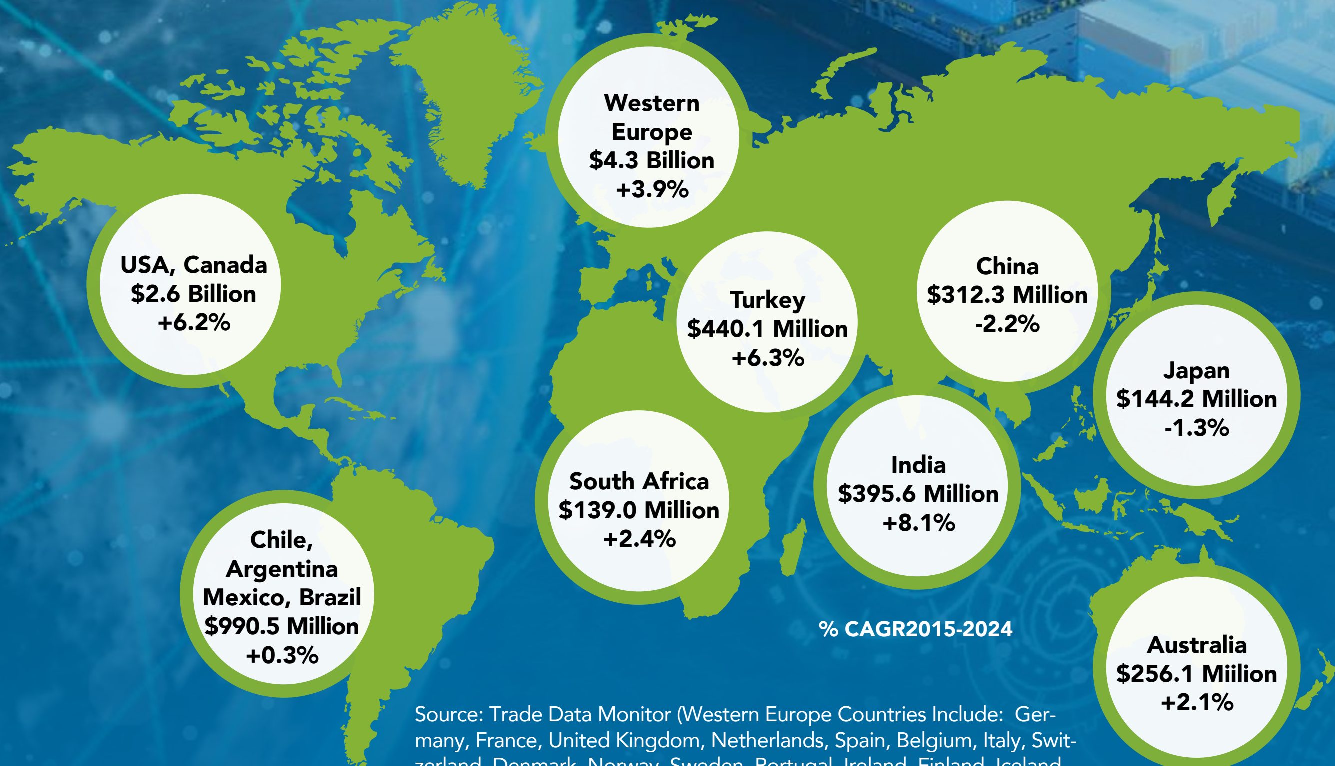
Annual Series: 2022 - 2024

Reporting Country	2022	2023	2024	% Change 2024/2023
Germany	$4,709,325,516	$5,328,597,329	$5,854,758,421	9.9%
Italy	$4,084,099,049	$5,136,438,134	$5,295,469,784	3.1%
China	$2,165,138,230	$2,341,941,326	$2,864,007,875	22.3%
Netherlands	$898,726,347	$959,258,537	$1,013,173,019	5.6%
Switzerland	$616,509,192	$782,903,491	$803,382,179	2.6%
United States	$715,293,988	$765,712,109	$711,124,879	-7.1%
France	$462,581,741	$543,213,040	$691,007,126	27.2%
Spain	$576,580,896	$687,892,372	$623,236,434	-9.4%
Canada	$532,845,266	$602,638,288	$612,677,804	1.7%
Japan	$660,987,496	$582,400,579	$583,603,699	0.2%
Turkey	$230,386,092	$286,159,925	$321,165,852	12.2%
United Kingdom	$295,829,658	$292,644,033	$319,520,828	9.2%
Sweden	$322,529,438	$344,701,617	$306,479,253	-11.1%
Belgium	$184,883,546	$243,343,971	$283,199,399	16.4%
South Korea	$220,921,107	$231,690,021	$243,911,152	5.3%
Taiwan	$295,644,451	$252,055,097	$233,581,148	-7.3%
Austria	$141,253,169	$235,981,405	$225,084,494	-4.6%
India	$171,372,038	$183,125,393	$219,737,634	20.0%
Denmark	$209,077,881	$220,186,969	$206,986,526	-6.0%
Czech Republic	$129,355,356	$152,743,829	$169,724,056	11.1%
Israel	$127,024,000	$119,295,000	$138,231,000	15.9%
Poland	$119,291,744	$135,072,609	$105,105,773	-22.2%
Slovenia	$65,854,417	$78,143,483	$101,244,457	29.6%
Malaysia	$96,817,862	$95,769,448	$83,215,310	-13.1%
Hungary	$60,083,662	$74,994,135	$80,989,806	8.0%
Other	$871,711,274	$1,002,462,963	$962,392,654	-4.0%
World	**$18,964,123,416**	**$21,679,365,103**	**$23,053,010,562**	**6.3%**

Other includes: Brazil, Finland , Thailand, Singapore, Serbia, New Zealand, Kyrgyzstan, Romania, Australia, Ireland, Slovakia, Bulgaria, Indonesia, South Africa, Portugal, Mexico, Hong Kong, Lithuania, Argentina, Norway, Uzbekistan, Greece, Estonia, Sri Lanka, Croatia, Kazakhstan, Iran, Peru, Latvia, Saudi Arabia, Colombia, Ukraine, Chile, Armenia, Egypt, Cyprus, Pakistan, Nigeria, Georgia, Kenya, Honduras, Ghana, Guatemala, Cambodia, Luxembourg, Philippines, Costa Rica, Morocco, Zimbabwe, Bosnia and Herzegovina, Kosovo, Jordan, Dominican Republic, Rep. of Moldova, Montenegro, El Salvador, Iceland, Paraguay, Ecuador, North Macedonia, Uruguay, Myanmar, Bahrain, Azerbaijan, Mozambique, Cote d'Ivoire, Mauritius, Malta, Barbados, Senegal, Zambia, Bolivia, Namibia, Mongolia, Brunei, Botswana, Madagascar, Guyana, Fiji, Albania, Macao, Belize, Grenada

Global Processing Machinery Imports by Region

Value of Imports, 2024 with % CAGR 2015-2024



Source: Trade Data Monitor (Western Europe Countries Include: Germany, France, United Kingdom, Netherlands, Spain, Belgium, Italy, Switzerland, Denmark, Norway, Sweden, Portugal, Ireland, Finland, Iceland, Luxembourg)

Top Processing Machinery Importers

Commodity: 8438, Machinery, Nesoi, For The Industrial Preparation Of Food Or Drink (Excluding Animal Or Fixed Vegetable Fats And Oils); Parts Thereof

Annual Series: 2022 - 2024				
Reporting Country	**2022**	**2023**	**2024**	**% Change 2024/2023**
United States	$1,995,372,310	$2,239,064,080	$2,037,450,786	-9.0%
Mexico	$389,424,789	$594,565,221	$645,386,866	8.5%
Canada	$496,080,067	$589,475,040	$588,148,192	-0.2%
France	$535,878,965	$549,110,521	$567,960,632	3.4%
Germany	$565,568,630	$571,629,113	$553,882,595	-3.1%
United Kingdom	$530,294,238	$513,312,830	$520,484,331	1.4%
Netherlands	$495,558,311	$456,030,616	$490,771,521	7.6%
Spain	$316,739,360	$387,764,472	$461,653,045	19.1%
Turkey	$190,770,857	$271,232,186	$440,153,844	62.3%
Belgium	$365,870,140	$352,893,060	$420,214,718	19.1%
India	$195,640,863	$347,724,796	$395,609,009	13.8%
Poland	$284,583,115	$336,357,549	$359,628,958	6.9%
Italy	$301,688,756	$351,674,575	$323,867,413	-7.9%
China	$383,763,793	$330,743,910	$312,302,002	-5.6%
Indonesia	$219,445,915	$250,216,460	$278,749,341	11.4%
Saudi Arabia	$114,019,356	$176,918,005	$273,482,817	54.6%
Switzerland	$216,280,753	$264,540,058	$272,875,624	3.2%
Brazil	$180,524,263	$194,491,721	$266,439,418	37.0%
Australia	$273,823,185	$312,808,624	$256,148,121	-18.1%
Austria	$197,163,561	$207,403,697	$220,373,327	6.3%
South Korea	$158,605,334	$142,570,680	$179,080,484	25.6%
Denmark	$215,871,503	$183,041,501	$173,986,393	-4.9%
Thailand	$152,435,637	$173,270,046	$171,141,863	-1.2%
Iran	$86,637,541	$141,638,938	$169,634,014	19.8%
Romania	$121,033,554	$152,800,697	$161,027,310	5.4%
Other	$3,513,908,513	$3,884,517,402	$4,110,120,778	5.8%
World	**$12,496,983,309**	**$13,975,795,798**	**$14,650,573,402**	**4.8%**

Other includes: Portugal, Japan, Malaysia, Chile, South Africa, Hungary, Norway, Greece, Colombia, Ukraine, Czech Republic, Ireland, Egypt, Uzbekistan, Slovakia, Kazakhstan, Taiwan, Morocco, Sweden, Guatemala, Bulgaria, Lithuania, Argentina, Philippines, New Zealand, Israel, Nigeria, Singapore, Cote d'Ivoire, Croatia, Ecuador, Kenya, Ethiopia, Finland, Peru, Dominican Republic, Slovenia, Serbia, Sri Lanka, Zambia, Costa Rica, Paraguay, El Salvador, Bosnia and Herzegovina, Hong Kong, Zimbabwe, Pakistan, Honduras, Georgia, Estonia, Uruguay, Azerbaijan, Bolivia, Latvia, Senegal, Armenia, Iceland, Rep. of Moldova, Panama, North Macedonia, Kyrgyzstan, Mongolia, Ghana, Namibia, Cambodia, Albania, Qatar, Kosovo, Guyana, Luxembourg, Cyprus, Mozambique, Fiji, Mauritius, Myanmar, Madagascar, Montenegro, Bahrain, Barbados, Botswana, Malta, Macao, Belize, Brunei, Grenada, Bermuda

Top Processing Machinery Exporters

Commodity: 8438, Machinery, Nesoi, For The Industrial Preparation Of Food Or Drink (Excluding Animal Or Fixed Vegetable Fats And Oils); Parts Thereof

Annual Series: 2022 - 2024				
Reporting Country	**2022**	**2023**	**2024**	**% Change 2024/2023**
Germany	$2,453,452,035	$2,859,924,155	$2,850,935,236	-0.3%
Italy	$2,169,925,233	$2,554,915,919	$2,736,131,051	7.1%
Netherlands	$2,076,804,769	$2,224,356,026	$2,381,834,168	7.1%
China	$1,420,469,135	$1,542,147,941	$1,757,608,559	14.0%
United States	$1,107,009,836	$1,195,503,992	$1,286,354,220	7.6%
Denmark	$689,341,774	$665,140,280	$737,253,378	10.8%
France	$616,585,945	$643,926,397	$669,539,367	4.0%
Spain	$390,496,255	$390,044,408	$459,268,673	17.7%
Switzerland	$365,326,740	$372,616,642	$376,767,515	1.1%
Turkey	$251,201,817	$317,024,457	$353,922,114	11.6%
Belgium	$288,513,052	$316,741,497	$346,773,745	9.5%
Austria	$266,884,387	$311,871,644	$334,555,011	7.3%
United Kingdom	$259,250,362	$278,521,531	$334,298,135	20.0%
Poland	$252,850,225	$294,797,081	$313,604,804	6.4%
Japan	$318,714,506	$257,376,487	$294,450,373	14.4%
India	$213,608,030	$203,188,537	$237,959,339	17.1%
Canada	$189,590,097	$210,279,600	$205,804,159	-2.1%
Slovakia	$140,852,911	$145,702,515	$156,353,691	7.3%
Czech Republic	$125,406,934	$138,479,508	$143,918,893	3.9%
Brazil	$108,158,670	$124,681,442	$139,181,623	11.6%
Taiwan	$134,826,911	$136,308,428	$122,004,918	-10.5%
South Korea	$74,026,160	$97,960,483	$111,204,987	13.5%
Sweden	$97,120,693	$101,621,865	$106,648,152	4.9%
Lithuania	$76,433,785	$133,349,663	$75,410,974	-43.4%
Australia	$75,725,512	$76,312,890	$73,355,611	-3.9%
Other	$811,060,842	$893,607,452	$889,116,200	-0.5%
World	**$14,973,636,616**	**$16,486,400,840**	**$17,494,254,896**	**6.1%**

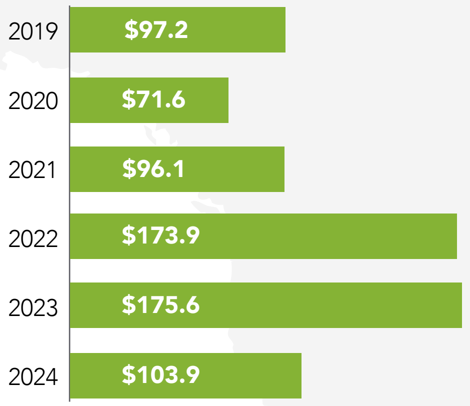
Other includes: Hungary, New Zealand, South Africa, Norway, Bulgaria, Slovenia, Mexico, Singapore, Romania, Portugal, Serbia, Greece, Latvia, Malaysia, Croatia, Thailand, Ireland, Finland , Pakistan, Colombia, Estonia, Iceland, Iran, Ukraine, Kazakhstan, Luxembourg, Rep. of Moldova, Chile, Philippines, Hong Kong, Bosnia and Herzegovina, Indonesia, Peru, Argentina, Israel, Uzbekistan, Saudi Arabia, Jordan, Morocco, Egypt, El Salvador, Namibia, Guatemala, Paraguay, Georgia, Costa Rica, Sri Lanka, North Macedonia, Kosovo, Kenya, Zambia, Armenia, Dominican Republic, Botswana, Uruguay, Ghana, Cambodia, Ecuador, Cyprus, Qatar, Montenegro, Albania, Mauritius, Kyrgyzstan, Bahrain, Honduras, Bermuda, Zimbabwe, Fiji, Malta, Myanmar, Cote d'Ivoire, Senegal, Barbados, Belize, Azerbaijan, Mozambique, Guyana, Grenada, Madagascar, Mongolia, Bolivia, Ethiopia, Macao, Brunei, Nigeria

The following pages outline several top machinery importing countries market share for packaging and processing equipment as well as top product categories, volume share of food packaging and volume share of beverage packaging and top companies in staple foods, soft drinks and beauty and personal care.

COUNTRIES (A-Z ORDER)

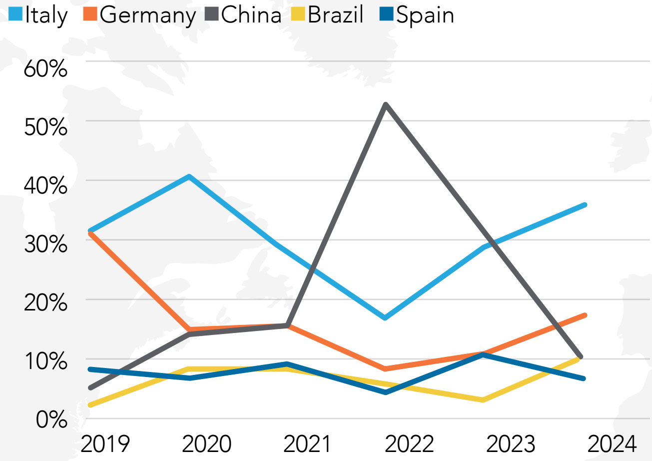
IMPORT STATISTICS
ARGENTINA

Packaging Machinery Imports (US Millions)



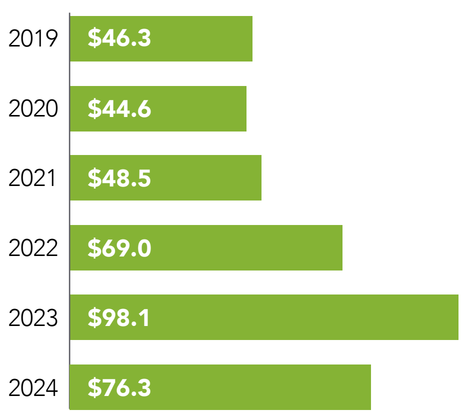
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



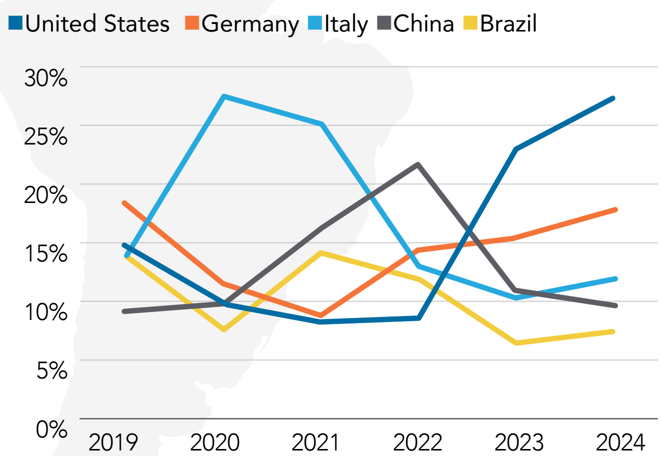
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

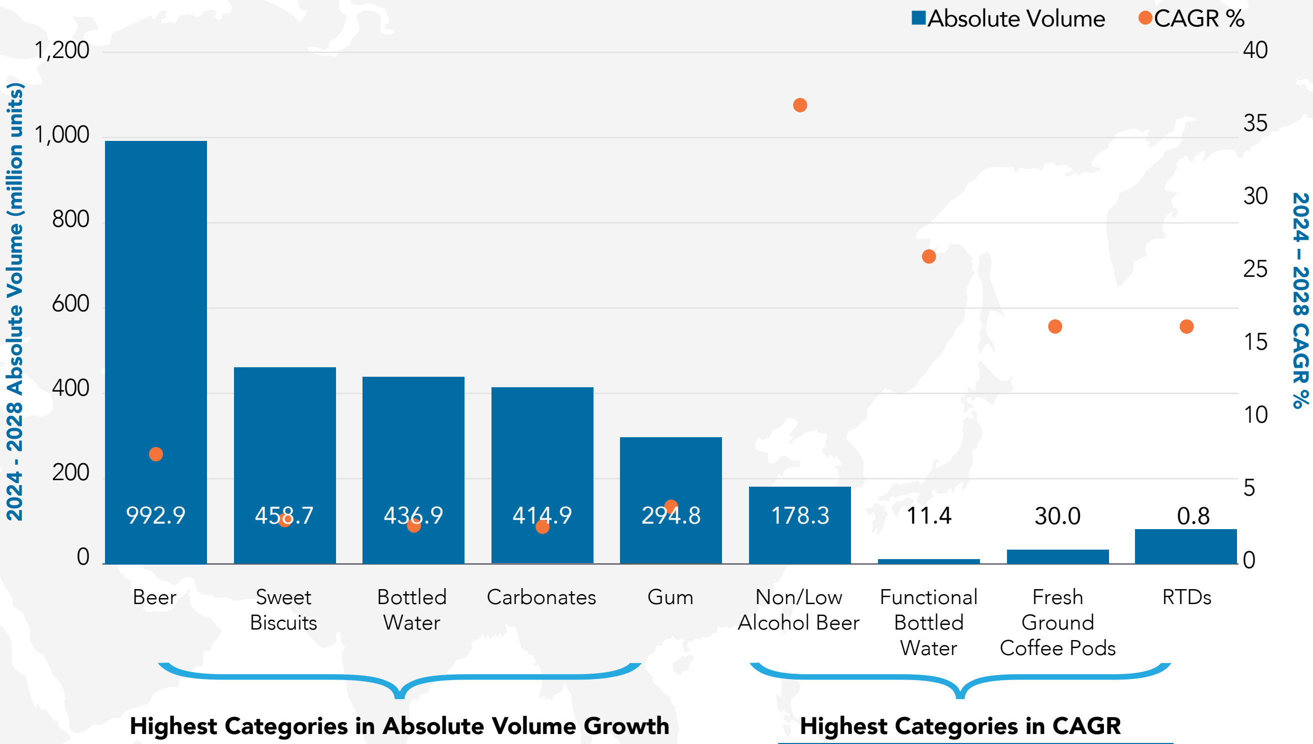
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

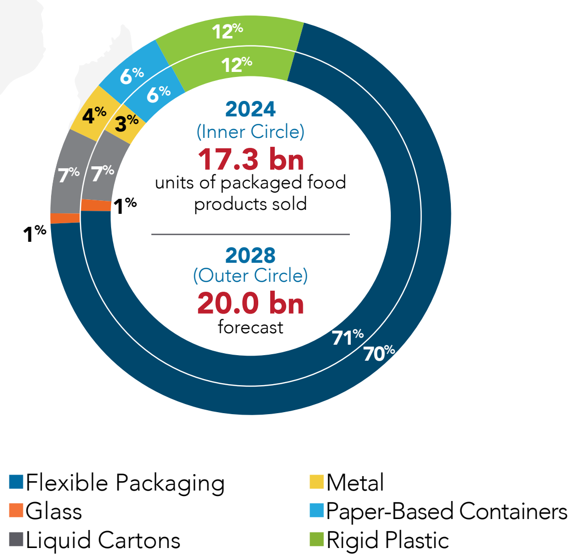
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

ARGENTINA



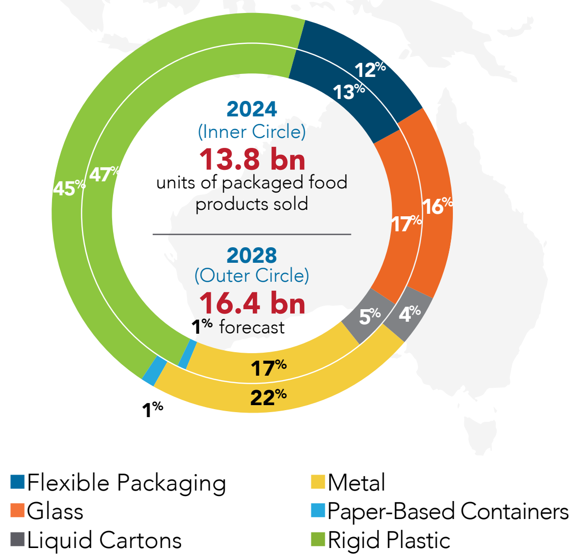
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Argentina



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Argentina



Data Source: © Euromonitor International 2025

TOP COMPANIES | ARGENTINA

Staple Foods	
Company Name	Retail Value RSP 2024
Artisanal	37.3
Private Label	15.7
Others	12.2
Molinos Río de la Plata SA	8.8
Frigorífico Paladini SA	3.8
Quickfood SA	3.0
Arcor SAIC	2.4
JBS Argentina SA	2.0
Grupo Bimbo SAB de CV	1.8
Molinos Ala SA	1.4
Dos Hermanos SA	1.1
Rafaela Alimentos SA	1.0
Bimbo de Argentina SA	0.8
Dielo SA, Fantoche	0.7
Salto de las Rosas SA	0.7
Mondelez Argentina SA	0.7
Frigorífico San Carlos SA	0.6
La Piamontesa SA	0.6
Semillas & Cereales SRL	0.4
Cafés La Virginia SA	0.4
Unilever de Argentina SA	0.4
Bunge Argentina SA	0.4
Campo Austral SA	0.3
Industrias Alimenticias Mendocinas SA	0.3
La Cachuera SA	0.3

Soft Drinks	
Company Name	Retail Value RSP 2024
Coca-Cola Argentina SA	39.7
Others	16.3
Cervecería y Maltería Quilmes SA	9.4
Aguas Danone de Argentina SA	6.2
El Jumillano SA	5.0
Refres Now SA	3.3
Cimes ChP	2.4
Pritty SA	2.0
Eco de los Andes SA	1.7
Mondelez Argentina SA	1.3
Cepas Argentinas SA	1.3
RPB SA	1.2
El Carmen SA	1.2
Red Bull Argentina SRL	1.0
Kraft Foods Argentina SA	0.8
Arcor SAIC	0.8
Carrefour Argentina SA	0.8
Oeste Embotelladora SA	0.7
Produnoa SA	0.6
Coto CICSA	0.6
Energy Group SRL	0.6
Other Private Label	0.6
Fedesur SA	0.4
Nutreco Alimentos SA	0.4
Frutafiel SA	0.3

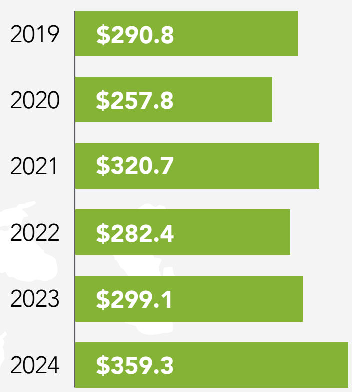
Beauty & Personal Care	
Company Name	Retail Value RSP 2024
Natura Argentina SA	15.5
Unilever de Argentina SA	12.6
Others	12.0
L'Oréal Argentina SA	10.3
Newsan SA	6.2
Cosméticos Avon SACI	6.0
Colgate-Palmolive Argentina SA	3.9
Beiersdorf (Argentina) SA	3.4
Laboratorios Andrómaco SA	3.3
Cannon Puntana SA	2.8
Puig Argentina SA	2.7
France Argentine Cosmetics SA	1.9
Diffupar SA	1.3
Other Private Label	1.3
Genomma Laboratories Argentina SA	1.2
Coty Argentina SA	1.1
Dreamco SA	1.1
Johnson & Johnson de Argentina SAC	1.0
Naturel SA	0.9
GlaxoSmithKline Argentina SA	0.7
Bic Argentina SA	0.7
Matiz SA	0.6
Lady Way SRL	0.6
Capilatis SA	0.6
Laboratorios Bagó SA	0.6

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

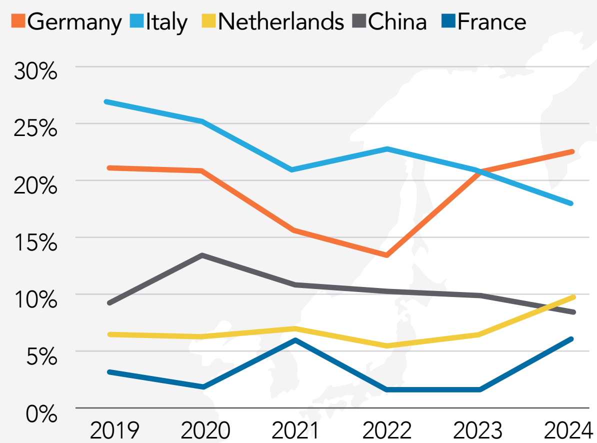
AUSTRALIA

Packaging Machinery Imports (US Millions)



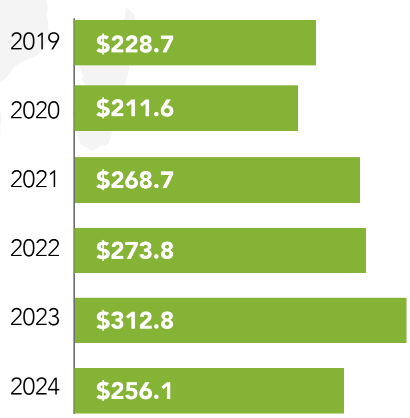
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



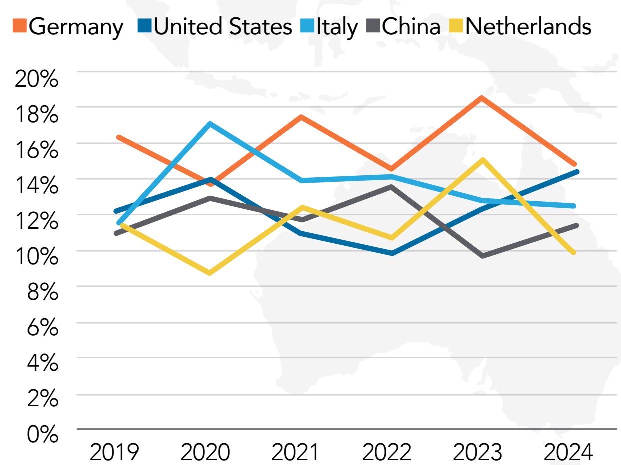
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



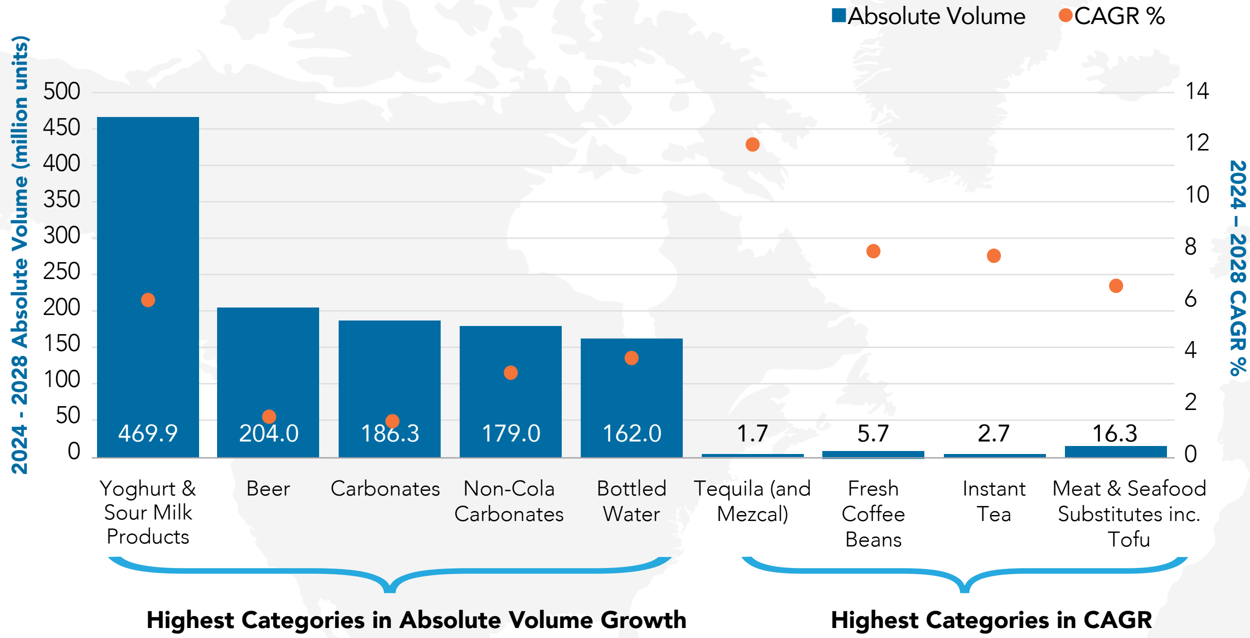
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



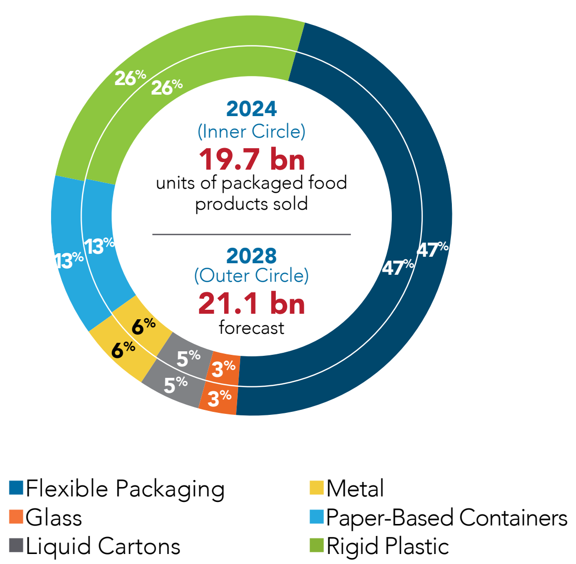
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
AUSTRALIA



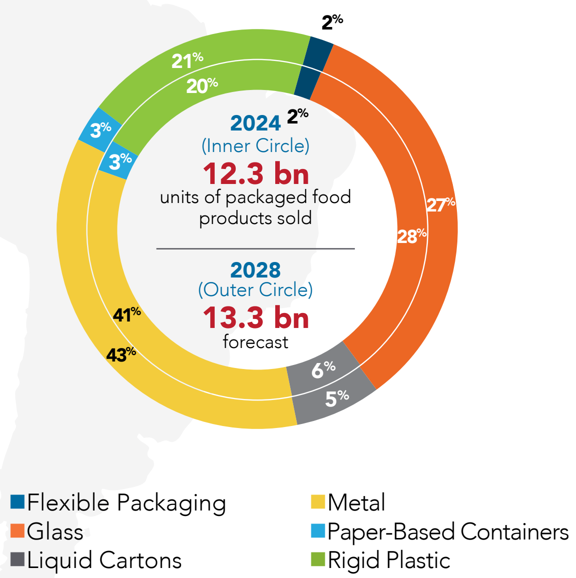
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Australia



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Australia



Data Source: © Euromonitor International 2025

TOP COMPANIES | **AUSTRALIA**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	25.4
Aldi Stores Supermarkets Pty Ltd	10.1
Woolworths Group Ltd	6.7
Coles Group Ltd	6.4
Others	6.2
Simplot Australia Pty Ltd	6.1
George Weston Foods Ltd	4.9
Goodman Fielder Ltd	4.1
Kellogg (Australia) Pty Ltd	2.4
P&M Quality Smallgoods Pty Ltd	2.4
Nestlé Australia Ltd	2.2
McCain Foods (Aust) Pty Ltd	1.8
Ingham Enterprises Pty Ltd	1.6
Heinz Co Australia Ltd, HJ	1.5
Rice Growers Ltd	1.5
San Remo Macaroni Co Pty Ltd	1.4
Sanitarium Health Food Co, The	1.2
SPC Ardmona Ltd	1.2
Oriental Merchant Pty Ltd	0.9
Valcorp Fine Foods Pty Ltd	0.9
General Mills Australia Pty Ltd	0.9
Mission Pty Ltd	0.8
Tassal Group Ltd	0.8
D'Orsogna Ltd	0.6
Green's General Foods Pty Ltd	0.5

Soft Drinks

Company Name	Retail Value RSP 2024
Coca-Cola Europacific Partners plc	27.0
Schweppes Australia Pty Ltd	16.6
Others	13.5
Private Label	7.9
Frucor Suntory Australia Pty Ltd	7.4
Red Bull Australia Pty Ltd	4.1
Bega Cheese Ltd	3.8
Heinz Co Australia Ltd, HJ	2.3
Monde Nissin (Australia) Pty Ltd	2.2
Bickford's Australia Pty Ltd	1.8
Bundaberg Brewed Drinks Pty Ltd	1.6
Food Revolution Group Ltd, The	1.2
Refresco Australia Pty Ltd	1.2
Southtrade International Pty Ltd	1.0
Made (Aust) Pty Ltd	0.9
San Pellegrino SpA	0.9
Nexba Beverages Pty Ltd	0.7
Remedy Drinks Ltd	0.7
SodaStream Australia Pty Ltd	0.6
Grove Fruit Juices Pty Ltd	0.4
Ocean Spray Cranberries Inc	0.3
Fresh Local Pty Ltd	0.3
Campbell's Co, The	0.3
Brownes Foods Operations Pty Ltd	0.3
H2Coco Pty Ltd	0.3

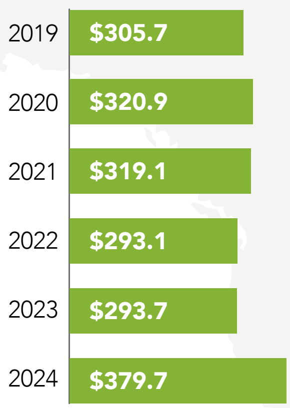
Beauty & Personal Care

Company Name	Retail Value RSP 2024
Others	31.8
L'Oréal Australia Pty Ltd	14.7
Procter & Gamble Australia Pty Ltd	5.1
Unilever Australia Ltd	5.1
Estée Lauder Pty Ltd	4.5
Colgate-Palmolive Pty Ltd	3.9
Coty Australia Pty Ltd	2.5
Beiersdorf Australia Ltd	2.3
Johnson & Johnson Pacific Pty Ltd	2.3
McPherson's Consumer Products Pty Ltd	2.2
Revlon Australia Pty Ltd	1.9
Chanel Australia Pty Ltd	1.3
Clarins Australia Pty Ltd	1.3
Deciem Australia Pty Ltd	1.2
Edgewell Personal Care Australia Pty Ltd	1.1
Henkel Australia Pty Ltd	0.9
Aesop Retail Pty Ltd	0.9
Body Shop Pty Ltd, The	0.9
GlaxoSmithKline Australia Pty Ltd	0.8
Church & Dwight (Australia) Pty Ltd	0.7
BWX Ltd	0.6
Nude by Nature Sales Pty Ltd	0.6
Pharmacare Laboratories Pty Ltd	0.6
Kimberly-Clark Australia Pty Ltd	0.6
Ella Baché SA - Laboratoire Suzy	0.6

Data Source: © Euromonitor International 2025

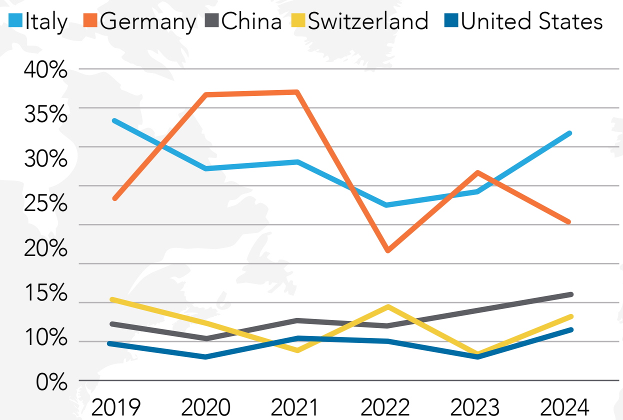
IMPORT STATISTICS
BRAZIL

Packaging Machinery Imports (US Millions)



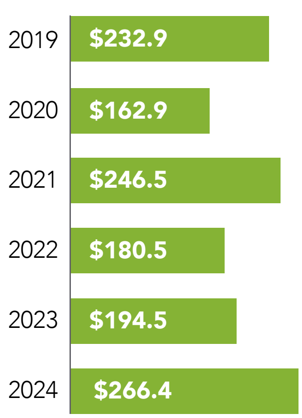
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



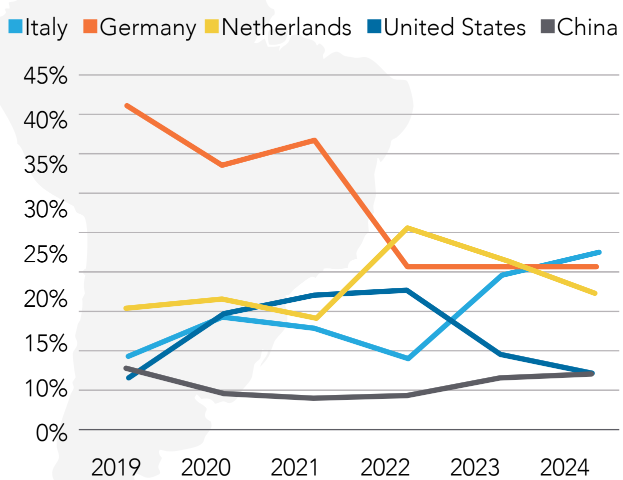
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



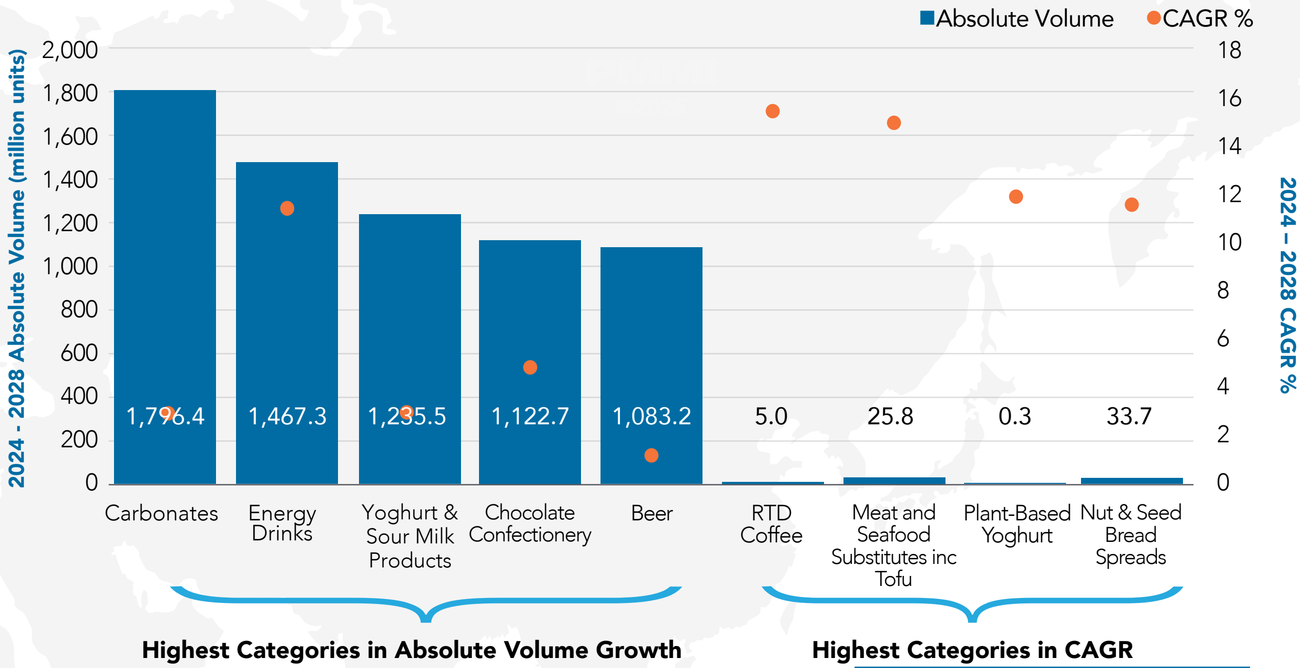
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



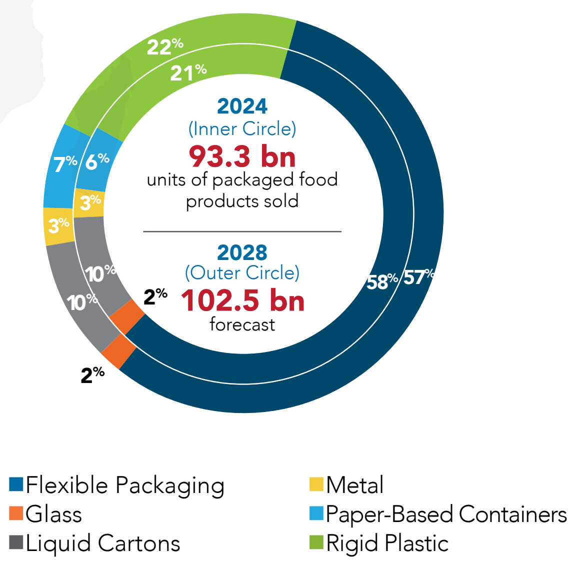
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
BRAZIL



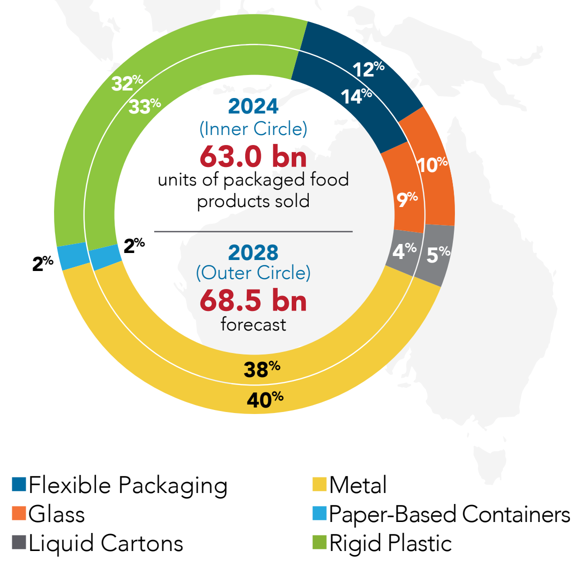
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Brazil



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Brazil



Data Source: © Euromonitor International 2025

TOP COMPANIES | **BRAZIL**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	51.8
Others	19.5
Camil Alimentos SA	3.1
BRF SA	2.9
Bimbo Brasil Ltda	2.1
Nissin Foods do Brasil Ltda	1.9
Pastifício Selmi SA	1.5
Josapar-Joaquim Oliveira SA Participações	1.4
WickBold & Nosso Pão Indústrias Alimentícias Ltda	1.3
Heinz Brasil Ltda	1.3
Pirahy Alimentos Ltda	1.3
Lua Nova Indústria Comércio Produtos Alimentícios Ltda	1.1
JBS SA	1.0
Pandurata Alimentos Ltda	1.0
Gomes da Costa Alimentos SA	1.0
M Dias Branco SA Indústria & Comércio de Alimentos	0.9
Cia Brasileira de Distribuição SA	0.8
J Macêdo SA	0.6
Carrefour Comércio e Indústria Ltda	0.6
Cotrisel - Cooperativa Triticola Sepeense Ltda	0.5
Other Private Label	0.5
Angelo Auricchio & Cia Ltda	0.4
Laticínios Condessa Ltda	0.4
PepsiCo do Brasil Ltda	0.4
Nestlé Brasil Ltda	0.3

Soft Drinks

Company Name	Retail Value RSP 2024
Others	34.9
Coca-Cola Indústrias Ltda	30.7
Cia Brasileira de Bebidas	7.4
Sucos Del Valle do Brasil Ltda	3.6
Red Bull do Brasil Ltda	3.4
Mondelez Brasil Ltda	2.6
Natural One SA	2.1
Heineken do Brasil Comercial Ltda	1.9
Indaiá Brasil Águas Minerais Ltda	1.5
Empresa Brasileira de Bebidas e Alimentos SA	1.2
Tampico Beverages Inc	1.0
Ajinomoto Interamericana Indústria e Comércio Ltda	0.8
Leão Júnior SA	0.7
Amacoco Água de Côco da Amazônia Ltda	0.7
Ducoco Alimentos SA	0.7
C L Pratinha-Eireli-ME	0.7
Minalba Alimentos e Bebidas Ltda	0.7
Bebidas Grassi Do Brasil Ltda	0.6
Wow Indústria e Comércio Ltda	0.5
Sococo SA Indústrias Alimentícias	0.5
Minalba Brasil	0.4
Viton 44 Indústria, Comércio e Exportação de Alimentos Ltda	0.3
Incrível Comércio de Bebidas e Alimentos Ltda	0.3
3 Corações SA	0.3
General Brands do Brasil Indústria e Comércio Ltda	0.3

Beauty & Personal Care

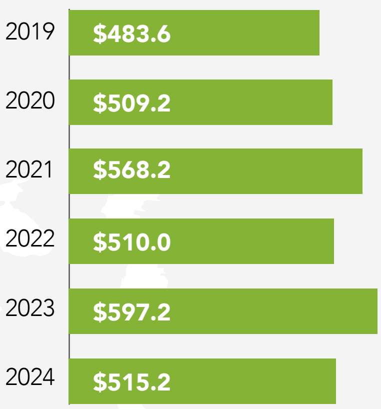
Company Name	Retail Value RSP 2024
Botica Comercial Farmacêutica Ltda	14.9
Others	14.8
Natura Cosméticos SA	14.1
Unilever Brasil Ltda	10.3
Colgate-Palmolive Indústria e Comércio Ltda	6.1
Procosa Produtos de Beleza Ltda	5.9
Procter & Gamble do Brasil SA	5.3
BDF Nivea Ltda	3.4
Johnson & Johnson do Brasil Indústria e Comércio de Produtos para Saúde Ltda	3.0
Coty Brasil Indústria e Comércio de Cosméticos Ltda	2.7
Avon Cosméticos Ltda	2.3
Phitoteraphia Biofitogenia Laboratorial Biota Ltda	1.1
Puig Brasil Comercializadora de Perfumes S/A	1.1
Niely do Brasil Industrial Ltda	1.1
Mary Kay do Brasil Ltda	1.1
Devintex Cosmeticos Ltda	1.0
Wella Brasil Ltda	0.8
Flora Produtos de Higiene e Limpeza SA	0.7
GlaxoSmithKline Brasil Ltda	0.7
LVMH Perfums & Cosmetics do Brasil Ltda	0.6
Casa Granado Laboratórios, Farmácias e Drogarias SA	0.6
Jequiti Cosméticos	0.5
Larru's Indústria e Comércio de Cosméticos Ltda	0.5
Estée Lauder Brasil	0.4
Skala Cosmeticos SA	0.4

Data Source: © Euromonitor International 2024

IMPORT STATISTICS

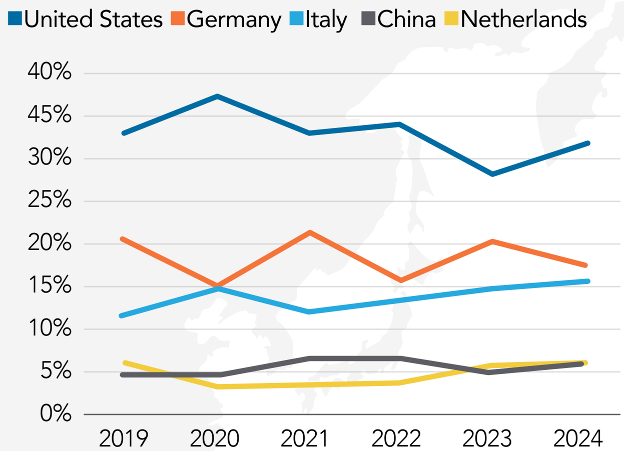
CANADA

Packaging Machinery Imports (US Millions)



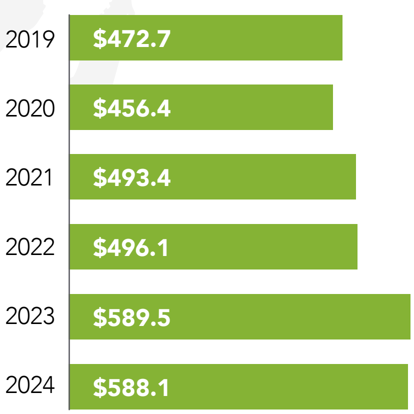
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



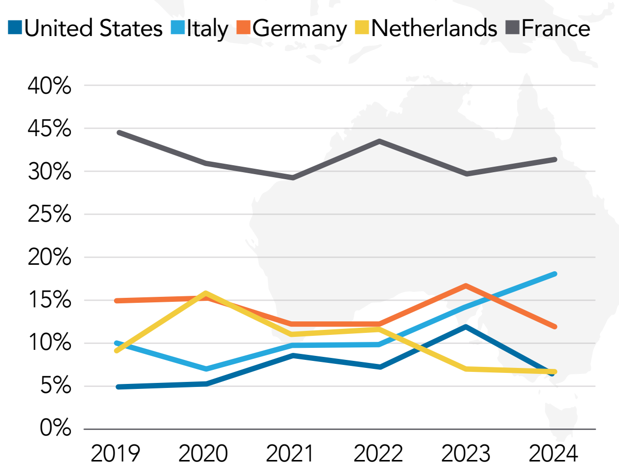
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



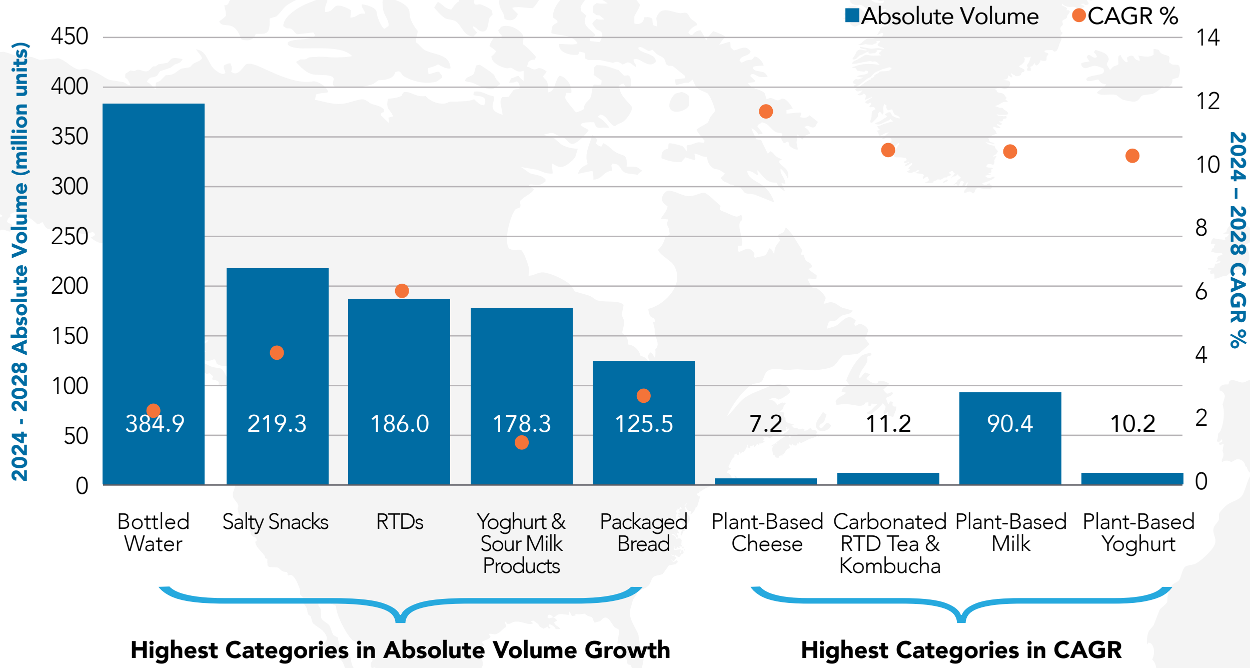
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



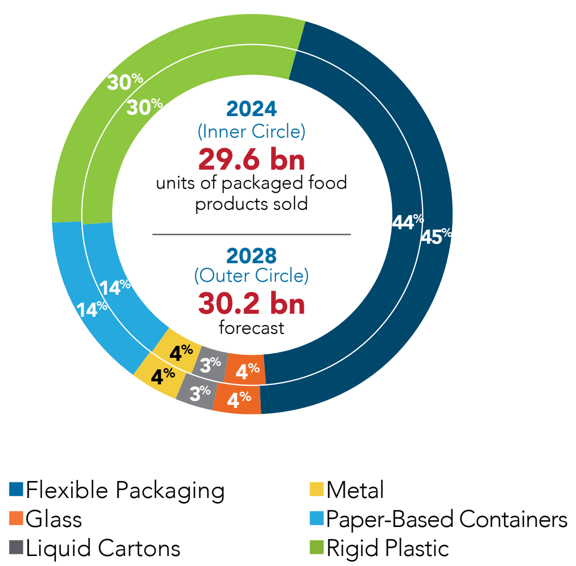
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
CANADA



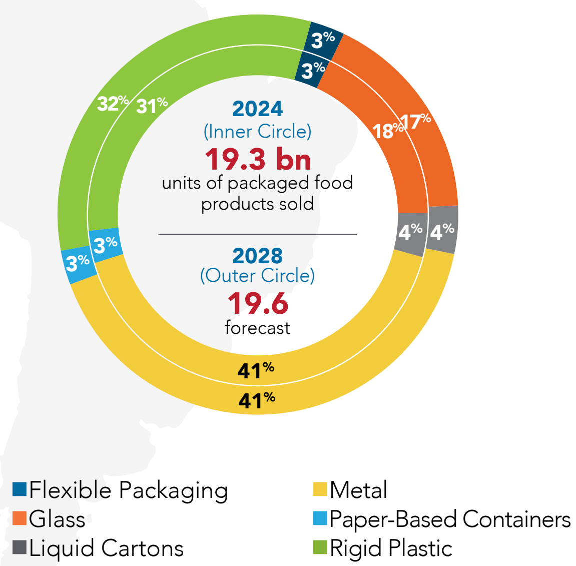
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Canada



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Canada



Data Source: © Euromonitor International 2025

TOP COMPANIES | **CANADA**

Staple Foods

Company Name	Retail Value RSP 2024
Others	21.6
Artisanal	14.5
Loblaw Cos Ltd	8.6
Canada Bread Co	4.9
FGF Brands Inc	4.5
Other Private Label	4.3
Schneider Corp	4.2
Maple Leaf Foods Inc	4.0
Sobeys Inc	3.8
Kellogg Canada Inc	2.9
General Mills Canada Corp	2.4
Olymel SEC/LP	2.1
Bonduelle Canada Inc	1.8
Catelli Foods Corp	1.7
Maple Lodge Farms Ltd	1.4
McCain Foods Ltd	1.3
High Liner Foods Inc	1.3
PepsiCo Beverages Canada	1.2
Culinar Inc	1.1
Clover Leaf Seafoods Inc	1.1
Canadian Fishing Co Ltd	0.9
Mars Canada Inc	0.9
Metro Inc	0.6
Europe's Best Inc	0.6
Sun-Brite Foods Ltd	0.5

Soft Drinks

Company Name	Retail Value RSP 2024
PepsiCo Beverages Canada	21.4
Others	13.5
Coca-Cola Ltd	13.2
Canada Dry Motts Inc	5.8
A Lassonde Inc	5.8
BlueTriton Brands Inc	5.4
Minute Maid Co of Canada	4.5
Loblaw Cos Ltd	4.5
Minute Maid Co Canada Inc	3.8
Other Private Label	3.7
Red Bull Canada Ltd	2.5
Nestlé Canada Inc	2.4
Sun-Rype Products Ltd	1.8
Sobeys Inc	1.3
Ocean Spray Cranberries Inc	1.2
Snapple Beverage Corp	1.2
Naya Waters Inc	1.0
Kraft Canada Inc	0.9
Campbell's Co, The	0.9
Saputo Inc	0.6
A&W Food Services of Canada Inc	0.5
Eaux Vives Water Inc	0.4
North American Coffee Partnership, The	0.4
Beverage World Inc	0.4
Tonica Kombucha	0.3

Beauty & Personal Care

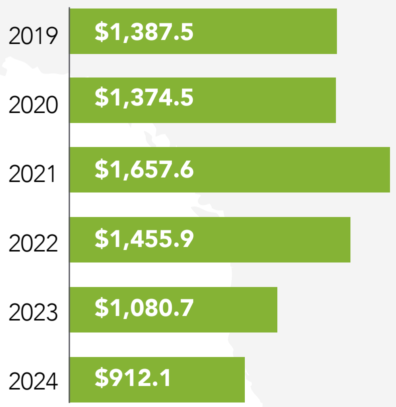
Company Name	Retail Value RSP 2024
Others	19.4
L'Oréal Canada Inc	16.6
Procter & Gamble Inc	14.2
Coty (Canada) Inc	5.1
Johnson & Johnson (Canada) Inc	4.6
Estée Lauder Cosmetics (Canada) Ltd	4.6
Unilever Canada Inc	3.7
Colgate-Palmolive Canada Inc	3.2
Beiersdorf Canada Inc	1.7
GlaxoSmithKline Consumer Healthcare Canada Inc	1.4
Alberto-Culver Canada Inc	1.3
Clarins Canada Inc	1.3
Chanel Inc	1.3
Wella Beauty Canada ULC	1.1
Groupe Marcelle	1.1
Deciem Inc	1.0
Limited Brands Canada	1.0
Other Private Label	1.0
Edgewell Personal Care Brands LLC	0.9
Puig Canada Inc	0.8
Revlon Canada Inc	0.8
Kao Brands Canada Inc	0.7
Church & Dwight Ltd	0.6
Yves Rocher Inc	0.6
Mary Kay Canada Inc	0.6

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

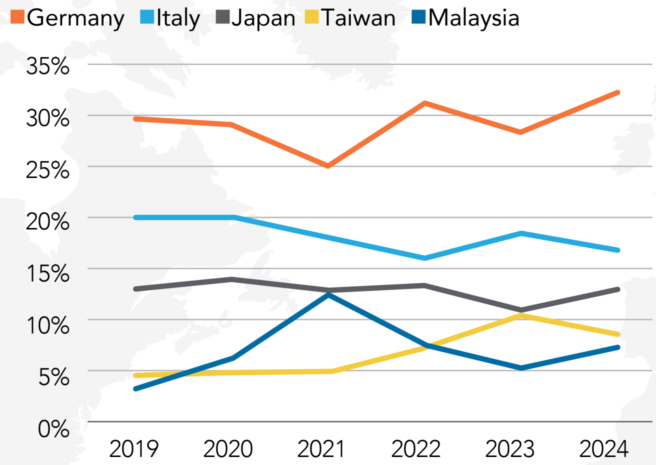
CHINA

Packaging Machinery Imports (US Millions)



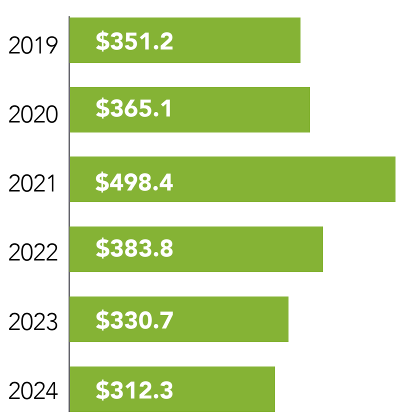
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



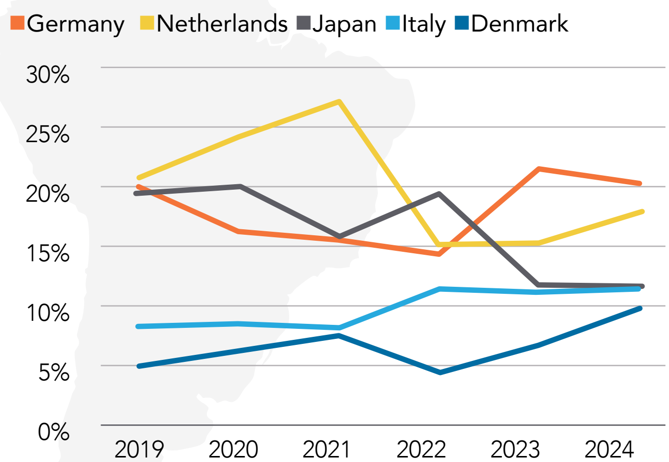
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



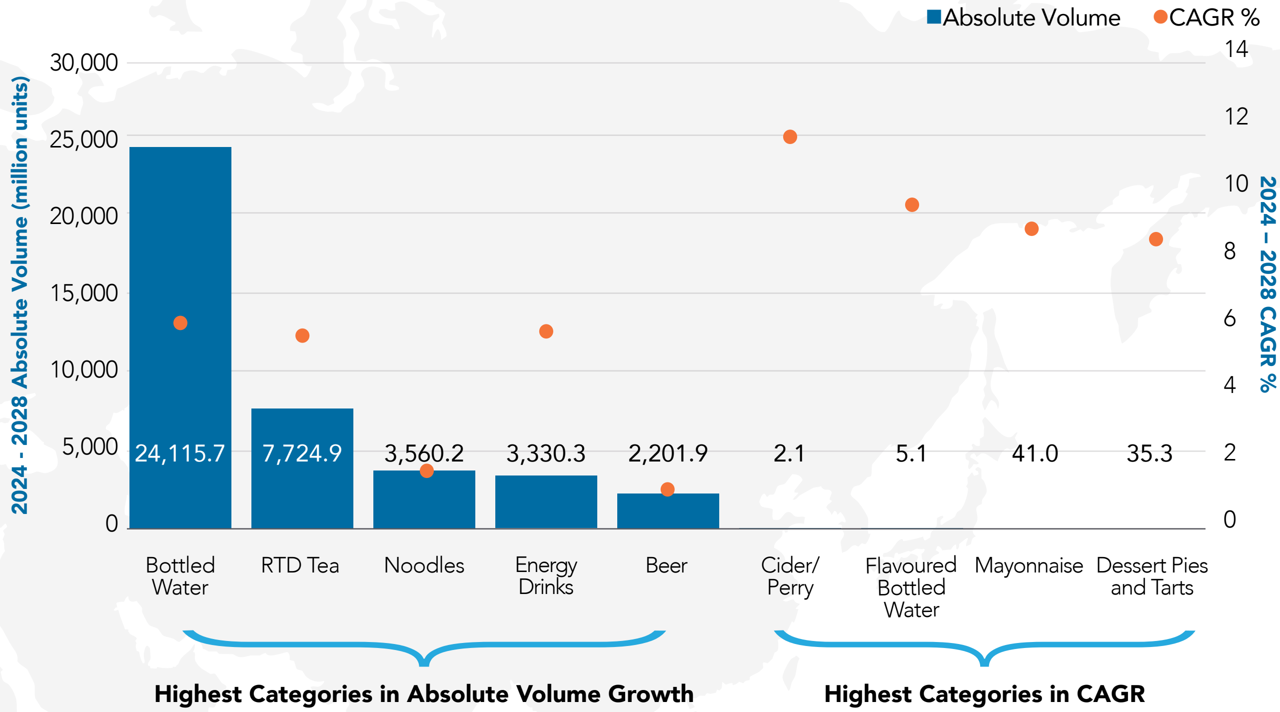
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



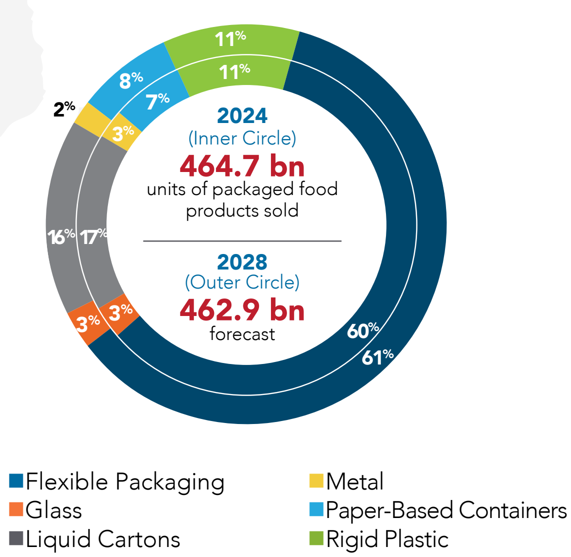
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
CHINA



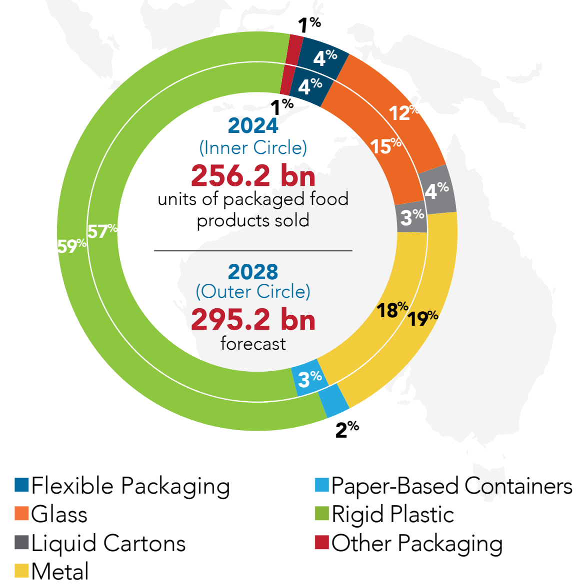
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in China



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in China



Data Source: © Euromonitor International 2025

TOP COMPANIES | **CHINA**

Staple Foods

Company Name	Retail Value RSP 2024
Others	44.7
Artisanal	15.3
Private Label	7.6
Tingyi (Cayman Islands) Holdings Corp	5.0
WH Group	3.3
Yihai Kerry Oils & Grains (China) Co Ltd	3.0
China National Cereals, Oils & Foodstuffs Imp & Exp Corp (COFCO)	2.2
Uni-President China Holdings Ltd	1.7
Jinmailang Food Co Ltd	1.5
Baixiang Food Group	1.5
People's Food Holdings Ltd	1.5
China Resources Ng Fung Limited	1.2
Shenyang Toly Bread Co Ltd	1.0
Fujian Dali Food Co Ltd	0.8
Fujian Anjoy Food Co Ltd	0.7
Shiyue Daotian Group Co Ltd	0.6
Shanghai Lehui Rice Industry Co Ltd	0.5
Fujian Changting Panpan Foodstuff Co Ltd	0.5
Nissin Foods Co Ltd	0.4
Kemen Noodle Mfg Co Ltd	0.4
Shenyang Nong Shim Foods Co Ltd	0.4
Shandong Zhucheng Foreign Trade Group Co Ltd	0.3
Guilin Seamild Foods Co Ltd	0.3
Hebei Jinshahe Noodles Co Ltd	0.3
Shandong Liuhe Group	0.3

Soft Drinks

Company Name	Retail Value RSP 2024
Others	31.1
Tingyi (Cayman Islands) Holdings Corp	10.5
Nongfu Spring Co Ltd	9.5
Coca-Cola China Ltd	8.5
President Enterprises (China) Investment Co Ltd	3.9
China Resources C'estbon Beverage (China) Co Ltd	3.8
Shenzhen Eastroc Beverage Co Ltd	3.4
Shenzhen Ganten Industry Co Ltd	3.4
Red Bull Vitamin Drink Co Ltd	3.3
Guangdong Jiaduobao Beverage & Food Co Ltd	2.9
Guangzhou Wanglaoji Pharmaceutical Co Ltd	2.7
Beijing Genki Forest Beverage Co Ltd	2.4
Hangzhou Wahaha Group Co Ltd	2.0
Beijing Huiyuan Beverage & Food Group Corp	1.2
Nestlé (China) Ltd	1.1
Jiaozuo Mingren Natural Medicine Co Ltd	1.0
Jinmailang Food Co Ltd	1.0
Fujian Dali Food Co Ltd	0.9
Danone (China) Food & Beverage Co Ltd	0.8
Shenzhen Pusheng Food Sales Co Ltd	0.7
Guangdong Jianlibao Group	0.7
Suntory (China) Holding Co Ltd	0.6
Vitasoy International Holdings Ltd	0.5
Henan Zhongwo Beverage Co Ltd	0.5
Blue Sword Drink & Food Holding Co Ltd	0.4

Beauty & Personal Care

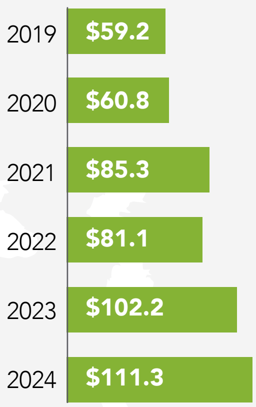
Company Name	Retail Value RSP 2024
Others	21.1
L'Oréal (China) Co Ltd	14.1
Procter & Gamble (Guangzhou) Ltd	7.9
Estée Lauder (Shanghai) Commercial Co Ltd	5.1
Shiseido China Co Ltd	2.7
Proya Cosmetics Co Ltd	2.7
LVMH Moët Hennessy Louis Vuitton SA	2.2
Unilever China Ltd	2.2
Jala (Group) Co Ltd	1.9
Shanghai Pehchaolin Daily Chemical Co Ltd	1.7
Kunming Botanee Bio Tech Co Ltd	1.5
Shanghai Chicmax Cosmetics Co Ltd	1.4
Yunnan Baiyao Group Co Ltd	1.2
Giant Biogene Holding Co Ltd	1.0
Hawley & Hazel Chemical (Zhongshou) Co Ltd	0.9
Shanghai Jahwa United Co Ltd	0.8
LG Household & Health Care Ltd	0.8
Guangdong Marubi Biotechnology Co Ltd	0.8
Henkel (China) Co Ltd	0.8
Beijing Dr Plant Biotechnology Co Ltd	0.8
Colgate (Guangzhou) Co Ltd	0.8
AmorePacific Cosmetics (Shanghai) Co Ltd	0.8
Mao Geping Cosmetics Co Ltd	0.7
Chanel (China) Trading Co Ltd	0.7
L'Occitane International SA	0.7

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

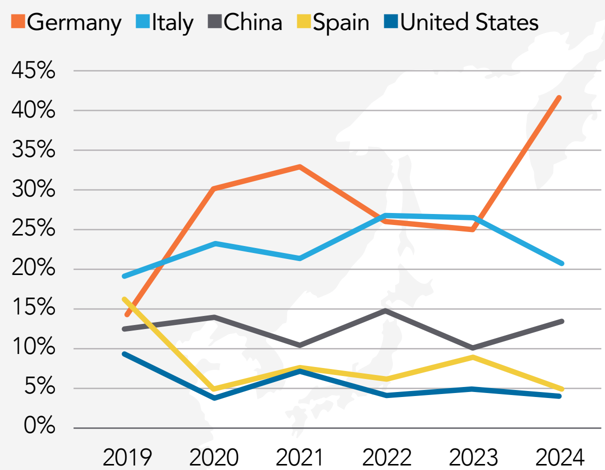
COLOMBIA

Packaging Machinery Imports (US Millions)



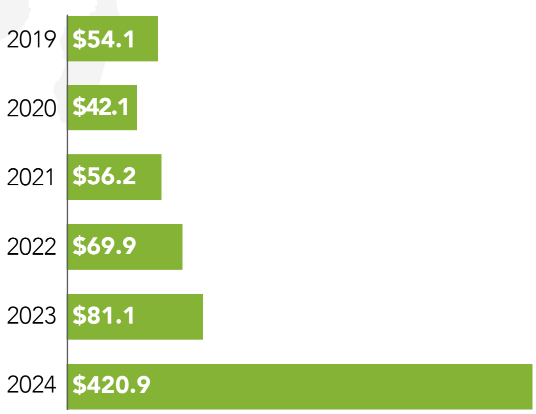
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



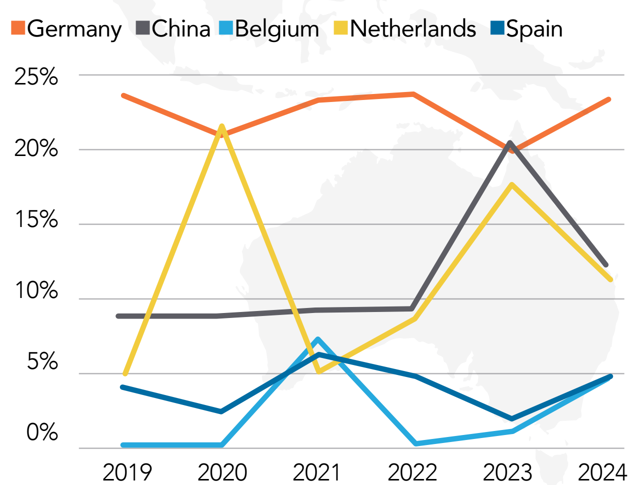
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

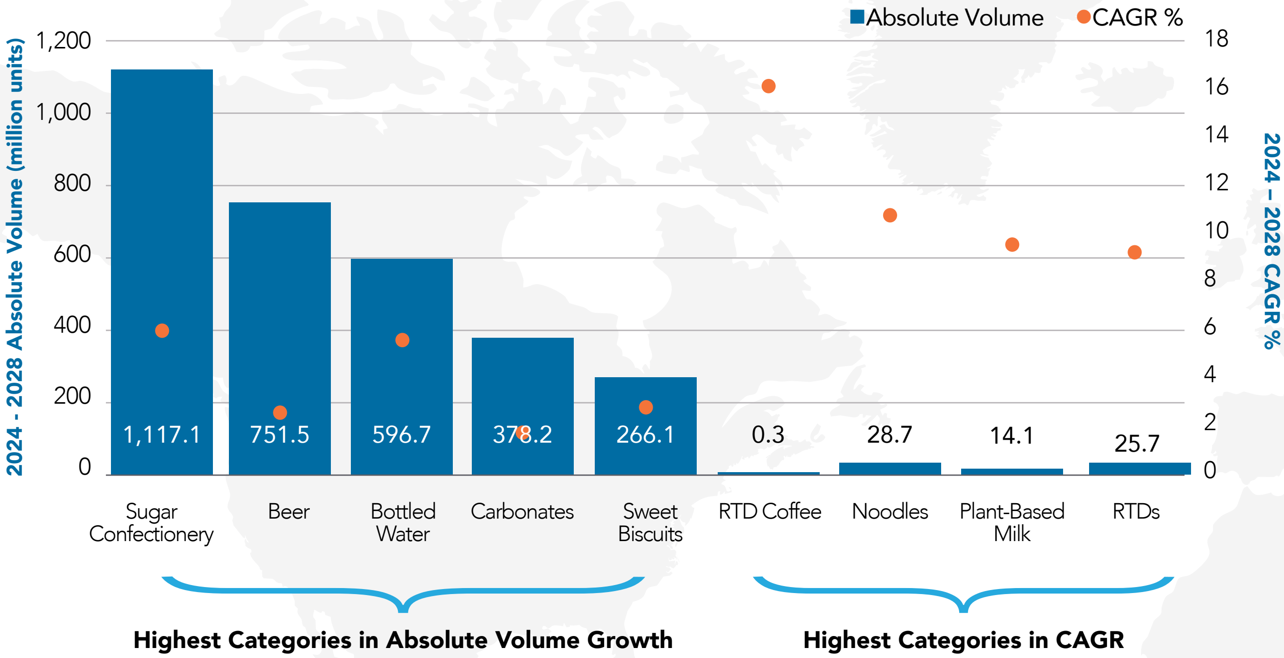
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

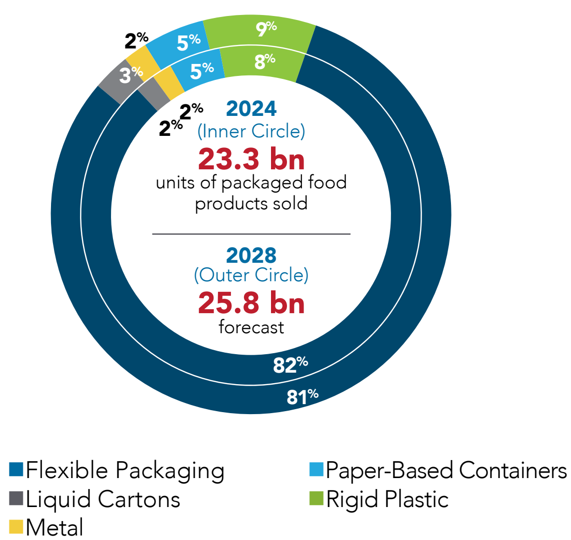
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

COLOMBIA



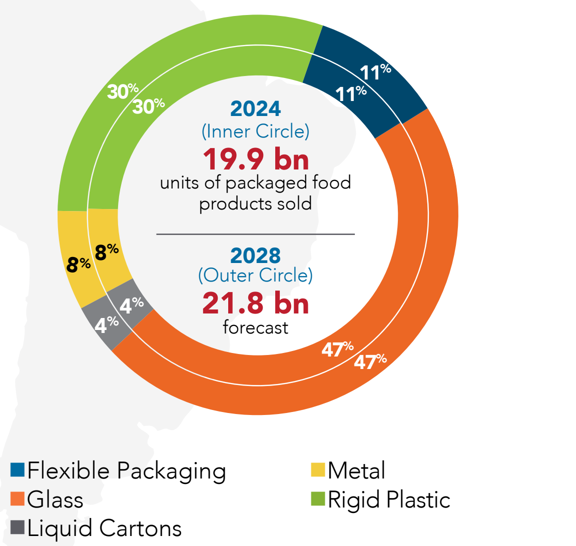
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Colombia



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Colombia



Data Source: © Euromonitor International 2025

TOP COMPANIES | **COLOMBIA**

Staple Foods	
Company Name	Retail Value RSP 2024
Private Label	18.3
Artisanal	17.7
Others	10.4
Industrias de Alimentos Zenú SA	7.9
Diana Corporación SAS	6.4
Bimbo de Colombia SA	6.4
ORF SA	5.5
Productos Ramo SA	3.9
Alimentos Cárnicos SA	3.7
Productos Alimenticios Doria SA	2.6
Seatech International Inc	1.7
Congelagro McCain Colombia SA	1.6
Harinera del Valle SA	1.5
Agroindustrial Molino Sonora AP SAS	1.4
Uniarroz SA	1.3
Inversiones Arroz Caribe SA	1.1
Distriaves SA	0.9
Kellogg de Colombia SA	0.8
Comapán SA	0.7
Industrias Santa Clara SA	0.6
Sary SAS	0.6
Quala SA	0.5
Don Maíz SA	0.4
Ajinomoto del Perú SA (Sucursal Colombia)	0.4
Colombo Española de Conservas	0.4

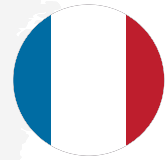
Soft Drinks	
Company Name	Retail Value RSP 2024
Postobón SA	40.6
Fomento Económico Mexicano SAB de CV	28.1
Others	8.2
Bavaria SA	6.1
Ajecolombia SA	4.9
Quala SA	4.4
Pisa Farmacéutica de Colombia SA	2.0
Red Bull Colombia SAS	1.4
Alpina Productos Alimenticios SA	1.2
Other Private Label	1.0
Conservas California SA	0.7
Monster Energy Colombia SAS	0.5
Central Cervecera de Colombia SAS	0.4
Various franchisees	0.4
Productos Naturales de la Sabana SA	0.1
Meals de Colombia SA	0.1
Levapan SA	0.1

Beauty & Personal Care	
Company Name	Retail Value RSP 2024
Belstar SA	9.5
Colgate-Palmolive & Cia	9.2
Other Private Label	9.1
Others	6.8
Unilever Andina Colombia SA	6.5
Natura Cosméticos Ltda	6.4
L'Oréal PROBECOL SA	5.5
Procter & Gamble de Colombia SA	5.5
Yanbal de Colombia SA	4.2
Beiersdorf (Colombia) SA	2.6
Henkel Colombiana SA	2.5
Avon Colombia Ltda	2.4
Johnson & Johnson de Colombia SA	2.4
Prebel SA	2.4
Belleza Express SA	1.4
Laboratorios de Cosméticos Vogue SA	1.4
Laboratorios Recamier Ltda	1.1
Tecnoquímicas SA	1.1
Isdin Colombia SAS	1.0
Productos Familia Sancela SA	1.0
Mary Kay Colombia SAS	0.9
Puig Colombia SAS	0.8
Genomma Lab Colombia Ltda	0.7
JGB SA, Laboratorios	0.7
Milagros Enterprise Group SAS	0.7

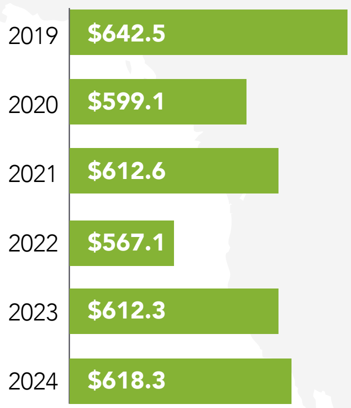
Data Source: © Euromonitor International 2025

IMPORT STATISTICS

FRANCE

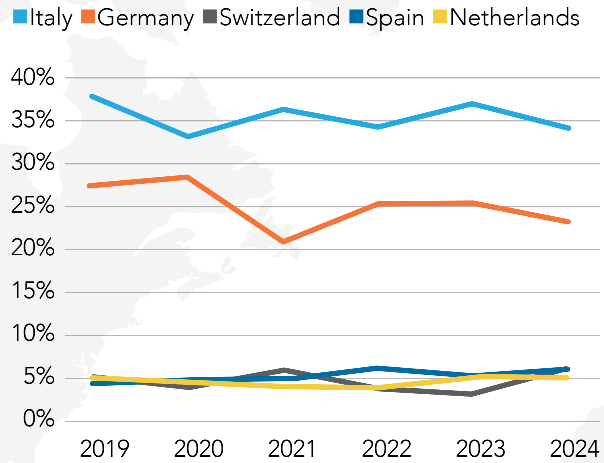


Packaging Machinery Imports (US Millions)



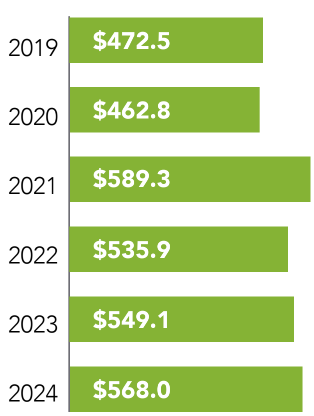
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



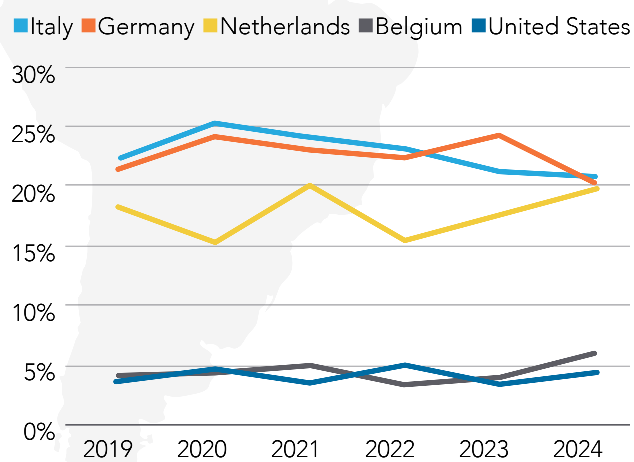
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

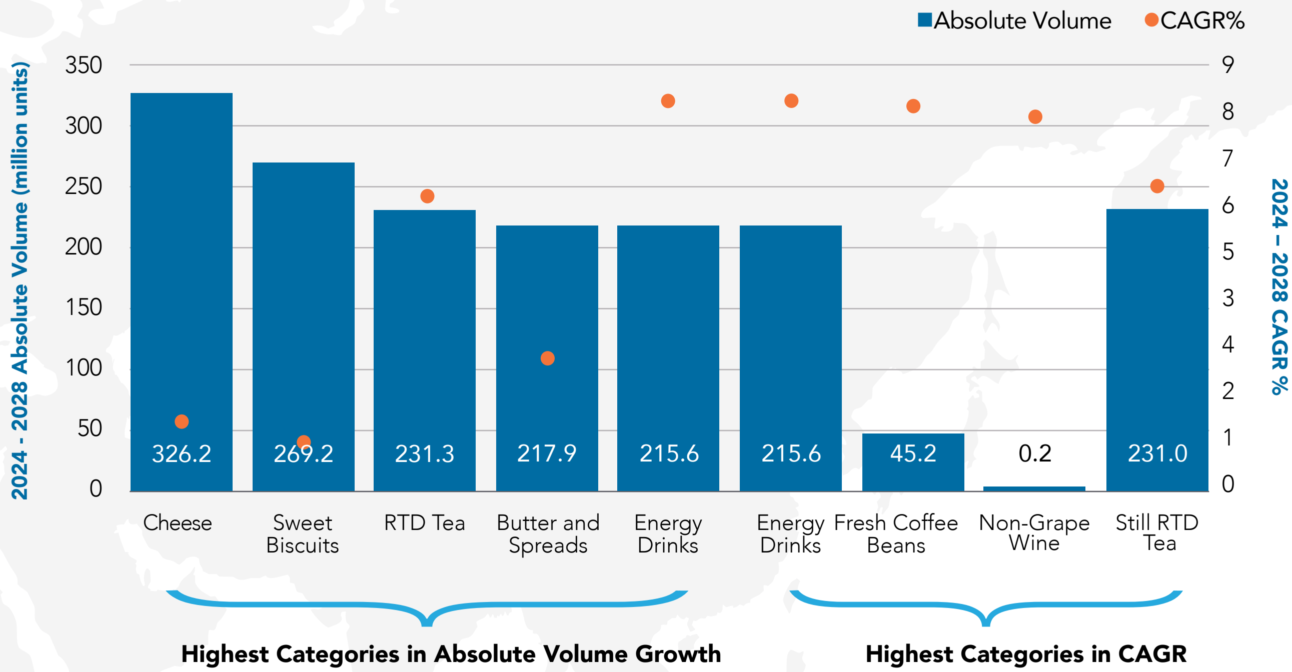
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

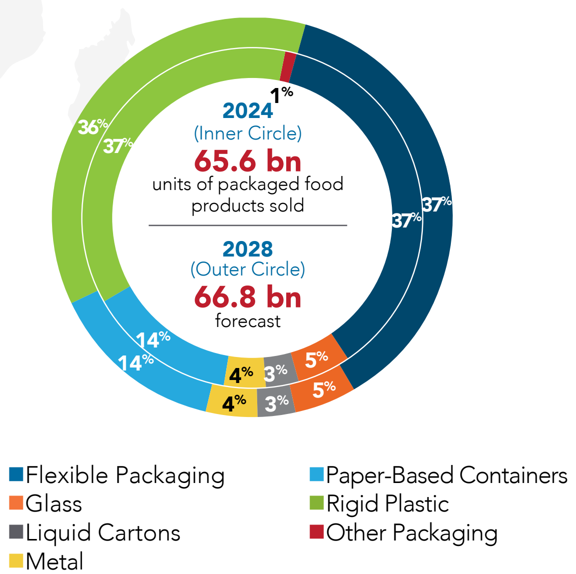
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

FRANCE



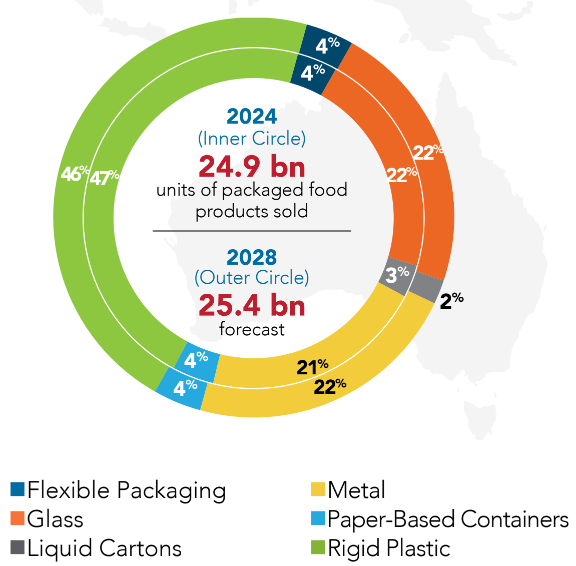
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in France



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in France



Data Source: © Euromonitor International 2025

TOP COMPANIES | **FRANCE**

Staple Foods	
Company Name	Retail Value RSP 2024
Artisanal	32.3
Others	10.5
Other Private Label	9.4
Galec - Centre Distributeur Edouard Leclerc	3.6
Carrefour SA	3.4
Fleury Michon, Groupe	2.9
Casino Guichard-Perrachon SA	2.8
Auchan France	2.7
Casa Tarradellas SA	2.6
Bigard SA, Groupe	2.3
Barilla France SA	2.1
Panzani SAS	2.0
ITM Entreprises SA	1.8
Bonduelle Groupe SA	1.4
Brioche Pasquier SA	1.3
Labeyrie Fine Foods SAS	1.2
Picard Surgelés SA	1.1
Paulet SA	0.9
Madrange SA	0.9
LDC - Société Lambert-Dodard-Chancereul	0.8
Groupe Aoste	0.8
McCain Alimentaire Sarl	0.8
Kellogg Produits Alimentaires SA	0.7
Findus France SAS	0.7
Delpeyrat Groupe	0.7

Soft Drinks	
Company Name	Retail Value RSP 2024
Coca-Cola Entreprises SA	21.8
Others	9.7
Nestlé Waters France SAS	8.2
Orangina Suntory France SAS	7.5
Neptune SA	7.0
Other Private Label	5.3
PepsiCo France SNC	4.9
Red Bull France SASU	4.7
Danone, Groupe	4.6
Société Anonyme des Eaux Minérales d'Evian (SAEME)	3.2
Carrefour France SA	2.8
Galec - Centre Distributeur Edouard Leclerc	2.4
Eckes-Granini France SNC	2.3
Teisseire France SAS	1.7
Fruité Entreprises SA	1.7
Innocent SAS	1.5
ITM Entreprises SA	1.5
Système U Centrale Nationale SA	1.2
Auchan France	1.0
Andros SAS	0.9
Nerios Groupe	0.6
Georges Monin SAS	0.4
Mc Energy SAS	0.4
Wattwiller Société des Domaines SA	0.4
Asco Foods Ltd	0.4

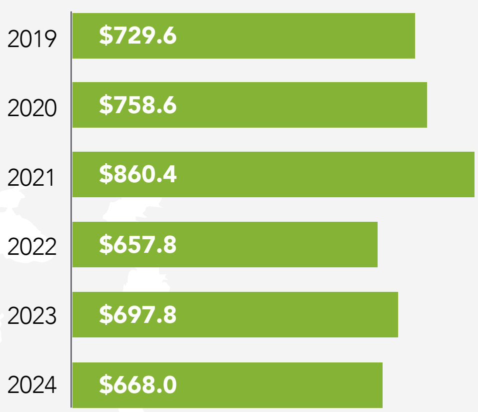
Beauty & Personal Care	
Company Name	Retail Value RSP 2024
Others	14.3
L'Oréal SA	6.0
Gemey Maybelline Garnier SNC	4.7
Procter & Gamble France SNC	4.3
Laboratoires LaScad	4.3
Cosmétique Active International (CAI)	4.3
Unilever France SA	4.1
Pierre Fabre SA, Laboratoires	3.3
Christian Dior SA, Parfums	3.1
Beiersdorf (France) SA	2.6
Colgate-Palmolive France SA	2.6
Henkel France SA	2.5
Yves Rocher SA	2.5
Chanel SA	2.4
Other Private Label	2.4
Guerlain SAS	1.9
GlaxoSmithKline SAS	1.8
Clarins SA	1.7
NAOS SAS	1.7
Vendôme SA, Laboratoires	1.6
Kiko SpA	1.4
Paco Rabanne - Groupe Puig SA	1.2
Estée Lauder (France) SA	1.2
Yves Saint Laurent Parfums	1.1
Coty France SA	1.1

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

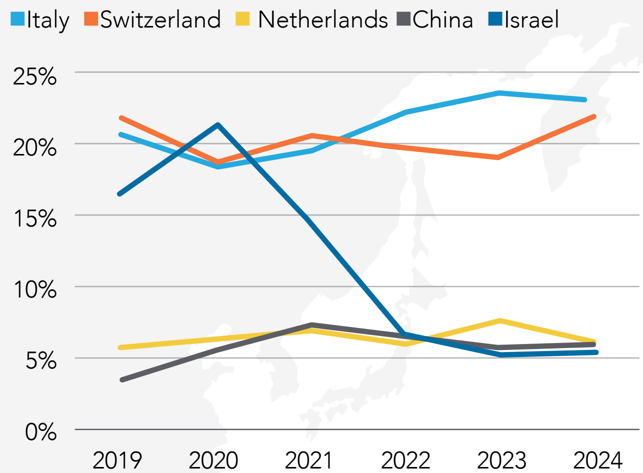
GERMANY

Packaging Machinery Imports (US Millions)



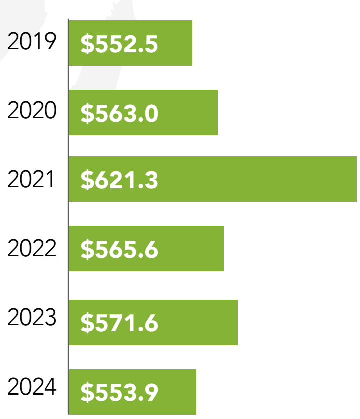
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



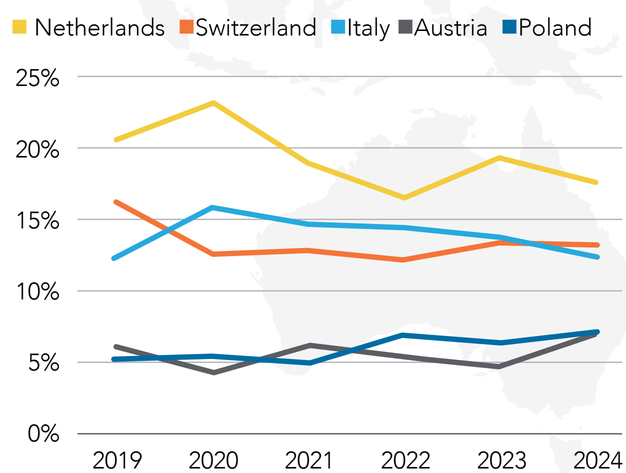
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



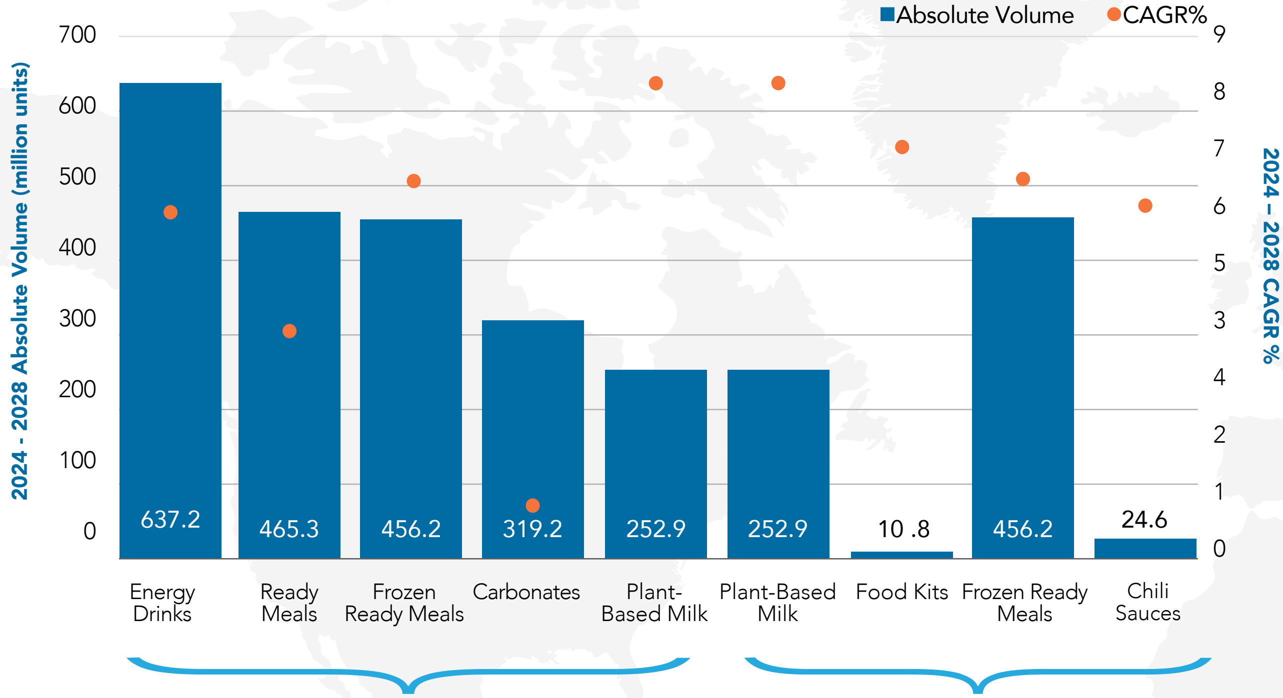
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



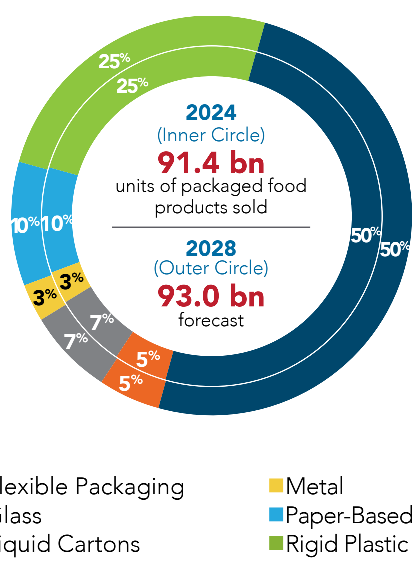
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
GERMANY



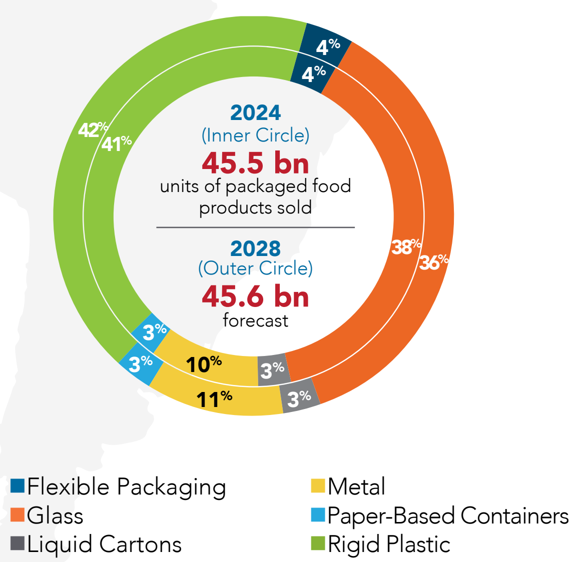
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Germany



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Germany



Data Source: © Euromonitor International 2025

TOP COMPANIES | **GERMANY**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	24.0
Aldi Einkauf GmbH & Co oHG	15.7
Others	12.6
Other Private Label	12.0
Rewe Markt GmbH	7.8
Lidl Stiftung & Co KG	4.9
Harry-Brot GmbH	3.4
Iglo Deutschland GmbH	1.7
Lieken AG	1.7
Bofrost Dienstleistungs GmbH & Co KG	1.2
Edeka Zentrale AG & Co KG	1.1
Rügen Fisch AG	0.9
Rügenwalder Wurstfabrik Carl Müller GmbH & Co KG	0.8
Dr August Oetker Nahrungsmittel KG	0.7
Kuchenmeister GmbH	0.7
Conditorei Coppenrath & Wiese GmbH & Co KG	0.7
Appel Feinkost GmbH & Co KG	0.6
Newlat GmbH	0.6
Wiesenhof Geflügel Kontor GmbH	0.6
Barilla Deutschland GmbH	0.6
Unilever Deutschland GmbH	0.5
Saupiquet Deutschland Gmbh	0.4
Bonduelle Deutschland GmbH	0.4
Zur Mühlen Gruppe	0.4
Mestemacher GmbH	0.3

Soft Drinks

Company Name	Retail Value RSP 2024
Others	39.1
Coca-Cola GmbH	11.3
Red Bull Deutschland GmbH	4.6
Aldi Einkauf GmbH & Co oHG	4.5
Lidl Stiftung & Co KG	3.6
Other Private Label	3.5
Rewe Markt GmbH	2.9
PepsiCo Deutschland GmbH	2.7
Gerolsteiner Brunnen GmbH & Co KG	2.5
Danone Waters Deutschland GmbH	2.5
Eckes-Granini Deutschland GmbH	2.4
Paulaner Brauerei GmbH & Co KG	1.7
Schweppes Deutschland GmbH	1.5
Pfanner Getränke GmbH, Hermann	1.1
SodaStream GmbH	1.0
Adelholzener Alpenquellen GmbH	1.0
Edeka Zentrale AG & Co KG	0.9
Vilsa-Brunnen O Rodekohr GmbH & Co	0.9
Mineralbrunnen Überkingen-Teinach AG	0.8
Franken Brunnen GmbH & Co KG	0.7
Hansa Heemann AG	0.7
Capri Sun GmbH	0.7
Global Drinks Partnership GmbH	0.7
Hassia Mineralquellen GmbH & Co KG	0.6
DrinkStar GmbH	0.6

Beauty & Personal Care

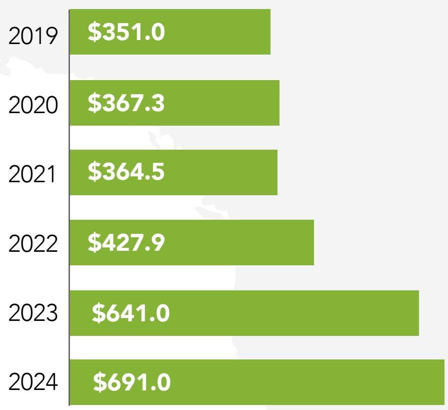
Company Name	Retail Value RSP 2024
Others	15.9
L'Oréal Deutschland GmbH	10.7
Beiersdorf AG	7.5
Procter & Gamble Germany GmbH & Co Operations oHG	5.8
Coty Deutschland GmbH	5.6
Henkel AG & Co KGaA	5.0
dm-Drogerie Markt GmbH & Co KG	4.0
Unilever Deutschland GmbH	3.9
Dirk Rossmann GmbH	3.3
Cosnova GmbH	3.0
Other Private Label	2.8
GlaxoSmithKline Healthcare GmbH	2.7
Estée Lauder Cos GmbH	2.3
LVMH Perfumes & Cosmetics GmbH	1.7
CP Gaba GmbH	1.6
Johnson & Johnson GmbH	1.5
Chanel GmbH	1.1
Aldi Einkauf GmbH & Co oHG	1.0
Dr Kurt Wolff GmbH & Co KG	0.9
Puig Deutschland GmbH	0.9
Kao Germany GmbH	0.9
Rituals Cosmetics Germany GmbH	0.7
Mäurer & Wirtz GmbH & Co KG	0.7
Guhl Ikebana GmbH	0.7
Reckitt Benckiser Deutschland GmbH	0.7

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

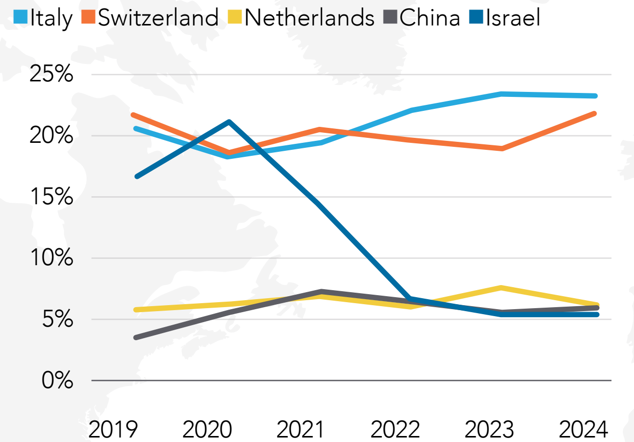
INDIA

Packaging Machinery Imports (US Millions)



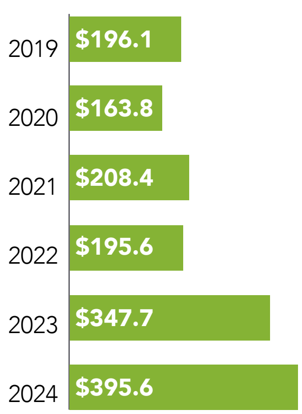
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



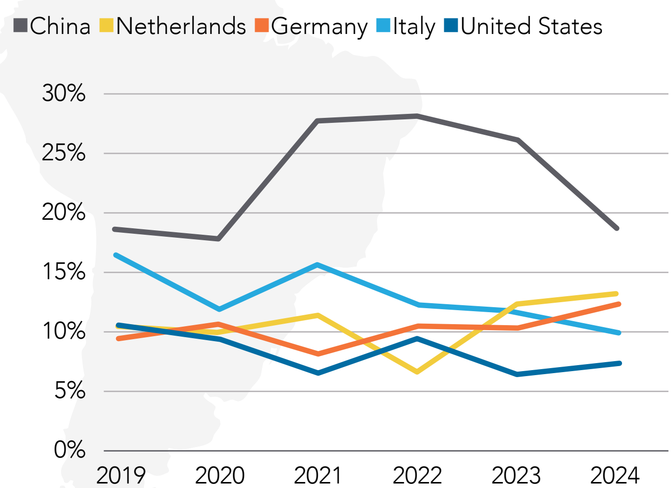
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

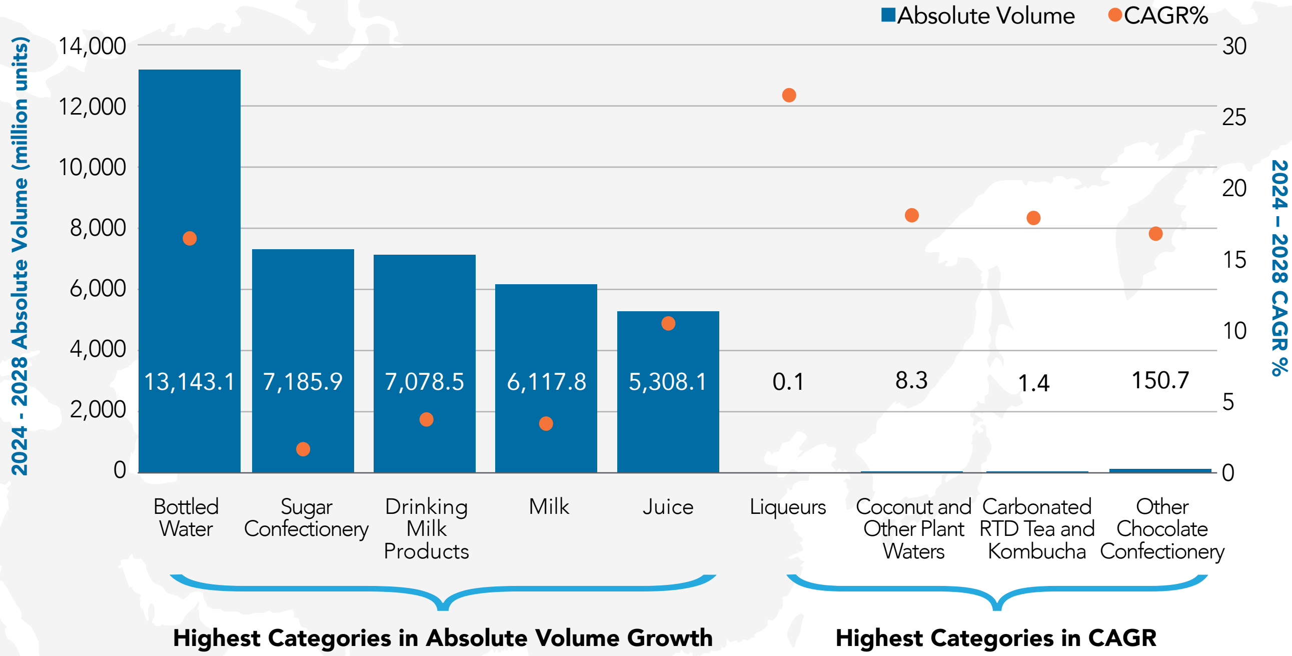
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

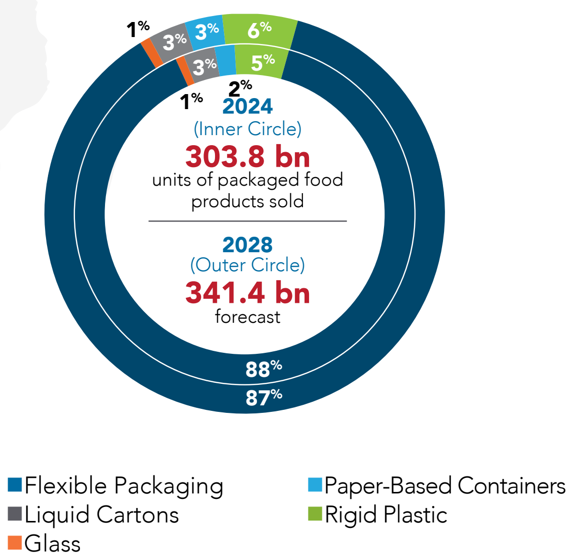
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

INDIA



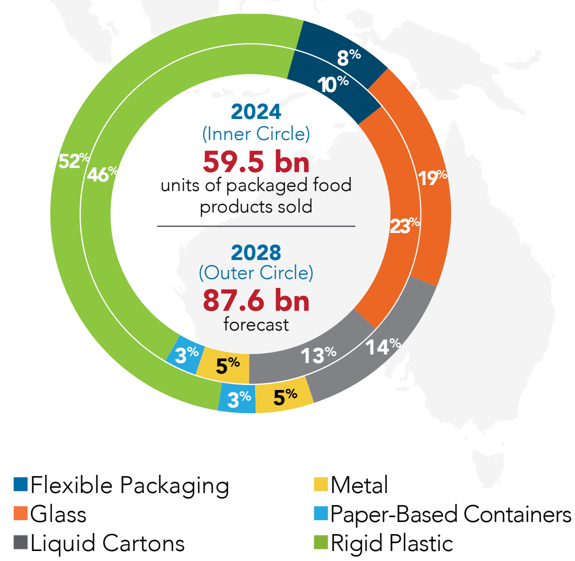
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in India



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in India



Data Source: © Euromonitor International 2025

TOP COMPANIES | **INDIA**

Staple Foods

Company Name	Retail Value RSP 2024
Others	66.5
Artisanal	7.6
Nestlé India Ltd	4.3
KRBL Ltd	2.7
ITC Ltd	2.2
Adani Wilmar Ltd	1.8
Britannia Industries Ltd	1.8
Kellogg India Pvt Ltd	1.5
Other Private Label	1.4
LT Foods Ltd	1.1
Amar Singh Chawal Wala	0.9
Marico Ltd	0.6
Pantaloon Retail India Ltd	0.4
Amir Chand Jagdish Kumar (Exports) Ltd	0.3
CG Foods India Pvt Ltd	0.3
McCain Foods India Pvt Ltd	0.3
Godrej Tyson Foods Ltd	0.3
Patanjali Ayurved Ltd	0.3
Venky's (India) Ltd	0.3
PepsiCo India Holdings Pvt Ltd	0.3
Weikfield Products Co (India) Pvt Ltd	0.3
Indo Nissin Foods Pvt Ltd	0.3
Dream Bake Pvt Ltd	0.3
Hindustan Unilever Ltd	0.3
Modern Food Enterprises Pvt Ltd	0.3

Data Source: © Euromonitor International 2025

Soft Drinks

Company Name	Retail Value RSP 2024
Others	40.0
Coca-Cola India Pvt Ltd	21.0
PepsiCo India Holdings Pvt Ltd	20.0
Parle Agro Pvt Ltd	5.0
Dabur India Ltd	4.3
Parle Bisleri Pvt Ltd	2.8
Red Bull GmbH	2.6
Rakyan Beverages Pvt Ltd	1.1
Pioma Industries Pvt Ltd	0.8
Dhariwal Industries Pvt Ltd	0.7
UB Group	0.4
Hindustan Unilever Ltd	0.4
ITC Foods Ltd	0.4
Hamdard Wakf Laboratories Ltd	0.2
Mondelez India Foods Pvt Ltd	0.1
Tunip Agro Pvt Ltd	0.1

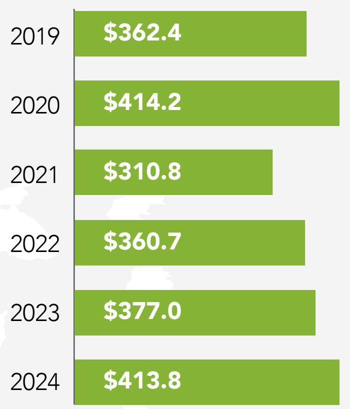
Beauty & Personal Care

Company Name	Retail Value RSP 2024
Others	24.9
Hindustan Unilever Ltd	20.1
Colgate-Palmolive India Ltd	4.8
L'Oréal India Pvt Ltd	4.8
Dabur India Ltd	3.5
Marico Ltd	3.5
Godrej Consumer Products Pvt Ltd	3.2
Reckitt Benckiser (India) Pvt Ltd	3.1
Himalaya Drug Co, The	2.8
Wipro Consumer Care & Lighting Ltd	2.3
Honasa Consumer Pvt Ltd	2.2
Gillette India Ltd	2.2
Johnson & Johnson (India) Ltd	2.1
Patanjali Ayurved Ltd	2.1
Procter & Gamble Home Products Pvt Ltd	1.6
ITC Ltd	1.4
Emami Ltd	1.4
Nivea India Pvt Ltd	1.2
Vini Cosmetics Pvt Ltd	0.8
Elca Cosmetics Pvt Ltd	0.8
GlaxoSmithKline Consumer Healthcare Ltd	0.7
Lotus Herbals Pvt Ltd	0.7
Hygienic Research Institute	0.6
Baccarose Perfumes & Beauty Products Pvt Ltd	0.6
Bajaj Consumer Care Ltd	0.6

IMPORT STATISTICS

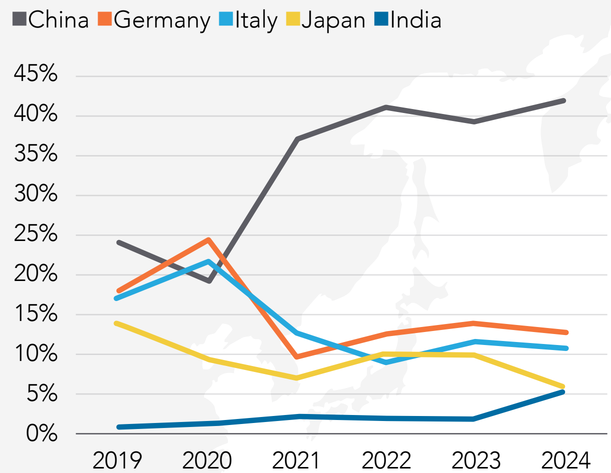
INDONESIA

Packaging Machinery Imports (US Millions)



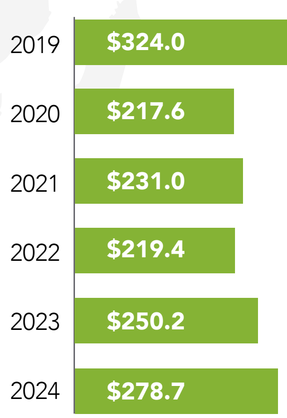
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



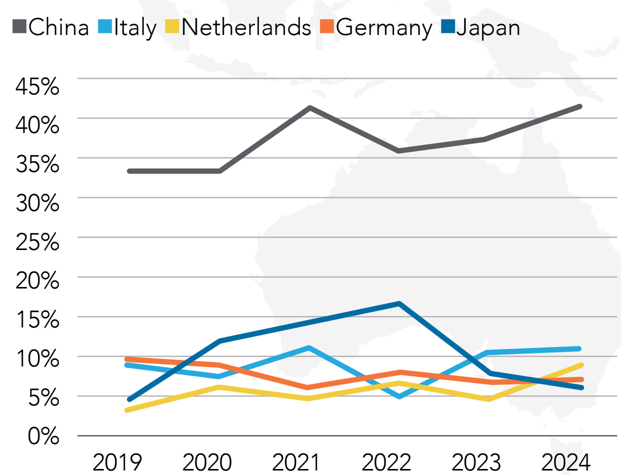
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

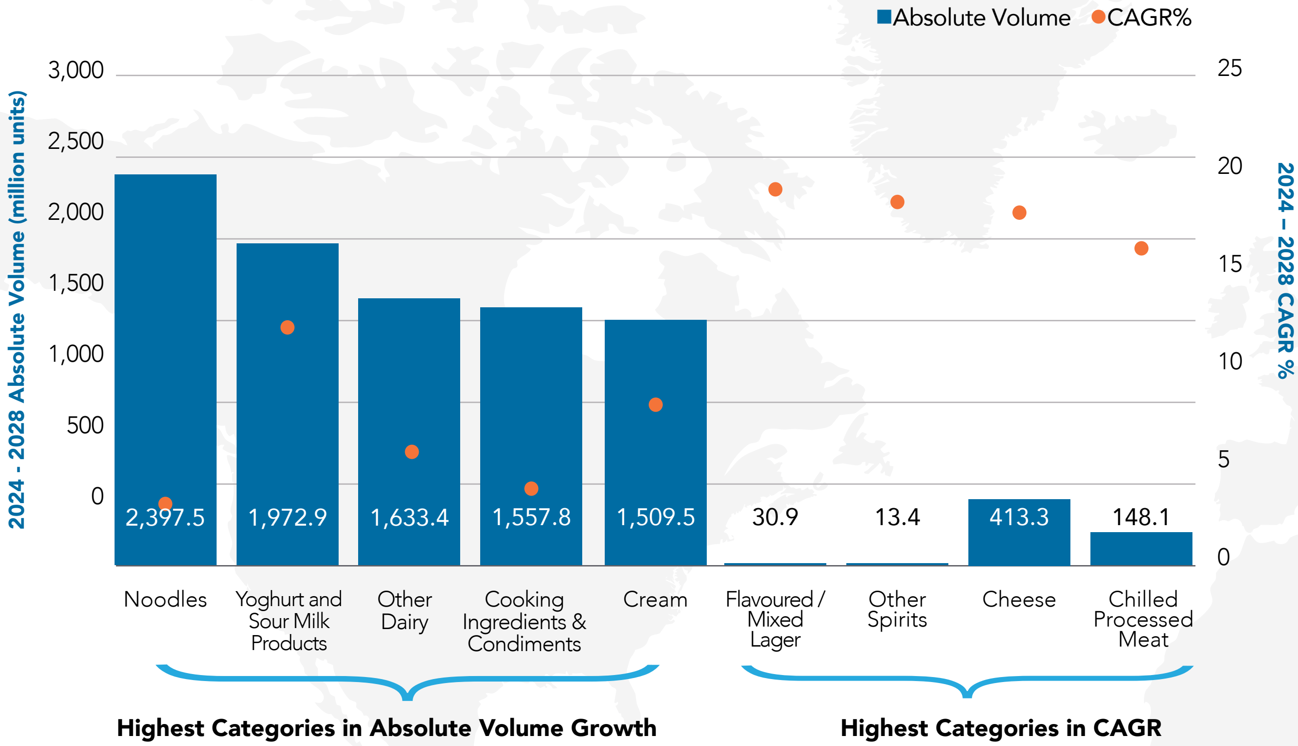
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

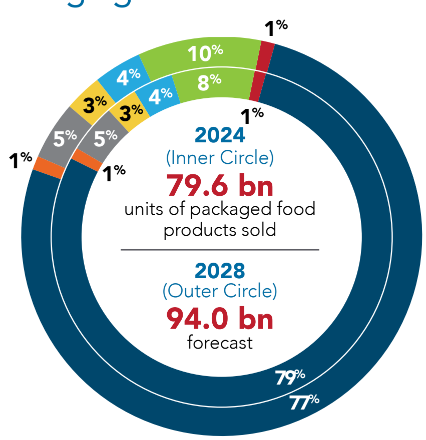
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

INDONESIA



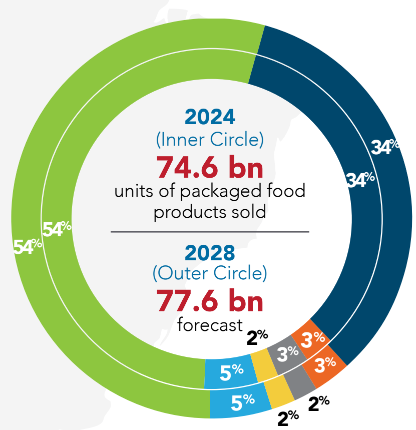
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Indonesia



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Indonesia



Data Source: © Euromonitor International 2025

TOP COMPANIES | **INDONESIA**

Staple Foods

Company Name	Retail Value RSP 2024
Others	54.3
Indofood Sukses Makmur Tbk PT	13.0
Artisanal	7.2
Other Private Label	3.9
Sayap Mas Utama PT	3.2
Alam Makmur Sembada PT	2.6
Primafood International PT	2.5
So Good Food PT	2.2
Prima Andalan Djaja Internusa PT	1.8
Macroprima Pangan Utama PT	1.3
Nippon Indosari Corp PT	1.0
Madusari Nusaperdana PT	0.7
Heinz ABC Indonesia PT	0.6
Jakarana Tama PT	0.6
Maya Muncar PT	0.5
Canning Foods Indonesia PT	0.4
Dunia Bintang Walet PT	0.3
Surya Jaya Abadi Perkasa PT	0.3
Nestlé Indonesia PT	0.3
Carrefour Indonesia PT	0.3
Denis Frères SA	0.3
Sierad Produce Tbk PT	0.3
Eloda Mitra PT	0.3
Lotte Indonesia PT	0.2
Forisa Nusapersada PT	0.2

Soft Drinks

Company Name	Retail Value RSP 2024
Others	16.2
Danone Aqua PT	14.9
Tirta Fresindo Jaya PT	12.4
Tirta Alam Segar PT	9.6
Coca-Cola Indonesia PT	9.1
Sinar Sosro PT	4.8
CS2 Pola Sehat PT	3.6
Amerta Indah Otsuka PT	3.5
Kino Indonesia Tbk PT	2.1
Lasalle Food Indonesia PT	1.7
Tirta Sukses Perkasa PT	1.5
Sinde Budi Sentosa PT	1.5
Djojonegoro C-1000 PT	1.5
Ultrajaya Milk Industry & Trading Co Tbk PT	1.4
Santos Jaya Abadi PT	1.2
Garuda Beverage Sukses PT	1.2
Asia Health Energi Beverages PT	1.2
Sariguna Primatirta Tbk PT	1.1
Heinz ABC Indonesia PT	1.1
Nutrifood Indonesia PT	1.0
Sari Enesis Indah PT	0.9
Unilever Indonesia Tbk PT	0.8
ABC President Indonesia PT	0.8
Akasha Wira International Tbk PT	0.8
Oasis Waters International PT	0.6

Beauty & Personal Care

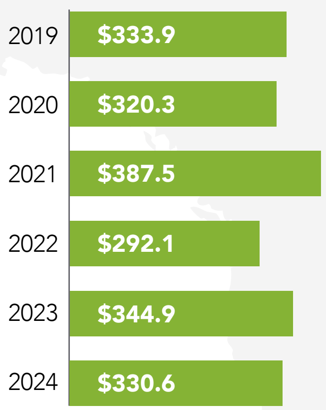
Company Name	Retail Value RSP 2024
Others	35.8
Unilever Indonesia Tbk PT	12.2
Procter & Gamble Home Products Indonesia PT	7.1
L'Oréal Indonesia PT	5.6
Paragon Technology & Innovation PT	5.3
May Sun Yvan PT	2.3
Mandom Indonesia Tbk PT	1.8
Lion Wings PT	1.5
PZ Cussons Indonesia PT	1.4
Sayap Mas Utama PT	1.3
Kao Indonesia PT	1.1
Ultra Prima Abadi PT	1.1
Beiersdorf Indonesia PT	1.1
Nayue Kosmetik Indonesia PT	1.1
Vitapharm PT	0.9
Kinocare Era Kosmetindo PT	0.9
Beaute Haul Indonesia PT	0.9
Johnson & Johnson Indonesia PT	0.8
Bina Karya Prima PT	0.8
Tempo Scan Pacific Tbk PT	0.8
Suntome Wisdom Indonesia PT	0.8
Hebe Beauty Style PT	0.8
ERHA Clinic Indonesia PT	0.7
Eka Jaya Internasional PT	0.7
Monica Hijau Lestari PT	0.7

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

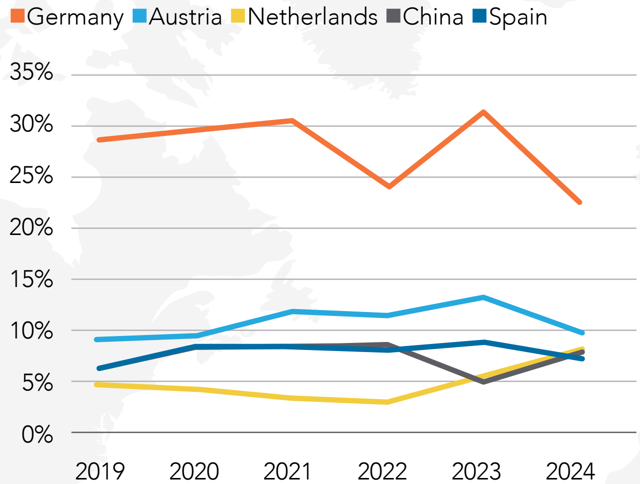
ITALY

Packaging Machinery Imports (US Millions)



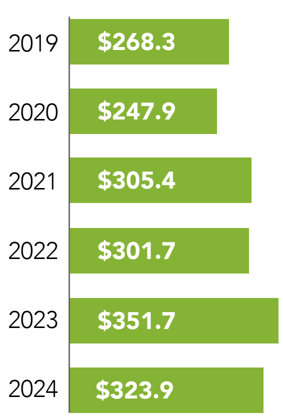
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



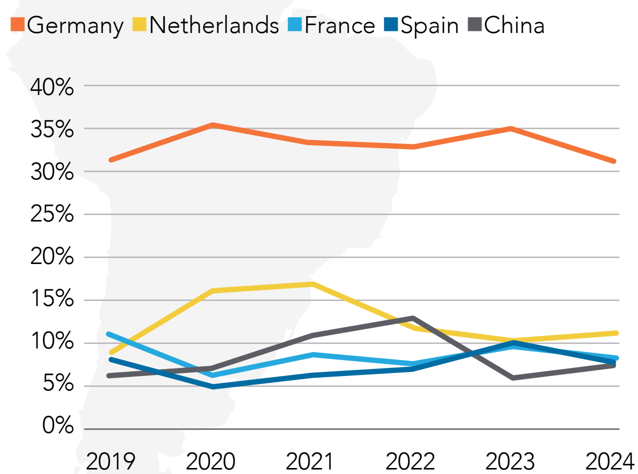
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

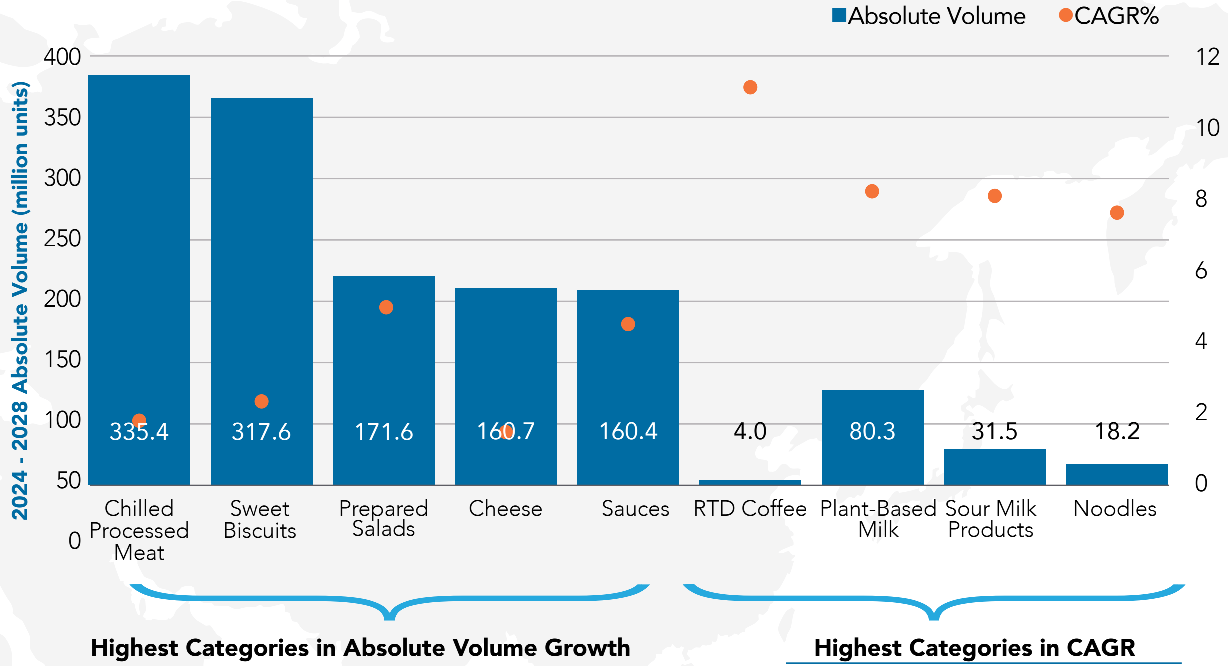
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

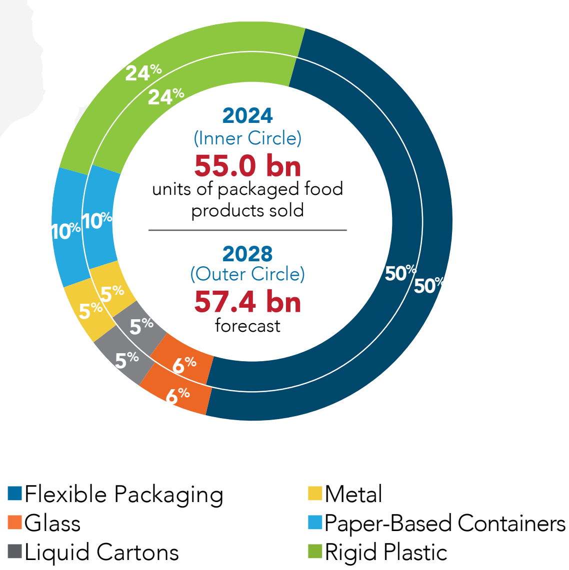
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

ITALY



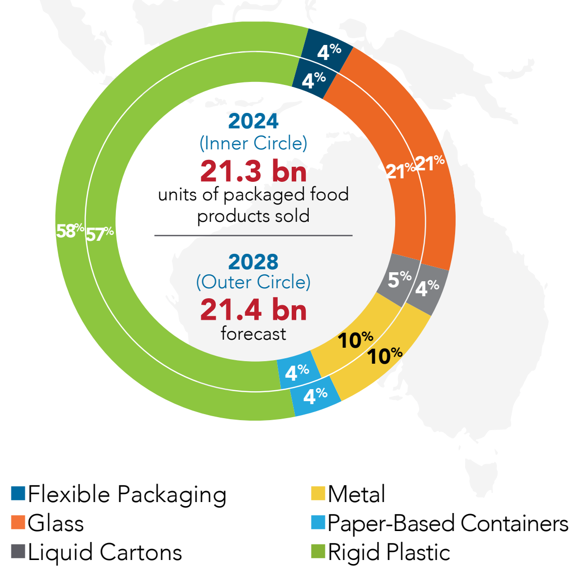
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Italy



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Italy



Data Source: © Euromonitor International 2025

TOP COMPANIES | **ITALY**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	40.0
Others	17.7
Coop Italia scarl	3.2
Barilla Alimentare SpA	3.2
CONAD - Consorzio Nazionale Dettaglianti Scrl	2.5
Esselunga SpA	2.2
Bauli SpA	1.9
Consorzio del Prosciutto di Parma	1.8
AIA - Agricola Italiana Alimentari SpA	1.6
Other Private Label	1.5
Piatti Freschi Italia SpA	1.3
Gesco Consorzio Cooperativo Societa Cooperativa Agricola	1.3
Carrefour Italia GS SpA	1.1
Ferrarini SpA	1.1
Ferrero SpA	1.1
CSI, Cia Surgelati Italiana SpA	1.0
Rovagnati SpA	0.8
Giuseppe Citterio Salumificio SpA	0.8
Auchan SpA	0.8
Eurospin Italia SpA	0.7
Grandi Salumifici Italiani SpA	0.7
Pastificio Rana SpA	0.7
Kellogg Italia SpA	0.6
Despar Italia Carl	0.6
Nestlé Italiana SpA	0.5

Soft Drinks

Company Name	Retail Value RSP 2024
Others	16.2
Coca-Cola HBC Italia Srl	15.8
Other Private Label	12.6
Acqua Minerale San Benedetto SpA	9.4
Fonti Di Vinadio SpA	5.8
San Pellegrino SpA	5.6
Ferrero SpA	3.3
PepsiCo Beverages Italia Srl	3.3
CoGeDi International SpA	3.1
Red Bull Srl	2.6
Ferrarelle SpA	2.6
Conserve Italia - Consorzio Cooperative Conserve Italia scarl	2.4
Zuegg SpA	1.9
Parmalat SpA	1.4
Rauch Italia Srl	1.3
Acque Minerali d'Italia SpA	1.3
AQua Vera SpA	1.1
CONAD - Consorzio Nazionale Dettaglianti Scrl	1.0
Coop Italia scarl	1.0
Lete SpA	0.9
Royal Unibrew A/S	0.8
Sorgente Santa Croce SpA	0.8
Refresco Italy Spa	0.7
Davide Campari Milano NV	0.7
Esselunga SpA	0.7

Beauty & Personal Care

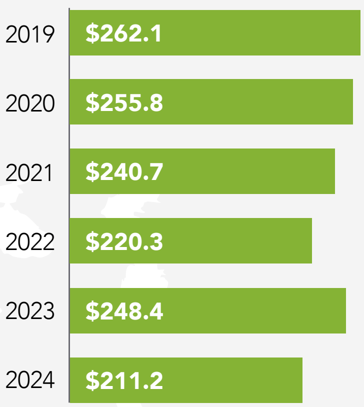
Company Name	Retail Value RSP 2024
Others	22.0
L'Oréal Italia SpA	13.5
Procter & Gamble Italia SpA	5.8
Unilever Italia Srl	3.9
Beiersdorf SpA	3.6
Società Italo Britannica L Manetti - H Roberts & C SpA	2.6
Christian Dior SpA, Parfums	2.6
Coty Italia SpA	2.5
Other Private Label	2.4
Estée Lauder Srl	2.1
Kiko SpA	2.1
Chanel Srl	1.9
Colgate-Palmolive SpA	1.9
Shiseido Group Italy SpA	1.6
Pierre Fabre Italia SpA	1.4
GlaxoSmithKline SpA	1.3
Yves Rocher Italia Srl	1.3
Henkel Italia Srl	1.2
Cosnova Italia Srl	1.2
LVMH Perfumes & Cosmetics Italia SpA	1.1
Clarins Italia SpA	1.0
Mirato SpA	1.0
Puig Italia Srl	0.9
Collistar SpA	0.8
Aziende Chimiche Riunite Angelini Francesco ACRAF SpA	0.8

Data Source: © Euromonitor International 2024

IMPORT STATISTICS

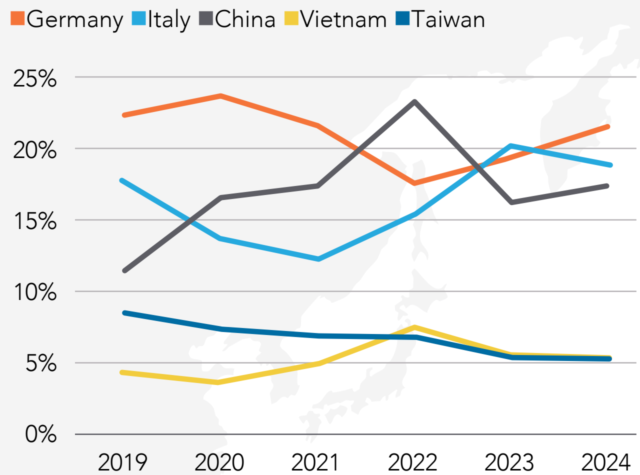
JAPAN

Packaging Machinery Imports (US Millions)



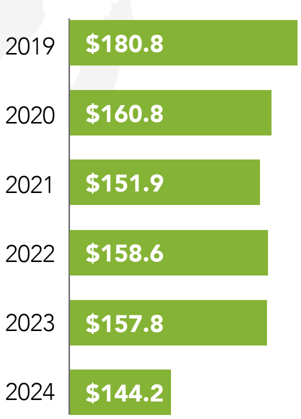
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



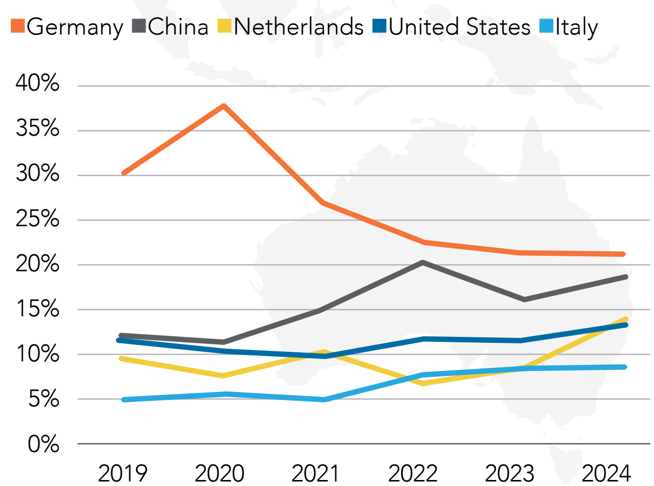
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

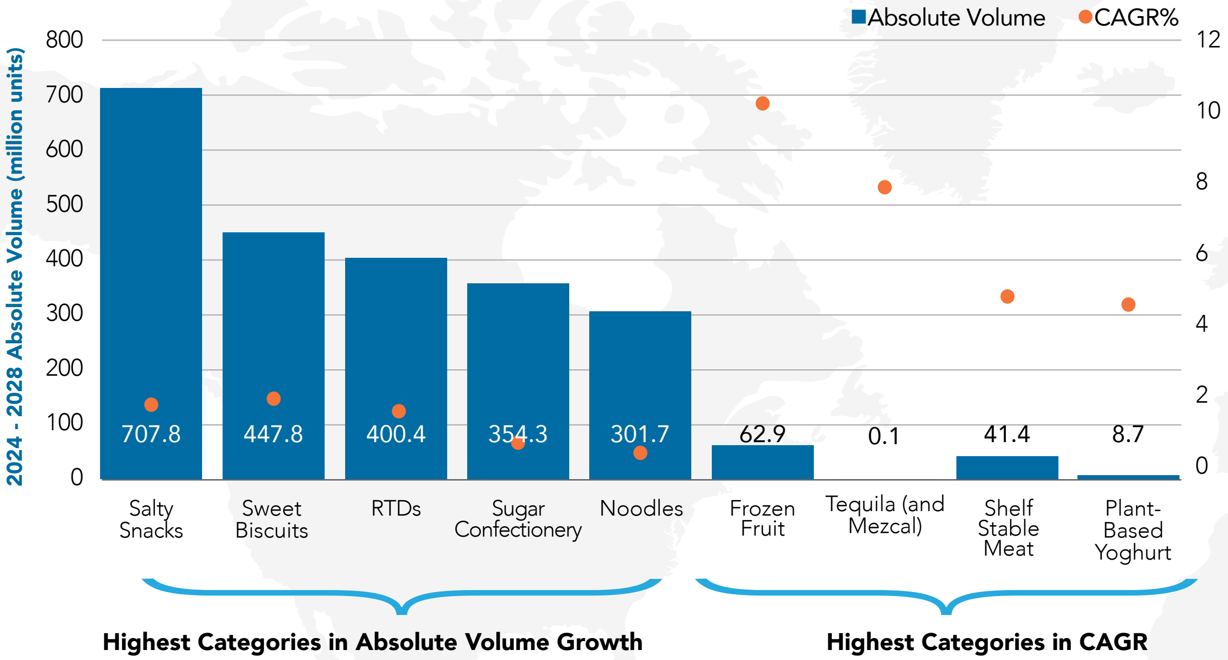
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

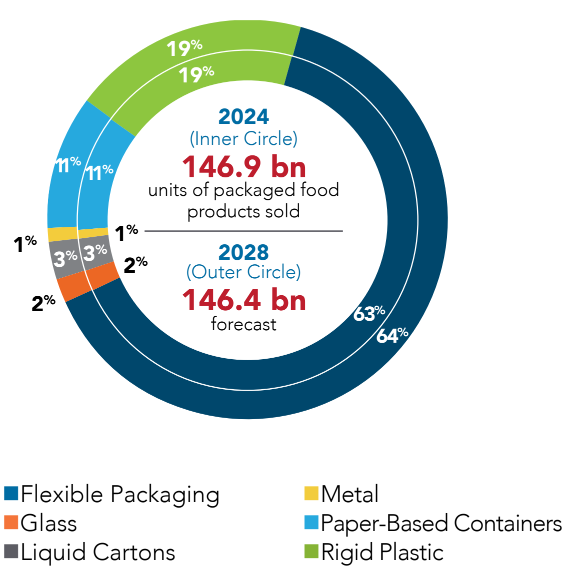
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

JAPAN



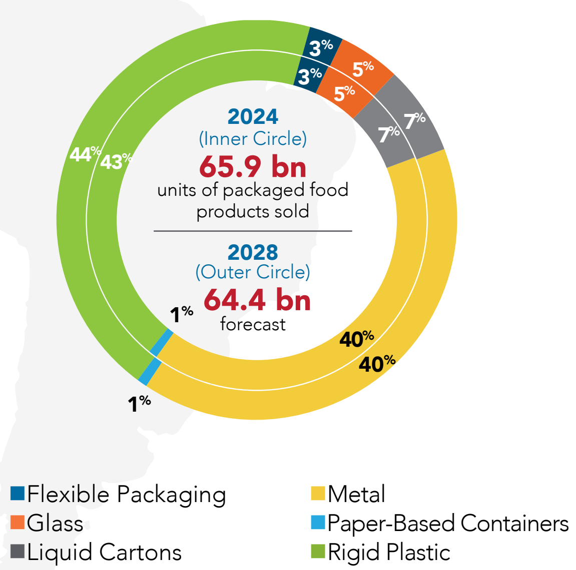
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Japan



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Japan



Data Source: © Euromonitor International 2025

TOP COMPANIES | **JAPAN**

Staple Foods

Company Name	Retail Value RSP 2024
Others	27.1
Generics	21.4
Private Label	9.5
Yamazaki Baking Co Ltd	7.7
Artisanal	5.8
JA Group (Japan Agricultural Cooperatives)	3.9
Nissin Food Products Co Ltd	2.5
Toyo Suisan Kaisha Ltd	2.3
Shikishima Baking Co Ltd	2.3
Fuji Baking Co Ltd	2.1
Itoham Foods Inc	1.2
NH Foods Ltd	1.1
Prima Meat Packers Ltd	0.9
Hagoromo Foods Corp	0.8
Sanyo Foods Co Ltd	0.8
Marudai Food Co Ltd	0.6
Sagamiya Foods Co Ltd	0.6
Maruha Nichiro Corp	0.5
TableMark Co Ltd	0.5
Kobeya Baking Co Ltd	0.5
Myojo Foods Co Ltd	0.5
Nichirei Corp	0.4
First Baking Co Ltd	0.4
Shimadaya Co Ltd	0.4
Nisshin Seifun Group Inc	0.4

Soft Drinks

Company Name	Retail Value RSP 2024
Coca-Cola (Japan) Co Ltd	22.6
Suntory Beverage & Food Ltd	19.0
Others	15.3
Asahi Soft Drinks Co Ltd	10.8
Kirin Beverage Corp	8.5
ITO EN Ltd	8.5
Otsuka Holdings Co Ltd	2.8
Kagome Co Ltd	2.5
Private Label	2.1
Dydo Drinco Inc	1.9
Morinaga Milk Industry Co Ltd	1.1
Red Bull Japan Co Ltd	1.1
UCC Ueshima Coffee Co Ltd	0.8
Pokka Sapporo Food & Beverage Ltd	0.5
Otsuka Foods Co Ltd	0.5
Nestlé Japan Ltd	0.4
Megmilk Snow Brand Co Ltd	0.4
Nac Co Ltd	0.2
Ehime Inryou Co Ltd	0.2
Aqua Clara Inc	0.2
Zaiho Group	0.2
Glico Dairy Products Co Ltd	0.1
CJ Japan Corp	0.1
Yakult Honsha Co Ltd	0.1
Nippon Del Monte Corp	0.1

Beauty & Personal Care

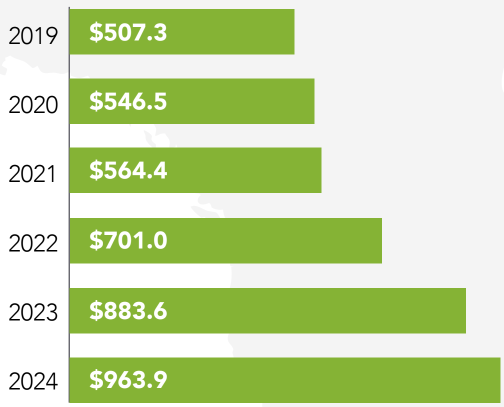
Company Name	Retail Value RSP 2024
Others	19.8
Shiseido Co Ltd	10.2
Kao Corp	9.4
Kosé Corp	8.0
Kanebo Cosmetics Inc	3.7
P&G Japan Ltd, The	2.8
Lion Corp	2.7
Unilever Japan KK	2.3
Rohto Pharmaceutical Co Ltd	2.1
DHC Corp	1.8
Fancl Corp	1.8
FineToday Co Ltd	1.7
Nivea-Kao Co Ltd	1.7
L'Oréal Japan Ltd	1.6
Pola Inc	1.5
Earth Corp	1.3
Orbis Co Ltd	1.2
Private Label	1.2
Mandom Corp	1.1
Kracie Holdings Ltd	1.1
Hoyu Co Ltd	1.0
Estée Lauder Group Cos KK	1.0
Chanel KK	1.0
Shinnihonseiyaku Co Ltd	0.9
Noevir Co Ltd	0.8

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

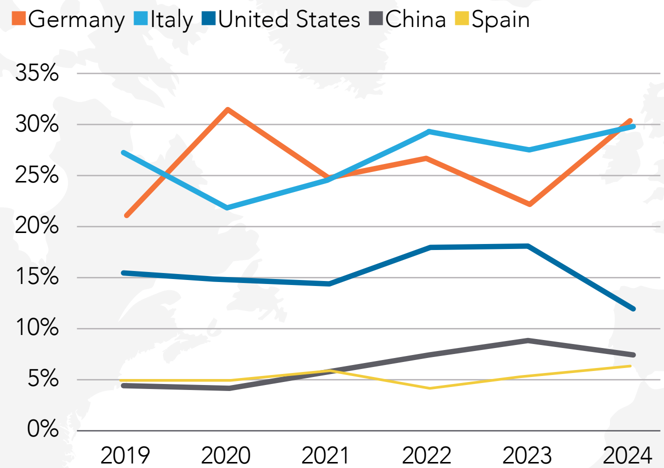
MEXICO

Packaging Machinery Imports (US Millions)



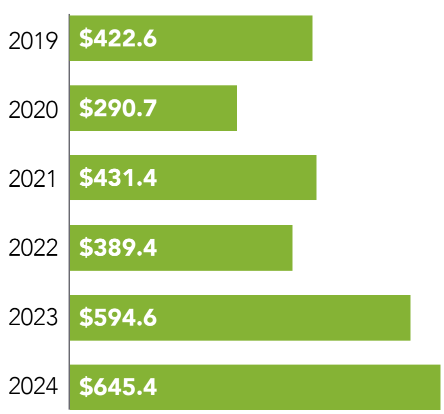
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



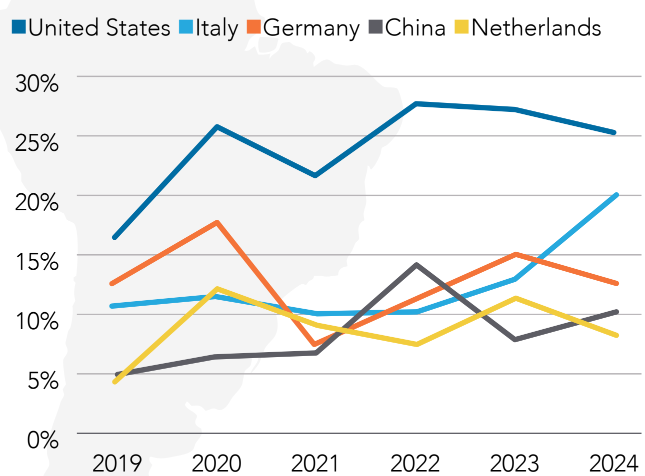
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

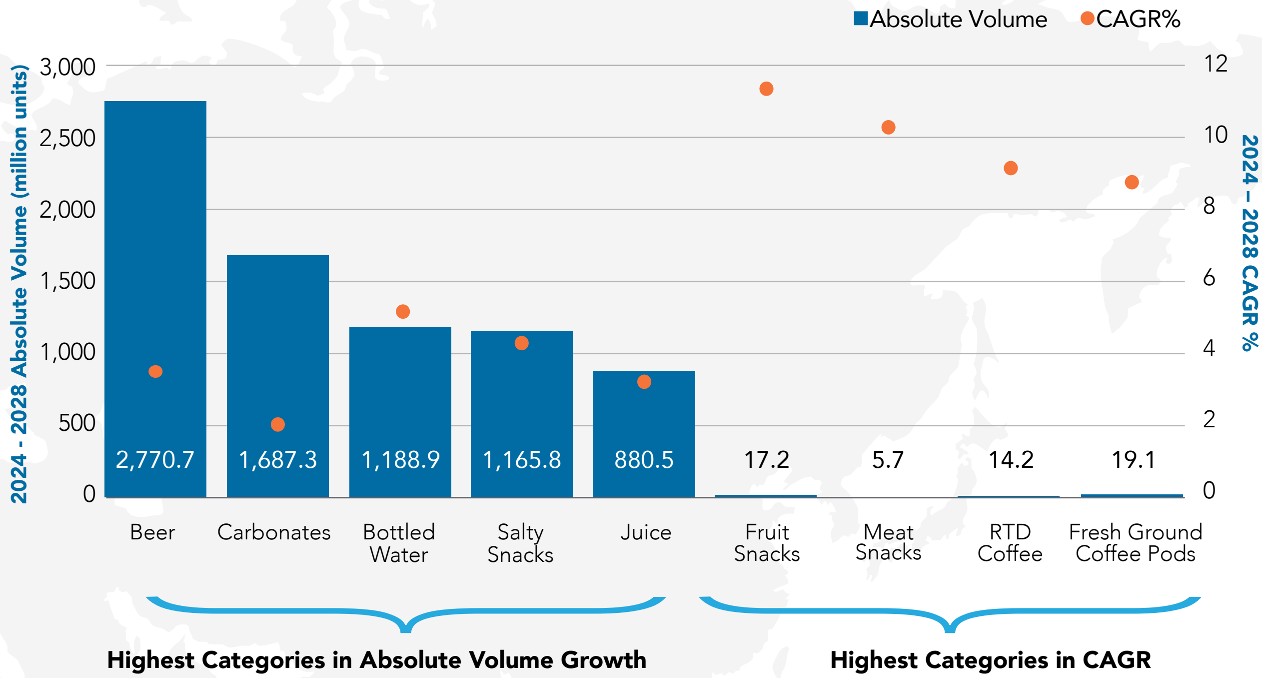
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

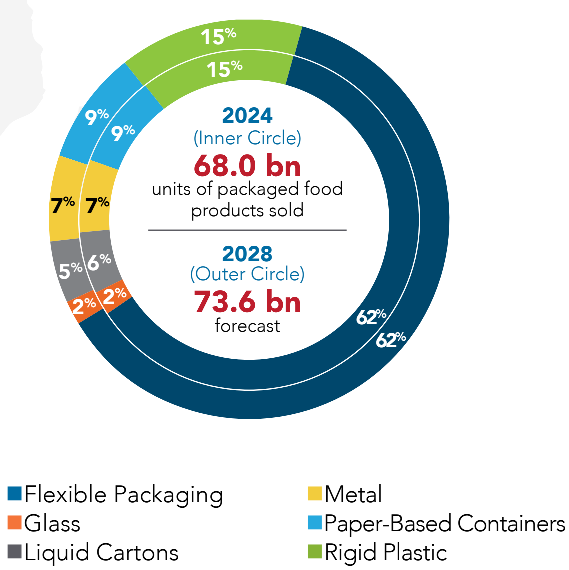
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

MEXICO



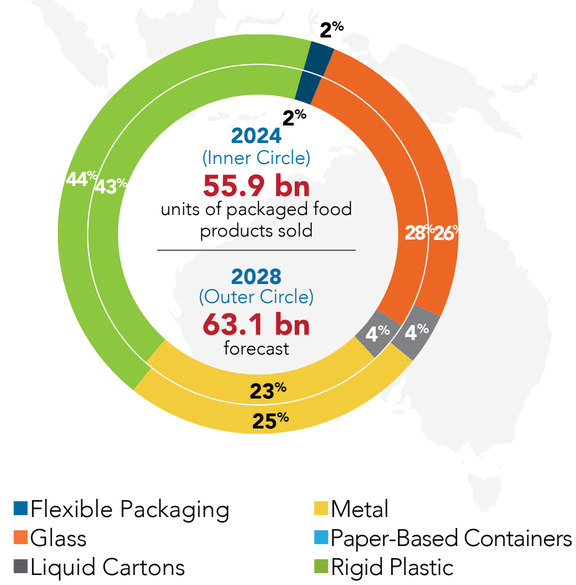
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Mexico



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Mexico



Data Source: © Euromonitor International 2025

TOP COMPANIES | **MEXICO**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	56.8
Grupo Bimbo SAB de CV	10.8
Others	7.1
Sigma Alimentos SA de CV	3.1
Toyo Suisan Kaisha Ltd	1.9
Kellogg de México SA de CV	1.9
Other Private Label	1.8
Fábrica de Pastas Alimenticias La Moderna SA de CV	1.6
Pescados Industrializados SA de CV	1.5
Qualtia Alimentos SA de CV	1.1
Grupo Bafar SAB de CV	1.1
Conservas La Costeña SA de CV	0.8
Grupo Marítimo Industrial SA de CV	0.8
Sabormex SA de CV	0.6
Herdez SAB de CV, Grupo	0.6
Barilla México SA de CV	0.5
Schettino Hermanos S de RL de CV	0.5
Mexicana de Arroz SA de CV	0.5
Productos Verde Valle SA de CV	0.5
American Beef SA de CV	0.4
Mondelez México S de RL de CV	0.4
Arroz SOS de Mexico SA de CV	0.4
Saljamex SA de CV	0.4
D'Gari SA de CV	0.3
Digrans SA de CV	0.3

Soft Drinks

Company Name	Retail Value RSP 2024
Coca-Cola Mexico	50.5
Others	11.2
Pepsi-Cola Mexicana SA de CV	11.0
Jugos del Valle SA de CV	4.2
Grupo Peñafiel SA de CV	3.9
Jumex SA de CV, Grupo	3.3
Consorcio Aga SA de CV	2.3
Laboratorios Pisa SA de CV	2.0
Danone de México SA de CV	1.4
Sociedad Cooperativa Trabajadores de Pascual SCL	1.3
Nestlé México SA de CV	1.3
Ajemex SA de CV	1.0
Qualamex SA de CV	0.9
Comercializadora Eloro SA de CV	0.9
Electropura S de RL de CV	0.8
Embotelladora Mexicana SA de CV	0.6
Genomma Lab Internacional SAB de CV	0.4
Grupo Lala SAB de CV	0.4
Private Label	0.4
Red Bull S de RL de CV	0.3
Unifoods SA de CV	0.2
Corporativo Fopa SA de CV	0.2
Campbell de México SA de CV	0.2
Casa Cuervo SA de CV	0.2
Kraft Foods de México S de RL de CV	0.2

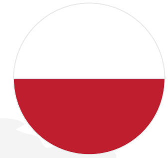
Beauty & Personal Care

Company Name	Retail Value RSP 2024
Others	13.8
Frabel SA de CV	11.5
Unilever de México S de RL de CV	10.4
Colgate-Palmolive de México SA de CV	8.1
Procter & Gamble de México SA de CV	7.1
Natura Cosméticos México SA de CV	3.8
Mary Kay Cosméticos de México SA de CV	3.7
Betterware de Mexico SAB de CV	3.4
BDF México SA de CV	3.4
Genomma Lab Internacional SAB de CV	3.2
Kimberly-Clark de México SAB de CV	2.1
Belcorp México SA de CV	1.9
Puig México SA de CV	1.8
Laboratorios Grisi Hermanos SA de CV	1.7
Avon Cosmetics SA de CV	1.6
Johnson & Johnson de México SA de CV	1.6
LVMH Perfumes & Cosmetics de México SA de CV	1.6
Parfumerie Versailles SA de CV	1.4
Estée Lauder Cosméticos SA de CV	1.4
Henkel Mexicana SA de CV	1.3
House of Fuller SA de CV	1.3
Coty México SA de CV	1.3
Arabela SA de CV	1.1
Other Private Label	1.0
Perfumes y Esencias Fraiche SA de CV	0.6

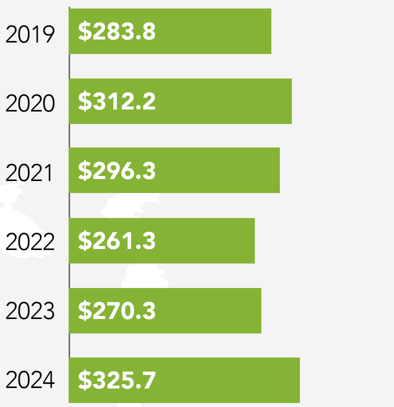
Data Source: © Euromonitor International 2025

IMPORT STATISTICS

POLAND

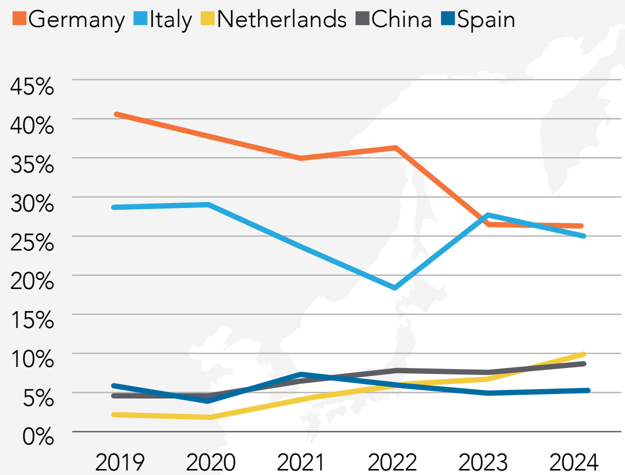


Packaging Machinery Imports (US Millions)



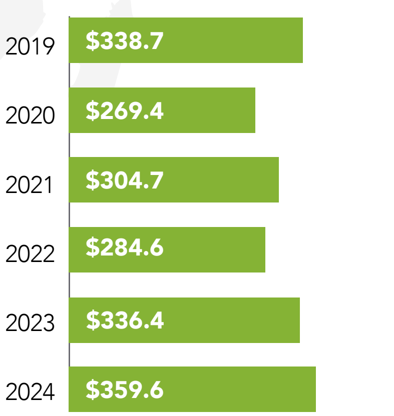
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



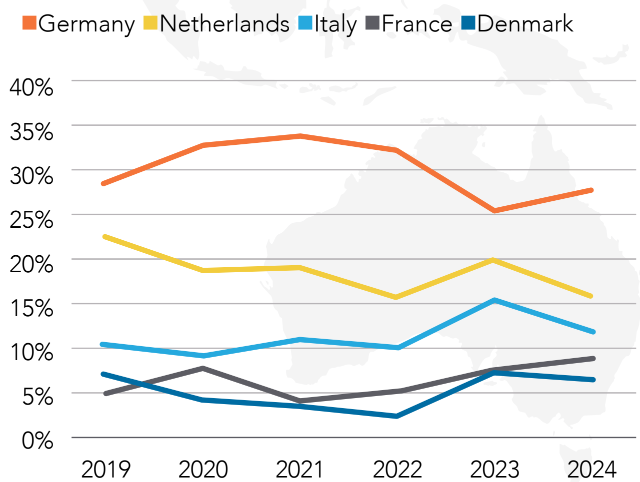
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

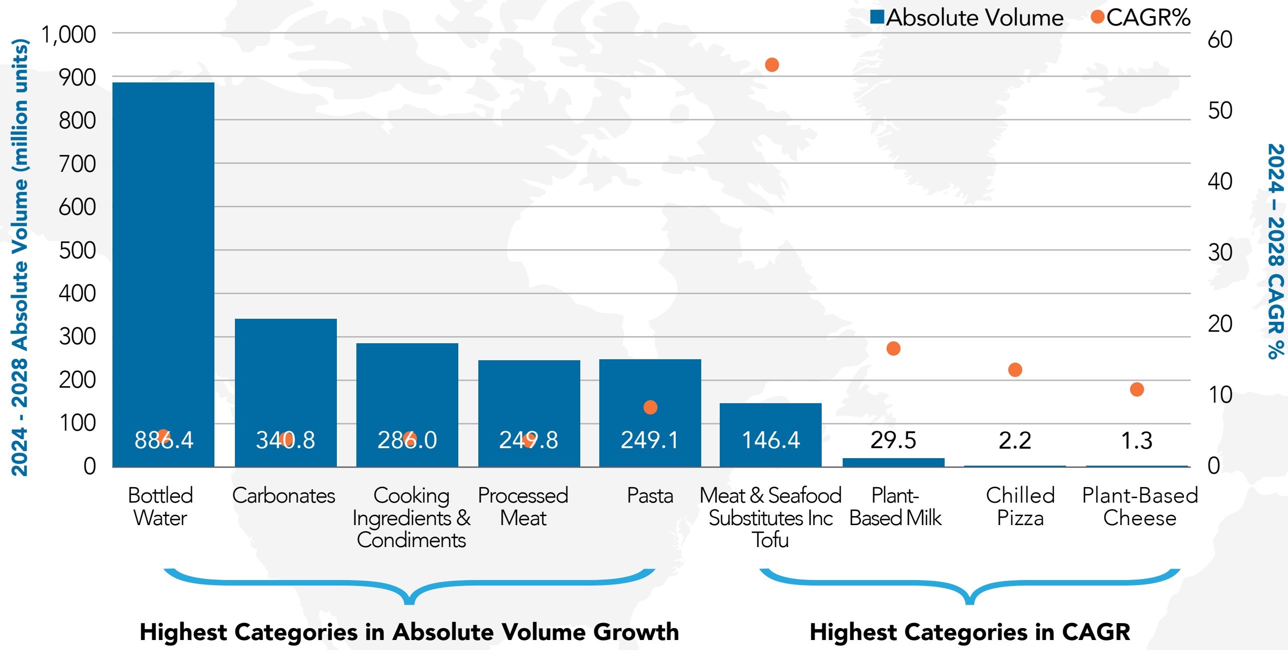
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

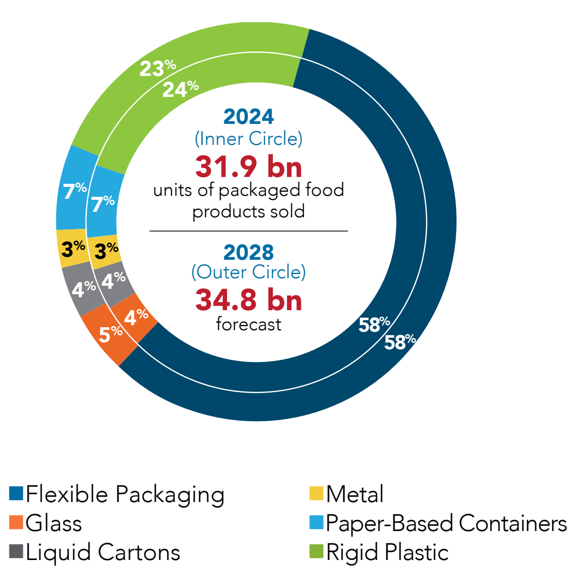
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

POLAND



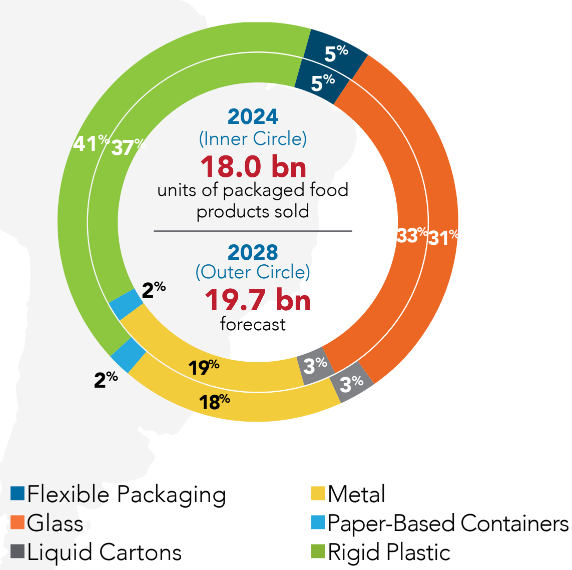
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Poland



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Poland



Data Source: © Euromonitor International 2025

TOP COMPANIES | **POLAND**

Staple Foods	
Company Name	Retail Value RSP 2024
Artisanal	33.1
Others	9.5
Jeronimo Martins Polska SA	8.5
Animex Foods Sp zoo Sp k	4.9
Auchan Polska Sp zoo	4.4
Sokolow SA	3.9
Carrefour Polska Sp zoo	3.9
Lidl Polska Sklepy Spozywcze Sp zoo Sp k	3.6
Other Private Label	3.2
Tarczynski SA	2.4
Lmeat Lukow SA	1.9
Nestlé Polska SA	1.6
La Lorraine Polska Sp zoo	1.5
Lubella Sp zoo SKA	1.2
Chipita Poland Sp zoo	1.1
Lisner Sp zoo	0.9
Unilever Polska SA	0.7
Makarony Polskie SA	0.7
Hortino Zaklad Przetwórstwa Owocowo-Warzywnego Lezajsk Sp zoo	0.7
Kaufland Polska Markety Sp zoo Spk	0.6
Dan Cake Polonia Sp zoo	0.6
Benus Sp zoo	0.6
Superfish SA	0.5
Lantmännen Unibake Poland Sp zoo	0.5
Frosta Sp zoo	0.5

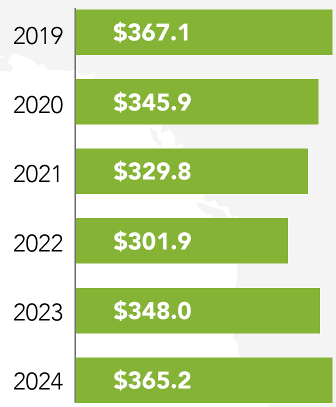
Data Source: © Euromonitor International 2025

Soft Drinks	
Company Name	Retail Value RSP 2024
Coca-Cola HBC Polska Sp zoo	17.3
Others	14.2
MWS Sp zoo Sp k	12.6
Pepsi-Cola General Bottlers Poland Sp zoo	8.2
Zywiec Zdroj Sp zoo	6.9
Jeronimo Martins Polska SA	4.4
Red Bull Sp zoo	2.9
FoodCare Sp zoo	2.8
ZL Naleczow Zdroj Sp zoo SKA	2.7
Other Private Label	2.6
Hortex Holding SA	2.5
Nestlé Waters Polska SA	2.4
Spoldzielnia Pracy Muszynianka	2.0
Lidl Sp zoo Sp k	1.6
Ustronianka Sp zoo	1.5
Oshee Polska Sp zoo	1.4
Hoop Polska Sp zoo	1.0
Orangina Schweppes Polska Sp zoo	1.0
Jurajska SA	1.0
Zbyszko Co Sp zoo	0.9
Excellence SA	0.8
Colian Sp zoo	0.8
Herbapol Lublin SA	0.8
Fortuna Sp zoo	0.8
Auchan Polska Sp zoo	0.7

Beauty & Personal Care	
Company Name	Retail Value RSP 2024
Others	22.8
L'Oréal Polska Sp zoo	13.4
Nivea Polska Sp zoo	5.4
Colgate-Palmolive Polska Sp zoo	4.8
Procter & Gamble DS Polska Sp zoo	4.7
Henkel Polska Sp zoo	3.0
Other Private Label	2.9
Unilever Polska SA	2.5
Avon Cosmetics Polska Sp zoo	2.1
Eveline Cosmetics SA Sp k	1.9
Kosmetyki Naturalne Bielenda Sp zoo	1.7
Ziaja Ltd Zaklad Produkcji Lekow Sp zoo	1.6
Johnson & Johnson Poland Sp zoo	1.6
Coty Polska Sp zoo	1.5
Laboratorium Kosmetyczne Dr Irena Eris SA	1.3
Jeronimo Martins Polska SA	1.2
Rossmann SDP Sp zoo	1.2
GlaxoSmithKline Consumer Healthcare Sp zoo	1.0
Mary Kay Cosmetics Poland Sp zoo	1.0
Puig SL	1.0
Oriflame Poland Sp zoo	0.9
Onlybio.life SA	0.9
Oceanic SA	0.8
PZ Cussons Polska SA	0.8
Estée Lauder Poland Sp zoo	0.8

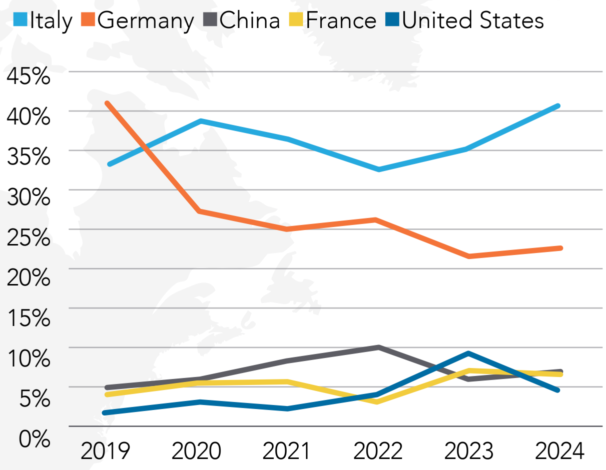
IMPORT STATISTICS
SPAIN

Packaging Machinery Imports (US Millions)



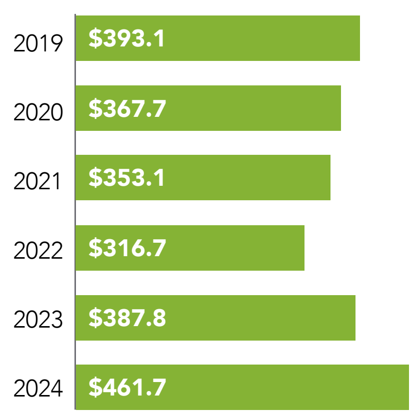
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



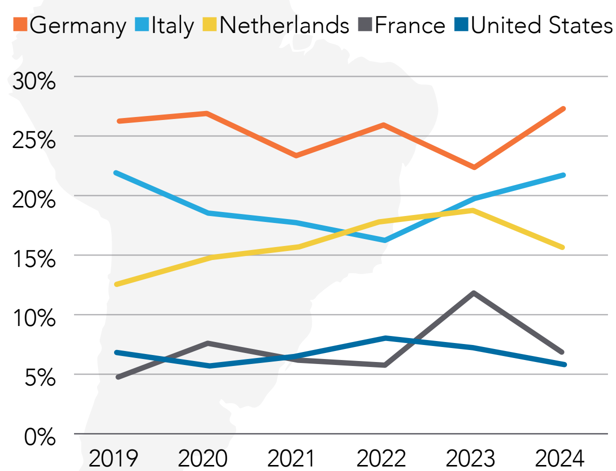
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



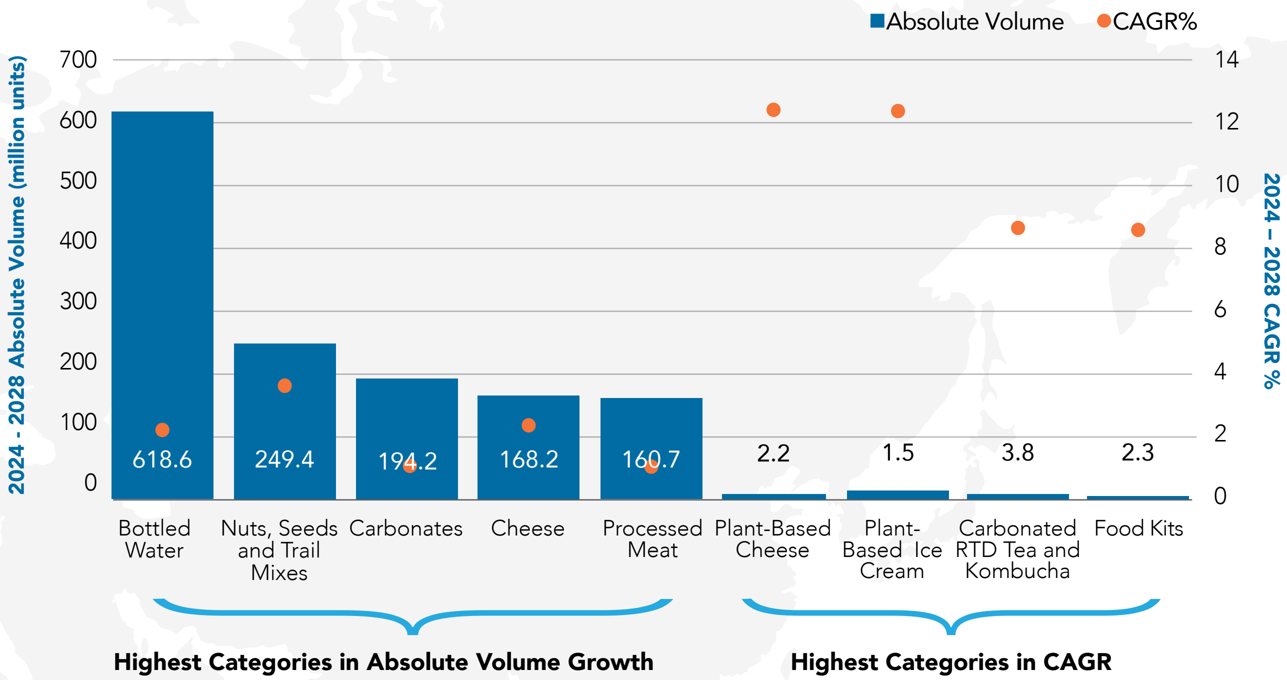
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



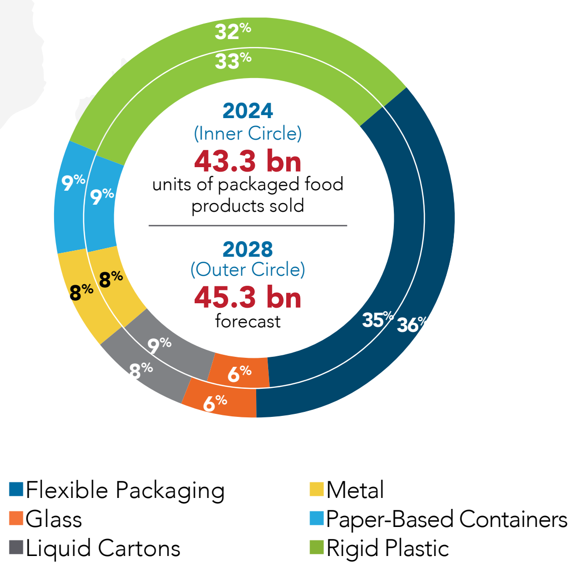
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
SPAIN



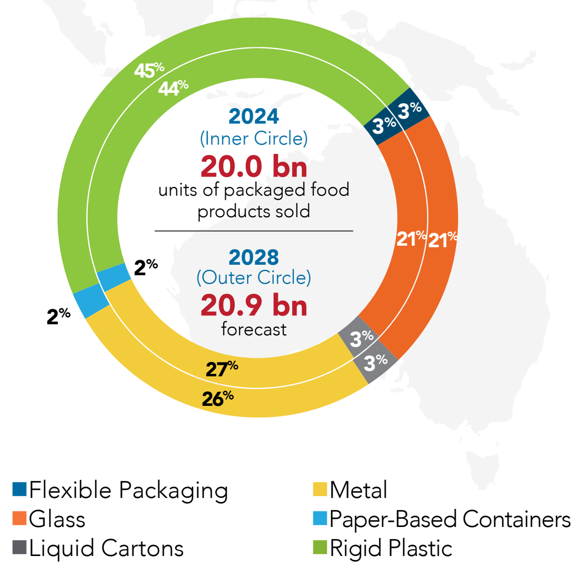
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Spain



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Spain



Data Source: © Euromonitor International 2025

TOP COMPANIES | **SPAIN**

Staple Foods

Company Name	Retail Value RSP 2023
Others	17.0
Artisanal	16.8
Other Private Label	14.5
Mercadona SA	13.8
Centros Comerciales Carrefour SA	6.7
Campofrío Food Group SA	4.1
Elpozo Alimentación SA	2.2
El Corte Inglés SA	2.0
Vicky Foods Products SLU	1.8
Eroski, Grupo	1.7
Bimbo SA	1.6
Auchan Retail España SA	1.5
Panrico SA	1.4
Calvo Conservas SL	0.9
Herba Ricemills SLU	0.9
Casa Tarradellas SA	0.8
Comercial Gallo SA	0.8
Kellogg España SA	0.7
Consum S Coop V Ltda	0.6
Conservas Garavilla SA	0.6
Noel Alimentaria SAU	0.5
Hijos de Carlos Albo SA	0.4
Alimentación Argal SA, Grupo	0.4
Angulas Aguinaga SA	0.4
Nueva Pescanova SA, Grupo	0.4

Soft Drinks

Company Name	Retail Value RSP 2023
Cía Servicios de Bebidas Refrescantes SL	31.0
Others	20.0
Mercadona SA	11.0
Aguas Danone SA	3.9
Other Private Label	3.7
Centros Comerciales Carrefour SA	3.4
Schweppes SA	3.3
Cía de Bebidas Pepsico SA	3.2
Calidad Pascual SAU	2.6
Agua Mineral San Benedetto SA	2.5
Vichy Catalán (Grupo) SA	2.1
Nestlé Waters España SA	1.9
J García Carrión SA	1.7
Balneario y Aguas de Solán de Cabras SA	1.5
Red Bull España SA	1.0
Kaiku Corporación Alimentaria SL	0.7
Eckes-Granini International	0.7
Gestion Fuente Liviana SL	0.7
Juver Alimentación SA	0.6
PepsiCo Foods AIE	0.4
Aguas de Vilaflor SA	0.4
Eneryeti Company SL	0.4
Aigua del Montseny SA	0.3
Fontaga SA	0.3
Aquadeus SL	0.3

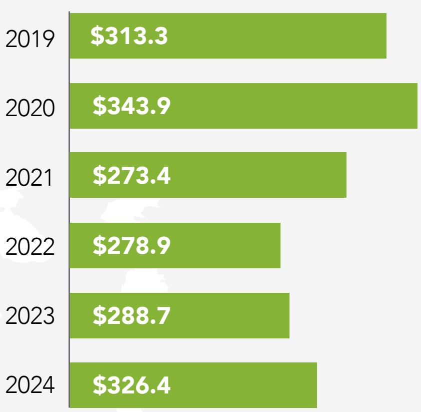
Beauty & Personal Care

Company Name	Retail Value RSP 2023
Others	21.7
L'Oréal España SA	14.0
Mercadona SA	7.3
Procter & Gamble España SA	5.9
Puig SL	5.6
Beiersdorf SA Spain	3.6
Coty Beauty Spain SL	3.5
Unilever España SA, Grupo	2.9
Other Private Label	2.6
Centros Comerciales Carrefour SA	2.4
Estée Lauder SA	2.4
Colgate-Palmolive España SA	2.2
Pierre Fabre Ibérica SA	1.8
Henkel Ibérica SA	1.6
ISDIN SA	1.3
LVMH Iberia SL	1.2
Future Cosmetics SA	1.1
Haleon Spain SA	1.1
Kiko Retail España SL	1.0
Johnson & Johnson SA	1.0
Inditex SA	0.9
Chanel España SA	0.8
AC Marca SA	0.8
Shiseido Spain SA	0.7
Comercial Farlabo España SL	0.6

IMPORT STATISTICS

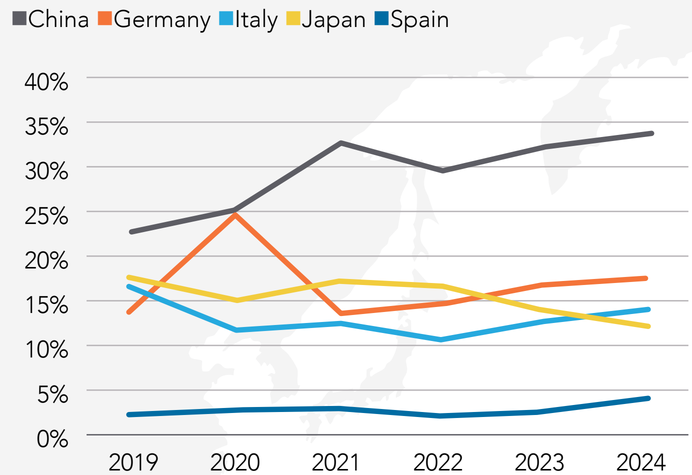
THAILAND

Packaging Machinery Imports (US Millions)



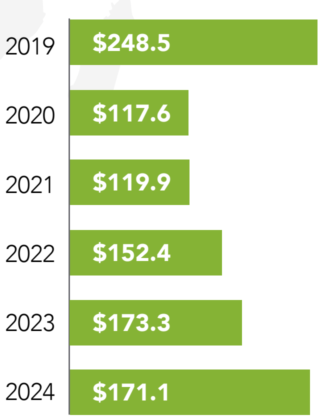
Source: *PMMI with data from Trade Data Monitor*

IMPORT MARKET SHARE BY COUNTRY



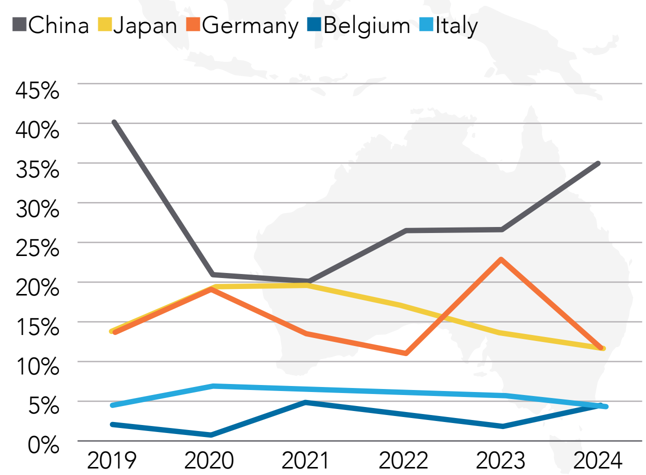
Source: *PMMI with data from Trade Data Monitor*

Processing Machinery Imports (US Millions)



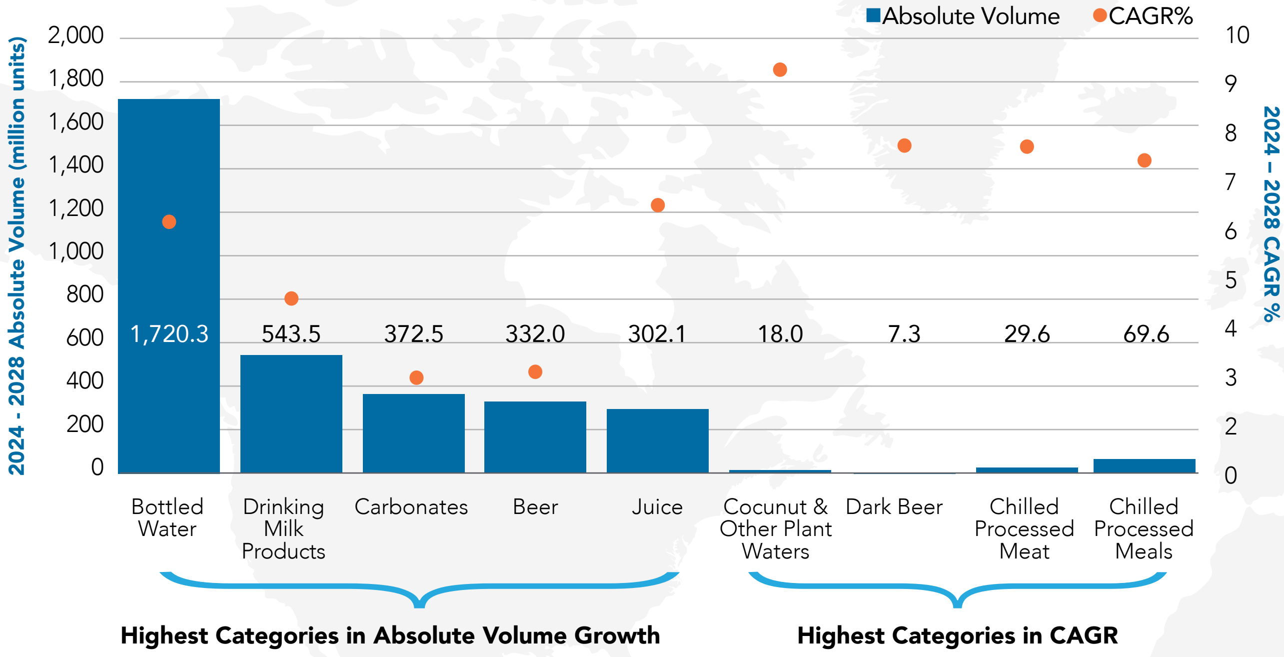
Source: *PMMI with data from Trade Data Monitor*

IMPORT MARKET SHARE BY COUNTRY



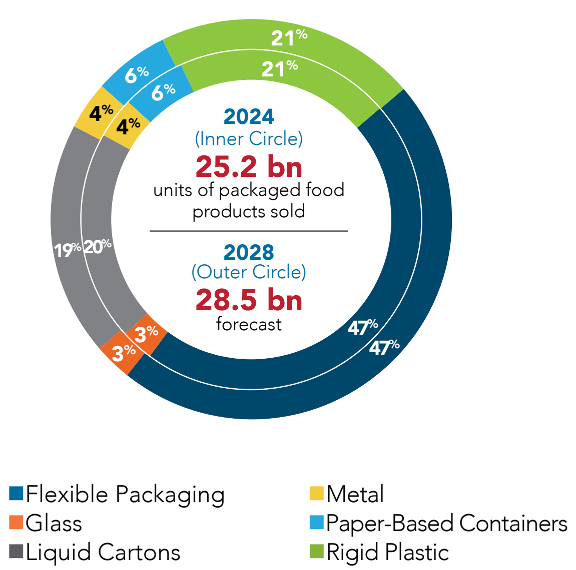
Source: *PMMI with data from Trade Data Monitor*

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
THAILAND



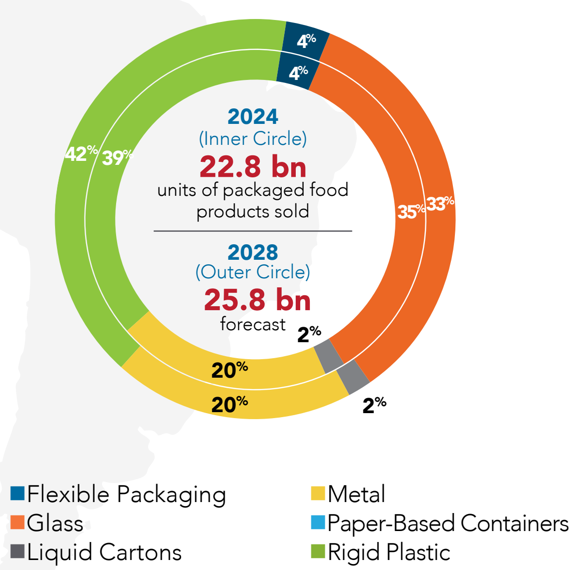
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Thailand



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Thailand



Data Source: © Euromonitor International 2025

TOP COMPANIES | **THAILAND**

Staple Foods

Company Name	Retail Value RSP 2024
Others	33.1
Artisanal	9.9
Thai President Foods Public Co Ltd	5.7
President Bakery PCL	5.4
Charoen Pokphand Foods PCL	4.8
CP Intertrade Co Ltd	4.5
CPRAM Co Ltd	4.0
Other Private Label	3.8
Thai Preserved Food Co Ltd	3.4
Siam Makro PCL	3.0
Bangsue Chia Meng Rice Mill Co Ltd	2.5
Hi-Q Food Products Co Ltd	1.9
Wan Thai Foods Industry Co Ltd	1.8
Patum Rice Mill & Granary PCL	1.3
S & P Syndicate PCL	1.1
Asia Inter Rice Export Co Ltd	1.0
European Foods PCL	1.0
Surapon Foods PCL	1.0
Sam Yang Foods Co Ltd	0.9
S Khonkaen Foods PCL	0.8
Sitthinan Co Ltd	0.8
Royal Food Co Ltd	0.8
Nestlé (Thai) Ltd	0.5
Kuang Pei San Food Products PCL	0.4
C&W Interfoods Co Ltd	0.4

Soft Drinks

Company Name	Retail Value RSP 2024
Coca-Cola (Thailand) Ltd	22.2
Others	11.0
Pepsi-Cola (Thai) Trading Co Ltd	9.9
Boon Rawd Brewery Co Ltd	7.0
Serm Suk PCL	6.1
Nestlé (Thai) Ltd	5.6
TC Pharmaceutical Industry Co Ltd	5.3
Osotspa Co Ltd	5.2
Oishi Group PCL	3.9
Ajinomoto (Thailand) Co Ltd	3.7
Carabao Tawandang Co Ltd	3.0
Ichitan Group PCL	2.4
FoodStar Inc	1.4
Aje Thai Co Ltd	1.4
Tipco Foods (Thailand) PCL	1.3
House Osotspa Food Co Ltd	1.3
Thai Beverage PCL	1.0
Thai Pure Drinks Ltd	0.8
Doi Kham Food Product Co Ltd	0.8
Malee Sampran Plc	0.7
General Beverage Co Ltd	0.7
Uni-President (Thailand) Co Ltd	0.5
Sappe Plc Co Ltd	0.5
ICC International PCL	0.5
Suntory PepsiCo Beverage (Thailand) Co Ltd	0.3

Beauty & Personal Care

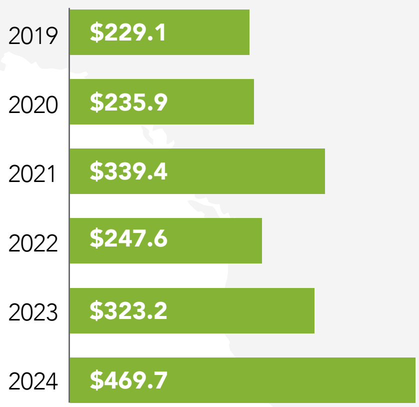
Company Name	Retail Value RSP 2024
Others	35.2
L'Oréal Thailand Co Ltd	9.3
Unilever Thai Holdings Ltd	8.3
Beiersdorf Thailand Co Ltd	5.3
Procter & Gamble Mfg Thailand Ltd	4.8
Colgate-Palmolive Thailand Ltd	3.1
Neo Corporate Co Ltd	2.1
Elca (Thailand) Co Ltd	2.1
Johnson & Johnson (Thailand) Ltd	2.0
Lion Corp (Thailand) Ltd	1.6
Amway (Thailand) Ltd	1.6
Shiseido (Thailand) Co Ltd	1.4
OP Natural Products Co Ltd	1.2
Osotspa Co Ltd	1.2
Other Private Label	1.2
Giffarine Skyline Unity Co Ltd	1.1
Better Way (Thailand) Co Ltd	1.0
Chanel (Thailand) Ltd	1.0
Henkel Thailand Co Ltd	0.9
Karmarts PCL	0.8
Kao Industrial (Thailand) Co Ltd	0.8
Smooth E Co Ltd	0.8
Sanofi-Aventis Thailand Ltd	0.7
Rojukiss International PCL	0.6
Amore Pacific (Thailand) Co Ltd	0.6

Data Source: © Euromonitor International 2025

IMPORT STATISTICS

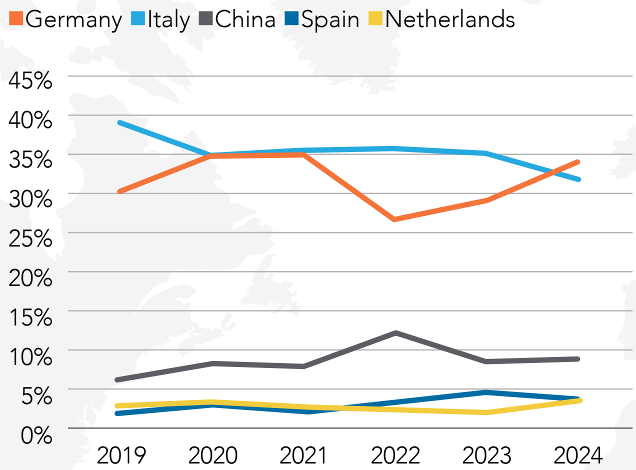
TURKEY

Packaging Machinery Imports (US Millions)



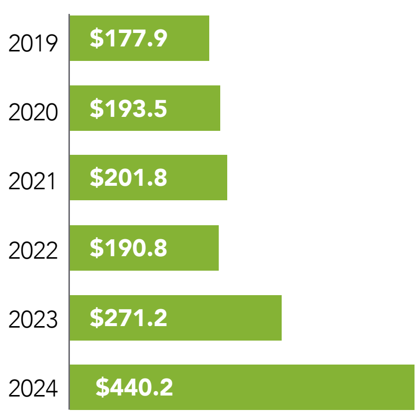
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



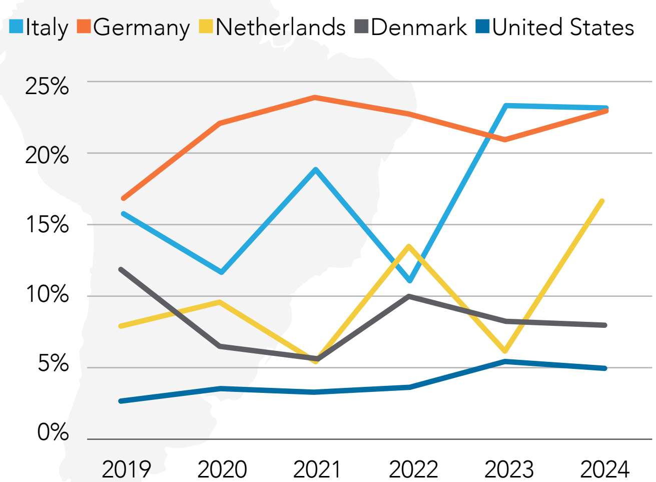
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



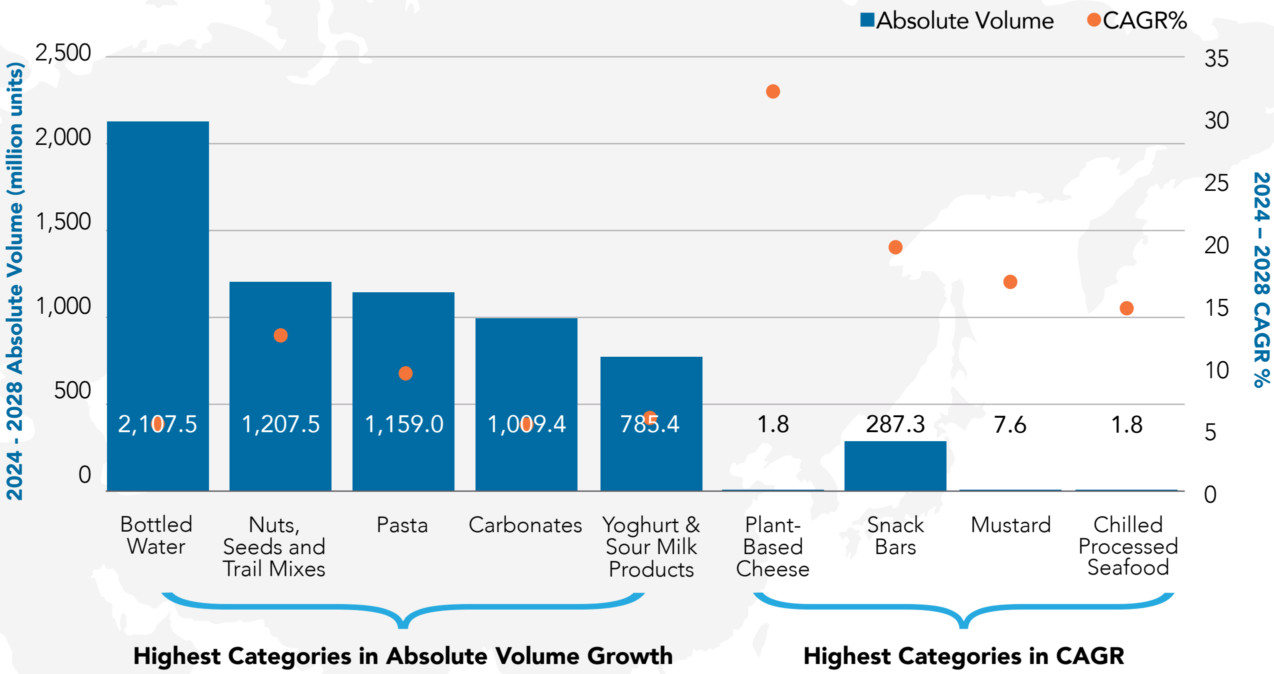
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



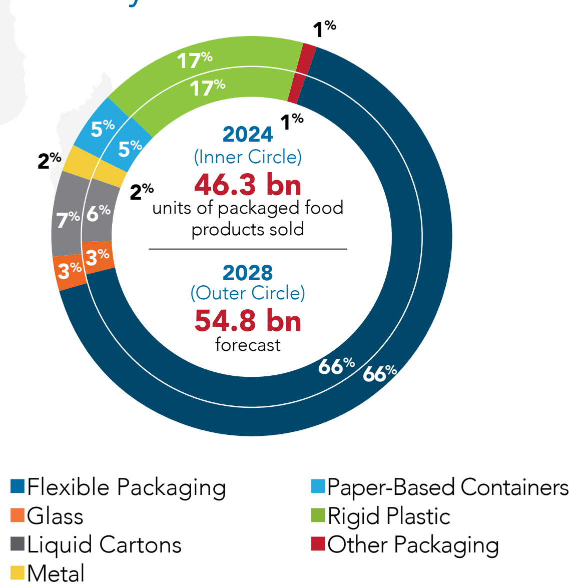
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE
TURKEY



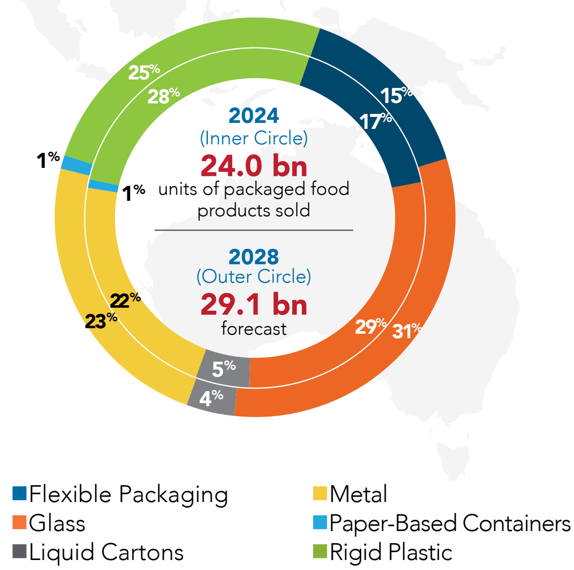
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in Turkey



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in Turkey



Data Source: © Euromonitor International 2025

TOP COMPANIES | **TURKEY**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	65.8
Others	7.4
Other Private Label	3.9
BIM Birlesik Magazacilik AS	2.9
Namet Gida San ve Tic AS	1.6
Pinar Entegre Et ve Un Sanayi AS	1.6
Nuhun Ankara Makarnasi San ve Tic AS	1.3
Barilla Gida San ve Tic AS	1.3
Kerevitas AS	1.0
A101 Yeni Magazacilik AS	1.0
Dardanel Onentas Gida Sanayii AS	0.9
UNMAS AS	0.8
Trakya Et ve Sut AS	0.7
Eti Gida San ve Tic AS	0.7
Durum Gida San ve Tic AS	0.7
Pladis Ltd	0.6
Halk Ekmek AS	0.6
Basak Tuketim ve Gida AS	0.6
Konya Seker San ve Tic AS	0.6
Reis Tarimsal Urunler San ve Tic AS	0.5
Sok Marketler Tic AS	0.4
Migros Tic AS	0.4
Pinar Süt Mamülleri San ve Tic AS	0.3
Yayla Agro Gida San ve Nakliyat AS	0.3
Tat Gida San AS	0.3

Data Source: © Euromonitor International 2025

Soft Drinks

Company Name	Retail Value RSP 2024
Coca-Cola Içecek AS	31.7
Pepsi-Cola International Tanitim Ltd	14.1
Others	13.7
Erbak-Uludag Mesrubatlari AS	6.1
Other Private Label	5.8
Red Bull Gida Dagitim ve Pazarlama Ticaret Ltd Sti	5.4
Sirmagrup Icecek San ve Tic AS	3.8
Beypazari Karakoca Dogal Mineralli Su Isletmesi Ltd Sti	2.8
Nestlé Waters Gida ve Mesrubat San Tic AS	2.0
Kizilay Maden Sulari AS	2.0
Dimes Gida San ve Ticaret AS	1.8
Danone Tikvesli Gida ve Icecek San ve Tic AS	1.4
Cakirmelikoglu Madensuyu Isletmesi Sanayi Ticaret AS	1.3
Yildiz Holding AS	1.1
Oguz Gida San ve Tic AS	1.1
Nestlé Gida Sanayii AS	1.0
BIM Birlesik Magazacilik AS	0.7
Pinar Süt Mamülleri San ve Tic AS	0.6
Monster Energy Turkiye	0.6
Cay Isletmeleri Genel Müdürlügü	0.6
Tamek Gida ve Konsantre Sanayi AS	0.6
Anele Gida San ve Tic AS	0.4
Aroma Bursa Meyva Sulari ve Gida San as	0.2
Capri Sun Group Holding AG	0.2
Özkaynak Su Sirketler Grubu	0.2

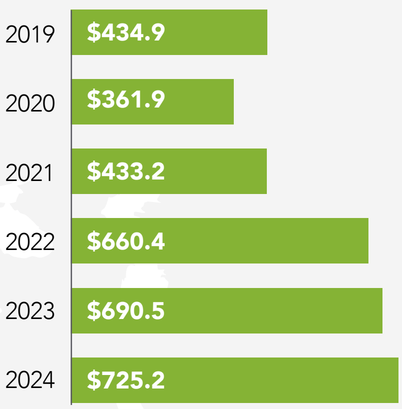
Beauty & Personal Care

Company Name	Retail Value RSP 2024
Others	16.5
L'Oréal Turkiye Kozmetik San ve Tic AS	10.0
Unilever San ve Tic Türk AS	6.2
Nivea Beiersdorf Turkey Kozmetik San Ve Tic AS	4.9
Naturel Kozmetik Ticaret AS	4.4
Procter & Gamble Tuketim Mallari Sanayi Ltd Skt	4.2
Other Private Label	4.0
Colgate-Palmolive Temizlik Urunleri San ve Ticaret AS	3.7
Gillette San ve Tic AS	3.4
Avon Kozmetik Urunleri San ve Tic AS	3.3
Türk Henkel Kimya San ve Tic AS	3.1
Farmasi Enternasyonel Tic AS	2.8
Evyap Sabun Yag Gliserin San ve Tic AS	2.8
Johnson & Johnson Sihhi Malzeme San ve Tic AS	2.5
GlaxoSmithKline Plc	2.2
Kosan Kozmetik Sanayi AS	2.0
Estée Lauder Cos Inc	2.0
Erkul Dagitim Pazarlama Tic AS	1.8
Kopas Kozmetik Pazarlama San AS	1.6
Azmüsebat Çakmak ve Tiras Biçagi San ve Ticaret AS	1.1
Wella AG	1.1
Dogus Grubu	1.0
Hunca Kozmetik Sanayii AS	1.0
Oriflame Kozmetik AS	0.7
Alticor Inc	0.7

IMPORT STATISTICS

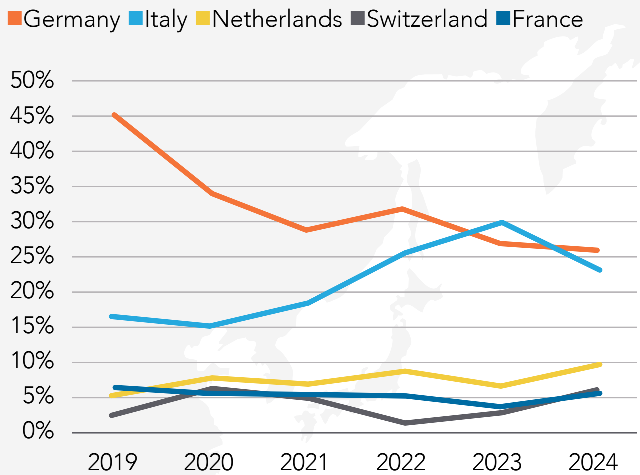
UNITED KINGDOM

Packaging Machinery Imports (US Millions)



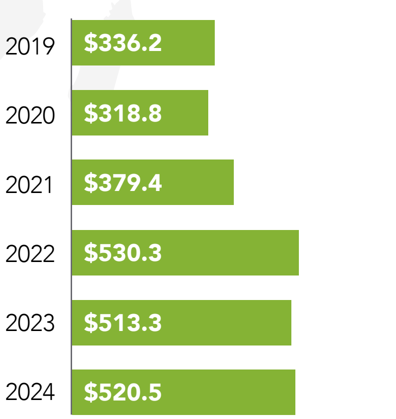
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



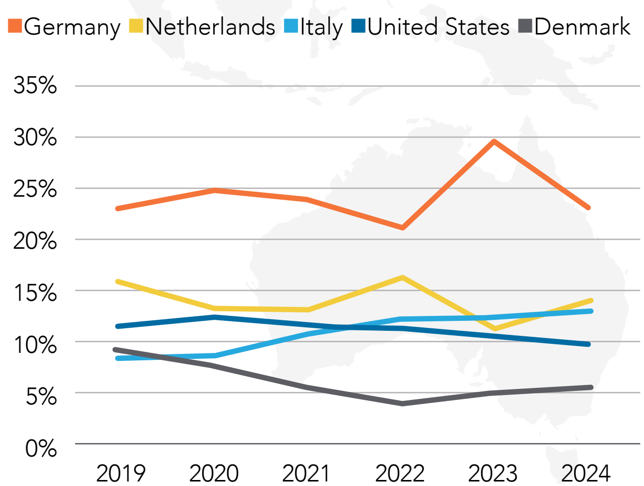
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

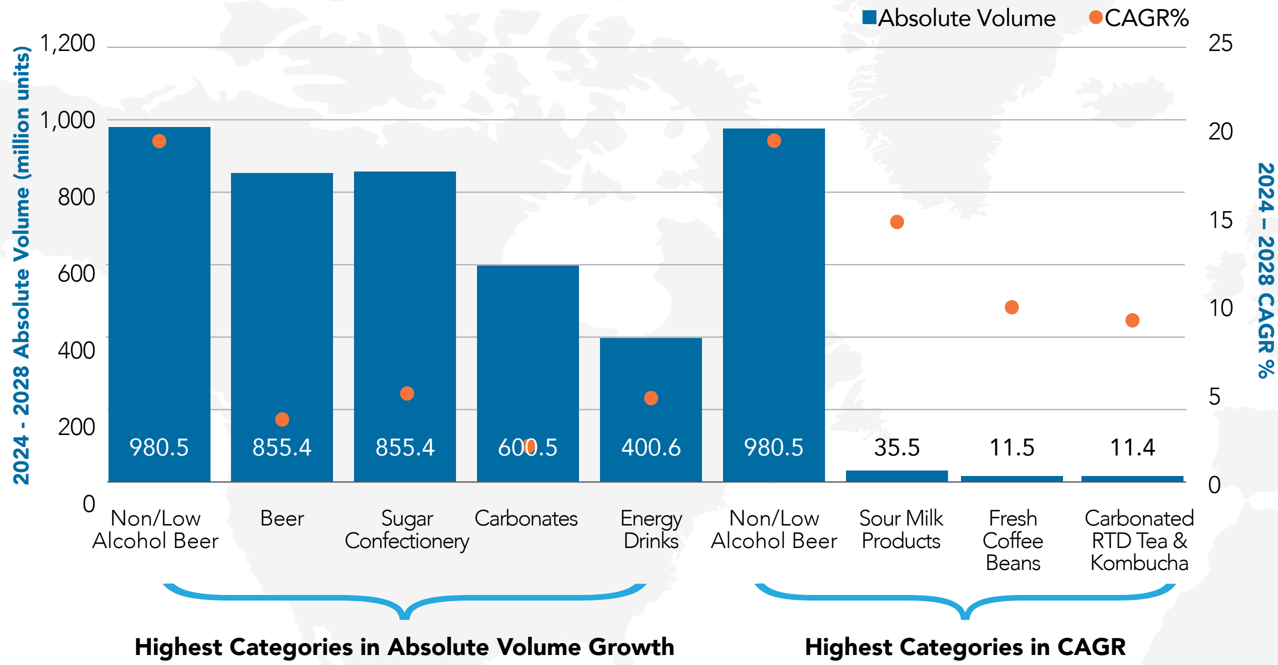
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

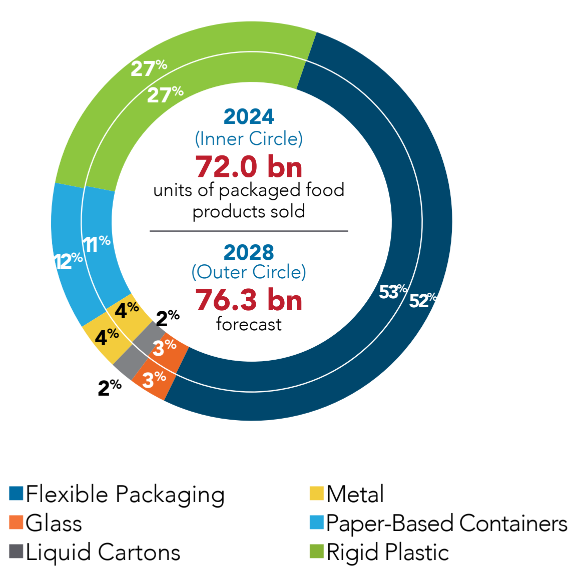
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

UNITED KINGDOM



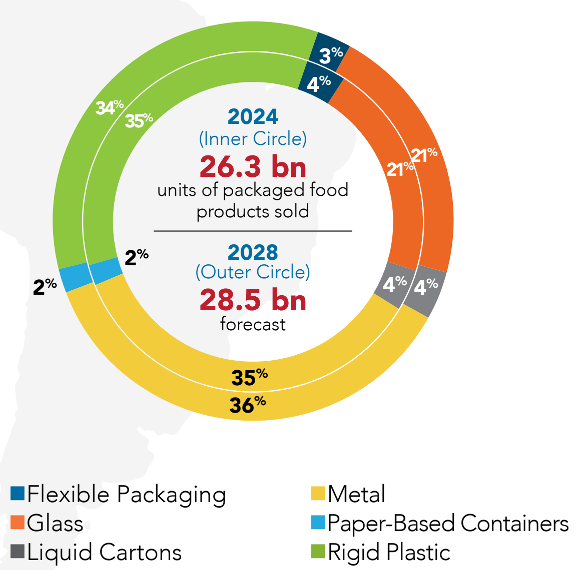
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in United Kingdom



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in United Kingdom



Data Source: © Euromonitor International 2025

TOP COMPANIES | **UNITED KINGDOM**

Staple Foods	
Company Name	Retail Value RSP 2024
Other Private Label	14.2
Tesco Plc	12.0
Others	11.6
Artisanal	9.1
J Sainsbury Plc	7.9
Asda Group Ltd	6.6
Wm Morrison Supermarkets Plc	4.8
Warburtons Ltd	2.6
Iglo Birds Eye Frozen Foods	2.3
Iceland Group Plc	2.3
Kellogg Co of Great Britain Ltd	2.1
Marks & Spencer Plc	2.0
Premier Foods Group Ltd	1.8
McCain Foods (GB) Ltd	1.7
Hovis Ltd	1.5
Pilgrim's Pride Ltd	1.4
Bernard Matthews Ltd	1.3
Waitrose Ltd	1.2
Heinz Co Ltd, HJ	1.0
Weetabix Ltd	1.0
Princes Ltd	0.9
Young's Seafood Ltd	0.9
Cereal Partners UK Ltd	0.8
Quaker Trading Ltd	0.8
Marlow Foods Ltd	0.7

Data Source: © Euromonitor International 2025

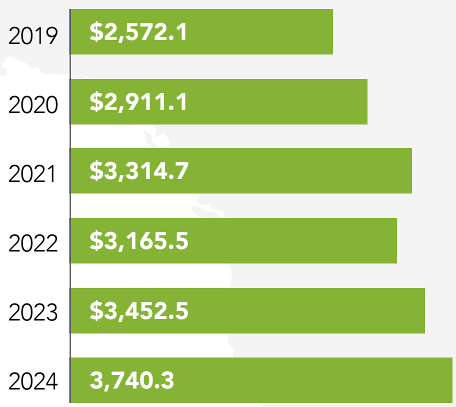
Soft Drinks	
Company Name	Retail Value RSP 2024
Coca-Cola Enterprises Ltd	24.9
Others	21.4
Britvic Soft Drinks Ltd	11.7
Red Bull Co Ltd	5.9
Lucozade Ribena Suntory Ltd	5.5
Tesco Plc	3.8
Danone Waters (UK & Ireland) Ltd	3.0
J Sainsbury Plc	2.6
Nestlé Waters UK Ltd	2.6
Innocent Drinks Co Ltd	2.2
Asda Group Ltd	2.1
Barr (AG) Plc	2.1
Tropicana UK Ltd	1.5
Other Private Label	1.4
Highland Spring Ltd	1.2
Nichols Plc	1.2
Arla Foods Ltd	1.2
Fevertree Ltd	0.7
Princes Soft Drinks Ltd	0.6
Clearly Drinks Ltd	0.6
Naked Juice Co	0.5
All Market Europe Ltd	0.3
Boost Drinks Ltd	0.3
Emmi AG	0.3
Dash Brands Ltd	0.3

Beauty & Personal Care	
Company Name	Retail Value RSP 2024
Others	18.2
L'Oréal (UK) Ltd	12.3
Procter & Gamble UK Ltd	7.1
Unilever UK Ltd	6.9
Estée Lauder Cosmetics Ltd	6.1
Boots UK Ltd	3.8
Beiersdorf UK Ltd	2.9
Colgate-Palmolive UK Ltd	2.9
Coty UK Ltd	2.6
Other Private Label	2.3
Johnson & Johnson Ltd	1.9
Puig UK Ltd	1.8
GlaxoSmithKline Plc	1.6
PZ Cussons Plc	1.5
Clarins UK Ltd	1.1
Chanel Ltd	1.0
L'Occitane Ltd	1.0
Christian Dior (UK) Ltd, Parfums	0.9
Rimmel International Ltd	0.9
Body Shop Plc, The	0.8
Elemis Ltd	0.7
Lush Cosmetics Ltd	0.7
Charlotte Tilbury Beauty Ltd	0.7
Avon Cosmetics Ltd	0.6
Henkel Ltd	0.6

IMPORT STATISTICS

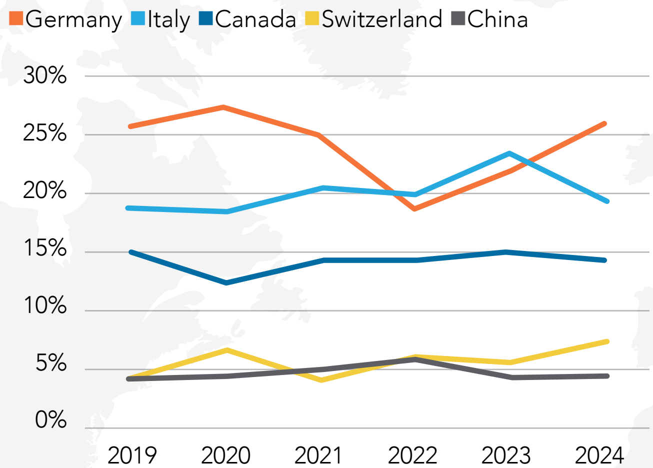
UNITED STATES

Packaging Machinery Imports (US Millions)



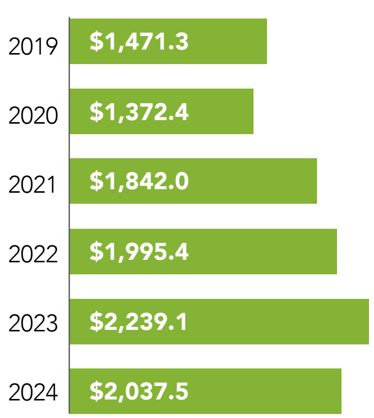
Source: *PMMI with data from Trade Data Monitor*

IMPORT MARKET SHARE BY COUNTRY



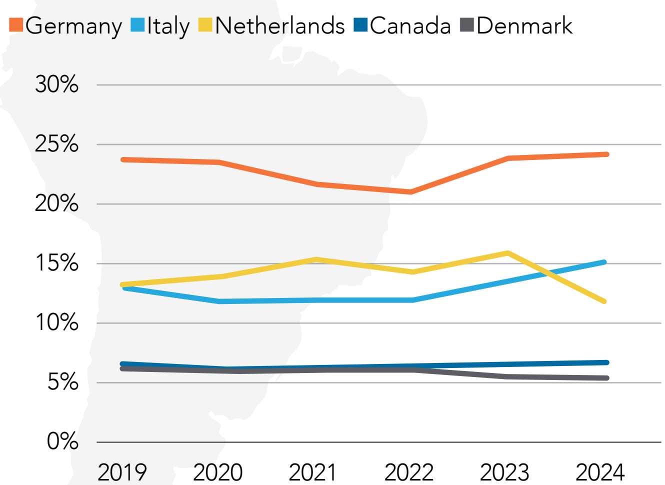
Source: *PMMI with data from Trade Data Monitor*

Processing Machinery Imports (US Millions)



Source: *PMMI with data from Trade Data Monitor*

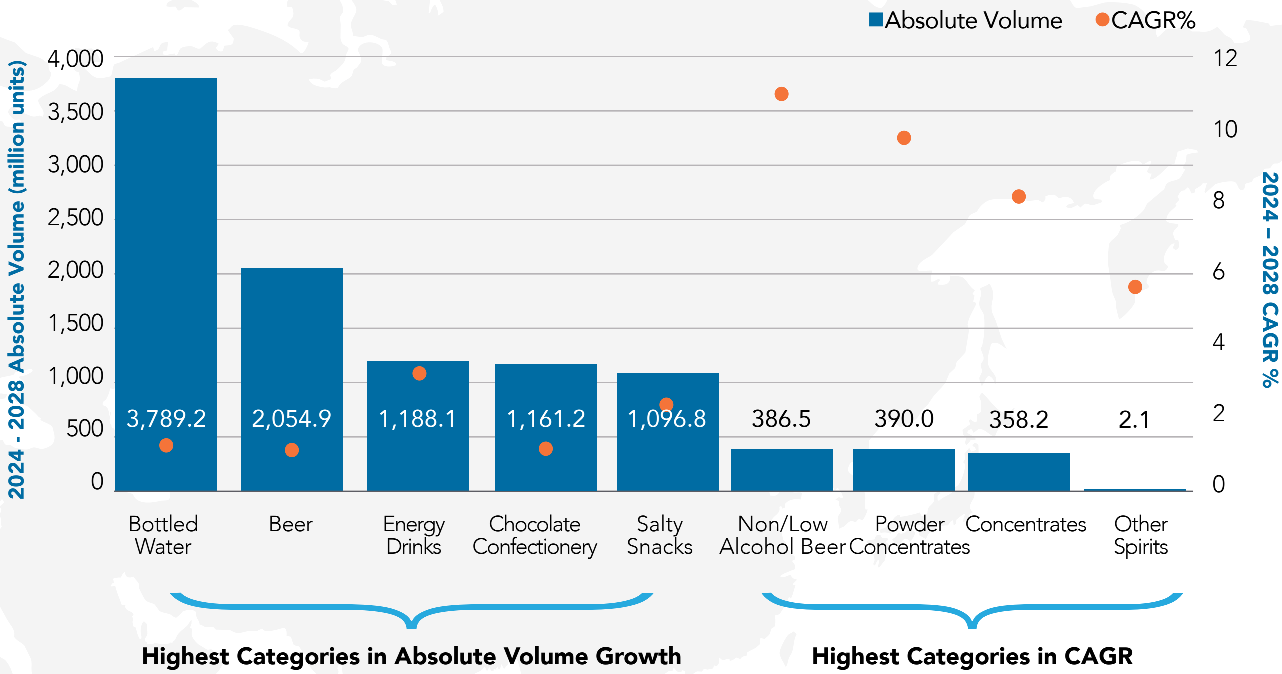
IMPORT MARKET SHARE BY COUNTRY



Source: *PMMI with data from Trade Data Monitor*

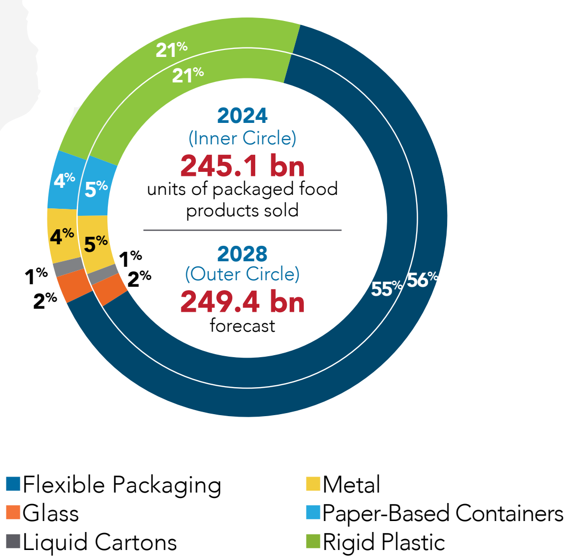
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

UNITED STATES



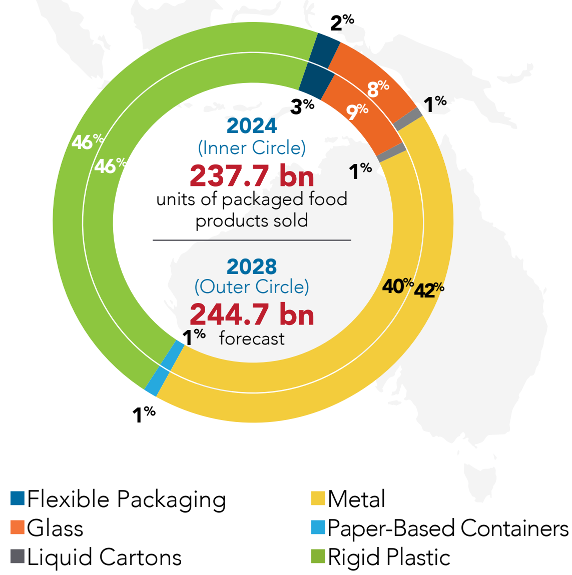
Data Source: © Euromonitor International 2025

Volume Share of Food Packaging in United States



Data Source: © Euromonitor International 2025

Volume Share of Beverage Packaging in United States



Data Source: © Euromonitor International 2025

TOP COMPANIES | **UNITED STATES**

Staple Foods

Company Name	Retail Value RSP 2024
Artisanal	21.7
Private Label	20.4
Others	19.4
Tyson Foods Inc	3.5
Kraft Heinz Co	2.9
Bimbo Bakeries USA Inc	2.8
General Mills Inc	1.9
Flowers Foods Inc	1.9
Hormel Foods Corp	1.7
WK Kellogg Co	1.5
ConAgra Brands Inc	1.3
Smithfield Foods Inc	1.2
Post Consumer Brands LLC	1.1
Hostess Brands LLC	1.0
Kellanova	1.0
McKee Foods Corp	1.0
Quaker Oats Co, The	0.9
Sara Lee Bakery Group	0.8
Del Monte Foods Inc	0.7
Toyo Suisan Kaisha Ltd	0.7
Johnsonville Sausage LLC	0.7
Goya Foods Inc	0.6
Campbell's Co, The	0.6
Barilla Alimentare SpA	0.6
Gruma Corp	0.6

Data Source: © Euromonitor International 2025

Soft Drinks

Company Name	Retail Value RSP 2024
Coca-Cola Co, The	17.8
Others	16.8
Private Label	10.5
PepsiCo Inc	8.5
Keurig Dr Pepper Inc	7.8
Gatorade Co Ltd, The	6.0
Monster Beverage Corp	5.3
Red Bull North America Inc	4.3
BlueTriton Brands Inc	2.7
Pepsi-Lipton Tea Partnership	1.5
North American Coffee Partnership, The	1.4
Energy Brands Inc	1.4
Tropicana Products Inc	1.2
Kraft Heinz Co	1.2
BA Sports Nutrition LLC	1.0
AriZona Beverage Co LLC	0.9
Ocean Spray Cranberries Inc	0.8
Talking Rain Beverage Co	0.8
Celsius Holdings Inc	0.8
Congo Brands LLC	0.7
National Beverage Corp	0.7
Unilever Bestfoods North America	0.5
Naked Juice Co	0.5
DS Services of America, Inc	0.5
Rockstar Inc	0.4

Beauty & Personal Care

Company Name	Retail Value RSP 2024
Others	16.7
L'Oréal USA Inc	12.9
Procter & Gamble Co, The	10.0
Unilever Home & Personal Care USA	5.8
Estée Lauder Cos Inc	5.6
Johnson & Johnson Consumer Products Inc	3.8
Other Private Label	2.9
Colgate-Palmolive Co	2.6
Coty Inc	2.6
LVMH Perfums & Cosmetics USA Inc	2.5
Bath & Body Works Inc	2.4
Shiseido Americas Corp	1.5
Chanel USA Inc	1.4
Mary Kay Inc	1.1
Puig Prestige Beauty	1.0
John Paul Mitchell Systems Inc	0.9
Beiersdorf Inc	0.9
Haleon Plc	0.9
Fenty Beauty LLC	0.9
Suave Brands Co LLC	0.9
Edgewell Personal Care Brands LLC	0.8
Victoria's Secret & Co	0.8
Inter Parfums Inc	0.7
Tarte Inc	0.6
Church & Dwight Co Inc	0.6


ESG

PACKAGING & PROCESSING MACHINERY IMPORT DUTIES & OTHER TAXES

The tariff environment is continuously changing. The information in this section was updated as of August 11, 2025. For the latest news on tariffs updates, please check out the Global Trends blog on the PMMI website: **https://www.pmmi.org/global-marketing/global-marketing-trends**

KEY TO IMPORT DUTY TABLES:

Black font = Standard, non-preferential tariff rates (also called "Most Favored Nation" or "MFN" rates) applied on imports from countries that do not benefit from lower preferential tariff rates.

Red font = Current lower preferential tariff rates available to imports from select exporting countries under existing free trade agreements (FTAs) or unilateral preference programs.

Bolded, italicized font = Current rates applied on imports into China from the United States that include China's MFN tariff rates plus an additional retaliatory tariff in response to US trade actions against China. As a result, the applied tariff rates for US-manufactured equipment may be higher than China's MFN rates. The United States is applying Section 301 duties in addition to MFN rates on imports from China that are also captured in the below tables.

Exporting countries reviewed for possible lower tariffs include United States (US), Canada (CA), and Mexico (MX), as well as China (CN), European Union (EU) -- including Germany and Italy -- Japan (JP), Korea (KR) and United Kingdom (UK), For imports from the US, Canada, and Mexico, preferential rules of origin required to benefit from current or future lower tariffs are noted in the table following the import duty tables.

Import Duties on Packaging Machinery

8422.20 - Machinery for cleaning or drying bottles or other containers
8422.30 - Machinery for filling, closing, sealing, capsuling or labeling bottles, cans, boxes or other containers; machinery for aerating beverages
8422.40 - Packing or wrapping machinery (including heat-shrink wrapping machinery)
8422.90 - Parts for machines for dishwashing, cleaning, filling, etc.; containers and parts for packing and wrapping; parts of machines for aerating beverages

Destination Market	8422.20	8422.30	8422.40	8422.90
United States *(for comparison with import tariffs applied on US-origin machinery)*	*Free*	*Free*	*Free*	*Free*
	See below section "**U.S. Tariffs & Reciprocal Trade Action**" for country-specific tariff rates for imports into the United States implemented by the Trump Administration in 2025.			
Argentina	12.6%	Free or 12.6%	Free or 12.6%	12.6%
Imports from MX	10.1%	Free or 10.1%	Free or 10.1%	10.1%
Australia	5%	5%	Free or 5%	5%
Imports from US, CA, CN, JP, KR, MX, UK	Free	Free	Free	Free
Brazil	12.6%	Free* or 12.6%	Free* or 12.6%	12.6%
Imports from MX	Free or 10.8%	Free or 10.8%	Free or 10.8%	10.08% or 12.8%
Canada	Free	Free	Free	Free
Chile	6%	6%	6%	6%
Imports from US, CA, CN, EU, UK, JP, KR, MX	Free	Free	Free	Free
China	8%	6%-12%	8%	4% or 8.5%
Imports from US*	***38%****	***41% or 47%****	***43%****	***39% or 43.5%****
Imports from KR	Free	Free	Free	Free
Imports from JP	6.4%	6.4% or 7.5	8.1%	5.4% or 6.7%
Colombia	Free***	Free*** or 5%	Free*** or 5%	5%
Imports from CA, MX, EU, UK, KR, US	Free	Free	Free	Free
European Union	1.7%	1.7%	1.7%	1.7%
Imports from CA, JP, KR, UK, MX, US****	Free	Free	Free	Free
India	7.5%	7.5%	7.5%	7.5%
Imports from JP, KR	Free	Free	Free	Free
Indonesia	5%	5%	5%	5%
Imports from CN, JP, KR	Free	Free	Free	Free
Japan	Free	Free	Free	Free

Destination Market	8422.20	8422.30	8422.40	8422.90
Malaysia	Free	Free	Free	Free
Mexico Imports from US, CA, EU, UK, JP	Free – 15% Free	Free or 5% Free	Free or 15% Free	Free Free
New Zealand Imports from CA, CN, EU, JP, KR, MX, UK	Free or 5% Free	Free or 5% Free	5% Free	Free or 5% Free
Norway	Free	Free	Free	Free
Panama Imports from US, CA, MX, EU, UK, KR	Free	Free or 3% Free	Free or 10% Free	Free
Peru	Free	Free	Free	Free
Philippines Imports from CN, JP, KR	3%***** Free	Free	Free	1%***** Free
Russia	Free	Free	Free	Free
Saudi Arabia	5%	5%	5%	5%
Singapore	Free	Free	Free	Free
South Africa	Free	Free	Free	Free
South Korea Imports from US, CA, CN, EU, UK Imports from JP	8% Free 6.4%	8% Free Free – 6.4%	8% Free 5.9% or 6.4%	8% Free 4.8% or 6.4%
Switzerland	Free	Free	Free	Free
Taiwan	4%	3%	3%	2.5%
Thailand	Free	Free	Free	Free
Turkey Imports from EU, KR, UK	1.7% Free	1.7% Free	1.7% Free	1.7% Free
Ukraine Imports from CA, EU, UK	5% Free	2% or 5% Free	Free or 5% Free	Free or 2% Free
UAE	5%	5%	5%	5%
United Kingdom	Free	Free	Free	Free
Venezuela Imports from MX	14% 12.3%	Free or 14% Free or 12.3%	Free or 14% Free or 12.3%	14% 12.3%
Vietnam Imports from CA, CN, EU, KR, JP, MX, UK	5% Free	Free	Free	Free or 5% Free

Import Duties on Food Processing Machinery

8438.10 - Bakery machinery and machinery for the industrial preparation or manufacture of macaroni, spaghetti or similar products (excluding ovens, macaroni drying machines and dough rollers)
8438.20 - Machinery for the industrial preparation or manufacture of confectionery, cocoa or chocolate (excluding centrifuges and filtering, heating or refrigerating equipment)
8438.30 - Machinery for sugar manufacture (excluding centrifuges and filtering, heating or refrigerating equipment)
8438.40 - Brewery machinery (excluding centrifuges and filtering, heating or refrigerating equipment)
8438.50 - Machinery for the industrial preparation of meat or poultry (excluding cooking and other heating appliances and refrigerating or freezing equipment)
8438.60 - Machinery for the industrial preparation of fruits, nuts or vegetables (excluding cooking and other heating appliances, refrigerating or freezing equipment and machinery for the sorting or grading of fruit and vegetables)
8438.80 - Machinery for the industrial preparation or manufacture of food or drink, not elsewhere specified
8438.90 - Parts of machinery for the industrial preparation or manufacture of food or drink, not elsewhere specified

Destination Market	8438.10	8438.20	8438.30	8438.40	8438.50	8438.60	8438.80	8438.90
United States (for comparison with import tariffs applied on US-origin machinery	*Free*	*Free*	*Free*	*2.3%*	*2.8%*	*Free*	*Free*	*Free*
	See below section "**U.S. Tariffs & Reciprocal Trade Action**" for country-specific tariff rates for imports into the United States implemented by the Trump Administration in 2025.							
Argentina	12.6%	Free or 12.6%	12.6%	12.6%	12.6%	12.6%	Free or 12.6%	12.6%
Imports from MX	10.1%	Free or 10.1%	10.1%	10.1%	10.1%	10.1%	Free or 10.1%	10.1%
Australia	Free or 5%	5%	5%	5%	5%	5%	5%	5%
Imports from US, CA, CN, KR, JP, MX, UK	Free	Free	Free	Free	Free	Free	Free	Free
Brazil	12.6%	Free* or 12.6%	12.6%	12.6%	12.6%	12.6%	Free* or 12.6%	Free* or 12.6%
Imports from MX	10.1%	Free, 11.2%	11.2%	Free	Free or 11.2%	Free	Free or 11.2%	Free
Canada	Free	Free	Free	Free	Free	Free	Free	Free
Chile	6%	6%	6%	6%	6%	6%	6%	6%
Imports from US, CA, CN, EU, UK, JP, KR, MX	Free	Free	Free	Free	Free	Free	Free	Free
China	7%	8%	8%	7%	7%	8%	8%	5%
Imports from US	***37%*****	***43%*****	***43%*****	***42%*****	***37%*****	***38%*****	***38%*****	***35%*****
Imports from KR	1.8%	Free	Free	Free	Free	Free	Free	Free
Imports from JP	5.3%	5.1%	6.4%	4.5%	4.5%	6.4%	5.4%	Free
Colombia	Free*** or 5%	Free***	10%	Free***	Free*** or 5%	10%	Free*** or 5%	5%
Imports from CA, MX, US, EU, UK, KR	Free	Free	Free	Free	Free	Free	Free	Free
European Union	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%
Imports from CA, JP, KR, MX, UK, US****	Free	Free	Free	Free	Free	Free	Free	Free
India	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%
Imports from JP	Free	Free	Free	Free	Free	Free	Free	Free
Imports from KR	Free	Free	Free	Free	Free	Free	Free	Free
Indonesia	5%	Free or 5%	5%	10%	5%	5%	5%	5%
Imports from CN, JP, KR	Free	Free	Free	Free	Free	Free	Free	Free

> CONTINUED

Countries	8438.10	8438.20	8438.30	8438.40	8438.50	8438.60	8438.80	8438.90
Japan	Free	Free	Free	Free	Free	Free	Free	Free
Malaysia	Free	Free	Free	Free	Free	Free	Free	Free
Mexico	Free or 15%	Free	Free or 15%	Free	Free or 15%	Free or 5%	Free	Free
Imports from US, CA, EU, JP, UK	Free	Free	Free	Free	Free	Free		
New Zealand	Free	Free	Free	Free	Free	Free	Free or 5%	Free or 5%
Imports from CA, CN, EU, MX, KR, JP, UK							Free	Free
Norway	Free	Free	Free	Free	Free	Free	Free	Free
Panama	Free	Free	Free	Free	Free	Free or 10%	Free	Free
Imports from CA, MX, US, EU, UK, KR						Free		
Peru	Free	Free	Free	Free	Free	Free	Free	Free
Philippines	Free	Free	Free	Free	Free	Free	Free or 3%*****	Free
Imports from CN, JP, KR							Free	
Russia	Free	Free	Free	Free	Free	Free	Free	Free
Saudi Arabia	5%	5%	5%	5%	5%	5%	5%	5%
Singapore	Free	Free	Free	Free	Free	Free	Free	Free
South Africa	Free	Free	Free	Free	Free	Free	Free	Free
South Korea	8%	8%	8%	8%	8%	8%	8%	8%
Imports from US, CA, CN, EU, UK	Free	Free	Free	Free	Free	Free	Free	Free
Imports from JP	6.4% or 8%	6.4%	6.4%	6.4%	6.4%	6.4%	6.4% or 8%	8%
Switzerland	Free	Free	Free	Free	Free	Free	Free	Free
Taiwan	3%	3%	3%	3%	3%	3%	4%	2.5%
Imports from CN							Free	
Thailand	Free	Free	Free	Free	Free	Free	Free	Free
Turkey	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%
Imports from EU, KR, UK	Free	Free	Free	Free	Free	Free	Free	Free
Ukraine	3%	Free	10%	1%	10%	5%	1% or 5%	Free
Imports from CA, EU, UK	Free		Free	Free	Free	Free	Free	
UAE	5%	5%	5%	5%	5%	5%	5%	5%
United Kingdom	Free	Free	Free	Free	Free	Free	Free	Free
Venezuela	14%	Free or 14%	14%	14%	14%	14%	Free or 14%	14%
Imports from MX	12.3%	Free or 12.3%	12.3%	12.3%	12.3%	12.3%	Free or 12.3%	12.3%
Vietnam	3%	3%	3%	5%	Free	Free	Free - 5%	Free
Imports from CA, CN, EU, JP, KR, MX, UK	Free	Free	Free	Free			Free	

Notes for HS Codes 8422 and 8438

* *For imports into Brazil, MFN tariff is 12.6% and is provisionally reduced to duty-free for products of 8422.30, 8422.40, 8438.20, and 8438.80. There is no timeline for when the temporary reduced rate will be lifted.*

** *Most machinery imports into China from the U.S. are assessed retaliatory duties in addition to the current MFN rate in response to U.S. Section 301 tariffs and IEEPA fentanyl/reciprocal tariffs on goods from China. China's retaliatory duties in response to U.S. Section 301 range from 5% to 25% depending on the tariff code and have been in place since 14 February 2020. China's retaliatory duties in response to IEEPA fentanyl/reciprocal tariffs are 10% on all US-origin imports, in place since 1 August 2025. U.S. origin agricultural machinery of 8438.60 is subject to an additional 10% retaliatory duty in response to IEEPA fentanyl/reciprocal tariff action.*

*** *For imports into Colombia, the tariff is provisionally MFN duty-free and must be reviewed annually. If duty-free treatment is revoked, select tariff lines may increase to a 5% MFN rate.*

**** *Imports into EU from the United States will be duty-free based on US-EU deal reached on 28 July 2025.*

***** *Imports into Philippines may be MFN duty-free. See additional details on conditions under Philippines in Taxes and Fees table below.*

U.S. Tariffs & Reciprocal Trade Action on Packaging & Processing Machinery

Total applied U.S. tariff rate on imports of food processing and packaging machinery and equipment from top 10 import markets

<table>
<tr><th></th><th>8422.20</th><th>8422.30</th><th>8422.40</th><th>8422.90</th><th>8438.10</th><th>8438.20</th><th>8438.30</th><th>8438.40</th><th>8438.50</th><th>8438.60</th><th>8438.80</th><th>8438.90</th></tr>
<tr><td>U.S. MFN</td><td>Free</td><td>Free</td><td>Free</td><td>Free</td><td>Free</td><td>Free</td><td>Free</td><td>2.3%</td><td>2.8%</td><td>Free</td><td>Free</td><td>Free or 2.8%</td></tr>
<tr><td>FROM CANADA
USMCA compliant</td><td colspan="7">Free</td><td>2.3%</td><td>2.8%</td><td colspan="2">Free</td><td>Free or 2.8%</td></tr>
<tr><td>Non-USMCA compliant:</td><td colspan="7">35%</td><td>37.3%</td><td>37.8%</td><td colspan="2">35%</td><td>35% or 7.8%</td></tr>
<tr><td>FROM CHINA</td><td colspan="3">55%</td><td>37.5% or 55%</td><td colspan="3">37.5%</td><td>39.8%</td><td>57.8%</td><td colspan="2">55%</td><td>55% or 57.8%</td></tr>
<tr><td>FROM EU-27</td><td colspan="12">15%</td></tr>
<tr><td>FROM INDIA</td><td colspan="7">50%</td><td>52.3%</td><td>52.8%</td><td colspan="2">50.0%</td><td>50% or 52.8%</td></tr>
<tr><td>FROM JAPAN</td><td colspan="7">15%</td><td>17.3%</td><td>17.8%</td><td colspan="2">15%</td><td>15% or 17.8%</td></tr>
<tr><td>FROM KOREA</td><td colspan="7">15%</td><td>17.3%</td><td>17.8%</td><td colspan="2">15%</td><td>15% or 17.8%</td></tr>
<tr><td>FROM MEXICO
USMCA compliant:</td><td colspan="7">Free</td><td>2.3%</td><td>2.8%</td><td colspan="2">Free</td><td>Free or 2.8%</td></tr>
<tr><td>Non-USMCA compliant:</td><td colspan="7">25%</td><td>27.3%</td><td>27.8%</td><td colspan="2">25%</td><td>25% or 27.8%</td></tr>
<tr><td>FROM SWITZERLAND</td><td colspan="7">39%</td><td>41.3%</td><td>41.8%</td><td colspan="2">39%</td><td>39% or 41.8%</td></tr>
<tr><td>FROM TAIWAN</td><td colspan="7">20%</td><td>22.3%</td><td>22.8%</td><td colspan="2">20%</td><td>20% or 22.8%</td></tr>
<tr><td>FROM THE UK</td><td colspan="7">10%</td><td>12.3%</td><td>12.8%</td><td colspan="2">10%</td><td>10% or 12.8%</td></tr>
</table>

Summary of U.S. tariffs in place and rates applied:

- Non-preferential tariffs, also called “MFN rates”: duty-free for most processing and packaging machinery under tariff code 8422 and 2.8% or less for processing and packaging machinery under tariff code 8438.
- USMCA preferential tariffs: duty-free
- Section 301 tariffs on imports from China: Most machinery imports into the United States from China are assessed U.S. Section 301 tariffs of 7.5% or 25%. U.S. Section 301 List 4A has been applied and reduced to 7.5% as of 14 February 2020, in addition to U.S. Section 301 List 1 of 25% applied since 6 July 2018.
- Section 232 tariffs
  - Steel and aluminum tariffs: 50% on the value of non-U.S. steel/aluminum content, except for imports from the UK, which are subject to 25%.
  - Copper tariffs: 50% tariff on semi-finished copper imports effective since 1 August 2025.
- IEEPA tariff actions

IEEPA trafficking tariffs

- Canada: 35% on non-USMCA compliant goods
- Mexico: 25% and then 30% announced for implementation on 29 October 2025 on non-USMCA compliant goods

IEEPA/fentanyl tariffs on imports from China: 20%

IEEPA/reciprocal tariffs:

- Effective 7 August, there are country-specific reciprocal tariff rates which range from 10%-41%.
- On 12 August, tariffs are scheduled to increase for imports from China to 34% if no negotiated deal.
- Canada and Mexico are exempt from reciprocal tariff action during the duration of the trafficking national emergency. If the President decides to terminate or suspends the IEEPA trafficking tariffs, goods from Canada or Mexico will be subject to a 12% reciprocal tariff rate.

IEEPA Russian oil purchase tariffs on imports from India: On 6 August President Trump announced an additional 25% tariff on imports from India which will enter into force on 27 August. The additional tariff is as a response to India’s purchase of Russian oil and is on top of the 25% reciprocal tariffs on Indian imports.

Examples of additional U.S. tariffs and how they stack on U.S. imports of machinery/equipment and parts/components/materials

Imported Good	HS Code	Country of Origin		MFN	Section 301*	Section 232 Steel/ Aluminum	IEEPA/ Fentanyl	IEEPA/ Trafficking	IEEPA/ Reciprocal	Total Applied Tariff
Parts of machines for aerating beverages	8422.90	CN		Free	7.5% or 25%	–	20%	–	10% **	37.5% or 55%
		CA	USMCA Compliant				–	Free		Free
			Not USMCA Compliant					35%		35%
		EU-27						–	15%	15%
Machinery for the industrial preparation or manufacture of food or drink, n.e.s.	8438.80	CN		Free	25%	–	20%	–	10% **	55%
		CA	USMCA Compliant				–	Free		Free
			Not USMCA Compliant					35%		35%
		EU-27						–	15%	15%
Wire of iron or nonalloy steel	7217	CN		Free	25%	50% on value of non-U.S. steel/alum content	20%	–	10% **	55% + 50% on value of non-U.S. steel/ alum content
		CA	USMCA Compliant				–	Free		50% on value of non-U.S. steel/alum content
			Not USMCA Compliant					35%		35% + 50% on value of non-U.S. steel/ alum content
		EU-27						–	15%	15% + 50% on value of non-U.S. steel/ alum content
Flat rolled stainless steel products	7219	CN		Free	25%	50% on value of non-U.S. steel/alum content	20%	–	10% **	55% + 50% on value of non-U.S. steel/ alum content
		CA	USMCA Compliant				–	Free		50% on value of non-U.S. steel/alum content
			Not USMCA Compliant					35%		35% + 50% on value of non-U.S. steel/ alum content
		EU-27						–	15%	15% + 50% on value of non-U.S. steel/ alum content

** Section 301 tariffs applied only on select Chinese imports.*
*** On 12 August 2025, tariffs are scheduled to increase for imports from China to 34% if no negotiated deal is announced.*

Preferential Rules of Origin for Imported Machinery Manufactured in the United States, Canada, and/or Mexico

KEY TO PREFERENTIAL RULES OF ORIGIN (ROO) TABLE:

Preferential rules of origin are the criteria required to benefit from lower preferential tariff rates under FTAs. Rules of origin are included in the table below when a lower preferential tariff, as noted in red text ((i.e., existing FTA) in the above duty tables, is available for imports from the **United States, Canada, and/or Mexico.**

CTH = Change the heading (4-digits); **CTSH** = Change the subheading (6-digits); **RVC** = Regional value content

Importing Country	Preferential ROOs required for imports from United States, Canada, and/or Mexico to benefit from lower duties under FTAs
United States (for comparison purposes)	**USMCA ROO for imports from CA, MX:** USMCA went into effect on 1 July 2020, replacing NAFTA. ROOs have not changed for PMMI member products. See **USMCA ROO** under "Mexico".
Argentina	**ACE No. 6 and ALADI regional ROO for imports from MX:** (1) CTH; **or** (2) CIF value of the non-originating materials does not exceed 50% of the FOB value of the export.
Australia	**US-Australia FTA ROO for imports from US:** **8422.11 – 8422.40:** CTSH **8422.90:** (1) CTH; **or** (2) No change in tariff classification required, provided that there is a RVC of not less than (a) 35% based on the build-up method or (b) 45% based on the build-down method. **8432.10 – 8438.80:** CTSH **8438.90:** CTH **Australia Generalized System of Preferences (GSP) for imports from MX:** To be eligible for preferences under the ASTP, goods must comply with two rules of origin requirements: (a) The final process of manufacture must have been carried out in the country claiming preference: and (b) At least half (50%) of the total factory or works cost of the goods must consist of the value of labor and/or materials of one or more DCs within the LDC, DC or DCS scheme, or Australia. **Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) ROO for imports from CA and MX** **8422.20 – 8422.90:** (1) CTH; or (2) No change in tariff classification, provided there is a RVC of not less than (a) 30% under the build-up method, (b) 40% under the build-down method, or (c) 50% under the focused value method taking into account only the non-originating materials of 8422. **8438.10 - 8438.80:** CTSH **8438.90:** (1) CTH; or (2) No change in tariff classification required, provided there is a RVC of not less than (a) 30% under the build-up method, (b) 40% under the build-down method, or (c) 50% under the focused value method taking into account only the non-originating materials of 8438.
Brazil	**ACE No. 53 and ALADI regional ROO for imports from MX:** (1) CTH; **or** (2) CIF value of the non-originating materials does not exceed 50% of the FOB value of the export.
Chile	**US-Chile FTA ROO for imports from US:** **8422.11-8422.40:** CTSH, including another subheading within that group. **8422.90:** CTH **8438.10-8438.80:** CTSH, including another subheading within that group. **8438.90:** CTH **Canada-Chile FTA ROO for imports from CA:** **8422.19-8422.40:** (1) CTH; **or** (2) Change from subheading 8422.90, whether there is also a change of heading, provided there is a RVC of not less than (a) 35% under the transaction value method, or (b) 25% under the net cost method. **8422.90:** CTH, except: **8422.90.aa:** Change from any other tariff item. **8422.90.bb:** Change from any other tariff item. **8438.10-8438.80:** (1) CTSH 8438.10 through 8438.80 from any other heading; **or** (2) CTSH 8438.10 through 8438.80 from subheading 8438.90, whether or not there is also a change from any other heading, provided there is a RVC of not less than: (a) 35% where the transaction value method is used, or (b) 25% where the net cost method is used. **8438.90:** CTSH **Pacific Alliance ROO for imports from MX:** **8422.19-8422.40:** (1) CTH **or** (2) RVC of 50% **8422.90:** CTH **8438.10-8438.80:** (1) CTH **or** (2) RVC of 50% **8438.90:** CTH

CTH = Change the heading (4-digits); CTSH = Change the subheading (6-digits); RVC = Regional value content

Importing Country	Preferential ROOs for imports from United States, Canada, and/or Mexico to benefit from lower duties under FTAs
Chile (continued)	**Mexico-Chile FTA (ACE No. 41) ROO for imports from MX:** **8422.19-8422.40:** (1) CTH; **or** (2) Change from subheading 8422.90, whether there is a change of heading, provided there is a RVC of not less than (a) 50% under the transaction value method, or (b) 40% under the net cost method. **8422.90:** CTH **8438.10-8438.80:** (1) CTH; **or** (2) Change from subheading 8438.90, whether there is a change of heading, provided there is a RVC of not less than (a) 50% under the transaction value method, or (b) 40% under the net cost method. **8438.90:** CTH **CPTPP ROO for imports from CA and MX:** See CPTPP ROO under "Australia".
Colombia	**US-Colombia FTA ROO for imports from US:** **8422.11 – 8422.40:** CTSH **8422.90:** (1) CTH, **or** (2) No change in tariff classification required, provided that there is a RVC of not less than (a) 35% under the build-up method, or (b) 45% under the build-down method. **8438.10 – 8438.80:** CTSH **8438.90:** CTH **Canada-Colombia FTA ROO for imports from CA:** **8422.11-8422.40:** CTSH **8422.90:** CTH **8438.10-8438.80:** CTSH **8438.90:** CTH **Mexico-Colombia ACE No. 33 ROO for imports from MX:** **8422.19-8422.40:** (1) CTH; **or** (2) Change from subheading 8422.90, whether there is a change of heading, provided there is a RVC of not less than 50%. **8422.90:** CTH **8438.10-8438.80:** (1) CTH; **or** (2) Change from subheading 8438.90, whether there is a change of heading, provided there is a RVC of not less than 50%. **8438.90:** CTH
European Union	**Mexico-EU FTA ROO for imports from MX:** **Chapter 84:** (1) Manufacture in which: - all the materials used are classified within a heading other than that of the product; - the value of all the materials used does not exceed 40% of the ex-works price of the product **or** (2) Manufacture in which the value of all the materials used does not exceed 30% of the ex-works price of the product
Mexico	**USMCA ROO for imports from the US, CA:** **8422.19-8422.40:** (1) CTH; **or** (2) Change from subheading 8422.90, whether there is also a change of heading, provided there is a RVC of not less than (a) 60% under the transaction value method, or (b) 50% under the net cost method. **8422.90:** CTH, except: **8422.90.aa:** Change to Canadian tariff item 8422.90.11 or 8422.90.22, US tariff item 8422.90.05A or Mexican tariff item 8422.90.05 from any other tariff item. **8422.90.bb:** Change to Canadian tariff item 8422.90.12 or 8422.90.23, US tariff item 8422.90.05B or Mexican tariff item 8422.90.06 from any other tariff item. **8438.10-8438.80:** (1) CTH; **or** (2) Change from subheading 8438.90, whether there is also a change of heading, provided there is a RVC of not less than (a) 60% under the transaction value method, or (b) 50% under the net cost method. **8438.90:** CTH **CPTPP ROO for imports from CA:** See CPTPP ROO under "Australia".
New Zealand	**CPTPP ROO for imports from CA and MX:** See CPTPP ROO under "Australia".
Panama	**US-Panama FTA ROO for imports from US:** **8422.11 – 8422.40:** CTSH **8422.90**: (1) CTH, **or** (2) No change in tariff classification required, provided that there is a RVC of not less than (a) 35% under the build-up method, or (b) 45% under the build-down method **8438.10 – 8438.80:** CTSH **8438.90:** CTH

CTH = Change the heading (4-digits); CTSH = Change the subheading (6-digits); RVC = Regional value content

Importing Country	Preferential ROOs for imports from United States, Canada, and/or Mexico to benefit from lower duties under FTAs
Panama (continued)	**Canada-Panama FTA ROO for imports from CA:** **8422.11 - 8422.40:** CTSH **8422.90:** CTH **8438.10 - 8438.80:** CTSH **8438.90:** CTH **Mexico-Panama FTA ROO for imports from MX:** **8422.19 - 8422.40:** (1) CTH; **or** (2) Change from subheading 8422.90 whether a change of heading, provided there is a RVC of not less than (a) 50% under the transaction value method; or (b) 40% under the net cost method. **8422.90:** CTH **8438.10 – 8438.80:** (1) CTH; **or** (2) No change in tariff classification required, provided there is a RVC of not less than (a) 50% under the transaction value method; or (b) 40% under the net cost method. **8438.90:** CTH
South Korea	**US-Korea FTA ROO for imports from US:** **8422.11 – 8422.40:** CTSH **8422.90:** (1) CTH, **or** (2) No change in tariff classification required, provided that there is a RVC of not less than (a) 35% under the build-up method, or (b) 45% under the build-down method. **8438.10 – 8438.80:** CTSH **8438.90:** CTH **Canada-Korea FTA ROO for imports from CA:** **8422.11 – 8422.40:** (1) CTH; **or** (2) Change from subheading 8422.90, whether there is also a change of heading, provided that the value of the non-originating materials of subheading 8422.90 does not exceed 55% of the transaction value or ex-works price of the good. **8422.90:** CTH **8438.10 – 8438.80:** (1) CTH; **or** (2) Change from subheading 8438.90, whether there is also a change of heading, provided that the value of the non-originating materials of subheading 8438.90 does not exceed 55% of the transaction value or ex-works price of the good. **8438.90:** CTH
Switzerland	**Mexico - European Free Trade Association ROO for imports from MX:** **8422:** (1) Manufacture in which all the materials used are classified within a heading other than that of the product, except for materials of headings 6804, 8202, 8207, 8208, 8466, 8467, 8501 and 8548 **or** (2) Manufacture in which the value of all the materials used does not exceed 50% of the ex-works price of the product **8438:** (1) Manufacture in which all the materials used are classified within a heading other than that of the product **or** (2) Manufacture in which the value of all the materials used does not exceed 50% of the ex-works price of the product
Ukraine	**Canada-Ukraine FTA ROO for imports from CA:** **8422**: (1) CTH; or (2) Change from within any of these headings, whether there is also change of heading, provided that the value of the non-originating materials classified in the same heading as the final product does not exceed 50% of the transaction value or ex-works price of the product. **8438:** CTSH
Venezuela	**ALADI regional ROO for imports from MX:** (1) CTH; **or** (2) CIF value of the non-originating materials does not exceed 50% of the FOB value of the export.
Vietnam	**CPTPP ROO for imports from CA and MX:** See CPTPP ROO under “Australia”.

Other Taxes on Packaging and Food Processing Machinery

In addition to import duties, the following additional taxes and fees may be imposed on imports of packaging and food processing machinery from any country. Currencies are noted as a three-letter code in front of the amount (e.g., USD 10 = 10 US dollars, BRL 185 = 185 Brazilian reals, etc.).

Importing Country	Typical taxes and fees applied upon import (in addition to import duty)
United States (for comparison purposes)	**Merchandise Processing Fee:** 0.3464% customs value on formal entries (imports of commercial goods valued at USD 2,500 or more). The MPF charged is subject to a minimum fee of 27.75 USD and a maximum fee of 538.40 USD. MPF for informal entries is a set fee and ranges from 2.22 USD – 9 USD per shipment. Most US FTA partners are exempt from MPF collection. **Harbor Maintenance Fee:** 0.125% customs value if goods are transported via ship. **State taxes:** Individual states may apply additional state taxes which vary by state.
Argentina	**Statistical tax**: 3% of CIF (maximum statistical tax = USD 150,000). **Profits tax:** 6% of CIF + duty + statistical tax. **Turnover tax:** 2.5% of CIF + duty + Processing fee. **VAT:** 21% of CIF + duty + statistical tax for capital goods. **Verification tax:** with a maximum rate of 2% of the customs value. **Customs processing fee:** Approximately USD 10 per transaction. **Tax on Debit and Credit bank transactions:** all money transactions are taxed at 0.6% if carried out using payment systems that replace the use of current accounts.
Australia	**General Sales Tax (GST):** 10% of CIF value + duty
Brazil	**Industrialized Product Tax (IPI):** 3.25% of CIF+ Duty (applied only on 8422.90.90 and 8438.90.00). **Merchandise Circulation Tax (ICMS):** 17% - 20% of CIF + duty + IPI depending on state. **Additional Freight for the Renewal of the Merchant Marine (AFRMM):** 8% tax on transport value. **Contribution to the Social Integration Program and Civil Service Asset Formation Program (PIS/PASEP) tax:** 2.1% of CIF on CIF + duty + ICMS + value of PIS/PASEP and COFINS. **Contribution to Social Security Financing (COFINS) tax:** 9.65%. Both the PIS/PASAP and COFINS are assessed on CIF + duty + ICMS + value of PIS/PASEP and COFINS contributions themselves. **Foreign Trade Integrated System (SISCOMEX) fee:** BRL 115.67 for importers to register the import declaration, with additional fees between BRL 38.56-3.86.
Canada	**Goods and services tax (GST):** 5%. Participating provinces of Nova Scotia, New Brunswick, Newfoundland and Labrador, Ontario, and Prince Edward Island have harmonized their provincial sales tax with the GST to create the harmonized sales tax (HST). The HST rate for Ontario: 13%; Nova Scotia, New Brunswick, and Newfoundland and Labrador, and Prince Edward Island: 15%. Additional taxes may be assessed separately when importing into other provinces.
Chile	**VAT:** 19% of CIF + duty.
China	**VAT:** 13% of CIF + duty.
Colombia	**VAT:** 19% of CIF + duty (all except 8438.8010, subject to reduced VAT of 5% of CIF + duty). **Industry and Commerce Tax ("Impuesto de Industria y Comercio"):** 0.2% - 1% depending on municipality.
European Union	**EU minimum VAT:** 15% of CIF + duty. EU Member States' standard VAT rates
India	**Goods and Services Tax (GST):** 18% of CIF + duty. **Social Welfare Surcharge levy:** 10% of duty. **Landing charge:** Variable landing charges apply based on CIF value of goods.
Indonesia	**VAT:** 12% of CIF + duty
Japan	**General Consumption Tax:** 10% (7.8% National Consumption Tax + 2.2% Local Consumption Tax) of CIF + duty.
Malaysia	**Sales and Services Tax (SST):** 10% CIF + duty applied on imports of all 8422 tariff lines covered in this guide and imports of 8438.40.00 and 8438.90.29. Other 8438 tariff lines in this guide are exempt from the SST.
Mexico	**VAT:** 16% of CIF + duty **Customs processing fee (CPF):** Max 0.8% of customs value. USMCA-compliant products exempt.
New Zealand	**Goods and Services Tax (GST):** 15% of CIF + duty. **Import Entry Transaction Fee (IETF):** NZD 38.53 (GST inclusive) applied on every import entry clearance and import declaration for goods. On 1 July 2025, the IETF increased to NZD 53.44 . **Ministry for Primary Industries biosecurity system entry levy:** NZD 46.40 (GST inclusive) applied on every entry on which an IETF is payable. **Inward Cargo Transaction Fee:** NZD 120.01 for air cargo and NZD 238.66 for sea cargo (GST inclusive) from 1 July 2025 to 31 March 2026.

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Importing Country	Typical taxes and fees applied upon import (in addition to import duty)
Norway	**VAT:** 25% of CIF + duty.
Panama	**Goods and Service Tax (ITBMS):** 7% of CIF + duty. **Import declaration fee:** PAB 100 per declaration is charged when CIF value is greater than or equal to PAB 2,000.
Peru	**VAT:** 18% effective rate consisting of: **General Sales Tax (GST):** 16% on CIF + duty + any other import tax (except the Municipal Promotion Tax). **Municipal Promotion Tax:** 2% on CIF + duty + any other import tax (except the GST). **Imports that arrive without insurance:** 1% on FOB value. **Financial Transaction Tax:** 0.005% on all debits and credits on bank accounts held by taxpayers.
Philippines	**VAT:** 12% of CIF + duty **Customs Documentary Stamp (CDS):** Charged on bill of landing, PHP 265. **Import Processing Fee (IPF):** Calculated on sum of the CIF + any additional charges and costs. If the Dutiable Value (DV) is PHP 250K or less, the IPF is PHP 250. If the DV is PHP 250K – 500K, the IPF is PHP 500. If the DV is PHP 500K – 750K, the IPF is PHP 750. If the DV is greater than PHP 750K, the IPF is PHP 1,000. **Additional fees:** Philippines may also charge wharfage and customs brokerage fees upon import. ****** Duty-free Imports:** Imports may be eligible for MFN duty-free entry under the Agriculture and Fisheries Modernization Act, subject to submission of Certificate of Eligibility or Accreditation issued by the Department of Agriculture-Regional Field Units, Bureau of Fisheries and Aquatic Resources, Department of Trade and Industry's regional and provincial offices, or the Board of Investments.
Russia	**VAT:** 20% of CIF + duty + fees. **Customs processing fee:** : Fees range from RUB 775 on cargo valued RUB 200,000 to RUB 30,000 on cargo valued RUB 10,000,000 or more. **Ecological fee:** As of 1 January 2019, Russia implemented an ecological levy on virtually all imports and manufactured products. The ecological levy is calculated based on a historical index, weight or number of units of finished goods put on the market, and whether the products meet Russia's recycling standards. Manufacturers and importers can seek exemption from the levy if they prove that their products meet Russia's recycling standards, recycle waste in-house, or enter into a recycling contract with a specialized contractor. **Additional fees:** Russia may charge additional customs and storage fees.
Saudi Arabia	**VAT:** 15% of CIF + duty + any other fees/charges. **Additional fees:** Saudi Arabia may charge additional customs and storage fees on imports, including a customs surcharge, port fees, cargo service fees, and an import inspection tax.
Singapore	**General Sales Tax:** 9% of CIF + duty
South Africa	**VAT:** 15% of CIF + duty + 10% markup (for imports from outside the Southern African Customs Union). **Additional mark-up:** 10% applied to imports from countries outside the South African Customs Union.
South Korea	**VAT:** 10% of CIF + duty
Switzerland	**VAT:** 8.1% of CIF + duty. **Additional tare:** Goods may be subject to an additional tare of 10% (assessed on net weight) if deemed to have insufficient packaging against damage in transit.
Taiwan	**VAT (also called "Business Tax"):** 5% of CIF + duty. **Trade Promotion Service Fee:** 0.0425% of CIF. **Customs Declaration Fee:** TWD 200 per declaration form. **Commercial Harbor Service Fee:** Applied to all imports based on cargo weight and net ship tonnage.
Thailand	**Import declaration fee:** THB 200 per entry. **Electronic Data Interface fee:** THB 70 per import declaration. **VAT:** 7% of CIF + duty Note: The standard rate of VAT is 10%, however the rate is reduced to 7% until 30 September 2024 unless otherwise specified by Thailand's government.
Turkey	**Stamp tax:** TRY 136.10 per bill of lading, TRY 898.20 per import declaration. **VAT:** 20% of CIF + duty + stamp tax. **VAT for 8422.30, 8422.40, and 8438:** 1% on CIF + duty + stamp tax.
Ukraine	**VAT:** 20% of CIF value + duty. Additional custom processing fees and port fees may be applied.
UAE	**VAT:** 5% of CIF + duty.
United Kingdom	**VAT:** 20% of CIF + duty.
Venezuela	**Customs service fee**:1% of CIF. **VAT:** 16% CIF + duties + customs service fee + stamp tax, if applicable. In some instances, a stamp tax is levied on a per transaction basis to offset the cost of processing the imported products. **Unidad Tributaria:** Venezuela applies declaration, valuation, stamp duties, and systems fees dependent on rates of the Unidad Tributaria (U.T.), an inflation protected currency which is adjusted annually. Rates range from 0.1 UT to 10,000 UT depending on service.
Vietnam	**VAT:** 8% of CIF + duty. Note: The standard rate of VAT is 10%, however the rate is reduced to 8% of CIF + duty from 1 July 2025 to 31 December 2026.

GLOBAL PACKAGING MEDIA & ASSOCIATION CONTACTS

Packaging Publications/Media

ASIA PACIFIC

Asia Food Beverages (Asia)
Food and Beverage Asia (Asia)
Pharma Focus Asia (Asia)
Food Navigator Asia
China Food Manufacturing Journal (China)
PKN Packaging News (Australia)
Food & Drink Business (Australia)
J Pack World (Japan)
Journal of Packaging Science & Technology (Japan)
Food Technology in New Zealand (New Zealand)
Packaging Technology (Asia Pacific)
Asia Pacific Food Magazine (Asia Pacific)
Asia Food Journal (Asia Pacific)
Asia Package Industry (China / Taiwan)
Asia Pacific Food Industry (Singapore)
Food & Beverage Asia (Asia Pacific)
Food Pacific Manufacturing Journal (Asia Pacific)

CENTRAL ASIA / MIDDLE EAST / AFRICA

Asia Food Journal (Regional)
The Packaging Professional (India)
Food and Beverage Processing (India)
The PACKMAN (India)
Beverage and Food World (India)
Packaging Connections (India)
Middle East Food (Middle East)
Asia & Middle East Food Trade Journal
Food Business Gulf & Middle East (Middle East)
Food Stuff South Africa (South Africa)
Packaging Bulletin (Turkey)
PrintWeek India
What Packaging? (India)
Pharma Focus Asia
Packaging South Asia
Print Week Middle East and Africa
Food Business Middle East and Africa
Food Trade Asia and Middle East

EUROPE

Packaging Europe (Europe)
Neue Verpackung (Germany)
PackMarknaden (Sweden)
Opakowanie (Poland)
PACKNEWS (Norway)
Ambalaza/REGprint (Croatia)
InPak (Denmark)
Packmarkedet (Denmark)
Finnish Packaging Magazine (Finland)
Pack Report (Germany)
Creativver Packen (Germany)
Packaging Observer (Italy)
Italia Imballagio (Italy)
Resegna de Imballagio (Italy)
SwissPack (Switzerland)
UPAKOVKA (Ukraine)
PACINFO (Ukraine)
Potato Processing International (Europe)
Packaging News (UK)
Pakkaus (Finland)
Dei Ernahrungs Industrie (Germany)
Pack Report (Germany)
Packaging Today (UK)
Retail Packaging (UK)
Materials World (UK)
Automate (UK)
Lebensmittel Zeitung (Germany)
New Food Magazine (Europe)
International Food Marketing & Technology (Europe)
Euro Meat News (Europe)
Meat Management (Europe)
BioPharma-Reporter (Europe)
PETplanet Insider (Germany)
Pack & Log (Austria)
Pack + Plast (Denmark)
Obalovy Institut Syba (Czech Republic)
Emballage Digest (France)
Packaging Journal (Germany)
C2 Coating & Converting (Europe)
Verlag W Sachon Publications (Germany)
Packaging (Belgium)
Tecniche Nuove (Italy)
Envaspres (Spain)
Verpakkings Management & Verpakken (Netherlands)
Pack Aktuell (Switzerland)
Swisspack International (Switzerland)
Food & Drink International (Europe)
Food and Drink Business (Australia)
BioPharma-Reporter (UK)
BakeryandSnacks.com (UK)
Confectionery News (UK)
Food Marketing & Technology/ DrinkWorld FoodBev Media (UK)
Packaging Europe (UK)
Sustainable Packaging News (UK)

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The Drinks Business (UK)
The Spirits Business (UK)
Food Navigator (Europe)

LATIN AMERICA

Embalagem Marca (Brazil)
Embalagem Marca (Brazil)
Packaging Argentino (Argentina)
Revista Alimentos & Bebidas (Mexico / Latin America)
Revista Enfasis Packaging (Argentina)
Editorial Emma Fiorentino (Argentina)
Abrenews/Packnews (Brazil)
O Auto-Adesivo (Brazil)
Enfasis (Mexico / Latin America)
El Empaque + Conversion (Mexico / Latin America)
EnvaPack (Mexico / Latin America)
Embanews (Brazil)
Mundo EXPO PACK (Mexico/Latin America)
Food Navigator (Latin America)

NORTH AMERICA

Packaging World
Beauty Packaging
Dairy Foods
DairyReporter
Food Engineering
Food Manufacturing
Meatingplace
Refrigerated & Frozen Foods
Pharma Manufacturing
Just Drinks
Healthcare Packaging
OEM
ProFood World
Baking & Snack
Beverage Industry
BeverageDaily and DairyReporter
BXP
Candy Industry
Flexible Packaging
Food Business News
RDG Media
Meat + Poultry
National Provisioner
Nutraceuticals World
Packaging Digest
Packaging Strategies
Pharmaceutical Technology
Prepared Foods
Snack Food & Wholesale Bakery
The Packer
Food Processing
Canadian Packaging
Food in Canada
Contract Manufacturing & Packaging
Bakery and Snacks
Fruit and Vegetable Magazine
Canadian Grocer
Paper, Film & Foil Converter Magazine
Packaging & Converting Intelligence
Beverage Daily
Food Business Review
Confectionary News
Contract PHARMA
Food Technology
Processing Magazine
Paperboard Packaging
World Packaging News
Packaging Gateway
Food Navigator USA
Commercial Baking
Logistics Management/Material Handling Network
Pharma Logistics IQ
Supply Chain & Demand Executive/Food Logistics
The Logistics of Logistics
All About Beer
Beer Marketer's Insights
Beer Business Daily
Brewbound
Craft Beer & Brewing Magazine
BevNET Magazine
Beverage Master
Cannabis Business Times
Marijuana Moment
Marijuana Venture Magazine
Psychedelia Magazine
Baking Business / World Grain / Food
Business News
Cheese Market News
Food Dive
Food Safety Magazine
Fierce Pharma
Pharmaceutical Executive
PharmaVOICE
Medtech Insight
Outsourced Pharma
Packaging Dive
Packaging Impressions
Packaging Technology Today
Board Converting News
Control Global
Machine Design
Plant Engineering
Manufacturing Dive
Industrial Equipment News
Resource Recycling
Inside Climate News
Petfood Industry
Pet Age
Pet Food Processing
Progressive Grocer
RetailWire
SeaFood News
Snack Magazine
Spudman
DC Velocity
SupplyChainBrain

PACKAGING ASSOCIATIONS

Argentina	Instituto Argentino del Envase
Australia	Australian Institute of Packaging (AIP)
	Australian Packaging and Processing Machinery Association (APPMA)
Austria	Packforce Austria
Belgium	Belgium Packaging Institute (IBE-BVI)
Brazil	Brazilian Packaging Association – Associação Brasileira de Embalagem (ABRE)
Canada	Packaging Association of Canada (PAC)
Chile	Chilean Packaging and Packaging Center – Centro de Envases Y Embalajes de Chile (CENEM)
China	China Packaging Federation (CPF)
	China Economic Information Network
	China Food & Packaging Machinery Industry Association (CFPMA)
	China National Export Commodoties Packaging Research Institute (CEPI)
Croatia	Institute of Packaging and Graphic Arts Tectus (IatT)
Czech Republic	Czech Packaging Institute (SYBA)
Denmark	Danish Technological Institute (DTI)
	Søg på Teknologisk Institut
Finland	Suomen Pakkausyhdistys ry (Finnish Packaging Association)
France	EVOLIS
	French Trade Association for Food Processing and Packaging Machinery
	The French Packaging Council
Georgia	PMAG
Germany	German Packaging Institute - Deutsches Verpackungsinstitut (DVI)
	Verband Deutscher Maschinen- und Anlagenbau (VDMA)
Greece	Association of Greek Manufacturers of Packaging and Materials (AGMPM)
Hungary	Hungarian Association of Packaging & Materials Handling (HAPMH)
India	Indian Institute of Packaging (IIP)
	Packaging Industry Association of India (PIAI)
	Institute of Packaging Machinery Manufacturers of India (IPMMI)
Indonesia	First Packaging Asia
	Indonesian Packaging Federation (IPF)
Iran	Iranian Institute of Packaging
Iraq	National Center for Packing and Packaging
Israel	Israel Institute for Packaging, Design & Product Logistics
Italy	Italian Packaging Machinery Manufacturers Association (UCIMA)
	Italy Packaging Institute - Istituto Italiano Imballaggio
Japan	Japan Packaging Institute (JPI)
	Japan Packaging Machinery Manufacturers Association (JPMA)
Jordan	JOPACK
Kazakhstan	Packaging Association of Kazakhstan
Kenya	Institute of Packaging Professionals Kenya
Latvia	Packaging Association of Latvia
Lebanon	LibanPack
Lithuania	Lietuvos Pakuotojo Asociacija
Malaysia	Federation of Malaysian Manufacturers (FMM)/ Packaging Council of Malaysia (PACMA)
Mexico	Mexican Packaging Association – Asociación Mexicana de Envase y Embalaje, A.C. (AMEE)
	Mexican Institute of Packaging Professionals – Instituto Mexicano de Profesionales En Envase Y Embalaje (IMPEE)
Morocco	FMP Federation Marocaine de Plasturgie
Netherlands	Active & Intelligent Packaging Association - NanoPack (AIPIA)
	Netherlands Packaging Centre – Nederlands Verpakkingscentrum (NVC)
	European Packaging Institutes Consortium (EPIC)

PACKAGING ASSOCIATIONS

Nigeria	Institute of Packaging, Nigeria
Norway	Norwegian Packaging Association - Den Norske Emballasjeforening
Pakistan	Flexible Packaging Association of Converters of Pakistan (FLEXPACK)
Palestine	Palestinian Federation of Paper and Packaging Industries (PFPPI)
Philippines	Packaging Institute of Philippines (PIP)
Poland	Polish Packaging Research Institute (COBRO)
	Polish Chamber of Packaging
Russia	Russian National Packaging Confederation
	Russian Non-Commercial Association (SOJUZUPAK)
Saudi Arabia	Riyadh Polytechnic Institute, Saudi Arabia
Singapore	Packaging Council of Singapore
South Africa	Institute of Packaging South Africa (IPSA)
	Packaging Council of South Africa
	African Packaging Organisation (APO)
South Korea	Korea Packaging Center (KOPACK)
	Korea Packaging Machinery Association (KPMA)
	Korean Packaging Association (KOPA)
	Korea Packaging Trade Association (KOPTA)
Spain	Association of Internationalized Industrial Companies (AMEC)
	Graphispack Asociación - Association for Graphic and Packaging
Sri Lanka	Sri Lanka Institute of Packaging
Sweden	Intressentforeningen Packforsk (IFP)
	RISE to the Swedish Packaging Guilde
Switzerland	Swiss Packaging Institute (SVI)
	International Trade Centre (ITC) Swissmem
Thailand	Thai Packaging Association
	Thai Packaging Centre: Thailand Institute of Scientific and Technological Research (TISTR)
	Thai Packaging Center (TPC)
	Department of Industrial Promotion (DIP)
Tunisia	PACKTEC
Turkey	Turkish Packaging Manufacturers Association (ASD)
	Turkish Standards Institution (TSE)
UK	The Packaging Society (IOM3)
	The Packaging Federation
	Processing and Packaging Machinery Association (PPMA)
	Industrial Packaging Association (IPA)
Ukraine	Club Packagers of Ukraine
US	Institute of Packaging Professionals (IOPP)
	PMMI - The Association for Packaging and Processing Technologies
	The Independent Packaging Association (AICC)
	The Contract Packaging Assocation (CPA)

UPCOMING INTERNATIONAL PACKAGING AND PROCESSING MACHINERY TRADESHOWS

AFRICA PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
FoodAfrica	9 - 12 December 2025	Cairo (Egypt)	The premier trade exhibition for the food and beverage industry in Africa and the Middle East.
Plastex	9 - 12 January 2026	Cairo (Egypt)	The largest plastics and rubber exhibition in the Middle East and North Africa
Nigeria agrofood	24 - 26 March 2026	Lagos (Nigeria)	International Trade Show on Agriculture & Livestock, Food, Beverage & Packaging Technology and Food, Beverages & Hospitality
Printpack Alger	30 March - 1 April, 2026	Algiers (Algeria)	International Printing and Packaging Trade Fair for Algeria and the Maghreb
Propak East Africa	3 - 5 May 2026	Nairobi (Kenya)	East Africa's leading exhibition & conference for packaging, printing , food-processing and plastic industry members
SenePack	14 - 16 May 2026	Dakar (Senegal)	The main international trade fair in West Africa, focusing on Food Packaging
ProPak MENA	2 - 4 June 2026	Cairo (Egypt)	ProPak MENA is Africa's processing & packaging event for the F&B manufacturing industry
Ethiopia agrofood	4 - 6 June 2026	Addis Ababa (Ethiopia)	AgroFood Ethiopia focuses on agricultural technology and machinery, tractors, seeds, animal production, horticulture, greenhouse technology, service companies.
Ethiopia plastprintpack	4 - 6 June 2026	Addis Ababa (Ethiopia)	International Plastic, Printing & Packaging Trade Exhibition
West Africa agrofood	8 - 10 October 2026	Abidjan (Côte d'Ivoire)	International Trade Show dedicated to Agriculture, Food Processing, Packaging, Bakery & Confectionery Technology, Ingredients, Food & Hospitality
West Africa plastprintpack	8 - 10 October 2026	Abidjan (Côte d'Ivoire)	West Africa's International Plastics, Printing and Packaging Trade Show
ProPak Cape	27 - 29 October 2026	Cape Town (South Africa)	International exhibition for packaging, food processing, printing, labelling and plastics industries
ProPak Africa	7 - 10 March 2028	Johannesburg (South Africa)	African International Packaging and Plastics incorporating FOODPRO the Food Processing Equipment Expo

ASIA & PACIFIC PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
JAPAN PACK	7 - 10 October, 2025	Tokyo (Japan)	Connecting with a variety of new technologies that improves productivity and efficiency, and bringing together innovative products and solutions to solve problems.
IPEX Indonesia	21 - 24 October 2025	Jakarta (Indonesia)	International Exhibition on Pharmaceutical, Ingredients, Contract manufacturing, Processing, Technology, Packaging machinery, Equipments and Services
Lankapak	23 - 25 October 2025	Colombo (Sri Lanka)	The premier international packaging, processing, printing & plastic exhibition in Sri Lanka.
NEPCON NAGOYA	29 - 31 October 2025	Nagoya (Japan)	Japan's leading exhibition gathering the latest technologies and products for electronics R&D and manufacturing such as mounters, testing equipment, electronics components/materials, PCBs, etc.
SIAL InterFOOD	12 - 15 November 2025	Jakarta (Indonesia)	The leading food and beverage exhibition in Indonesia
PLASPAK Indonesia	19 - 22 November 2025	Jakarta (Indonesia)	International Plastic, Printing & Packaging Trade Exhibition
Swop	25 - 27 November 2025	Shanghai (China)	International Food Processing and Packaging Technology Exhibition
Labelexpo Asia	2 - 5 December 2025	Shanghai (China)	Labelexpo Asia is the largest event for the label and package printing industry in South Asia
Myanmar PlasPrintPack	16 - 19 December 2025	Yangon (Myanmar)	Myanmar International Plastics, Printing & Packaging Industry Exhibition
Convertech Japan	28 - 30 January 2026	Tokyo (Japan)	Professional exhibition of Coating, Laminating, Printing and Slitting
ProPak Philippines	4 - 6 February 2026	Manila (Philippines)	International Processing & Packaging Exhibition for the Philippines
PACKINNO	4 - 6 March 2026	Guangzhou (China)	PACKINNO will display a full range of innovative & functional packaging products and materials, premium packaging tailored for diversified end products
Sino-Pack	4 - 6 March 2026	Guangzhou (China)	International Exhibition on Packaging Machinery & Materials
ProPak Vietnam	31 March - 2 April 2026	Ho Chi Minh (Vietnam)	International Processing & Packaging Exhibition for Vietnam
Korea Pack	31 March - 3 April 2026	Seoul (South Korea)	KOREA PACK focuses on packaging machinery, packaging parts & automation parts, package printing machines, packaging inspection equipment, packaging processing equipment, packaging materials & containers

ASIA & PACIFIC PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
Luxe Pack - Shanghai	14 - 15 April 2026	Shanghai (China)	Exhibition for Luxury Goods Packaging - beauty, alcohols, jewelry, fine food, tobacco, fashion, etc.
CPHI Japan	21 - 23 April 2026	Tokyo (Japan)	International tradeshow for Pharmaceutical Ingredients in Japan and wider Asian-Pacific region
Hong Kong International Printing & Packaging Fair	27 - 30 April 2026	Hong Kong	International fair featuring Printing and Packaging Equipment, Printing Consumables, Packaging Materials
INTERPHEX Japan	20 - 22 May 2026	Tokyo (Japan)	INTERPEHX JAPAN is Japan's largest exhibition for pharmaceutical and cosmetics manufacturing/ packaging technologies
ProPak Asia	10 - 13 June 2026	Bangkok (Thailand)	The Processing & Packaging trade event for Food, Drink, Pharmaceutical, Cosmetics, and Consumer Products
ProPak China	15 - 17 June 2026	Shanghai (China)	International Processing and Packaging Technology industry exhibition
Taipei Pack	24 - 27 June 2026	Taipei (Taiwan)	Taiwan Packaging exhibition featuring Packaging Machinery and Materials
TOKYO PACK	14 - 16 October 2026	Tokyo (Japan)	Japan International Packaging Exhibition
APPEX	16 - 19 March 2027	Melbourne (Australia)	Australia's largest processing & packaging expo

SOUTH ASIA PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
Anuga FoodTec India	20 - 22 August 2025	Mumbai (India)	Anuga FoodTec India is the leading trade fair in the food and beverage technology sector, attracting key players from India and across the globe, positioning itself as a global market centre stage
ProPak India	3 - 5 September 2025	Dehli (India)	Showcases top suppliers, innovative sustainable machinery, live product demonstrations, and exceptional conferences
PackPlus South	7 - 9 November 2025	Hyderabad (India)	India’s Total Packaging, Processing and Supply Chain event that brings together seven established niche shows dedicated to distinct segments
BAPA FoodPro	20 - 22 Janaury 2026	Dhaka (Bangladesh)	International Exhibition of food products and beverages, food processing machinery, food packaging machinery and related technology

SOUTH ASIA PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
IPF Bangladesh	28 - 31 January 2026	Dhaka (Bangladesh)	Bangladesh International Plastics, Printing, Packaging Industry Fair
PAMEX	27 - 30 January 2026	Mumbai (India)	Packaging on Printing and Allied Machinery Industries
PLASTIVISION India	21 - 25 January 2027	Mumbai (India)	International plastic packaging and printing exhibition and conference

CENTRAL & EASTERN EUROPE PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
TAROPAK	24 - 26 September 2025	Poznan (Poland)	The most important packaging and logistic industry event in in Central and Eastern Europe
Eurasia Packaging	22 - 25 October 2025	Istanbul (Turkey)	International Packaging Industry Fair
WorldFood Ukraine	28 - 30 October 2025	Kyiv (Ukraine)	International Food & Drink Technology exhibition
Packaging Poland	18 - 20 November 2025	Warsaw (Poland)	This is a unique meeting place for industry leaders, showcasing modern solutions and the latest trends.
Warsaw Pack	14 - 16 April 2026	Warsaw (Poland)	International Trade Fair for Packaging Technology and Packaging Equipment
RosUpack	16 - 19 June 2026	Moscow (Russia)	International Exhibition for the Packaging Industry and Labelling, Materials and Technologies, Machinery and Equipment for manufacturing of packages.

WESTERN EUROPE PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
drinktec	15 - 19 September 2025	Munich (Germany)	World's Leading Trade Fair for the Beverage and Liquid Food Industry
Labelexpo Europe	16 - 19 September 2025	Barcelona (Spain)	Labelexpo Europe is the world's largest event for the label and package printing industry.
FachPack	23 - 25 September 2025	Nuremberg (Germany)	European trade fair for packaging, technology and processing
The PPMA Total Show	23 - 25 September 2025	Birmingham (UK)	The leading UK show for processing and packging machinery.
LUXE PACK - Monaco	29 September - 1 October 2025	Monaco (Monaco)	Exhibition for Luxury Goods Packaging and Creative Packaging - beauty, alcohols, jewelry, fine food, tobacco, fashion, etc.
Empack Stockholm	1 - 2 October 2025	Stockholm (Sweden)	International Packaging Fair in Sweden. Empack is a specialised trade show designed for and marketed to budget-holding decision makers who are in charge of packaging at their enterprises
Empack Madrid	15 - 16 October 2025	Madrid (Spain)	Trade Fair for Innovative Packaging Solutions. Empack exhibitors will showcase Packaging Materials, Equipment & Technologies, Labeling and Marking Technology, Creative and Design, Recycling, Services
Empack Mechelen	22 - 23 October 2025	Mechelen (Belgium)	Empack brings exhibitors and visitors together to discover the latest trends and developments regarding packaging technology and packaging machines.
CPHI Europe	28 - 30 October 2025	Frankfurt (Germany)	CPHI facilitates opportunities for you to grow your business and develop meaningful connections at the heart of pharma.
Prod & Pack	18 - 20 November 2025	Lyon (France)	Prod & Pack is the show that connects the key players in the production, process and packaging industries around today's solutions and tomorrow's innovations.
VSPACK	2 - 4 December 2025	Cognac (France)	Trade show dedicated to Packaging Innovation for Wines and Spirits.
Pharmapack	21 - 22 January 2026	Paris (France)	Show for Packaging Manufacturers that serve the Pharmaceutical Industry.
EMPACK	28 - 29 January 2026	Bern (Switzerland)	Trade Fair for Innovative Packaging Solutions. Empack exhibitors will showcase Packaging Materials, Equipment & Technologies, Labeling and Marking Technology, Creative and Design, Recycling, Services

WESTERN EUROPE PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
ProSweets	1 - 4 February 2026	Cologne (Germany)	International Tradeshow for Packaging and Processing for Confectionery and Snacks industries, Industrial and Functional Ingredients for Confectionery and Snacks.
Paris Packaging Week (ADF, PCD, PLD)	5 - 6 February 2026	Paris (France)	PCD connects packaging developers, designers and suppliers in an exciting and inspirational environment to shape the future of packaging for the beauty market.
Packaging Innovations and Empack Birmingham	11 - 12 February 2026	Birmingham (UK)	Packaging Innovations London is the opportunity to source a wide range of services & solutions including; marketing, design, branding & materials, a very useful insight for brand building and drawing inspiration from packaging
Empack Dortmund	25 - 26 February 2026	Dortmund (Germany)	National Trade fair for packaging products, machines & services for the sales regions of North-Rhine Westphalia, North Germany & BeNeLux
PacTec, FoodTec & PlastExpo Nordic	11 -12 March 2026	Helsinki (Finland)	The trade events for the packaging, food and drink, and plastics industries
COSMOPACK	26 - 28 March 2026	Bologna (Italy)	International event focused on Packaging Design, Contract Manufacturing, Raw Materials, Machinery and all services for the Cosmetic Industry.
IFE Manufacturing	30 March - 1 April 2026	London (UK)	UK's largest and most respected Food and Drink tradeshow
Food & Drink Expo	13 - 15 April 2026	Birmingham (UK)	Food & Drink Expo, incorporating The Restaurant Show, provides buyers from the retail, wholesale, foodservice, manufacturing and hospitality sectors
Empack Gorinchem	14 - 16 April 2026	Gorinchem (Netherlands)	Empack is the largest trade fair in the Benelux in the field of packaging technology and forms the unique business platform for products, services and solutions from the packaging world.
interpack	7 - 13 May 2026	Dusseldorf (Germany)	Interpack is the essential event for the Food, Beverage, Confectionery, Bakery, Pharmaceutical Cosmetics, Non-Food and Industrial Goods sectors
Macfrut	21 - 23 May 2026	Rimini (Italy)	International exhibition of Plants, Technologies and Services for the Production, Conditioning, Marketing and Transport of fruit and vegetables.
Empack Gent	22 - 23 September 2026	Gent (Belgium)	Empack brings exhibitors and visitors together to discover the latest trends and developments regarding packaging technology and packaging machines.

WESTERN EUROPE PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
CIBUS TEC	27 - 30 October 2026	Parma (Italy)	CIBUS TEC is among the most innovative food technology exhibitions and a complete showcase of the best solutions – from ingredients to processing technologies, from packaging to logistics – for all segments of the food and beverage industry
Syskevasia	6 - 9 November 2026	Athens (Greece)	International Exhibition of Packaging, Machines, Printings & Storage
SIMEI	17 - 20 November 2026	Milan (Italy)	International exhibition for Enological and Bottling Equipment, Wine and Beverage Technology
ALL4PACK	24 - 26 November 2026	Paris (France)	International Tradeshow featuring Process and Packaging Machines, Primary Materials, Consumables and Films, Identification, Traceability, Marking, Coding machines, Secondary, Tertiary and Shipping Machines, Converting, Printing Packaging and Labelling, Packaging and Containers (cardboard, plastic, glass, metal, wood).
Anuga FoodTec	23 - 26 February 2027	Cologne (Germany)	Exhibition for the International Food and Beverage Industry covering all aspects of food production; from processing, filling and packaging technology to packaging materials, ingredients, food safety
CCE International	9 - 11 March 2027	Munich (Germany)	Corrugated and Carton international exhibition
Hispack	4 - 7 May 2027	Barcelona (Spain)	International Packaging Exhibition in Barcelona
Print4All	25 - 28 May 2027	Milan (Italy)	Print4All is the big industry event focused on printing and converting.
ACHEMA	14 - 18 June 2027	Frankfurt (Germany)	The world's leading show for all areas of the process industry
Scanpack	26 - 29 October 2027	Gothenburg (Sweden)	Scanpack is the only international platform located in Scandinavia for anyone who deliveries or utilizes packaging solutions.
IPACK-IMA	29 May - 1 June 2028	Milan (Italy)	IPACK-IMA is the fair specializing in food and non-food processing and packaging

LATIN AMERICA PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
ENVASE	16 - 19 September 2025	Buenos Aires (Argentina)	Show for International Machinery and Equipment for Food and Beverages Processing
Andina Pack	4 - 7 November 2025	Bogotá (Colombia)	Tradeshow in Converting, Processing and Packaging sectors in Andean and Caribbean region.
EXPO PACK México	2 - 5 June 2026	Mexico City (Mexico)	Exhibitors presenting the latest Machinery, Materials, Components, Containers, proven solutions for the Processing, Packaging, Storage and Distribution of products.
Fispal Tecnologia	16 - 19 June 2026	São Paulo (Brazil)	International Packaging, Processing trade show for the Food and Beverage industries.
Pack Peru	19 - 22 August 2026	Lima (Peru)	International fair for the plastics industry, to enrich the event and generate more opportunities for national and international visitors.
EXPO PACK Guadalajara	15 - 17 June 2027	Guadalajara (Mexico)	Exhibitors presenting the latest Machinery, Materials, Components, Containers, proven solutions for the Processing, Packaging, Storage and Distribution of products.

MIDDLE EAST PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
Gulfood Manufacturing	4 - 6 November 2025	Dubai (UAE)	The biggest Food and Beverage Process industry event for the Middle East & Africa
ISRAFOOD	18 - 20 November 2025	Tel Aviv (Israel)	Food & Beverage International Trade Fair. IsraFood is the main platform for a professional & business encounter between manufacturers & importers, and representatives of the institutional, professional, retail chains & private sectors.
AgroPack Iraq	24 - 27 November 2025	Erbil (Iraq)	The largest agrofood event in Iraq
Propack Jeddah	3 - 5 December 2025	Jeddah (Saudi Arabia)	Propack Jeddah is the foremost global trade event for processing and packaging in Saudi Arabia

MIDDLE EAST PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
Oman Plast	9 - 11 December 2025	Muscat (Oman)	International Plastics, Rubber, Petrochemicals, Chemicals, Fertilizers, Plastics Recycling, Printing and Packaging Industry Exhibition & Conference
Iran Print Pack & Paper	23 - 26 December 2025	Tehran (Iran)	An opportunity for Iranian and non-Iranian business activists to find out about the latest technologies and business development strategies of the domestic and international markets
Saudi Print & Pack	12 - 15 April 2026	Riyadh (Saudi Arabia)	International Trade Exhibiton for Printing & Packaging Technologies

ESG AND ITS RELEVANCE TO PACKAGING AND PROCESSING MACHINERY AND TECHNOLOGIES

What is ESG?

ESG[1] stands for Environmental, Social and Governance. It refers to a set of standards used to measure an organization's impact in these three areas and is a common framework used by businesses and investors that prioritize sustainable environmental and social outcomes. Companies can use the ESG framework to improve their overall sustainability while managing risks and opportunities within their operations and measure against the three distinct dimensions:

Environment: Focuses on a company's impact on the planet, such as:

- Reducing emissions and energy consumption in manufacturing operations.
- Designing energy efficient machinery.

Social: Covers the impact an organization has on employees, customers, and communities, such as:

- Supporting local communities where a company sources materials or operates.
- Investing in workforce training and development.

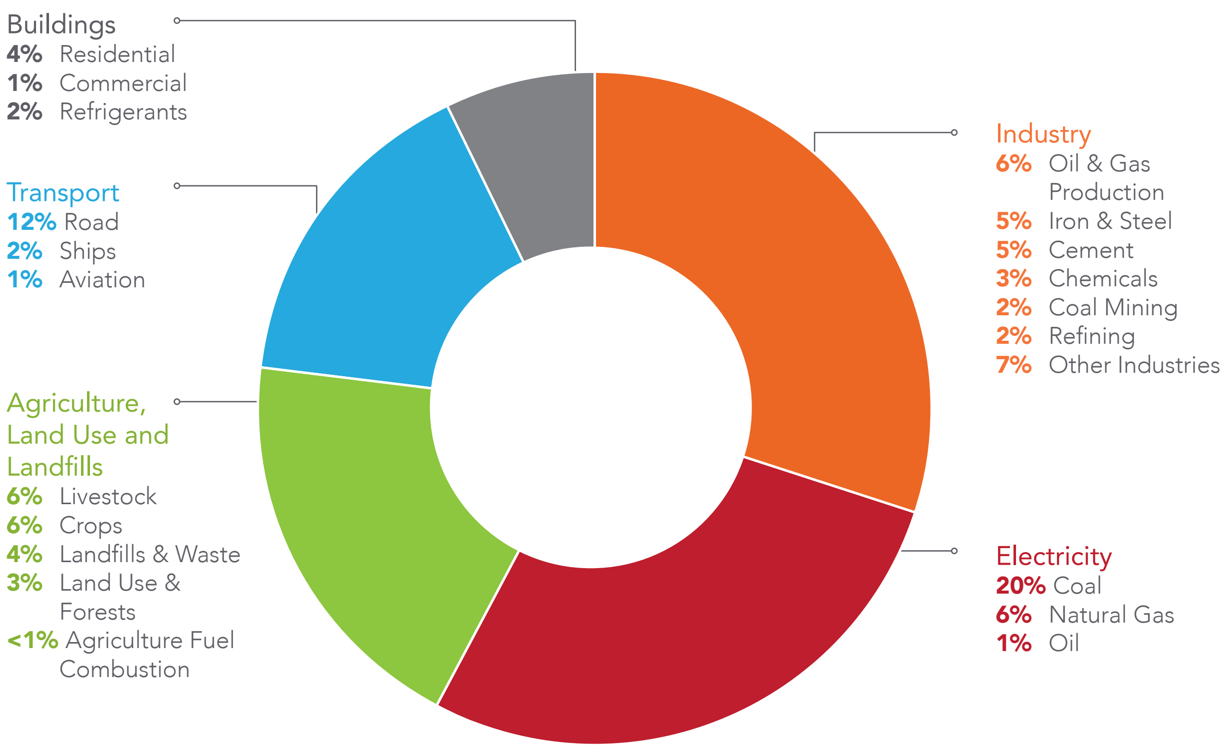
Governance: Focuses on how the company is managed, including:

- Transparent decision-making in areas like compensation, succession, and board management.
- Clear reporting on ESG performance and ESG regulatory compliance.

Adopting ESG frameworks within the company's supply chain operations is an increasingly valuable business strategy as consumers become more socially and environmentally conscious, favoring firms with strong sustainability records; investors leverage ESG scores to analyze investment opportunities; and policymakers and regulators in various markets implement ESG mandates.

New ESG requirements have been driven by policymakers seeking to curb greenhouse emissions stemming from the manufacturing sector. In 2022, the industry sector comprised 30% of total global CO2 emissions[2], and emissions from the manufacturing sector are projected to increase 17% between 2024 and 2050[3]. To combat this, many countries are implementing regulations to become climate neutral by 2050. Since 2002, at least 38 countries[4] have introduced mandatory ESG disclosure requirements, including key PMMI export markets such as **China, EU, and the United Kingdom**. It is important for PMMI members to understand the ESG landscape and what implications it has for exporting into foreign markets as these regulations become more prevalent.

Percent share of 2022 net GHG emissions



Source: Rhodium Group

[1] *What is environmental, social, and governance?, IBM (January 2024)*

[2] *Global Greenhouse Gas Emissions: 1990-2022 and Preliminary 2023 Estimates, Rhodium Group (November 2024)*

[3] *Emissions of Greenhouse Gases in the Manufacturing Sector, Congressional Budget Office (February 2024)*

[4] *The Effects of Mandatory ESG Disclosure Around the World, page 50, SSRN (2024)*

ESG IN THE MACHINERY AND EQUIPMENT MANUFACTURING INDUSTRY

ESG is reshaping partnerships between equipment suppliers and customers, enabling equipment suppliers to meet their own ESG and sustainability objectives. As consumer-facing companies become increasingly focused on curbing their own emissions and energy consumption, they rely on machinery suppliers to create manufacturing solutions that are more energy efficient, built with lifecycle circularity in mind, and incorporate sustainable materials.

As machinery and equipment manufacturers continue to advance supply chain management initiatives and explore ESG disclosures, some key questions to consider include:

- Did inputs, components, materials or parts for my product come from a source that is known for forced labor or environmental degradation?
- How does our company support social impact within the communities in which we work?
- Are we being transparent with how we are reporting our data?
- Are we holding our suppliers accountable to the same ESG standards we set for ourselves?

The table below provides an overview of how ESG standards could impact PMMI members' operations[5].

Area	Examples
Resource Efficiency	Reduced waste, carbon emissions, reducing water consumption, minimizing material waste throughout the value stream
Regulatory Compliance	Stricter requirements for emissions, waste management, and sustainable sourcing
Labor Practices	Focus on worker safety, fair wages, and human rights
Community Impact	Being a partner within the community, ensure safe working conditions, reducing negative environmental impact
Diversity and Inclusion	Need for a diverse workforce, bringing in different perspectives, driving innovation, and improving company culture
Risk Management	Transparent reporting mechanisms
Supply Chain Transparency	ISO9001 Standard ensures that manufacturers supply chains are ethical and sustainable

ESG IN THE UNITED STATES AND ROLE OF THE U.S.

ESG and sustainability continues to be an evolving space, particularly in the United States as changes in Administration has led to increased interest on how ESG is leveraged and promoted within corporate America.

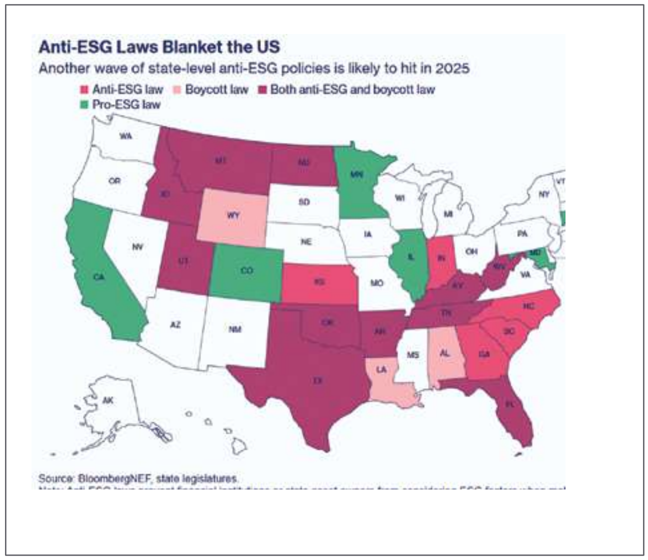
During the second Trump Administration, policymakers are less interested in implementing ESG requirements that were developed during the previous Administration. For example, President Trump signed the Big Beautiful Bill Act in July 2025 which eliminates subsidies for green energy sources such as solar and wind[6].

[5] *ESG and the Manufacturing Industry, IBM (January 2024)*

[6] *Fact Sheet: President Donlad J. Trump Ends Market Distorting Subsidies for Unreliable Foreign – Controlled Energy Sources The White House (July 2025)*

At the state-level, there is an even more dynamic and less consistent ESG regulatory environment, with states holding varying degrees of interest in promoting ESG standards. For example, California signed SB 253: *Climate Corporate Data Accountability Act*[7], which reports greenhouse gas emissions to state air resources board. In contrast, Florida passed CS/CS/HB 3: *Government and Corporate Activism*[8], which requires a Chief Financial Officer and the state to make fund investments solely on money-related factors and not let politics or social values influence the decision. The graphic to the right shows the status of state-level ESG policies expected in 2025.

The future of ESG standards under the Trump Administration is unclear and continues to change, often running counter to global trends. Manufacturing companies should be aware of both the U.S. context and global trends as they navigate the ESG landscape and what it means for their business[9].



ESG AROUND THE WORLD

Parallel to the United States, global adoption of ESG requirements is advancing at a different pace and direction across different countries, highlighting the evolving environment that companies must navigate. Increasingly more foreign governments are pro-ESG, particularly the United Kingdom (UK) and Member States of the European Union (EU-27) that have implemented mandatory ESG regulations. Other countries, such as Canada, Japan, and Brazil, are starting to intensify their efforts through stronger regulations, mandatory disclosures, and sustainability linked frameworks.

Europe

The EU-27 and the UK are leading the way with their ESG initiatives and are influencing regulatory frameworks around the world. In 2019, the EU-27 adopted The Green Deal, which consists of policy initiatives that set a green transition for the EU-27 with goal of reaching climate neutrality by 2050[10].

Post-Brexit, the UK did not adopt the EU-27's framework but instead used it as a guideline for their own. In 2019, the United Kingdom was the first major country to publish a green finance strategy, and, in 2021, they became the first G20 nation to require the largest companies and financial firms to make public how they are responding to financial risks and opportunities from climate change[11].

With the deployment of expansive ESG requirements across Europe, U.S. manufacturers face difficulty navigating the ESG landscape and ensuring they comply with these regulations. The American Chamber of Commerce noted 84% of member companies doing business in the EU consider ESG rules "a primary barrier" to trade, which has resulted in the Chamber urging EU regulators to simplify ESG requirements[12]. The EU has proposed some simplifications such as limiting the scope of companies subject to ESG reporting requirements, but it is unclear if the regulatory cutback will be implemented given opposition by some EU Member States, including Germany and France. This highlights the reality that the ESG landscape continues to mature with no clear indication of what a final ESG regulatory system may look like. To mitigate risk in markets where governments are taking a stronger position on ESG, PMMI members should collaborate with customers to ensure they are aware of and can comply with all ESG related requirements.

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[7] *SB-253 Climate Corporate Data Accountability Act, California State (2023-2024)*

[8] *CS/CS/HM 3 Government and Corporate Activism, Florida State (July 2023)*

[9] *Why ESG Faces Backlash and Its Future Under Trump 2.0, Bloomberg (March 2025)*

[10] *European Green Deal, European Council (2025)*

[11] *Mobilizing Green Investment, the United Kingdom Government (2023)*

[12] *US companies Say ESG Rules are a Serious Barrier to EU Trade, Bloomberg (February 2025)*

Latin America

Latin America is working towards developing ESG standards throughout the region. Right now, efforts focus primarily on ways to reduce carbon footprint in supply chains. Colombia, Mexico, and Panama have adopted green taxonomies, which are frameworks that help define environmentally sustainable investments[13]. In Brazil, ESG reporting will be mandatory for all publicly traded companies starting in 2026. As the ESG landscape in Latin American evolves, PMMI members can expect more stringent regulations in the future pertaining to their operations when selling into these markets.

Rest of the World

Other areas of the world are similarly starting to implement ESG standards and principles. In the Middle East and North Africa, countries like UAE, Saudi Arabia, and Oman are actively developing their own frameworks.

In the Asia-Pacific region, ESG is gaining traction. China does not have any specialized ESG laws; however, in 2024, China published guidelines that required companies to disclose sustainability-related information. In Japan, ministries have published guidelines between 2021 and 2024 that are ESG focused, and Singapore is developing ESG framework that is more standardized.

We anticipate countries will continue to explore and pursue development and implementation of ESG standards that require greater insight into supply chains, including ethical and sustainable sourcing requirements, as well as more transparency into company management and social initiatives. PMMI manufacturers may need to gather more information from their suppliers. PMMI members' customers may require more information to comply with these regulations and requirements. Please see Annex A for relevant regulations that may impact PMMI members or require more information to be shared with customers for their reporting.

ESG, OUR INDUSTRY, AND CROSS-BORDER TRADE CONSIDERATIONS

ESG-related pressures are materializing in both direct and indirect ways for manufacturers of packaging and processing machinery. A key focus of international ESG standards is tracking and reporting carbon emissions. For example, U.S. exporters may be required by EU importers to disclose emissions data, categorized as Scope 1 (direct emissions), Scope 2 (indirect emissions from energy), and Scope 3 (value chain emissions). These demands are increasingly common in markets with robust ESG mandates, particularly in Europe and parts of Asia. Please see Annex B for example of an ESG questionnaire a manufacturer may request – or require – from their suppliers.

However, proactively embracing ESG principles offers more than just compliance benefits - it is becoming a source of strategic strength. Manufacturers which incorporate ESG into their operations and manufacturing may become preferred partners for customers under pressure to meet their own sustainability goals. In this context, machinery and equipment manufacturers that design more energy-efficient systems can directly contribute to their customers' ESG reporting and carbon reduction targets, strengthen long-term relationships, and unlock new market opportunities.

At a regulatory level, countries advancing ESG policy are also reshaping trade compliance. Customs agencies may soon require ESG documentation for customs clearance, elevating sustainability from a voluntary practice to a trade-enabling function. This shift will require manufacturers to integrate ESG metrics into their supply chain management and reporting systems.

ESG is no longer a peripheral concern but rather becoming a central element of competitiveness, market access, and operational strategy in the manufacturing machinery industry. Companies that adapt early will not only navigate compliance more effectively but will also position themselves to lead in markets where transparency, sustainability, and corporate responsibility are increasingly non-negotiable.

[13]*Why ESG is so important when choosing a project location in Latin America, Thomson Reuters (April 2024)*

ANNEX A: Mandatory ESG Regulations Around the World

Policy Name	Policy ESG Objective	Policy Overview	Requirements and considerations for food processing and packaging machinery manufacturers and suppliers of materials, parts and components
Europe (EU 27) 2024 cross-border trade for machinery and equipment with the US: Imports into the US: \$4.6 B, Exports from the US: \$389.9 M			
Carbon Boarder Adjustment Mechanism (CBAM)	Supports EU climate goal of reducing greenhouse gas emissions and reaching climate neutrality.	Importers of goods from specific industries (such as steel and aluminum) into the EU will need to gather data on the direct and indirect emissions of their products. **Direct emissions** means the emissions from the production process of goods and **indirect emissions** means emissions from the production of electricity. These emissions need to be reported regardless of the location of production.	Required to monitor and report both direct and indirect emissions.
Corporate Sustainability Reporting Directive (CSRD)	Supports EU climate goal of reducing greenhouse gas emissions and reaching climate neutrality.	EU and non-EU companies of certain criteria are required to report their climate and environmental impact. **EU Companies** that meet two out of three of the below criteria: (1) €50+ million in net turnover, (2) €25+ million in assets, or (3) 250+ employees **Non-EU Companies** that have a net turnover of €150 million or more in the EU and have at least one of the following: (1) a large EU subsidiary (meeting the criteria listed above), (2) a branch in the EU with net turnover exceeding €40 million, and (3) securities listed on EU regulated markets. Starting in 2025, the CSRD will mandate that businesses have a Paris Agreement aligned emissions reduction plan to reach net zero by 2050.	Required to disclose information on climate and environmental impact such as Scope 3 emissions, water and marine resources, climate change adaptation, pollution, etc.

ANNEX A: Mandatory ESG Regulations Around the World *(continued)*

Policy Name	Policy ESG Objective	Policy Overview	Requirements and considerations for food processing and packaging machinery manufacturers and suppliers of materials, parts and components
Corporate Sustainability Due Diligence (CSDDD)	Supports EU goal of ensuring health and human safety.	Sets minimum requirements for EU and non-EU companies to develop and implement due diligence mechanisms to identify adverse human rights and environment impacts Member States will transpose the CSDDD by 26 July 2025. The CSDDD will be implemented in three phases and apply to: • 1st Phase: From July 2027, large EU companies (that have more than 5,000 employees and report a net annual worldwide turnover of more than 1.5 B EUR) and non-EU companies that generate more than 1.5 B EUR • 2nd Phase: From July 2028, EU companies with more than 3,000 employees and more than 900 M EUR and non-EU companies generating the same net turnover • 3rd Phase: From July 2029, all other companies failing under general scope Micro companies and SMEs are not covered.	Required to implement policy to ensure risk-based human rights and environmental due diligence, identify and assess actual or potential adverse impacts (upstream and downstream), develop corrective action plans, establish and maintain notification mechanism and complaints procedure, monitor the effectiveness of due diligence policies, publicly communicate due diligence process, and adopt and implement climate transition plan.
Europe (EU 27) 2024 cross-border trade for machinery and equipment with the US: Imports into the US: $4.6 B, Exports from the US: $389.9 M			
Eco-design for Sustainable Products Regulations (ESPR)	Supports EU climate goal of doubling its circularity rate of material use and achieve energy efficiency targets by 2030.	Importers of goods will need to make sure **products placed on the market comply with applicable eco-design requirements.** Economic operators (which are manufacturers, importers, and other value chain actors) will need to annually disclose information on unsold consumer products which they can decide to include in their sustainability reporting for the CSRD.	Required to check compliance, assess conformity and prepare technical documentation, ensure product identification, provide clear contact details for consumer inquiries, ensure instructions are available. If a product is found to be non-complaint, then PMMI member must be prepared to take corrective actions which can include withdrawal or recall of the product.

ANNEX A: Mandatory ESG Regulations Around the World *(continued)*

Policy Name	Policy ESG Objective	Policy Overview	Requirements and considerations for food processing and packaging machinery manufacturers and suppliers of materials, parts and components
The Sustainable Finance Disclosure Regulation (SFDR)	Supports EU climate goal of achieving climate neutrality.	Companies that are EU-based financial market participants with over 500 employees will have to provide more transparency in how they address ESG risks.	Required to check compliance.
China 2024 cross-border trade for machinery and equipment with the US: Imports into the US: $349.2 M, Exports from the US: $54.3 M			
Corporate Sustainability Disclosure Standards – Basic Standards (CSDS)	Supports China's goal of reducing carbon footprint and reaching climate neutrality.	Establishes standardized guidelines for companies operating in China to disclose ESG information.	Required to disclose develop outline on data reporting, disclose information related to climate change, corporate governance, etc., and provide case studies to help other businesses with making disclosures.
Japan 2024 cross-border trade for machinery and equipment with the US: Imports into the US: $273.1 M, Exports from the US: $38.3 M			
Sustainability Disclosure Standards	Supports Japan's goal of increasing corporate transparency with regards to ESG principles.	Companies in Japan are required to disclose sustainability-related information based on strategy, metrics, targets, governance, and risk management.	Required to disclose ESG related information.
United Kingdom 2024 cross-border trade for machinery and equipment with the US: Imports into the US: $161.6 M, Exports from the US: $72.1 M			
Streamlined Energy and Carbon Reporting (SECR)	Supports UK's goal of reducing greenhouse gas emissions.	Companies listed on the UK stock exchange, a European Economic Area Market, or whose shares on are the New York Stock Exchange or large Limited Liability Partnerships are **required to share energy use and carbon emissions information in their annual reports.**	Required to report Scope 1, 2, and 3 emissions, intensity metric for year-on-year, methodologies used in calculations, and energy efficiency action taken in the year.
Sustainability Disclosure Requirements	Supports UK's commitment to ensure transparency and commitment towards sustainable practices.	Companies that are listed on the UK regulated market **will have to disclose their positive and negative impacts on the environment and society.**	Adopting sustainability investment strategies could help align with UK standards and attract investors. **If operating in the UK, then required.**

ANNEX A: Mandatory ESG Regulations Around the World *(continued)*

Policy Name	Policy ESG Objective	Policy Overview	Requirements and considerations for food processing and packaging machinery manufacturers and suppliers of materials, parts and components
Brazil 2024 cross-border trade for machinery and equipment with the US: Imports into the US: $40 M, Exports from the US: $46.8 M			
International Sustainability Board (ISSB) S1 and S2 Standards	Supports Brazil's goal of creating transparency around sustainability-related risks and opportunities companies face.	Provides companies with a set of disclosure requirements that will help communicate to investors about the sustainability-related risks and opportunities they face.	Adopting sustainability investment strategies could help align with international standards and attract investors.

Annex B: Example of ESG Questionnaire to Suppliers

Supplier Name:

Does your company have policies in place that prohibit Forced Labor and/or Child Labor?
☐ Yes, Please attach copies of policies
☐ No

Does your company have policies in place that ensure your suppliers prohibit Forced Labor and/or Child Labor?
☐ Yes, Please attach copies of policies
☐ No

Has your organization performed training for your employees regarding Forced Labor and/or Child Labor?
☐ Yes, Please attach copies of policies
☐ No

Do you perform any due diligence to ensure that your organization or supply chain (that provides, imports, or distributes goods) does not conduct any Forced Labor and/or Child Labor?
☐ Yes
☐ No

Do you employ any person younger than 18 years of age?
☐ Yes
☐ No

Are you committed to net-zero by 2050, assuming it is reasonably economic to do so and is technically feasible?
☐ Yes, no current documented plan
☐ Yes, current documented plan attached
☐ No

Has your organization set emission reduction targets?
☐ Yes
☐ No

What initiatives are planned or are currently being undertaken at your organization to reduce GHG emissions?

Does your organization currently record Scope 1 and 2 emissions?
☐ Yes, please provide documentation
☐ No, but we do have plans to provide in the future
☐ No, we currently have no plans to report

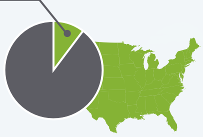
DETERMINING IF YOUR COMPANY IS READY TO EXPORT

With annual industry growth in the United States expected to be only about 2% for the foreseeable future, equipment manufacturers may want to expand sales into international markets. While exporting can help a company dramatically expand its top and bottom line, it is a very complex, time-consuming endeavor that requires strong commitment from management.

The initial stages of establishing an export business are especially challenging. Management's focus will divert from existing domestic business, but service to current clients should not decline. There are radically different environments, cultures, languages and regulations to understand, and the customer base, customers' needs and competitors are all very different. Thus, it is critical for management teams to honestly and thoughtfully evaluate their company to determine if it is ready to export, and if it is, to carefully establish a plan to create this business.

Many companies start exporting when a multinational client asks for equipment in one of their overseas manufacturing plants. Exporting to current customers is a relatively safe way to begin exporting because the customer can provide guidance on the export process, and the company has already made an export sale before drafting any export business plans. This type of exporting is called pull exporting, since a current customer is pulling their supplier into a foreign market. Once the company has the initial experience of exporting into an international market, the experience and local client become a strategic beachhead that can facilitate additional sales to other local manufacturers. Push exporting is where there are no established relationships within the country the company is trying to penetrate, and the company is pushing its products into the market.

2% INDUSTRY GROWTH

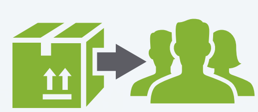


Annual industry growth in the United States expected to be only about 2% for the foreseeable future.

READY TO EXPORT?

It is critical for management teams to be honest and thoughtful when evaluating if their company is ready to export.

EXPORTING TO CURRENT CUSTOMERS



This is a relatively safe way to begin exporting because the customer can provide guidance on the export process.

Q&A

Export Preparedness Questionnaire

The list of questions below is designed to help managers determine if their company has the potential to expand into export markets. If the responses to most questions are positive, the firm is probably ready to start developing export plans. Any weak areas revealed should be addressed early in the planning process.

Management and Staff Readiness

Is the management team faithfully committed to creating export markets? For instance, will management support this effort with ample staff, time and other resources to ensure success?

Management commitment is critical to successfully establishing an export business. Developing export markets often takes more time, effort and finances than initially projected, which can distract focus from current domestic business. To maximize success, both national and international customers and sales prospects should receive the same high level of service.

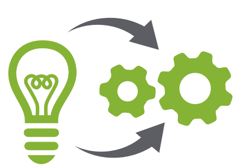
What are the company strategies to address time, language and cultural differences and ensure quality service to international customers?

To ensure export success, the staff will need additional training and will need to extend their work hours or be on call to address issues that arise in international markets. Sales, service people and upper management will also need to travel extensively (and often unglamorously) to establish relationships and maintain smoothly running operations.

Do current managers or staff have significant export experience? If not, what kind of export training or export advice has or will the management receive?

The logistics, regulations and processes for running an export business can be significantly different than in the local market. Acquiring advice, training and experienced staff can help management teams learn and adapt quickly to this new type of business and the targeted foreign markets.

COMMITMENT



STRATEGY

EXPERIENCE

Q&A CONTINUED

Product Readiness and Suitability

Is the product or service ready to export?

To determine if a product is ready to export, teams must understand the regulatory, compliance and procedural issues that might affect the product or service in the target market. This is a critical first step because a rule or regulation can prevent the product from entering the target market. The regulatory issues might include anything from quality, safety or packaging requirements.

Will companies want the exported product?

Once a product is determined to be exportable, the demand for the product needs to be evaluated to ensure the exporting efforts can be profitable. Sales should not be projected based on a handful of inquiries or other companies' success stories. Companies should conduct research and obtain hard evidence to convince stakeholders that each target country is a profitable and strategically important market.

Financial Readiness

Are stakeholders ready to invest the needed amount to launch the export business?

Exporting can be a much larger drain on finances than expected; transport costs are higher, lead times for payment are longer and the company may need to invest in more staff, training and equipment to meet additional demand. Additionally, establishing foreign markets usually involves participating in international trade shows, market research and international business training.

Have you investigated payment issues?

Exporting often involves significantly larger financial risk simply because it's harder to conduct credit checks on foreign companies and harder to secure payment when it's more difficult to visit them. Always check a buyer's credit before completing the sale. A U.S. Commercial Service International Company Profile (ICP) provides useful information for credit checks. Asking for a letter of credit from the purchaser's bank before shipment is a good idea, as is purchasing insurance to manage the risk while your goods are in transit.

DETERMINE PRODUCT READINESS

ESTABLISH FOREIGN MARKETS

CHECK CLIENT CREDIT

Q&A CONTINUED

Marketing and Sales Readiness

Does the product have a compelling value proposition in the chosen country?	*Companies within the target country will naturally prefer to work with companies they already know. New exporters will need to effectively convey a significant difference or unique competitive advantage to gain the interest of their target market.*
Will the management team create an international marketing plan with defined goals and strategies?	*Many companies are eager to start the international sales process after identifying the first lead. However, committing the necessary time and energy to develop an export marketing plan will help your company find and focus on the best export opportunities, utilize resources most effectively and maximize chances for success.*
Does the management team have a sophisticated understanding of the target markets?	*Cultures, business practices, regulations and customer needs can differ surprisingly across export markets. Do not assume they will be identical to the domestic market. Companies can gain intimate knowledge of target markets through research and getting advice from other exporters doing business in the same markets. The more a company knows about operating and competing in a different country, the fewer pitfalls they are likely to encounter.*
What is the pricing strategy for the target market and will it succeed?	*Exporters need to know that even with a significant competitive advantage and an attractive value proposition, the target market may not be willing to pay the prices you want to charge. If price needs to be reduced to meet market expectations, exporters will need to understand the impact on the viability of the export business.*

TARGET MARKET

UTILIZE RESOURCES

KNOWLEDGE THROUGH RESEARCH

ATTRACTIVE VALUE PROPOSITIONS

Q&A CONTINUED

Operational Readiness

Does the company have sufficient production capacity to handle export sales?	*More space and equipment may be needed to manufacture for the new target countries. Productivity will need to increase, and it will likely become more complex to meet the export market's standards and regulations. This additional complexity should not impact the output quality for either domestic or international markets.*
Does the management team have adequate knowledge of shipping its product overseas, such as identifying and selecting international freight forwarders and freight costing?	*Exporters must be aware of packing, labeling, documentation and insurance requirements. Many exporters seek the services of international freight forwarder agents. These agents are familiar with the import rules and regulations of foreign countries, the export regulations of the U.S. government, the methods of shipping and the documents related to foreign trade.*
What kind of local sales teams, service teams and parts storage will be available in the target markets?	*Customers want to work with those who have good knowledge of the needs of their local market. They also want to know that any problems with equipment can be serviced in a timely and cost-effective manner. Having to wait a week for parts or for service technicians to fly across the country is unacceptably long for many potential customers.*

INCREASE PRODUCTIVITY

IMPORT RULES

KNOWLEDGE OF LOCAL MARKETS

RESOURCE:	WEBSITE:
Basic guide to exporting by the U.S. Department of Commerce	http://www.unzco.com/basicguide/
Government programs to help U.S. exporters finance selling overseas	
The Export-Import Bank	www.exim.gov
Small Business Administration	www.sba.gov
Department of Agriculture	www.usda.gov
Regulations, export controls, industry and regional information	www.export.gov
National Customs Brokers and Freight Forwarders Association of America	www.ncbfaa.org
California Inland Empire District Export Council	www.cieDecemberorg/resources/federal-agencies

Selecting Export Markets

AIDS FOR SELECTING EXPORT MARKETS

Determining an export market will take an honest assessment of a product's strengths, weaknesses, unique value proposition and how the product fits within the target countries' customer base and competitors. Additionally, there are taxes, import duties, regulations and many other variables to consider.

Each country will have unique challenges or issues that it is grappling with in the short, medium and long term. These challenges can provide excellent opportunities for newly exporting manufacturers to gain sales and penetrate markets provided their solution effectively addresses the need and if all other business issues of exporting to this market are positive or neutral. The table below outlines a few possible target country challenges and potential solutions that can help the local customer base.

Target Country Challenge	Challenge Potential Solutions
High or significantly increasing labor costs, and/or high employee turnover	Any solutions that can reduce human labor on the production and packaging line, such as more integrated or automated equipment, or the addition of robotics and cobots.
High or significantly increasing inflation	Packaging solutions that will extend product life, such as canning lines for food or packaging solutions with superior closures that extend the life of any perishable item.
Strong GDP growth for the foreseeable future	Innovative packaging solutions that deliver new value, such as active and intelligent solutions, or new packaging lines to expand production.
Slow GDP growth for the foreseeable future	Manufacturers will aim to reduce costs and/or steal market share from competitors. Thus, packaging solutions that 1) are lower in cost, durable and easily serviceable, or 2) can help a manufacturer better differentiate their products and offer new value, will be most attractive.
Increasing food safety concerns or regulations	Equipment designed for optimal food safety, such as easily cleaned equipment, active / intelligent packaging solutions and robotics.
A large portion of the population nearing retirement age	User-friendly packaging designed specifically for older people and the integration of robotics into production and packaging lines.
High energy (electricity) prices	Machinery with more energy-efficient solutions.
New labeling regulations	Coders, scanners and other labeling solutions that address any new regulations.
Rising middle class	Packaging solutions of all types, as manufactures seek to satisfy these consumers with a myriad of new products.

Q&A

QUESTIONS ON IMPORTING / EXPORTING

Classification of Machinery, Inputs, and Parts

1. Where can I find information on tariff classification for processing and packaging machinery?

For classification of packaging machinery, PMMI's Guide to Global Markets includes information on tariff codes to the 6-digit and tariff rates or ranges of tariffs into key export markets. The below chart lists the typical 6-digit codes for OEMs' products. Most countries require 8 to 10 digits for import as the additional digits provide more information on the machinery. For instance, into the United States, "can-sealing machines" will enter under 8422.30.1100.

Packaging Machinery

8422.20 - Machinery for cleaning or drying bottles or other containers

8422.30 - Machinery for filling, closing, sealing, capsuling or labeling bottles, cans, boxes or other containers; machinery for aerating beverages

8422.40 - Packing or wrapping machinery (including heat-shrink wrapping machinery)

8422.90 - Parts for machines for dishwashing, cleaning, filling, etc.; containers and parts for packing and wrapping; parts of machines for aerating beverages

Food Processing Machinery

8438.10 - Bakery machinery and machinery for the industrial preparation or manufacture of macaroni, spaghetti or similar products (excluding ovens, macaroni drying machines and dough rollers)

8438.20 - Machinery for the industrial preparation or manufacture of confectionery, cocoa or chocolate (excluding centrifuges and filtering, heating or refrigerating equipment)

8438.30 - Machinery for sugar manufacture (excluding centrifuges and filtering, heating or refrigerating equipment)

8438.40 - Brewery machinery (excluding centrifuges and filtering, heating or refrigerating equipment)

8438.50 - Machinery for the industrial preparation of meat or poultry (excluding cooking and other heating appliances and refrigerating or freezing equipment)

8438.60 - Machinery for the industrial preparation of fruits, nuts or vegetables (excluding cooking and other heating appliances, refrigerating or freezing equipment and machinery for the sorting or grading of fruit and vegetables)

8438.80 - Machinery for the industrial preparation or manufacture of food or drink, not elsewhere specified

8438.90 - Parts of machinery for the industrial preparation or manufacture of food or drink, not elsewhere specified

Q&A CONTINUED

2. If our company acts as the importer, where can I find information to determine the tariff classification for inputs and parts used in manufacturing? Is there a different code for the type of material, e.g., stainless steel, aluminum, etc.?

There are several resources to help importers with tariff classification of their machinery, inputs and parts

- If you are using a licensed U.S. customs broker, they can help with tariff classification into the United States as part of their service agreement.
- U.S. Customs and Border Protection (CBP) provides a database of U.S. customs rulings via Customs Rulings Online Search System, or CROSS, to help importers see how similar products are classified. While CROSS is the most comprehensive rulings database, other markets have similar databases to help provide insight on tariff classifications. For instance, the EU's Binding Tariff Information (BTI) portal provides rulings on goods imported into EU Member States. Customs rulings help importers understand Customs authorities' perspective on classification of goods into their market.
- U.S. tariff codes to the 10-digit level and tariff rates can be found in the Harmonized Tariff System of the United States (HTSUS). Other countries' tariff codes are typically found on the website of the Customs authority for that market.
- Customs lawyers and consultants can also help determine and review possible classifications for import or export.

Parts of packaging machinery fall under 8422.90 and parts of food processing machinery fall under 8438.90. However, not every part of a machine is classified as "parts". As one simple example, a bolt is a bolt, not a part of a machine and should be classified as a bolt.

Tariff classification is not always straightforward, especially for inputs. While machinery falls under Chapter 84 (e.g., 8422.40 for packing or wrapping machinery), inputs typically fall in other chapters, for example:

- Steel under chapter 72.
- Steel products under Chapter 73.
- Aluminum products under Chapter 76.
- Measuring and checking devices in Chapter 90.

Classification will depend on material, function/use and/or the form in which the product is entered. Spec sheets, detailed descriptions and catalogs can all be helpful resources to properly classify imported inputs and parts.

Q&A CONTINUED

Importing into The United States

1. What is the "importer of record"? When shipping items into the United States, which entity is the importer of record?

The importer of record (IOR) is the person or entity that has ownership of the imported goods at the time of import, has the legal responsibility to ensure products comply with U.S. importing requirements, and pays any tariffs and taxes to U.S. CBP.

The IOR is responsible for using "reasonable care" to enter, classify and determine the value of imported merchandise and to provide any other information necessary to enable CBP to properly assess duties, collect accurate statistics, and determine whether other applicable legal requirements, if any, have been met.

2. Who should use a licensed U.S. customs broker and where can I find one?

There is no legal requirement to hire a licensed U.S. customs broker to clear your goods. However, many importers opt to do so for convenience and to assist with using reasonable care. Customs brokers are licensed by CBP to conduct customs business on behalf of importers. The benefits of using a licensed U.S. customs broker include:

- Brokers stay up to date with all customs regulations and procedures and will be aware of changes well before you are.
- They can prepare all the documentation that U.S. CBP requires.
- Before your goods can clear customs, U.S. regulations require a bond for their value plus any duties. Your broker can arrange this bond for you.
- A broker will seek to clear your goods through customs quickly to help minimize storage costs.

Best practices in customs compliance include using a licensed U.S. customs broker. If your company is the IOR, the customs broker clears the goods on your behalf. If your customer or vendor will clear the product at the U.S. border, they are the IOR and can use their customs broker.

A list of U.S. customs brokers can be found on the CBP website or under the Ports section by clicking on the state/port of entry through which you intend to import. The National Customs Brokers & Forwarders Association of America (NCBFAA) has a searchable membership directory that will direct you to the websites and contact information of licensed U.S. customs brokers that are NCBFAA members.

3. Is it best to have just one customs broker or multiple brokers?

Some importers use multiple customs brokers if they have high volumes of goods entering the U.S. at multiple ports. Others may require a specialty broker (e.g., certain sectors in the food industry, automotives, etc.).

For processing and packaging machinery and parts, most U.S. customs brokers should be able to meet your needs and more than one broker is likely not necessary.

Q&A CONTINUED

4. What paperwork is required from CBP to import machinery and parts into the United States?

The following documents should be included with imported shipments:

- Commercial invoice. See CBP's requirements for invoice contents. Depending on the product, CBP may require additional information on the invoice. For example:
  - **Machines, equipment and apparatus** - Chapters 84 and 85: A statement as to the use or method of operation of each type of machine.
  - **Machine parts** - Statement specifying the kind of machine for which the parts are intended, or if this is not known to the shipper, the kinds of machines for which the parts are suitable.
- Packing list
- Bill of lading or airway bill
- If claiming duty-free preference (such as under the US-Mexico-Canada Agreement), certification of origin noted on the commercial invoice or other documentation.
- If arriving by ocean carrier, an Importer Security Filing is required to be submitted by the importer of record.

CBP requires all information be provided in English and that all prices in foreign currency must also be converted to U.S. dollars (USD) on invoices and other entry documents. There may be additional information required depending on the product from other government agencies (e.g., health c ertificate for food items imported as samples for testing on lines may be required from the U.S. Department of Agriculture.)

5. Our company needs to import food items to do test runs on processing and packaging machinery for our customer. What is the process for importing samples? What is the process to ship those items back to the customer?

Commercial samples for test runs are often treated like any other imported food product. The imported food will need to meet U.S. import requirements when entering the United States as well as potentially meet import requirements upon return to the foreign. Which requirements will depend on type of food, how packaged, and/or whether the food product is regulated (e.g., dairy or pet food).

As an example, a manufacturer imported commercial samples of milk powder in bulk into the United States from the EU for line tests. The company indicated the samples were not for human consumption.
Steps included:

1. Obtaining an import permit from the U.S. Department of Agricultures' Animal and Plant Health Inspection Service (USDA/APHIS).
2. Properly classifying the milk powder for customs entry and to determine appropriate duty rate.
3. Properly completing U.S. Food and Drug Administration's (FDA) Product Code for import.
4. Providing Prior Notice of importation of samples to FDA.
5. Noting "Samples, not for human consumption" on import documents.

If your customer is already exporting food to the United States, they may be able to help facilitate the clearance in the United States of samples. In addition, they may be able to help manage the process to re-import the packaged product into their market to ensure their sample products can clear customs and comply with food-related requirements. For instance, the product may require a health certificate from USDA to be re-imported into their market.

Q&A CONTINUED

Exporting from The United States

1. What information is required for exports from the United States?

The U.S. Census Bureau requires information on U.S. exports to be provided in the Automated Export System (AES) including description of goods being exported, shipment details, parties related to the shipment, and transportation details. More information can be found in the AES User Guide.

2. What is a Schedule B code? Is it the same as the HTSUS tariff code for imports?

Schedule B codes, required by the U.S. Census Bureau to track exports, are similar to tariff codes under the HTSUS up to the 6-digit code, but may differ at the 8- or 10-digit level. For example, for import or export, "Can sealing machines" are classified under 8422.30.1100.

In other instances, the tariff code and Schedule B code are not fully aligned. For example, the HTSUS includes two breakout tariff codes for "Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products: 8438.10.0010 for "Bakery machinery" and 8438.10.0090 for "Other machinery". While the Schedule B code combines into one code 8438.10.0000: "Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products".

3. What is an "ECCN" and what is the right ECCN for our food processing and packaging machinery?

The Export Control Classification Number, or ECCN, is a five-digit identifier used by the U.S. Department of Commerce to categorize items that are subject to export control restrictions. Most U.S. exports are not subject to export controls and are noted with ECCN "EAR99". Exporters can check with the Bureau of Industry and Security if questions on the ECCN for their exports.

4. Are there restrictions on exporting to certain countries or customers?

U.S. regulations require that U.S. companies do not export goods to denied parties, which are organizations, companies or individuals that various U.S. agencies have identified as parties that one should not do business with as they may be or be affiliated with a terrorist organization, have a history of corrupt business practices, or pose a threat to national security. The Consolidated Screening List (CSL) is a list of parties for which the U.S. Government maintains restrictions on certain exports, reexports, or transfers of items. It is a searchable and downloadable file that consolidates export screening lists of the Departments of Commerce, State and the Treasury into one spreadsheet to assist in screening potential parties to regulated transactions. Access the Consolidated Screening List Search Engine via the trade.gov website.

5. What information should be included on a customs invoice when exporting

While each market is different, typical information to include on the invoice:

- Vendor name and address
- Exporter name and address
- Consignee/"Ship to" name and address
- Purchaser/"Sold to" name and address
- Commercial invoice or PO number
- Date of shipment
- Country of origin of goods
- Country of trans-shipment, if applicable
- Mode of transportation
- Ship from location
- Product description and characteristics
- Tariff code, if known
- Indication of marks and numbers
- Quantity/Number and kind of packages
- Total weight: both net and gross
- Unit price
- Total price paid or payable
- Invoice total
- Conditions of sale and terms of payment
- Currency of settlement

PAVILIONS AT INTERNATIONAL TRADE SHOWS

To help PMMI members gain a foothold in key international markets, PMMI sponsors promotional booths and pavilions at international trade shows.

Each pavilion offers PMMI members a preferable space rate and turn-key decoration packages as well as additional services including:

- Private Meeting Rooms & Business Lounge Area
- Wi-Fi
- B2B Matchmaking Assistance
- Networking Events
- Translation assistance
- Dedicated on-site personnel to assist as needed
- And more!

UPCOMING PMMI PAVILIONS AT INTERNATIONAL TRADESHOWS:

SHOW	DATE	LOCATION
interpack	May 7-13, 2026	Düsseldorf (Germany)
EXPO PACK Mexico	June 2-5, 2026	Mexico City (Mexico)
ProPak Asia	June 10-13, 2026	Bangkok (Thailand)
Fispal Tecnologia	June 16-19, 2026	São Paulo (Brazil)
Gulfood Manufacturing	November 2026	Dubai (UAE)

INTERNATIONAL TRADE SHOW ASSISTANCE PROGRAM

With this PMMI member benefit, general member companies exhibiting for the first time at qualified trade shows, specifically selected by PMMI, are eligible to get a reimbursement for up to $10,000 in financial assistance from PMMI to apply toward the cost of floor space and booth decoration packages. Members must be approved prior to requesting reimbursement.
If you are a PMMI general member interested in exhibiting for the first time at a specific trade show outside of North America, be sure to take advantage of PMMI International Trade Show Assistance up to $10,000 (some exclusions apply).

OTHER SHOWS ELIGIBLE FOR TRADE SHOW ASSISTANCE FUNDS:

PMMI has slots available for shows where PMMI does not have a pavilion - the approved list of shows where funding is eliagble can be found at www.pmmi.org/global. Funds are on a first-serve basis.

If you are interested in applying, please complete the trade show assistance form or email Andrea Admana at aadmana@pmmi.org

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