

SEPTEMBER 2026



2026 Guide to Global Markets







The Association for Packaging
and Processing Technologies



Australian Packaging and Processing
Machinery Association Limited



PMMI HEADQUARTERS
12930 Worldgate Dr.
Suite 200
Herndon, VA 20170
(571) 612-3200
info@pmmi.org
www.pmmi.org

PMMI LATIN AMERICA
Homero 418 Piso 3
Col. Miguel Chapultepec
Miguel Hidalgo, CDMX
11570 Mexico
+ (52-55) 5545-4254

APPMA | Australian
Packaging &
Processing
Machinery
Association
PO Box 18,
Mooroolbark, VIC,
3138
www.appma.com.au

Automate UK
New Progress
House,
34 Stafford Road,
Wallington,
SM6 9AA,
United Kingdom
www.automate-uk.com

Korea Packaging
Machinery
Association (KPMA)
84, Gasan digital
1-ro, Geumcheon-gu,
Seoul, Republic of
Korea, 08590
(Acehighend Tower
8-cha, #405)
www.kpmasite.or.kr

UCIMA - Italian
Packaging
Machinery
Manufacturers
Association
Stradello Fossa
Buracchione, 84,
41126 Baggiovara
MO Italy
www.ucima.it

2026 Guide to Global Markets

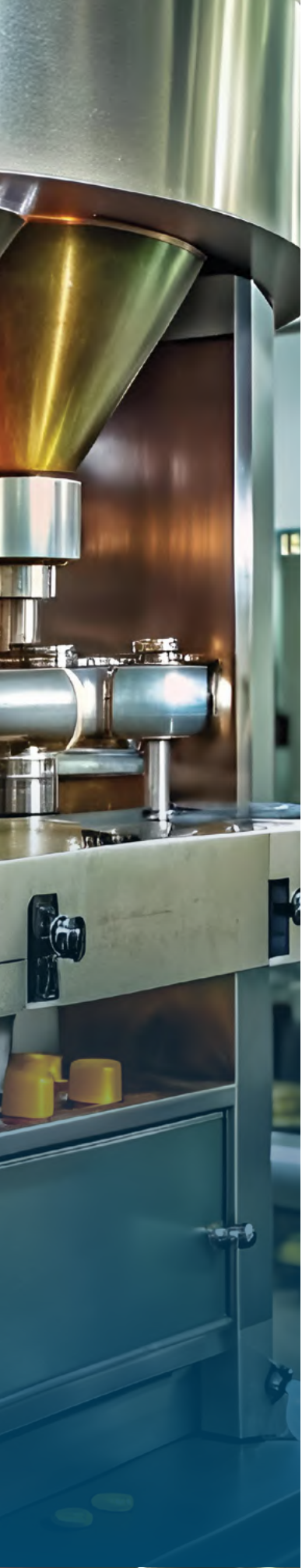
Publication Date: September 2026

Jorge Izquierdo, Vice President, Market Development, PMMI

Andrea Admana, Manager, Market Development, PMMI

© Copyright 2026 PMMI, The Association for Packaging and Processing Technologies, Inc. All rights reserved. The information contained herein shall not be distributed or shared by the recipient. No part of this document may be reproduced without the express written permission of PMMI.





CONTENTS

- 7** INTRODUCTION
- 8** GLOBAL PACKAGING MACHINERY MARKET
- 13** PACKAGING & PROCESSING MACHINERY EXPORTS & IMPORTS
COUNTRY REPORTS
- 80** PACKAGING & PROCESSING MACHINERY IMPORT DUTIES &
OTHER TAXES
 - 81** Import Duties on Packaging Machinery
 - 83** Import Duties on Food Processing Machinery
 - 85** U.S. Tariffs & Reciprocal Trade Action on Packaging &
Processing Machinery
 - 87** Preferential Rules of Origin for Imported Machinery
Manufactured in the United States, Canada, and/or Mexico
 - 90** Other Taxes on Packaging and Food Processing Machinery
- 92** GLOBAL PACKAGING MEDIA & ASSOCIATION CONTACTS
- 98** UPCOMING INTERNATIONAL PACKAGING AND PROCESSING
MACHINERY TRADESHOWS
- 108** ESG AND ITS RELEVANCE TO PACKAGING AND PROCESSING
MACHINERY AND TECHNOLOGIES
- 118** DETERMINING IF YOUR COMPANY IS READY TO EXPORT
- 124** QUESTIONS ON IMPORTING / EXPORTING
- 129** PAVILIONS AT INTERNATIONAL TRADE SHOWS



INTRODUCTION

Welcome to the 2026 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.

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.

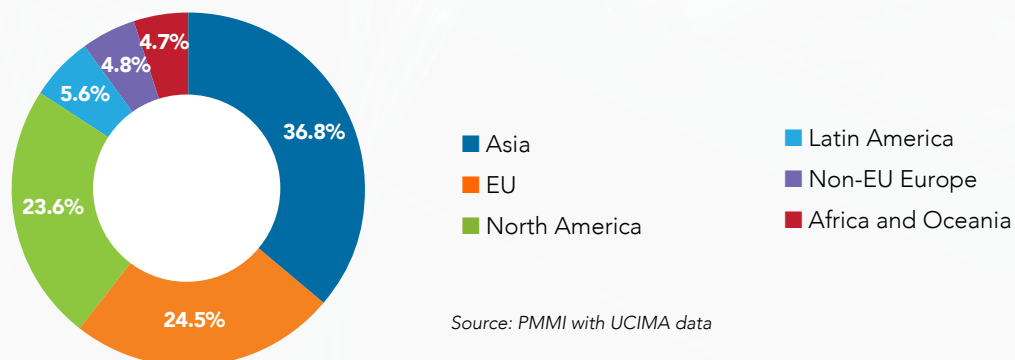
This edition's report was done in collaboration with APPMA, Automate UK, KPMA, and UCIMA. We hope this guide will help in your efforts to find the right export market for your business.

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>.

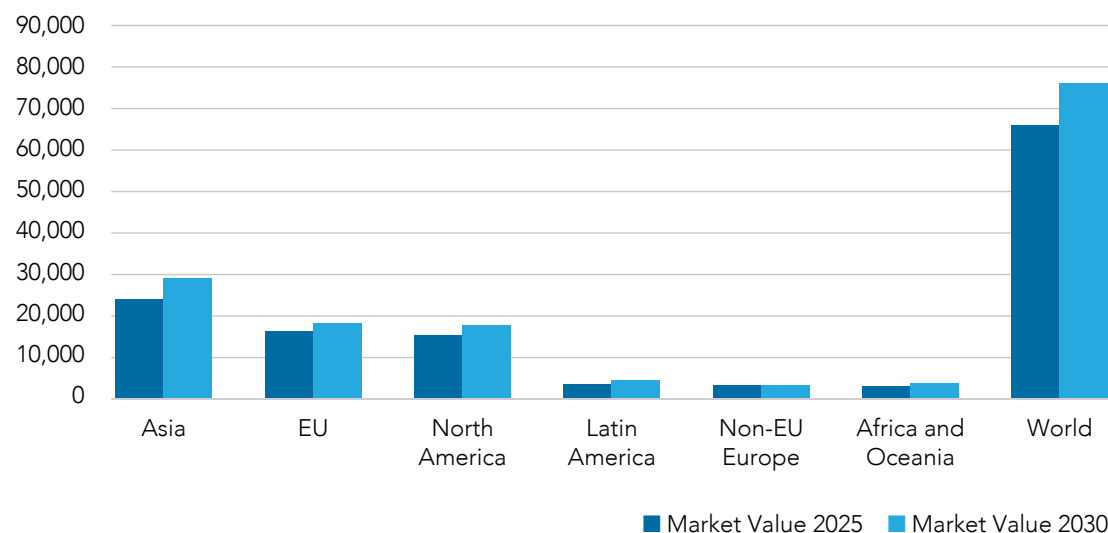
Values converted from EUR to USD at 1 EUR = 1.1300 USD (source: Deutsche Bundesbank, Exchange rate statistics). Shares and CAGRs are unchanged: a single fixed rate applies to every year, so growth rates and proportions are unaffected by the conversion.

World Market share by Region 2025



On a geographic level, Asia is the clear leader with a market value of \$24.3 billion in 2025, representing 36.8% of global demand. The European Union follows at \$16.2 billion (24.5%), now slightly ahead of North America at \$15.6 billion (23.6%). While smaller in scale, Latin America (\$3.7 billion), Non-EU Europe (\$3.2 billion), and Africa & Oceania (\$3.1 billion) all play important roles and demonstrate growth potential. Asia leads with a compound annual growth rate of 3.6%, followed by Latin America at 3.5% and Africa & Oceania at 3.2%. Asia alone adds more than \$4.7 billion in value by 2030 while Non-EU Europe grows most slowly at 1.7%. Altogether, the global packaging machinery market is expected to rise from \$66.1 billion in 2025 to \$76.4 billion in 2030, reflecting a CAGR of 2.9%.

World Market of Packaging Machinery Growth 2025 - 2030



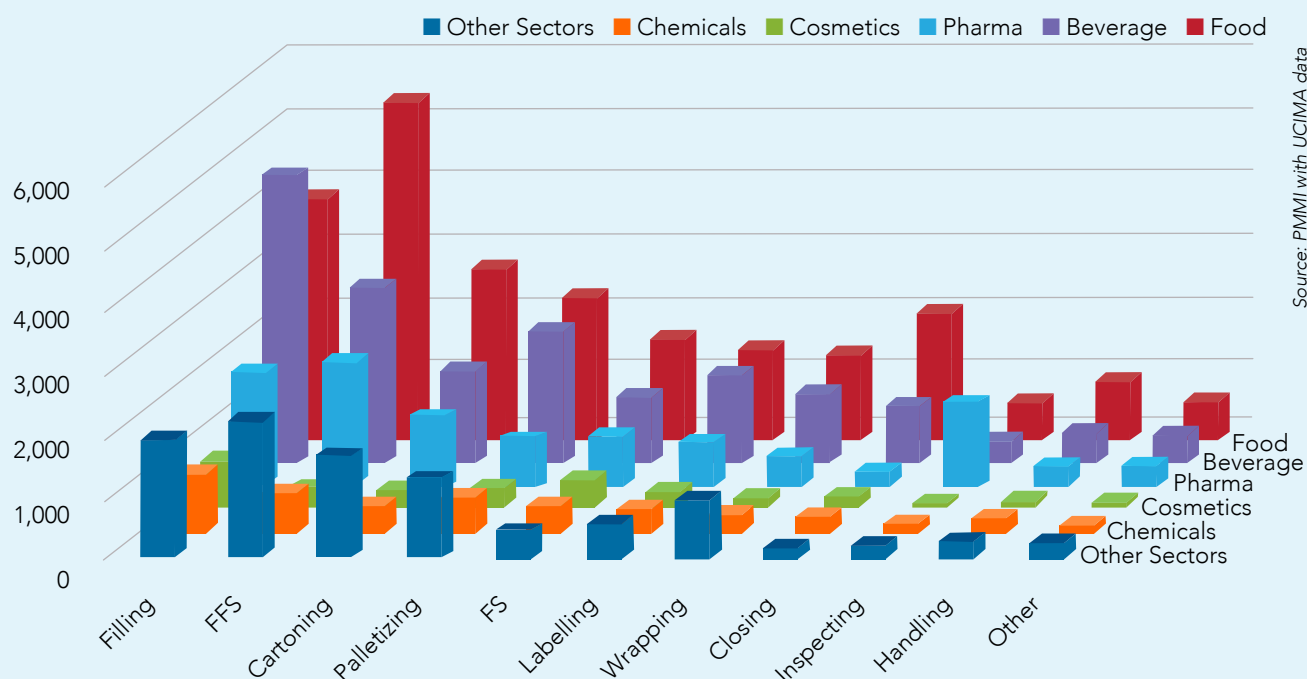
Source: PMMI with UCIMA data

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

	Market Value 2025	Shares	CAGR 2026–2030	Market Value 2030
Asia	24,348.1	36.8%	3.6%	29,005.8
EU	16,202.0	24.5%	2.7%	18,467.9
North America	15,608.1	23.6%	2.3%	17,525.4
Latin America	3,674.4	5.6%	3.5%	4,365.0
Non-EU Europe	3,160.9	4.8%	1.7%	3,384.5
Africa and Oceania	3,116.3	4.7%	3.2%	3,698.6
World	66,109.7	100.0%	2.9%	76,447.3

Source: PMMI with UCIMA data

World Market by Sector and Technology 2025



In 2025, the global packaging machinery market is dominated by Filling equipment and Form-Fill-Seal (FFS) systems, with both machinery categories generating over \$13.2 billion in value across all sectors. Together, these two technologies account for nearly 41% of the total market. Cartoning (\$7.6 billion) and Palletizing (\$7.1 billion) also represent significant segments, reflecting widespread demand for secondary packaging and logistics solutions. On the demand side, Food (\$22.7 billion) and Beverage (\$16.6 billion) together make up close to 60% of global consumption.

World Market 2025 (data in USD million)

	Food	Beverage	Pharma	Cosmetics	Chemicals	Other	TOTAL
Filling	3,824.1	4,527.1	1,809.5	735.0	955.1	1,865.8	13,716.6
FFS	5,353.8	2,777.4	1,962.5	326.5	651.7	2,172.6	13,244.5
Cartoning	2,695.3	1,467.8	1,069.0	286.9	440.8	1,611.8	7,571.7
Palletizing	2,214.5	2,086.3	692.4	318.7	552.7	1,277.2	7,141.7
FS	1,629.3	1,048.9	768.7	440.5	451.4	455.3	4,794.0
Labelling	1,476.6	1,403.8	665.3	254.7	393.5	534.7	4,728.7
Wrapping	1,354.2	1,111.3	431.8	168.0	318.6	917.8	4,301.6
Closing	2,008.0	909.0	190.2	188.5	274.0	164.0	3,733.7
Inspecting	586.4	348.0	1,329.9	72.7	158.9	196.0	2,692.0
Handling	934.2	496.4	274.8	127.5	244.6	269.4	2,347.0
Other	612.0	440.8	322.0	93.4	142.8	227.2	1,838.2
Total Technology	22,688.5	16,616.8	9,516.1	3,012.5	4,583.9	9,691.9	66,109.7

By 2030, Filling machinery remains the largest technology category, reaching \$15.7 billion across all sectors, followed closely by FFS systems at \$15.4 billion. Food continues to be the largest sector for nearly every technology at \$26.2 billion, with strong contributions from Beverage (\$19.1 billion) and Pharma (\$11.1 billion). Cosmetics, Chemicals, and Other Sectors, while smaller in absolute value, show notable growth compared to 2025.

CAGR 26-30 (%)

	Food	Beverage	Pharma	Cosmetics	Chemicals	Other	TOTAL
FS	3.2	3.1	3.6	3.1	3.1	3	3.2
FFS	2.8	3.3	3.3	2.6	2.8	3.4	3.1
Inspecting	3	3.4	3	3.3	3	3.1	3.1
Closing	3	3.2	2.6	2.3	3.2	3	3
Cartoning	2.9	2.8	2.3	2.5	3.1	3.7	3
Palletizing	3.2	3.1	2.7	2.6	3.2	2.6	3
Other	2.7	2.8	3.7	3.4	3	2.7	3
Handling	3	2.7	3.3	3	2.9	2.5	2.9
Filling	2.8	2.4	3.3	2.5	2.9	3.1	2.8
Wrapping	2.7	2.5	2.5	2.7	2.8	3.5	2.8
Labelling	2.9	2.3	3	3.2	3.3	3	2.8
Total Technology	2.9	2.8	3.1	2.7	3	3.2	2.9

Source: PMMI with UCIMA data

World Market 2030 (data in USD million)

	Food	Beverage	Pharma	Cosmetics	Chemicals	Other	TOTAL
Filling	4,395.4	5,088.0	2,131.3	830.0	1,102.2	2,177.6	15,724.6
FFS	6,142.2	3,261.9	2,307.4	370.4	747.7	2,567.3	15,397.0
Cartoning	3,113.8	1,684.5	1,198.2	324.3	514.2	1,928.7	8,763.7
Palletizing	2,598.3	2,426.7	790.8	362.9	647.9	1,449.3	8,275.9
FS	1,906.0	1,223.7	915.2	513.2	524.5	527.6	5,610.3
Labelling	1,701.8	1,576.6	772.3	298.7	462.8	619.3	5,431.5
Wrapping	1,547.9	1,255.1	488.1	192.3	365.8	1,091.5	4,940.6
Closing	2,331.7	1,066.2	216.1	211.7	320.4	190.5	4,336.7
Inspecting	680.0	411.2	1,539.5	85.6	184.2	228.0	3,128.6
Handling	1,084.3	567.8	322.7	147.9	281.7	305.1	2,709.5
Other	700.8	506.0	386.2	110.6	165.1	260.2	2,128.9
Total Technology	26,202.3	19,067.9	11,067.8	3,447.7	5,316.5	11,345.1	76,447.3

Looking ahead to 2026-2030, growth trends show steady expansion across most machinery types and industries. Fill-Seal (FS) equipment stands out with the strongest growth rate at 3.2%, ranging from 3.0% to 3.6% depending on the sector and peaking in Pharma. FFS and Inspecting technologies follow at 3.1%, and Closing, Cartoning, Palletizing and Other technologies are all expected to expand at 3.0%. By sector, Other Sectors (3.2%) and Pharma (3.1%) outpace the global average, while Cosmetics (2.7%) and Beverage (2.8%) advance more slowly. The fastest-growing individual segments are Cartoning and Other technologies for Other Sectors and Pharma respectively, both at 3.7%.

A NOTE ON METHODOLOGY

By cross-referencing a wide range of different sources (Eurostat, OECD, IMF, WTO and World Bank for macroeconomic, household consumption 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 country's detailed 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-equation 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, multilateral exchange rates; end consumption of Food, Beverage, Pharmaceuticals, 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 years). Best estimates are then chosen on the best BIC (Schwarz's Bayesian 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 situation, country risk, monetary, currency and tariff policies; the real effective multilateral exchange rates, the changes in transaction costs 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).

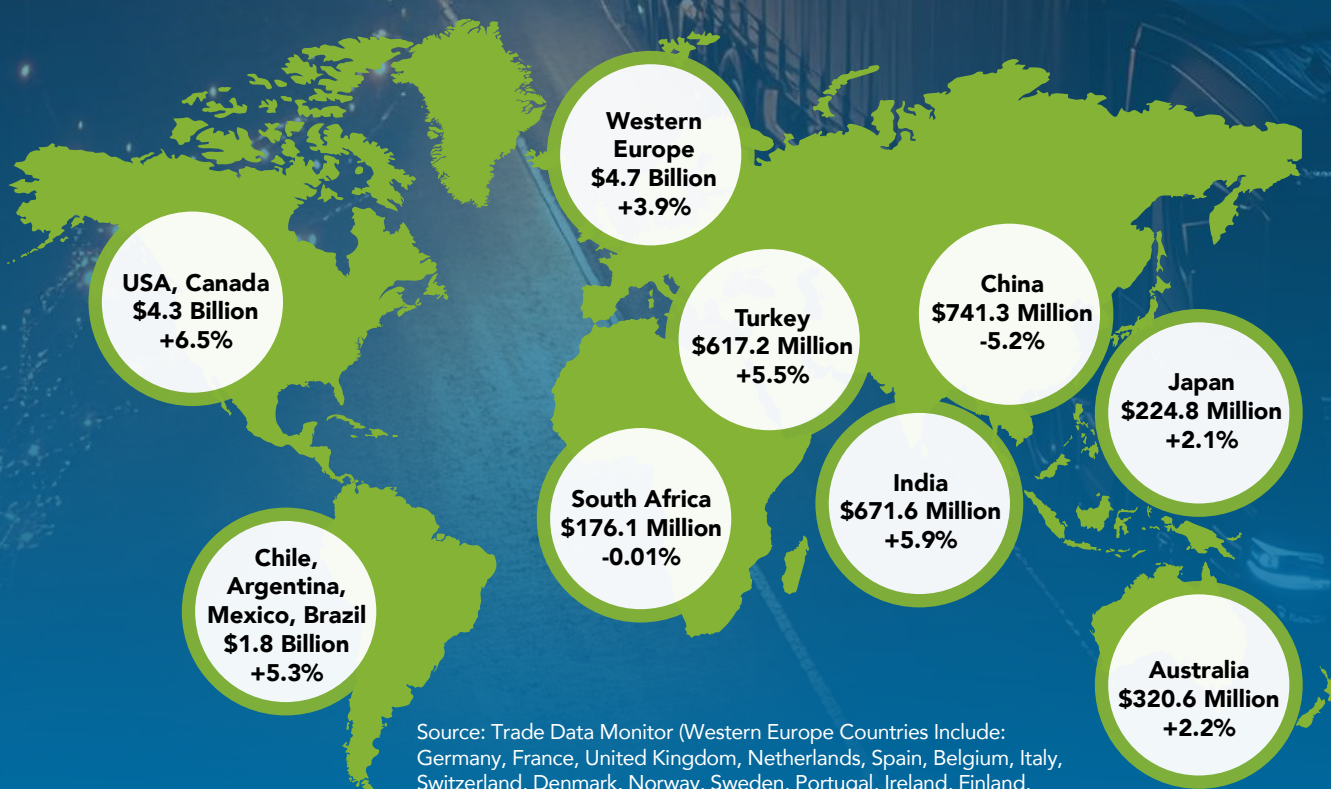
Beyond computational complexity, the unique value of the CUBE lies firstly in the methodological approach adopted, in which the forecasts are based on an integrated and coherent estimation/calibration/computation system using many different sources and secondly in the method used for weighting the three dimensions 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 observed 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 segments (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 period of four years (in this edition, the five-year period 2026-2030). 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 individual growth/ production trends in downstream end product segments, 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, 2025 with % CAGR 2016-2025



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: 2023 - 2025

Reporting Country	2023	2024	2025	% Change 2025/2024
United States	\$3,455,400,130	\$3,742,773,407	\$3,810,215,708	1.8%
Mexico	\$883,554,770	\$963,874,441	\$1,124,786,043	16.7%
United Kingdom	\$690,492,779	\$725,153,993	\$812,252,856	12.0%
Germany	\$697,781,698	\$683,299,903	\$803,220,595	17.6%
China	\$1,080,651,074	\$912,073,834	\$741,296,255	-18.7%
India	\$641,045,053	\$689,165,487	\$671,568,840	-2.6%
France	\$612,711,877	\$620,341,783	\$629,985,962	1.6%
Turkey	\$323,198,269	\$469,653,242	\$617,165,253	31.4%
Indonesia	\$379,342,834	\$417,574,262	\$517,087,714	23.8%
Canada	\$597,263,628	\$515,585,020	\$504,179,910	-2.2%
Brazil	\$293,665,485	\$379,711,364	\$491,035,524	29.3%
Spain	\$349,752,335	\$365,157,968	\$457,108,034	25.2%
Thailand	\$288,671,630	\$326,408,395	\$449,013,900	37.6%
Italy	\$344,856,985	\$330,608,895	\$423,985,871	28.2%
Netherlands	\$332,146,061	\$362,842,147	\$417,816,408	15.2%
Poland	\$270,302,928	\$335,295,265	\$383,278,826	14.3%
South Korea	\$302,974,404	\$260,819,096	\$341,333,548	30.9%
Switzerland	\$354,570,429	\$363,412,875	\$335,365,321	-7.7%
Saudi Arabia	\$175,409,904	\$274,305,572	\$321,045,484	17.0%
Australia	\$299,077,936	\$359,318,825	\$320,646,687	-10.8%
Japan	\$248,397,305	\$211,168,492	\$224,780,359	6.4%
Belgium	\$178,916,640	\$187,655,991	\$218,511,312	16.4%
Austria	\$151,225,346	\$186,356,403	\$211,030,107	13.2%
Malaysia	\$139,438,420	\$149,040,528	\$188,744,443	26.6%
Romania	\$141,302,417	\$171,005,277	\$183,439,693	7.3%
Other	\$3,963,122,386	\$4,265,727,650	\$4,829,894,567	13.2%
World	\$17,195,272,723	\$18,268,330,115	\$20,028,789,220	9.6%

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

Top Packaging Machinery Exporters

UDG: 8422.20 to 8422.40, Just Machinery

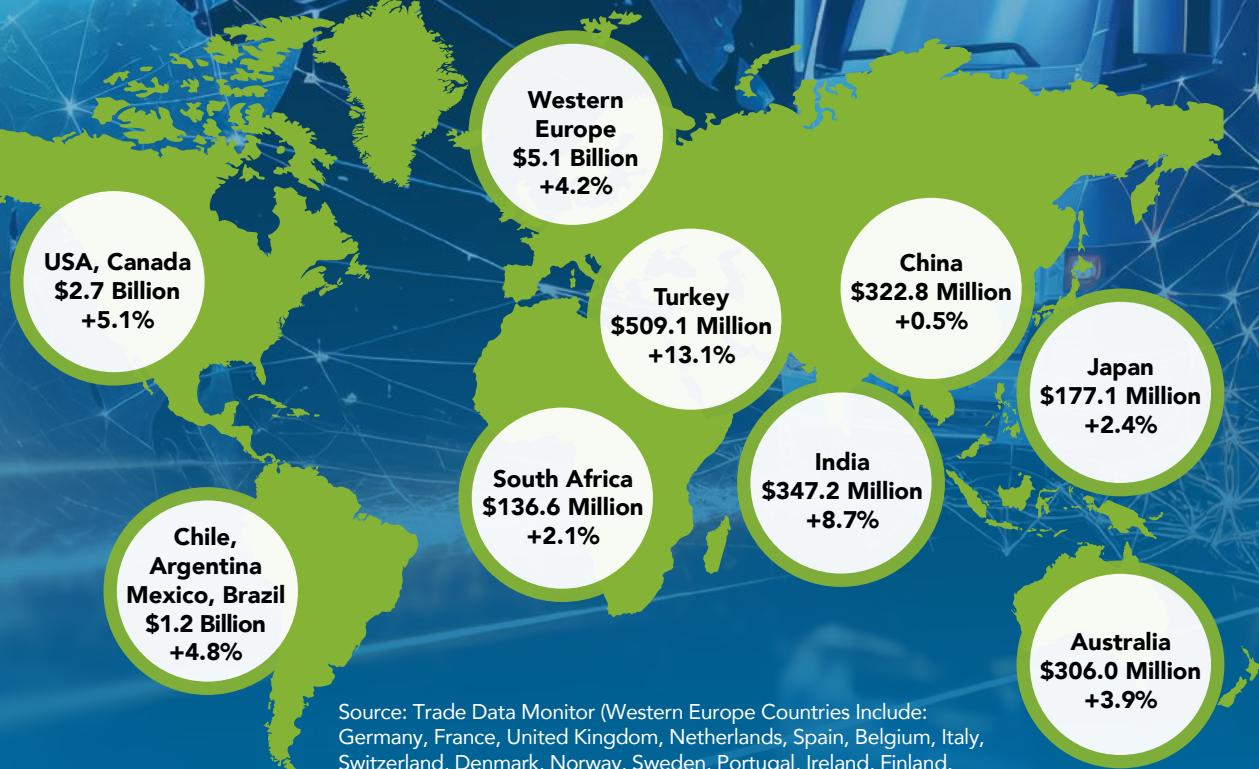
Annual Series: 2023 - 2025

Reporting Country	2023	2024	2025	% Change 2025/2024
Germany	\$5,328,597,329	\$5,892,267,212	\$6,632,124,060	12.6%
Italy	\$5,136,438,134	\$5,295,469,784	\$5,609,417,784	5.9%
China	\$2,341,941,326	\$2,864,007,875	\$3,502,012,062	22.3%
Netherlands	\$956,345,316	\$1,013,919,904	\$1,179,719,766	16.4%
Switzerland	\$782,903,491	\$803,382,179	\$807,587,893	0.5%
Spain	\$687,307,396	\$623,236,434	\$733,878,027	17.8%
Japan	\$582,400,579	\$583,603,699	\$703,675,998	20.6%
United States	\$765,677,774	\$711,382,022	\$689,180,160	-3.1%
France	\$543,362,540	\$691,254,327	\$684,940,401	-0.9%
Canada	\$602,378,414	\$612,650,287	\$549,956,041	-10.2%
Sweden	\$344,701,617	\$306,503,138	\$366,734,958	19.7%
Turkey	\$286,159,925	\$321,165,852	\$357,921,416	11.4%
United Kingdom	\$292,644,033	\$319,520,828	\$341,253,063	6.8%
South Korea	\$231,690,021	\$243,911,152	\$297,611,702	22.0%
Austria	\$235,981,405	\$220,668,171	\$250,027,330	13.3%
Belgium	\$258,137,303	\$279,862,263	\$245,386,908	-12.3%
Taiwan	\$252,055,097	\$233,581,148	\$244,938,790	4.9%
India	\$183,125,393	\$219,771,974	\$234,660,085	6.8%
Denmark	\$217,678,323	\$206,006,440	\$215,968,281	4.8%
Czech Republic	\$152,743,829	\$169,724,056	\$154,600,103	-8.9%
Israel	\$119,295,000	\$138,452,000	\$133,277,000	-3.7%
Poland	\$135,072,609	\$109,558,718	\$130,859,890	19.4%
Slovenia	\$78,143,483	\$92,905,980	\$101,042,297	8.8%
Malaysia	\$95,769,448	\$83,215,281	\$96,248,164	15.7%
Singapore	\$76,283,868	\$64,676,455	\$78,727,181	21.7%
Other	\$1,001,432,634	\$974,759,638	\$928,783,019	-4.7%
World	\$21,688,266,287	\$23,075,456,817	\$25,270,532,379	9.5%

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

Global Processing Machinery Imports by Region

Value of Imports, 2025 with % CAGR 2016-2025



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: 2023 - 2025				
Reporting Country	2023	2024	2025	% Change 2025/2024
United States	\$2,239,063,389	\$2,036,830,859	\$2,081,785,722	2.2%
Germany	\$571,629,113	\$578,286,644	\$747,755,631	29.3%
United Kingdom	\$513,312,830	\$520,484,331	\$665,420,127	27.8%
Spain	\$394,067,118	\$461,653,045	\$633,779,428	37.3%
France	\$549,160,189	\$568,526,502	\$590,252,847	3.8%
Canada	\$589,488,570	\$588,521,576	\$587,235,264	-0.2%
Netherlands	\$455,828,985	\$498,524,086	\$542,706,409	8.9%
Turkey	\$271,232,186	\$440,153,844	\$509,080,681	15.7%
Mexico	\$594,565,221	\$645,386,866	\$520,394,892	-19.4%
Poland	\$336,357,549	\$385,408,992	\$463,533,021	20.3%
Brazil	\$194,491,721	\$266,439,418	\$452,142,231	69.7%
Italy	\$351,674,575	\$323,867,413	\$420,787,264	29.9%
Belgium	\$368,843,715	\$437,799,690	\$395,808,083	-9.6%
India	\$347,724,796	\$395,290,925	\$347,213,831	-12.2%
China	\$330,743,910	\$312,262,467	\$322,830,133	3.4%
Indonesia	\$250,566,226	\$278,759,421	\$316,752,766	13.6%
Australia	\$312,808,624	\$256,148,121	\$306,020,941	19.5%
Saudi Arabia	\$176,918,005	\$273,482,817	\$303,812,353	11.1%
Switzerland	\$264,540,058	\$272,875,624	\$235,808,603	-13.6%
Austria	\$207,403,697	\$212,882,755	\$228,125,064	7.2%
South Korea	\$142,570,680	\$179,080,484	\$222,615,853	24.3%
Denmark	\$183,712,502	\$170,442,143	\$214,268,568	25.7%
Japan	\$157,856,582	\$144,205,386	\$177,143,901	22.8%
Czech Republic	\$108,822,919	\$106,759,874	\$160,543,149	50.4%
Romania	\$152,800,697	\$160,839,579	\$158,321,067	-1.6%
Other	\$3,919,483,969	\$4,139,264,097	\$4,495,758,821	8.6%
World	\$13,985,667,826	\$14,654,176,959	\$16,099,896,650	9.9%

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

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: 2023 - 2025

Reporting Country	2023	2024	2025	% Change 2025/2024
Italy	\$2,554,915,919	\$2,736,131,051	\$3,132,595,931	14.5%
Germany	\$2,859,924,155	\$2,907,061,191	\$2,881,251,498	-0.9%
Netherlands	\$2,220,827,911	\$2,383,527,836	\$2,621,895,309	10.0%
China	\$1,542,147,941	\$1,757,609,145	\$1,927,230,238	9.7%
United States	\$1,195,503,992	\$1,286,701,044	\$1,233,048,170	-4.2%
Denmark	\$658,845,030	\$733,009,258	\$863,765,200	17.8%
France	\$643,952,205	\$670,903,258	\$715,052,495	6.6%
Spain	\$389,974,470	\$459,268,673	\$530,406,513	15.5%
Turkey	\$317,024,457	\$353,922,114	\$430,692,609	21.7%
Switzerland	\$372,616,642	\$376,767,515	\$388,778,275	3.2%
Belgium	\$328,282,479	\$369,675,107	\$356,661,383	-3.5%
Poland	\$294,797,081	\$314,864,847	\$346,389,403	10.0%
Japan	\$257,376,487	\$294,450,028	\$339,575,468	15.3%
United Kingdom	\$278,521,531	\$334,298,135	\$320,065,560	-4.3%
Austria	\$311,871,644	\$337,979,919	\$298,934,702	-11.6%
India	\$203,188,537	\$237,992,437	\$277,408,967	16.6%
Slovakia	\$145,702,515	\$168,082,940	\$233,407,965	38.9%
Canada	\$210,279,600	\$205,825,179	\$201,384,366	-2.2%
Sweden	\$101,621,865	\$106,344,291	\$154,605,773	45.4%
Brazil	\$124,681,442	\$139,181,623	\$151,247,691	8.7%
Czech Republic	\$138,479,508	\$143,918,893	\$149,805,469	4.1%
Taiwan	\$136,308,428	\$122,004,918	\$120,699,965	-1.1%
South Korea	\$97,960,483	\$111,204,987	\$109,185,281	-1.8%
Australia	\$76,312,890	\$73,355,611	\$94,271,416	28.5%
South Africa	\$53,203,263	\$49,944,127	\$70,543,844	41.2%
Other	\$968,709,309	\$899,687,958	\$947,675,893	5.3%
World	\$16,483,029,784	\$17,573,712,085	\$18,896,579,384	7.5%

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

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)



ARGENTINA
pg 20



AUSTRALIA
pg 23



BRAZIL
pg 26



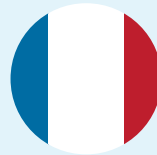
CANADA
pg 29



CHINA
pg 32



COLOMBIA
pg 35



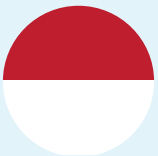
FRANCE
pg 38



GERMANY
pg 41



INDIA
pg 44



INDONESIA
pg 47



ITALY
pg 50



JAPAN
pg 53



MEXICO
pg 56



POLAND
pg 59



SOUTH KOREA
pg 62



SPAIN
pg 65



THAILAND
pg 68



TURKEY
pg 71



UNITED KINGDOM
pg 74



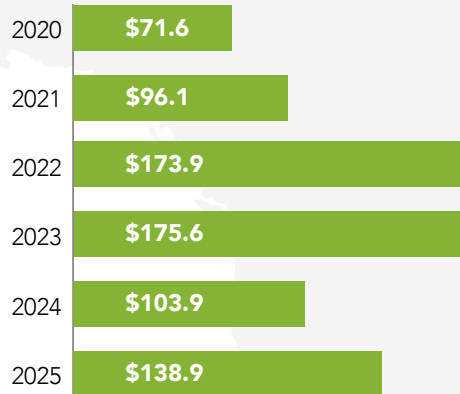
UNITED STATES
pg 77

IMPORT STATISTICS

ARGENTINA

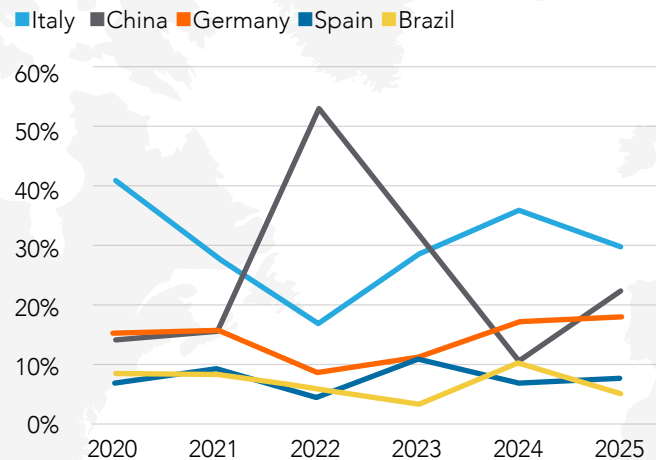


Packaging Machinery Imports (US Millions)



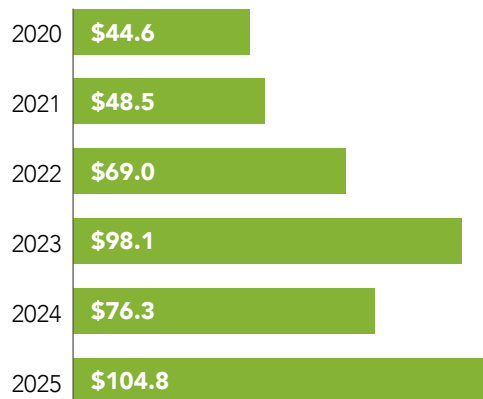
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



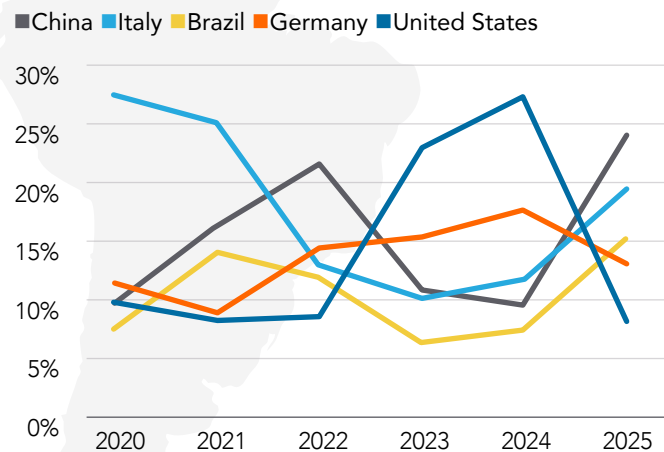
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

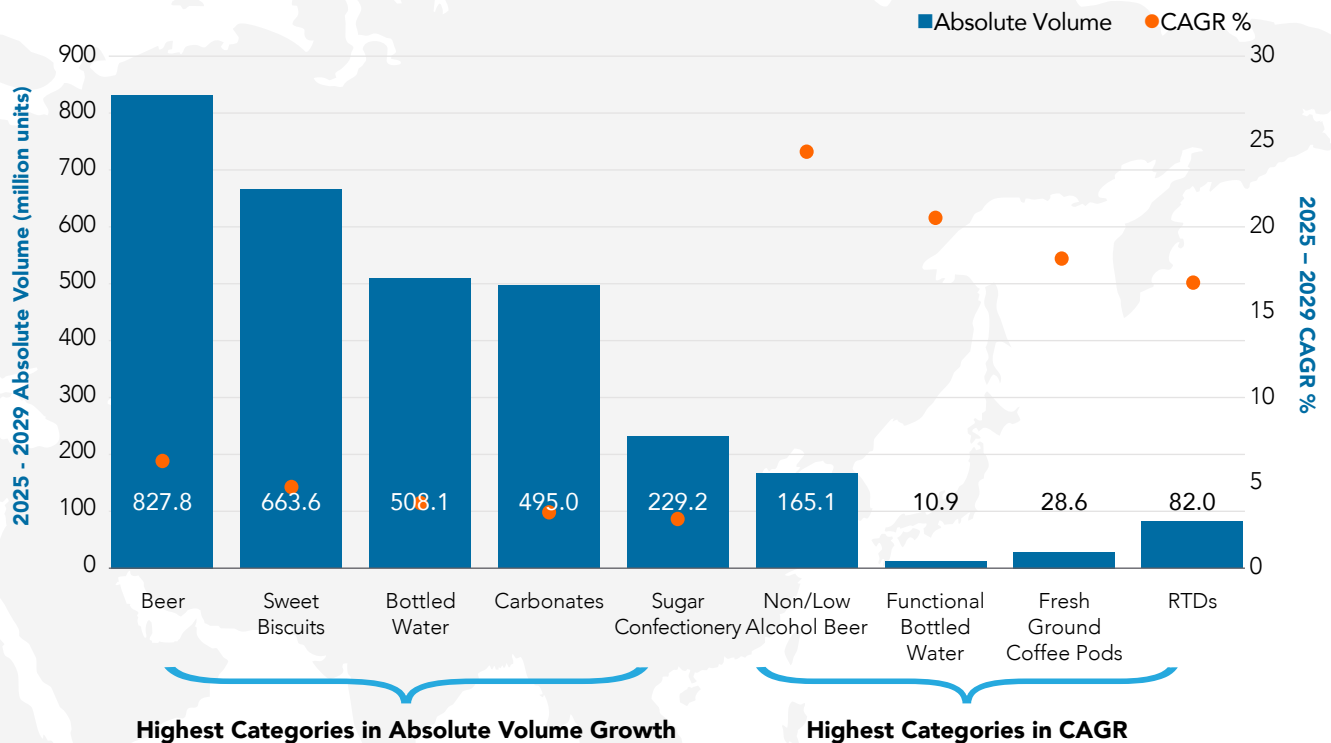
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

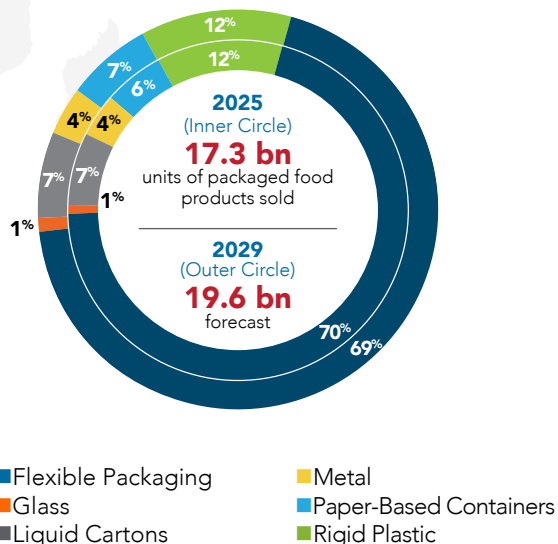
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

ARGENTINA



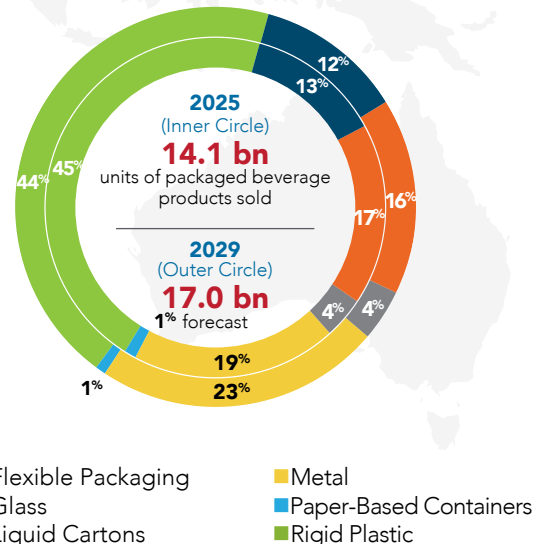
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Argentina



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Argentina



Data Source: © Euromonitor International 2026

TOP COMPANIES | ARGENTINA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	42.5	Coca-Cola Argentina SA	41.5	Others	15.2
Private Label	16.1	Others	15.8	Natura Argentina SA	14.9
Others	11.5	Cervecería y Maltería Quilmes SA	9.9	Unilever de Argentina SA	12.6
Molinos Río de la Plata SA	5.7	El Jumillano SA	5.2	L'Oréal Argentina SA	10.6
Quickfood SA	4.4	Refres Now SA	4.3	Newsan SA	6.3
Frigorífico Paladini SA	3.9	Aguas Danone de Argentina SA	4.1	Colgate-Palmolive Argentina SA	3.9
JBS Argentina SA	2.5	Cimes ChP	2.3	Cosméticos Avon SACI	3.7
Arcor SAIC	1.8	Pritty SA	1.9	Laboratorios Andrómaco SA	3.2
Grupo Bimbo SAB de CV	1.6	Eco de los Andes SA	1.6	Beiersdorf (Argentina) SA	3.1
Rafaela Alimentos SA	1.2	El Carmen SA	1.3	Puig Argentina SA	3.0
Dielo SA, Fantoche	0.9	Mondelez Argentina SA	1.2	Cannon Puntana SA	2.1
La Piamontesa SA	0.7	Red Bull Argentina SRL	1.0	France Argentine Cosmetics SA	1.7
Salto de las Rosas SA	0.7	Cepas Argentinas SA	1.0	Cdimex SA	1.7
Molinos Ala SA	0.7	RPB SA	1.0	Diffupar SA	1.2
Bimbo de Argentina SA	0.6	Carrefour Argentina SA	0.9	Genomma Laboratories Argentina SA	1.1
Dos Hermanos SA	0.5	Kraft Foods Argentina SA	0.8	Dreamco SA	1.1
Mondelez Argentina SA	0.4	Arcor SAIC	0.7	Coty Argentina SA	1.1
Campo Austral SA	0.4	Oeste Embotelladora SA	0.7	Johnson & Johnson de Argentina SAC	1.0
Cía Procesadora de Carnes SA	0.3	Other Private Label	0.7	Other Private Label	1.0
Productos Pozo SA	0.3	Coto CICSA	0.6	Naturel SA	0.9
Cafés La Virginia SA	0.3	Produnoa SA	0.6	GlaxoSmithKline Argentina SA	0.8
Frigorífico Rydhans SA	0.3	Energy Group SRL	0.5	Bic Argentina SA	0.8
Alimentos Granix	0.3	Nutreco Alimentos SA	0.4	Lady Way SRL	0.6
Unilever de Argentina SA	0.2	Fedesur SA	0.3	Matiz SA	0.6
CV Trading SRL	0.2	Dia Argentina SA	0.3	Capilatis SA	0.6

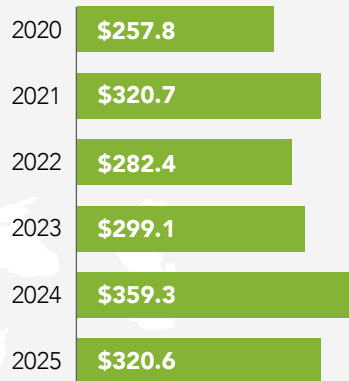
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

AUSTRALIA

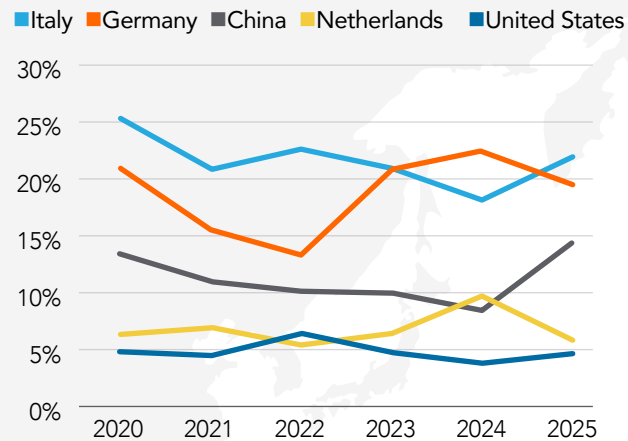


Packaging Machinery Imports (US Millions)



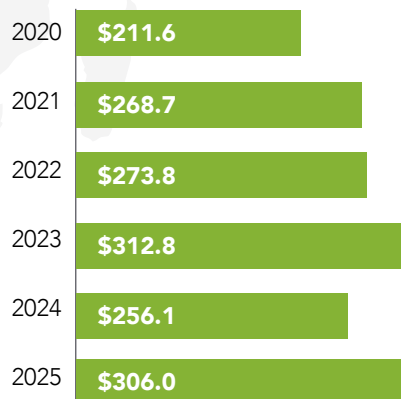
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



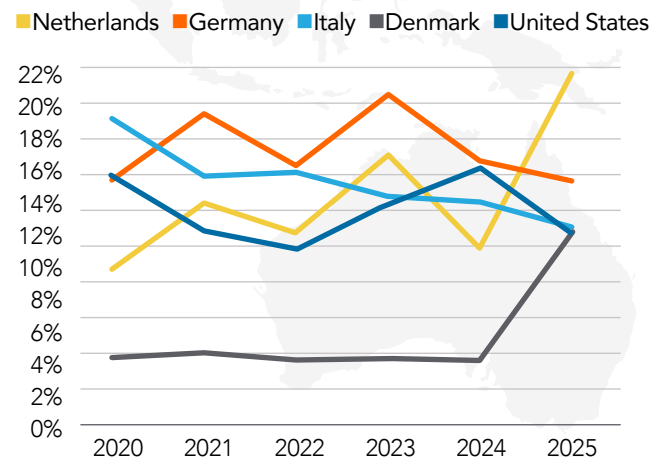
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



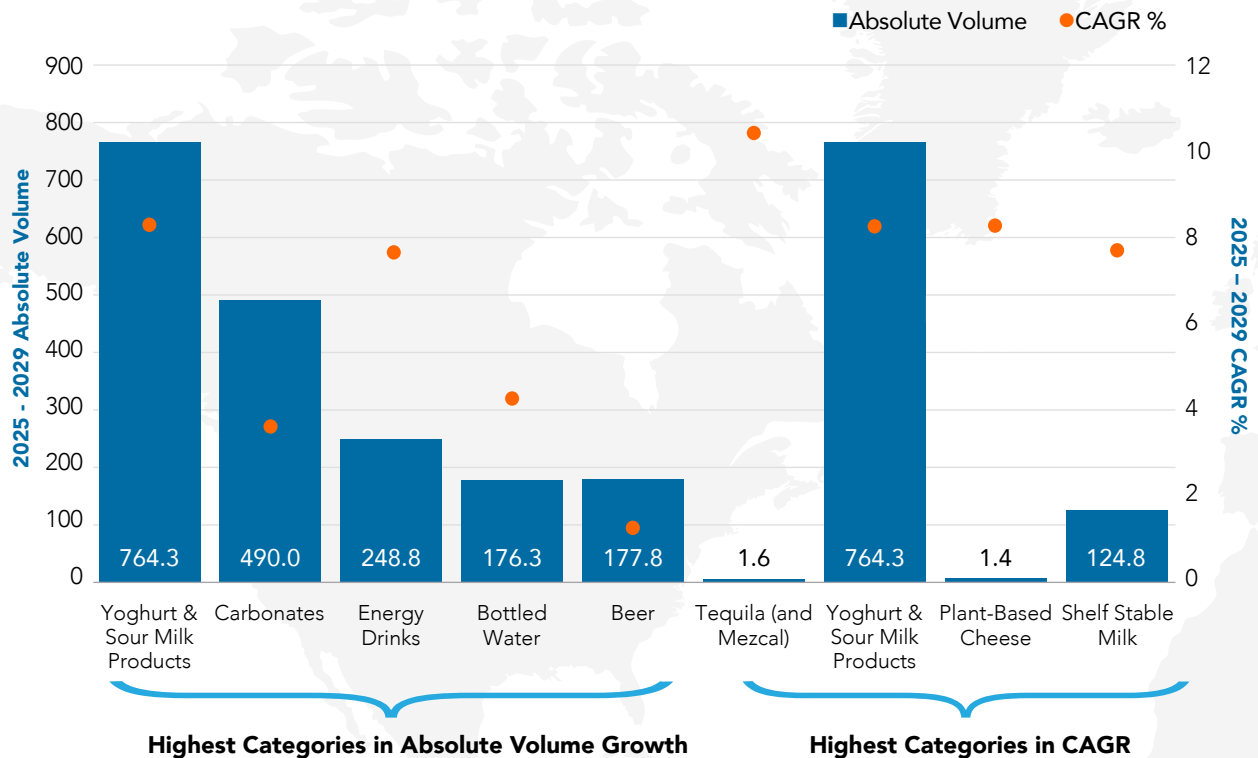
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



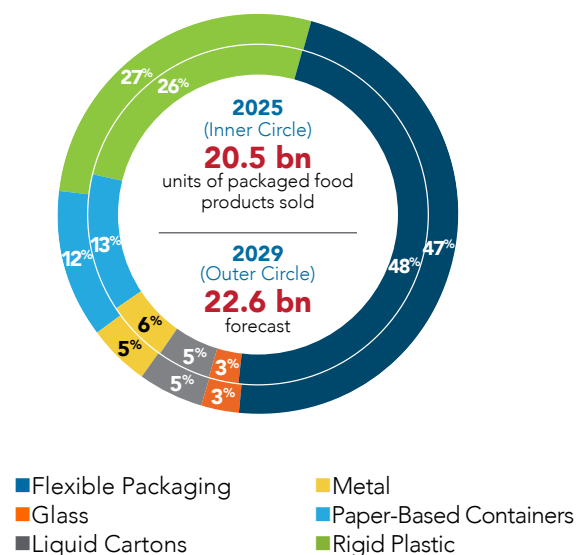
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE AUSTRALIA



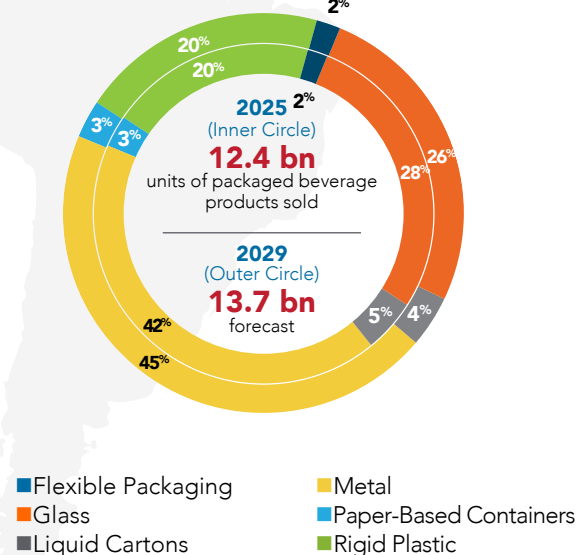
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Australia



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Australia



Data Source: © Euromonitor International 2026

TOP COMPANIES | AUSTRALIA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	25.4	Coca-Cola Europacific Partners plc	26.8	Others	33.1
Aldi Stores Supermarkets Pty Ltd	10.3	Others	16.5	L'Oréal Australia Pty Ltd	14.9
Woolworths Group Ltd	6.9	Schweppes Australia Pty Ltd	16.3	Procter & Gamble Australia Pty Ltd	5.0
Coles Group Ltd	6.5	Frucor Suntory Australia Pty Ltd	7.7	Unilever Australia Ltd	4.9
Simplot Australia Pty Ltd	6.0	Private Label	7.0	Estée Lauder Pty Ltd	4.2
Others	6.0	Red Bull Australia Pty Ltd	4.2	Colgate-Palmolive Pty Ltd	3.8
George Weston Foods Ltd	4.8	Bega Cheese Ltd	3.2	Coty Australia Pty Ltd	2.5
Goodman Fielder Ltd	4.0	Monde Nissin (Australia) Pty Ltd	2.8	McPherson's Consumer Products Pty Ltd	2.3
Kellogg (Australia) Pty Ltd	2.4	Heinz Co Australia Ltd, HJ	2.0	Beiersdorf Australia Ltd	2.2
Nestlé Australia Ltd	2.2	Bundaberg Brewed Drinks Pty Ltd	1.5	Johnson & Johnson Pacific Pty Ltd	2.2
P&M Quality Smallgoods Pty Ltd	2.2	Southtrade International Pty Ltd	1.1	Revlon Australia Pty Ltd	1.9
McCain Foods (Aust) Pty Ltd	1.8	Bickford's Australia Pty Ltd	1.1	Clarins Australia Pty Ltd	1.2
Rice Growers Ltd	1.6	Made (Aust) Pty Ltd	1.1	Chanel Australia Pty Ltd	1.2
Ingham Enterprises Pty Ltd	1.6	San Pellegrino SpA	1.0	Edgewell Personal Care Australia Pty Ltd	1.1
Heinz Co Australia Ltd, HJ	1.5	Food Revolution Group Ltd, The	1.0	Deciem Australia Pty Ltd	0.9
San Remo Macaroni Co Pty Ltd	1.4	Refresco Australia Pty Ltd	0.9	Henkel Australia Pty Ltd	0.9
Sanitarium Health Food Co, The	1.2	SodaStream Australia Pty Ltd	0.7	Aesop Retail Pty Ltd	0.9
SPC Ardmona Ltd	1.2	Remedy Drinks Ltd	0.7	Body Shop Pty Ltd, The	0.8
Valcorp Fine Foods Pty Ltd	0.9	Nexba Beverages Pty Ltd	0.7	GlaxoSmithKline Australia Pty Ltd	0.7
Oriental Merchant Pty Ltd	0.9	Brownes Foods Operations Pty Ltd	0.3	Pharmacare Laboratories Pty Ltd	0.7
General Mills Australia Pty Ltd	0.9	Fresh Local Pty Ltd	0.3	Church & Dwight (Australia) Pty Ltd	0.7
Mission Pty Ltd	0.8	Soulfresh Global Pty Ltd	0.3	Nude by Nature Sales Pty Ltd	0.6
Tassal Group Ltd	0.8	Grove Fruit Juices Pty Ltd	0.3	Parfums Christian Dior	0.6
D'Orsogna Ltd	0.6	Campbell's Co, The	0.3	Puig SL	0.5
Green's General Foods Pty Ltd	0.5	Nestlé Australia Ltd	0.2	Kimberly-Clark Australia Pty Ltd	0.5

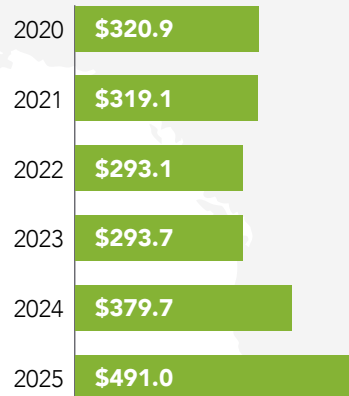
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

BRAZIL

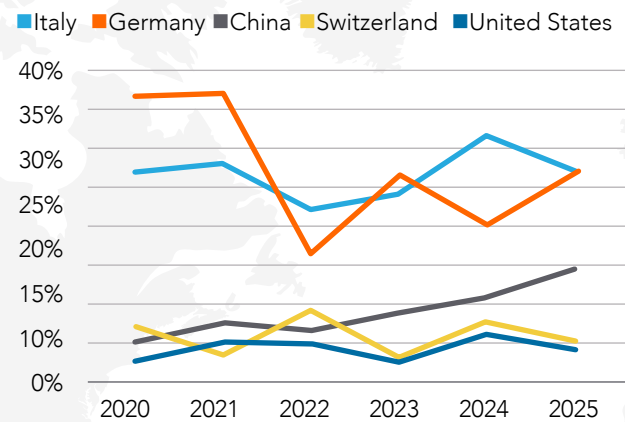


Packaging Machinery Imports (US Millions)



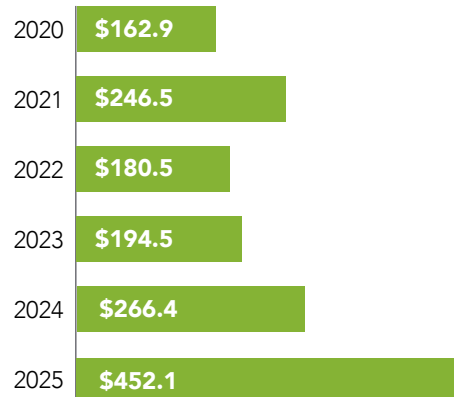
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



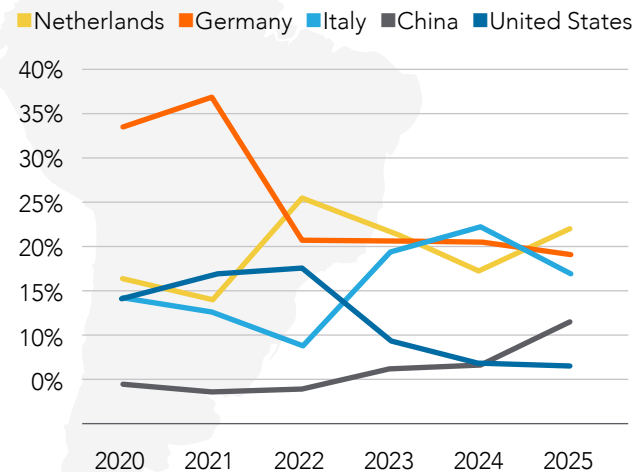
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



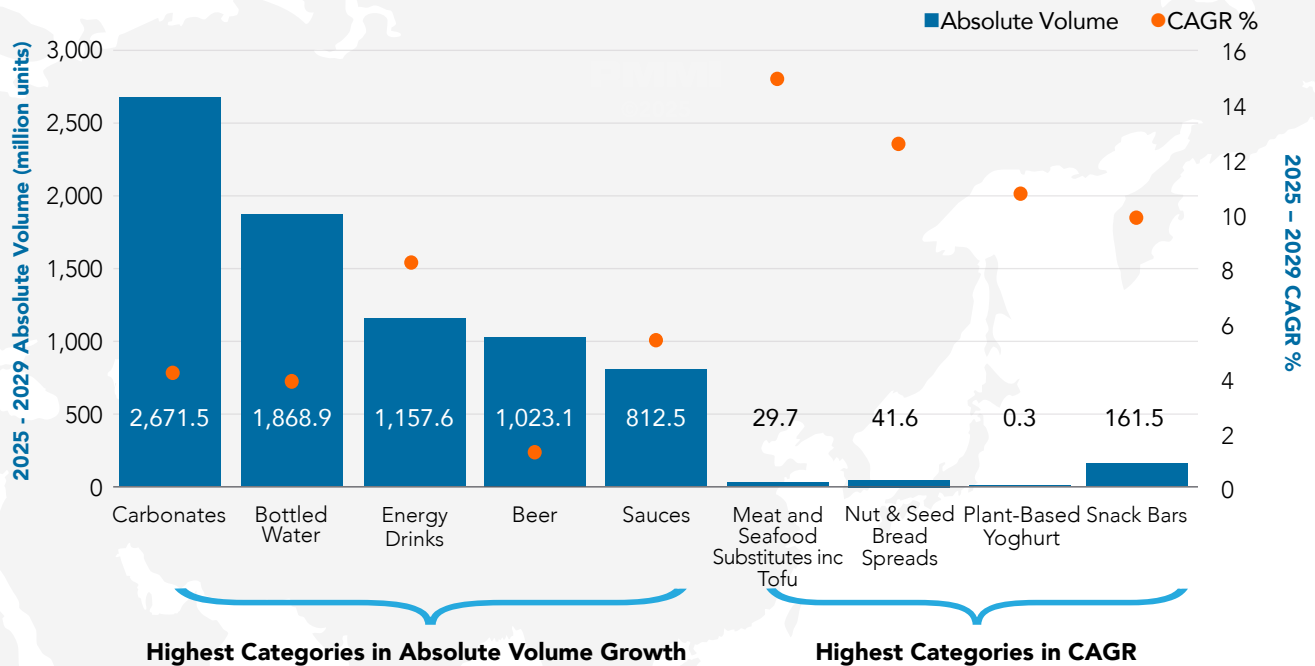
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



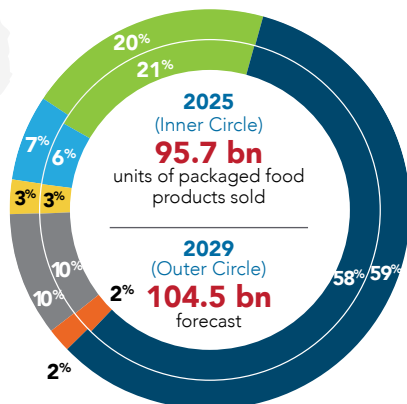
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE BRAZIL



Data Source: © Euromonitor International 2026

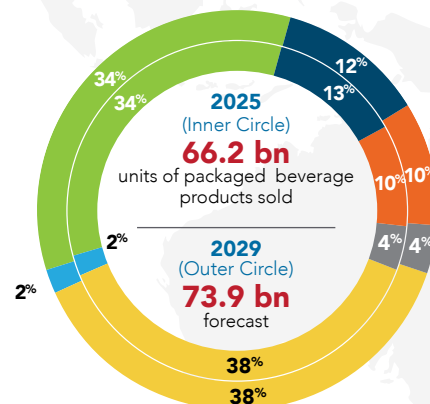
Volume Share of Food Packaging in Brazil



Flexible Packaging
Glass
Liquid Cartons
Metal
Paper-Based Containers
Rigid Plastic

Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Brazil



Flexible Packaging
Glass
Liquid Cartons
Metal
Paper-Based Containers
Rigid Plastic

Data Source: © Euromonitor International 2026

TOP COMPANIES | BRAZIL

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	52.5	Coca-Cola Indústrias Ltda	33.2	Others	16.4
Others	16.4	Others	33.2	Botica Comercial Farmacêutica Ltda	15.2
Camil Alimentos SA	3.5	Cia Brasileira de Bebidas	7.6	Natura Cosméticos SA	13.7
BRF SA	3.2	Red Bull do Brasil Ltda	3.7	Unilever Brasil Ltda	10.0
Nissin Foods do Brasil Ltda	2.1	Sucos Del Valle do Brasil Ltda	3.7	Procosa Produtos de Beleza Ltda	6.1
Bimbo Brasil Ltda	2.1	Mondelez Brasil Ltda	2.3	Colgate-Palmolive Indústria e Comércio Ltda	5.8
Pastificio Selmi SA	1.7	Natural One SA	2.1	Procter & Gamble do Brasil SA	5.5
Josapar-Joaquim Oliveira SA Participações	1.7	Heineken do Brasil Comercial Ltda	1.8	BDF Nivea Ltda	3.3
WickBold & Nosso Pão Indústrias Alimentícias Ltda	1.4	Indaiá Brasil Águas Minerais Ltda	1.5	Johnson & Johnson do Brasil Indústria e Comércio de Produtos para Saúde Ltda	2.7
Pirahy Alimentos Ltda	1.4	Empresa Brasileira de Bebidas e Alimentos SA	1.2	Coty Brasil Indústria e Comércio de Cosméticos Ltda	2.5
Heinz Brasil Ltda	1.3	Bebidas Grassi Do Brasil Ltda	1.1	Avon Cosméticos Ltda	2.0
Lua Nova Indústria Comércio Produtos Alimentícios Ltda	1.2	Tampico Beverages Inc	1.0	Devintex Cosmeticos Ltda	1.3
JBS SA	1.1	C L Pratinha-Eireli-ME	0.7	Phitoteraphia Biofitogenia Laboratorial Biota Ltda	1.1
Gomes da Costa Alimentos SA	1.1	Ajinomoto Interamericana Indústria e Comércio Ltda	0.7	Puig Brasil Comercializadora de Perfumes S/A	1.0
Pandurata Alimentos Ltda	1.0	Minalba Alimentos e Bebidas Ltda	0.7	Niely do Brasil Industrial Ltda	1.0
M Dias Branco SA Indústria & Comércio de Alimentos	0.9	Leão Júnior SA	0.6	Mary Kay do Brasil Ltda	1.0
Cia Brasileira de Distribuição SA	0.9	Wow Indústria e Comércio Ltda	0.5	Wella Brasil Ltda	0.8
J Macêdo SA	0.7	Amacoco Água de Côco da Amazônia Ltda	0.4	Flora Produtos de Higiene e Limpeza SA	0.7
Carrefour Comércio e Indústria Ltda	0.6	Ducoco Alimentos SA	0.4	GlaxoSmithKline Brasil Ltda	0.7
Cotrisel - Cooperativa Tríticola Sepeense Ltda	0.6	Sococo SA Indústrias Alimentícias	0.4	Casa Granado Laboratórios, Farmácias e Drogarias SA	0.6
Other Private Label	0.6	Minalba Brasil	0.4	LVMH Perfums & Cosmetics do Brasil Ltda	0.6
Angelo Auricchio & Cia Ltda	0.5	Viton 44 Indústria, Comércio e Exportação de Alimentos Ltda	0.3	Jequiti Cosméticos	0.5
Laticínios Condessa Ltda	0.5	Incrível Comércio de Bebidas e Alimentos Ltda	0.3	Kimberly-Clark Brasil Indústria e Comércio de Produtos de Higiene Ltda	0.4
PepsiCo do Brasil Ltda	0.4	3 Corações SA	0.3	Estée Lauder Brasil	0.4
Nestlé Brasil Ltda	0.3	General Brands do Brasil Indústria e Comércio Ltda	0.3	Skala Cosmeticos SA	0.4

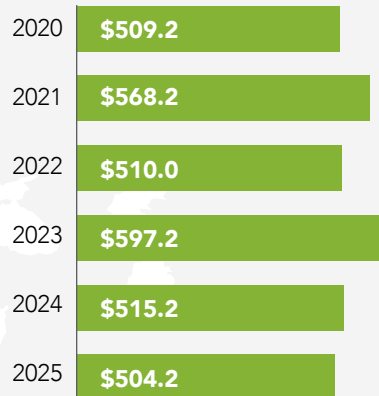
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

CANADA

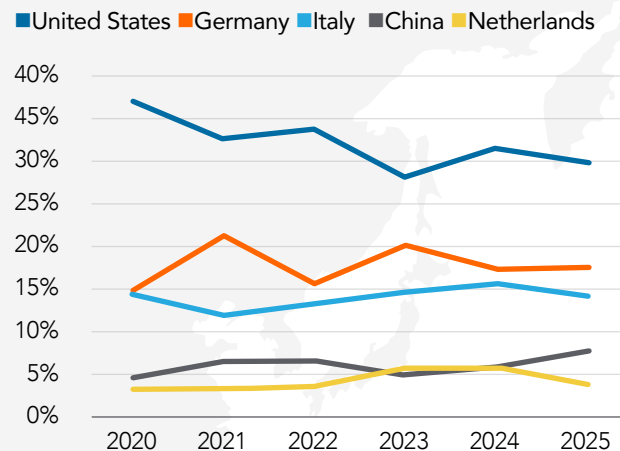


Packaging Machinery Imports (US Millions)



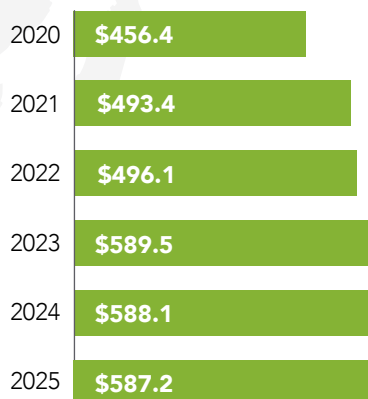
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



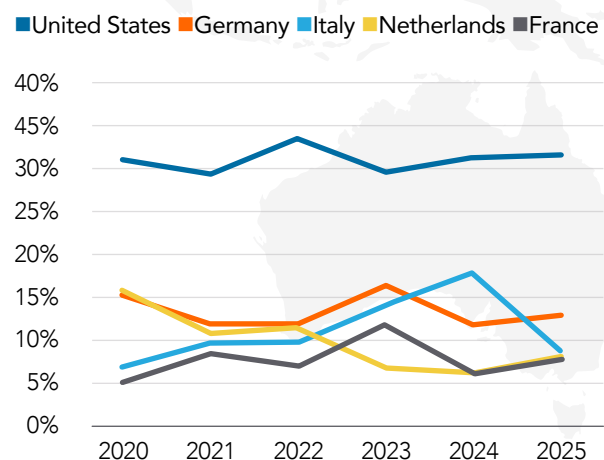
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



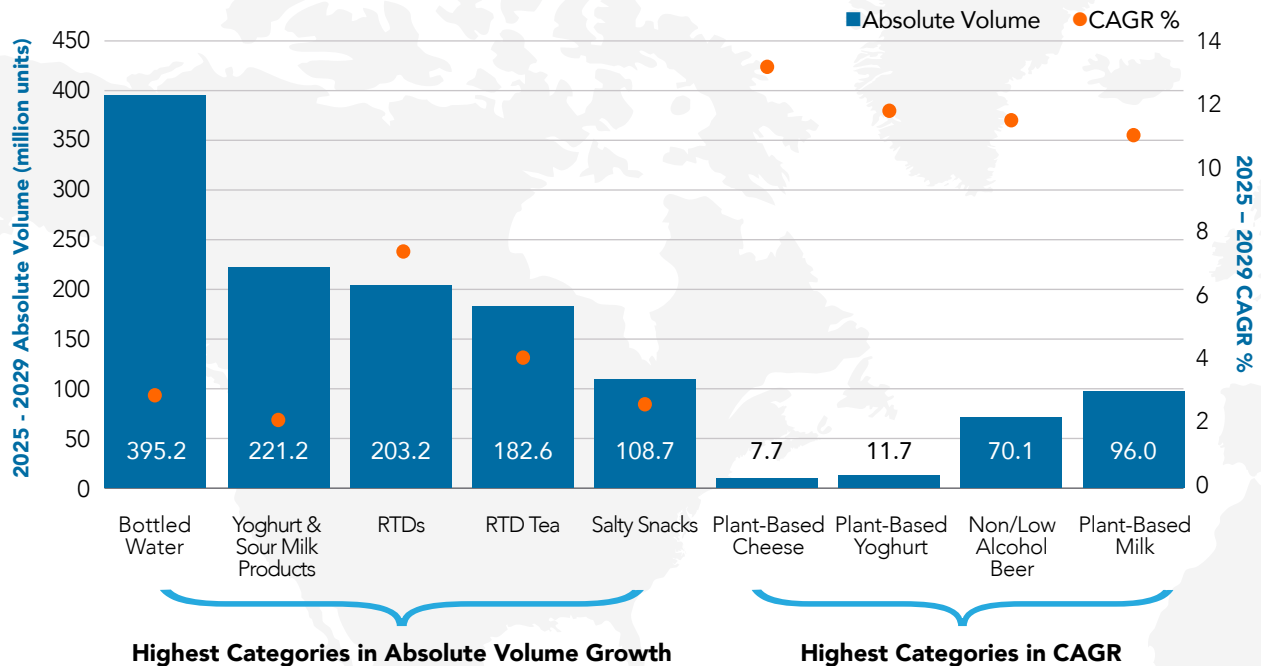
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



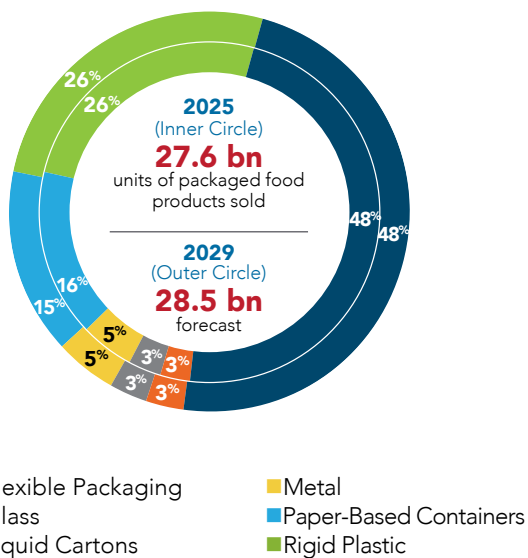
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE CANADA



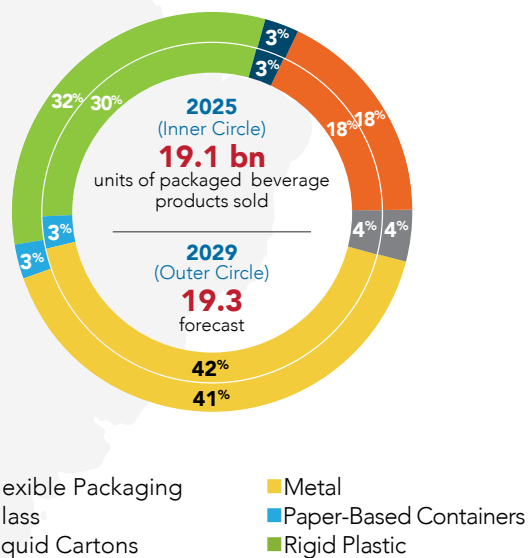
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Canada



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Canada



Data Source: © Euromonitor International 2026

TOP COMPANIES | CANADA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Others	21.6	PepsiCo Beverages Canada	20.9	Others	20.3
Artisanal	13.8	Others	13.5	L'Oréal Canada Inc	17.2
Loblaw Cos Ltd	8.5	Coca-Cola Ltd	13.4	Procter & Gamble Inc	13.8
Canada Bread Co	4.7	Canada Dry Motts Inc	10.0	Coty (Canada) Inc	4.9
Schneider Corp	4.6	A Lassonde Inc	5.8	Johnson & Johnson (Canada) Inc	4.5
Other Private Label	4.4	BlueTriton Brands Inc	5.3	Estée Lauder Cosmetics (Canada) Ltd	4.3
FGF Brands Inc	4.3	Loblaw Cos Ltd	4.4	Unilever Canada Inc	3.8
Maple Leaf Foods Inc	4.1	Minute Maid Co of Canada	4.4	Colgate-Palmolive Canada Inc	3.1
Sobeys Inc	3.7	Other Private Label	3.7	Beiersdorf Canada Inc	1.8
General Mills Canada Corp	2.4	Red Bull Canada Ltd	2.6	GlaxoSmithKline Consumer Healthcare Canada Inc	1.4
WK Kellogg Canada Corp	2.3	Nestlé Canada Inc	2.3	Alberto-Culver Canada Inc	1.3
Olymel SEC/LP	2.1	Sun-Rype Products Ltd	1.8	Clarins Canada Inc	1.3
Bonduelle Canada Inc	1.9	Sobeys Inc	1.3	Chanel Inc	1.2
Catelli Foods Corp	1.8	Snapple Beverage Corp	1.2	Wella Beauty Canada ULC	1.1
Maple Lodge Farms Ltd	1.6	Ocean Spray Cranberries Inc	1.2	Groupe Marcelle	1.1
McCain Foods Ltd	1.5	Naya Waters Inc	1.0	Limited Brands Canada	1.0
High Liner Foods Inc	1.3	Kraft Heinz Canada ULC	1.0	Puig Canada Inc	0.9
PepsiCo Beverages Canada	1.2	Campbell's Co, The	0.9	Deciem Inc	0.9
Clover Leaf Seafoods Inc	1.1	Saputo Inc	0.5	Edgewell Personal Care Brands LLC	0.8
Vachon Bakery Inc	1.1	A&W Food Services of Canada Inc	0.5	Other Private Label	0.8
Canadian Fishing Co Ltd	1.0	Eaux Vives Water Inc	0.5	Revlon Canada Inc	0.7
Mars Canada Inc	0.9	Beverage World Inc	0.4	Kao Brands Canada Inc	0.7
Kellanova Canada Inc	0.6	North American Coffee Partnership, The	0.4	Yves Rocher Inc	0.6
Europe's Best Inc	0.6	Tonica Beverages Ltd	0.4	Church & Dwight Ltd	0.6
Metro Inc	0.6	LaCroix Beverages Inc	0.3	Mary Kay Canada Inc	0.5

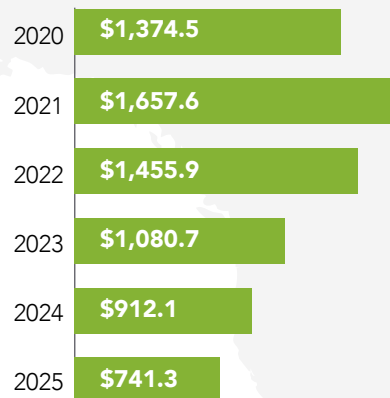
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

CHINA

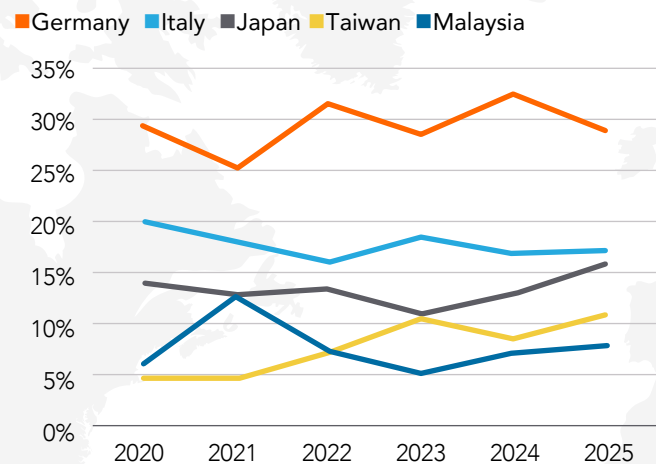


Packaging Machinery Imports (US Millions)



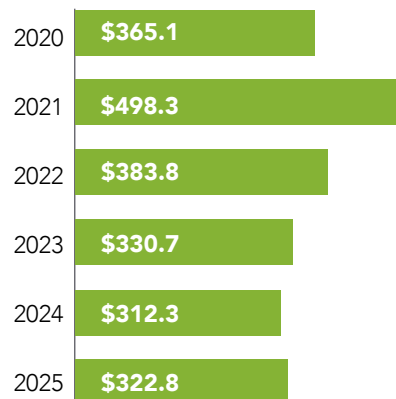
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



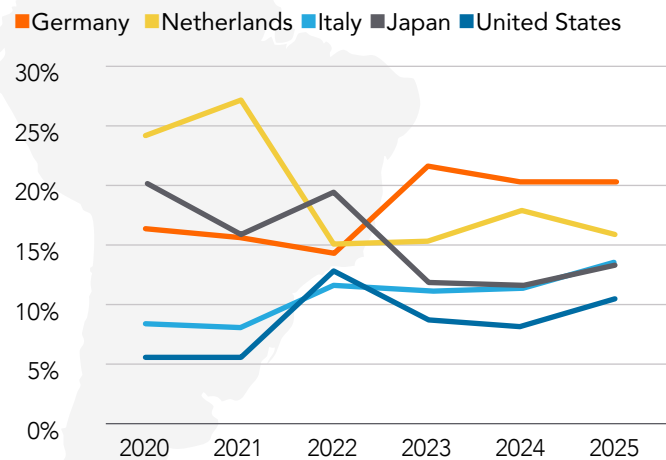
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



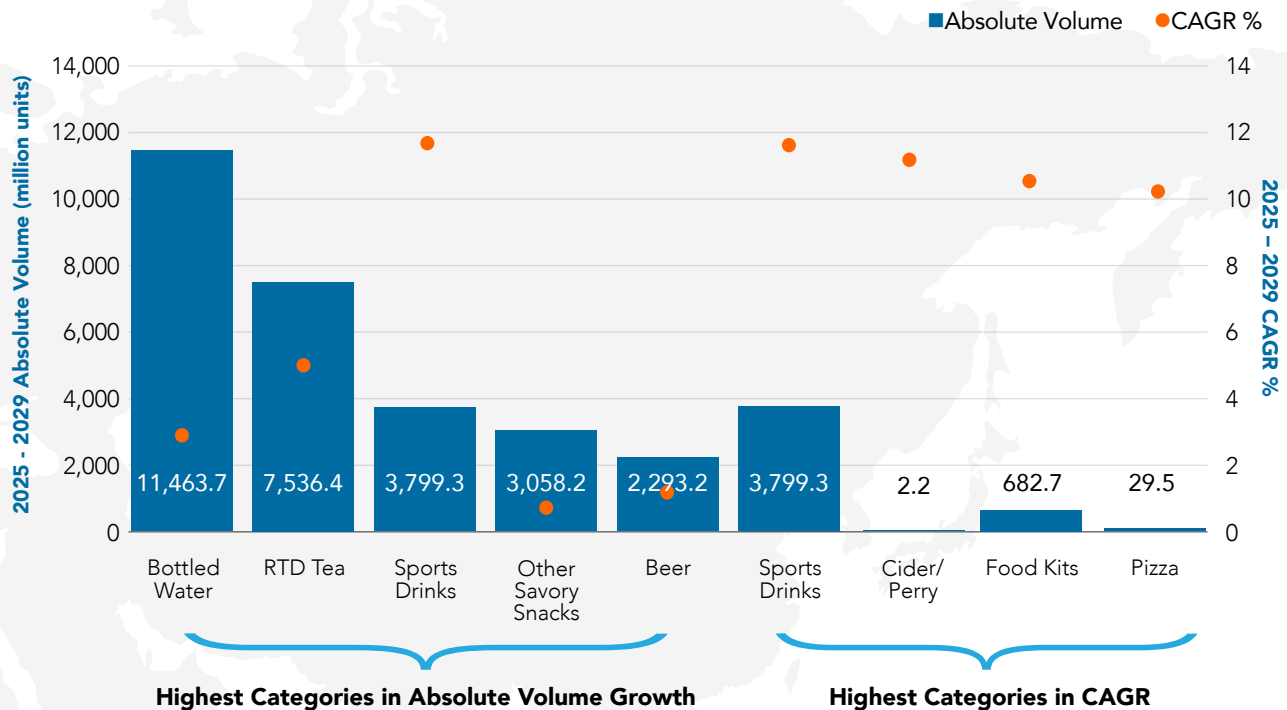
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



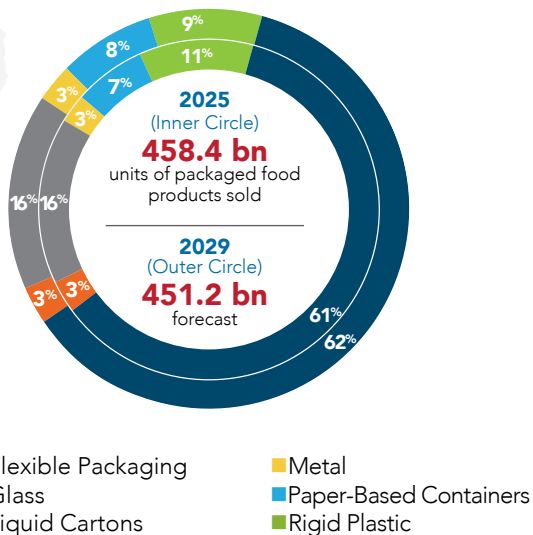
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE CHINA



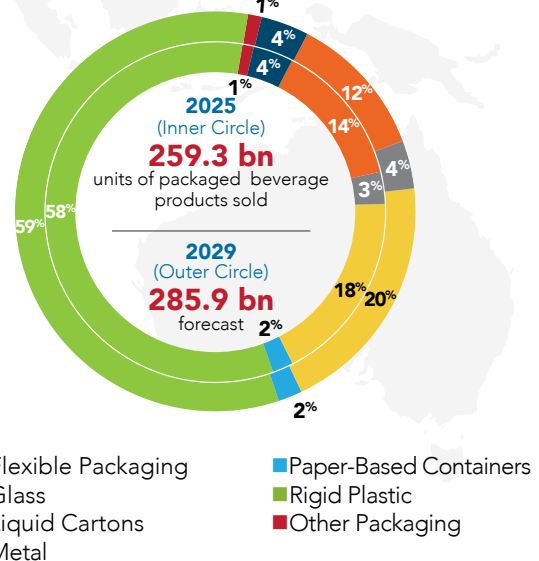
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in China



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in China



Data Source: © Euromonitor International 2026

TOP COMPANIES | CHINA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Others	44.1	Others	31.7	Others	21.3
Artisanal	16.1	Nongfu Spring Co Ltd	9.7	L'Oréal (China) Co Ltd	14.3
Private Label	8.1	Tingyi (Cayman Islands) Holdings Corp	9.6	Procter & Gamble (Guangzhou) Ltd	7.3
Tingyi (Cayman Islands) Holdings Corp	5.0	Coca-Cola China Ltd	7.8	Estée Lauder (Shanghai) Commercial Co Ltd	5.3
WH Group	3.1	Shenzhen Eastroc Beverage Co Ltd	4.4	Shiseido China Co Ltd	2.6
Yihai Kerry Oils & Grains (China) Co Ltd	2.7	Hangzhou Wahaha Group Co Ltd	4.3	Proya Cosmetics Co Ltd	2.5
China National Cereals, Oils & Foodstuffs Imp & Exp Corp (COFCO)	2.2	President Enterprises (China) Investment Co Ltd	4.2	LVMH Moët Hennessy Louis Vuitton SA	2.1
Uni-President China Holdings Ltd	1.8	Red Bull Vitamin Drink Co Ltd	3.6	Unilever China Ltd	2.0
Baixiang Food Group	1.6	Guangdong Jiaduobao Beverage & Food Co Ltd	2.8	Shanghai Pehchaolin Daily Chemical Co Ltd	1.7
Jinmailang Food Co Ltd	1.4	Shenzhen Ganten Industry Co Ltd	2.7	Jala (Group) Co Ltd	1.7
People's Food Holdings Ltd	1.4	China Resources C'estbon Beverage (China) Co Ltd	2.5	Shanghai Chicmax Cosmetics Co Ltd	1.7
China Resources Ng Fung Limited	1.3	Guangzhou Wanglaoji Pharmaceutical Co Ltd	1.8	Kunming Botanee Bio Tech Co Ltd	1.4
Shenyang Toly Bread Co Ltd	0.9	Chi Forest (Beijing) Food Technology Group Co Ltd	1.8	Yunnan Baiyao Group Co Ltd	1.3
Fujian Dali Food Co Ltd	0.7	Danone (China) Food & Beverage Co Ltd	1.3	Giant Biogene Holding Co Ltd	1.0
Fujian Anjoy Food Co Ltd	0.6	Beijing Huiyuan Beverage & Food Group Corp	1.2	Guangdong Marubi Biotechnology Co Ltd	0.9
Shiyue Daotian Group Co Ltd	0.6	Beijing Genki Forest Beverage Co Ltd	0.9	Henkel (China) Co Ltd	0.9
Shanghai Lehui Rice Industry Co Ltd	0.5	Jinmailang Food Co Ltd	0.8	Mao Geping Cosmetics Co Ltd	0.9
Fujian Changting Panpan Foodstuff Co Ltd	0.4	Fujian Dali Food Co Ltd	0.6	Hawley & Hazel Chemical (Zhongshou) Co Ltd	0.9
Guilin Seamild Foods Co Ltd	0.4	Shenzhen Pusheng Food Sales Co Ltd	0.6	Shanghai Jahwa United Co Ltd	0.8
Nissin Foods Co Ltd	0.4	Nestlé (China) Ltd	0.6	Colgate (Guangzhou) Co Ltd	0.8
Sam Yang Foods Co Ltd	0.4	Suntory (China) Holding Co Ltd	0.6	Beijing Dr Plant Biotechnology Co Ltd	0.7
Shenyang Nong Shim Foods Co Ltd	0.3	Vitasoy International Holdings Ltd	0.5	Chanel (China) Trading Co Ltd	0.7
Orion (China) Co Ltd	0.3	Henan Zhongwo Beverage Co Ltd	0.5	L'Occitane International SA	0.7
Shandong Zhucheng Foreign Trade Group Co Ltd	0.3	Jiaozuo Mingren Natural Medicine Co Ltd	0.5	LG H&H Co Ltd	0.7
Kemen Noodle Mfg Co Ltd	0.3	General Beverage Co Ltd	0.4	Guangzhou Weimeizi Personal Care Co Ltd	0.7

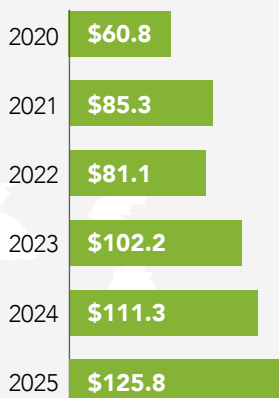
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

COLOMBIA

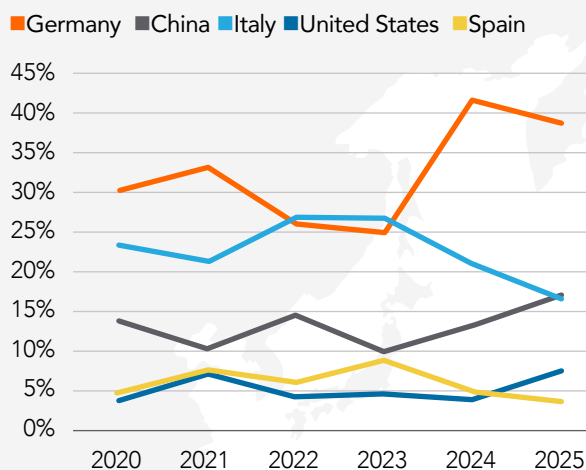


Packaging Machinery Imports (US Millions)



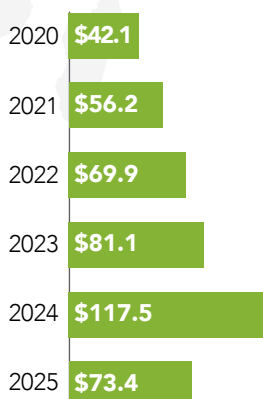
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



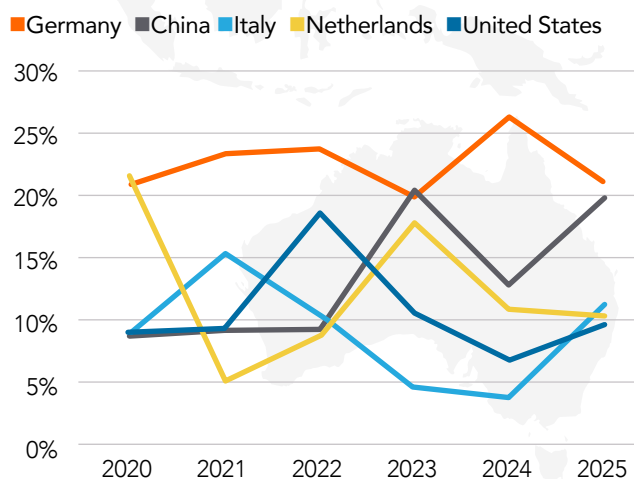
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

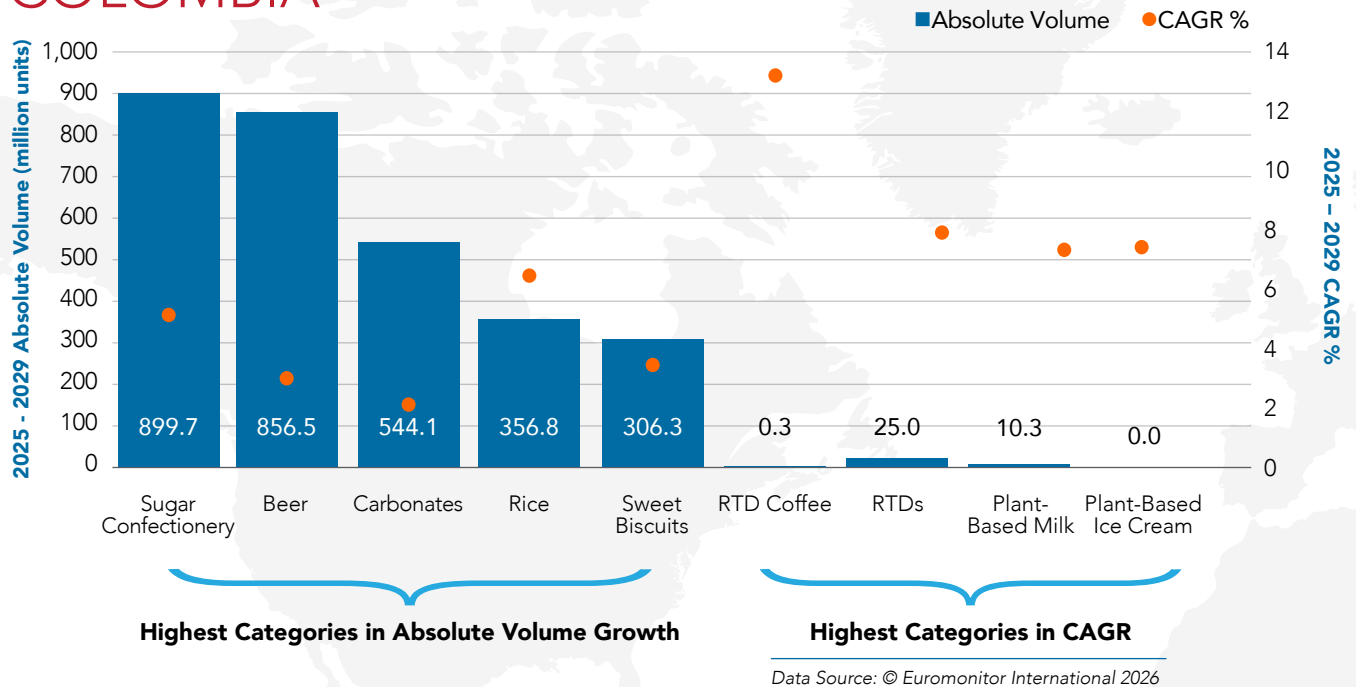
IMPORT MARKET SHARE BY COUNTRY



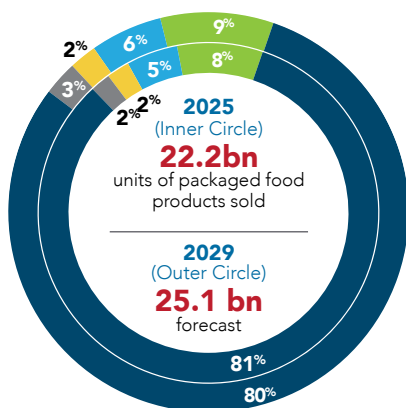
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

COLOMBIA



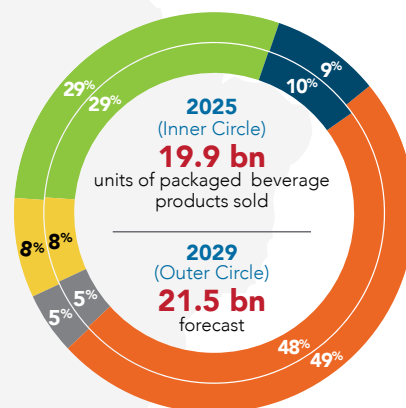
Volume Share of Food Packaging in Colombia



Flexible Packaging
Liquid Cartons
Metal
Paper-Based Containers
Rigid Plastic

Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Colombia



Flexible Packaging
Glass
Liquid Cartons
Metal
Rigid Plastic

Data Source: © Euromonitor International 2026

TOP COMPANIES | COLOMBIA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	20.7	Postobón SA	40.5	Others	10.4
Private Label	19.6	Fomento Económico Mexicano SAB de CV	27.8	Belstar SA	9.4
Others	9.8	Others	7.7	Colgate-Palmolive & Cia	8.5
Industrias de Alimentos Zenú SA	6.8	Bavaria SA	6.4	Other Private Label	7.3
Bimbo de Colombia SA	6.5	Ajecolombia SA	4.5	Natura Cosméticos Ltda	6.8
Diana Corporación SAS	5.5	Quala SA	4.0	Unilever Andina Colombia SA	6.3
Productos Ramo SA	4.7	Pisa Farmacéutica de Colombia SA	3.4	L'Oréal PROBECOL SA	5.5
ORF SA	4.6	Other Private Label	1.7	Yanbal de Colombia SA	5.2
Alimentos Cárnicos SA	3.0	Alpina Productos Alimenticios SA	0.9	Procter & Gamble de Colombia SA	5.0
Productos Alimenticios Doria SA	2.5	Conservas California SA	0.7	Beiersdorf (Colombia) SA	2.6
Congelagro McCain Colombia SA	1.7	Monster Energy Colombia SAS	0.7	Prebel SA	2.3
Seatech International Inc	1.7	Red Bull Colombia SAS	0.6	Avon Colombia Ltda	2.0
Harinera del Valle SA	1.5	Central Cervecera de Colombia SAS	0.4	Johnson & Johnson de Colombia SA	1.9
Agroindustrial Molino Sonora AP SAS	1.2	Various franchisees	0.3	Henkel Colombiana SA	1.8
Inversiones Arroz Caribe SA	1.0	Productos Naturales de la Sabana SA	0.1	Belleza Express SA	1.3
Uniarroz SA	0.9	Levapan SA	0.1	Laboratorios de Cosméticos Vogue SA	1.3
Distriaves SA	0.8			Laboratorios Recamier Ltda	1.1
Comapán SA	0.8			Quala SA	1.1
Kellogg de Colombia SA	0.6			Isdin Colombia SAS	1.1
Sary SAS	0.6			Milagros Enterprise Group SAS	1.0
Quala SA	0.5			Genomma Lab Colombia Ltda	1.0
Ajinomoto del Perú SA (Sucursal Colombia)	0.5			Tecnoquímicas SA	1.0
Industrias Santa Clara SA	0.5			Puig Colombia SAS	0.9
Levapan SA	0.4			Mary Kay Colombia SAS	0.8
Don Maíz SA	0.4			Productos Familia Sancela SA	0.8

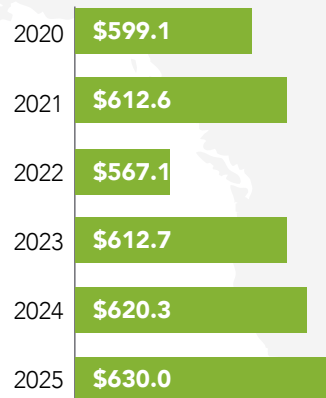
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

FRANCE

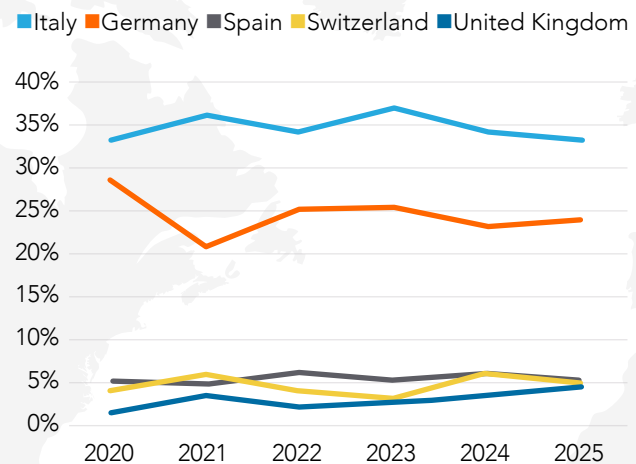


Packaging Machinery Imports (US Millions)



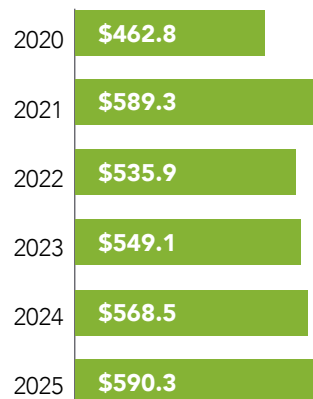
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



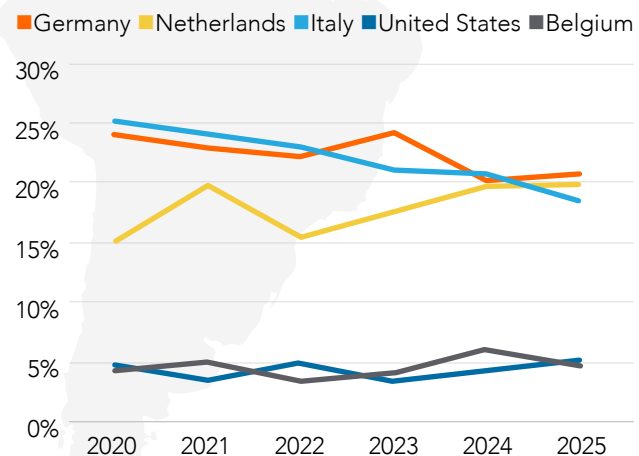
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



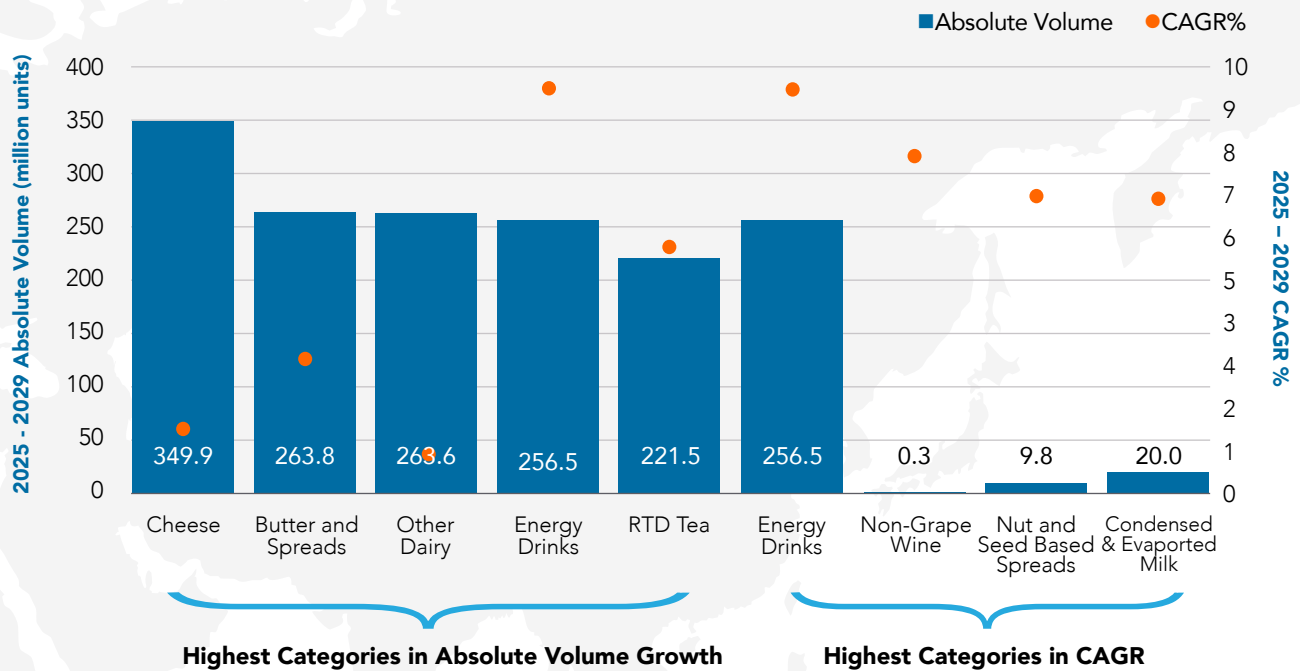
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



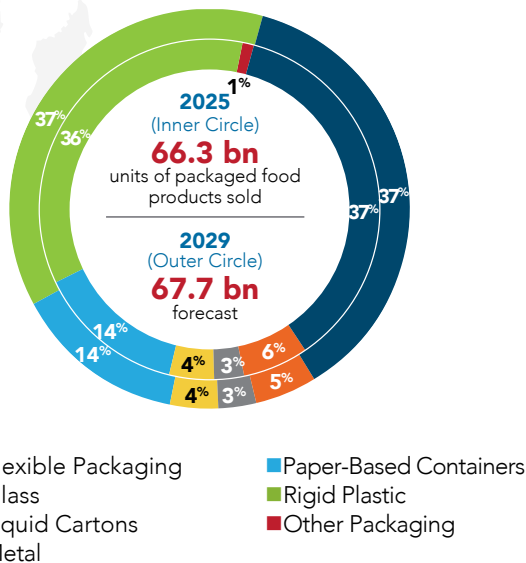
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE FRANCE



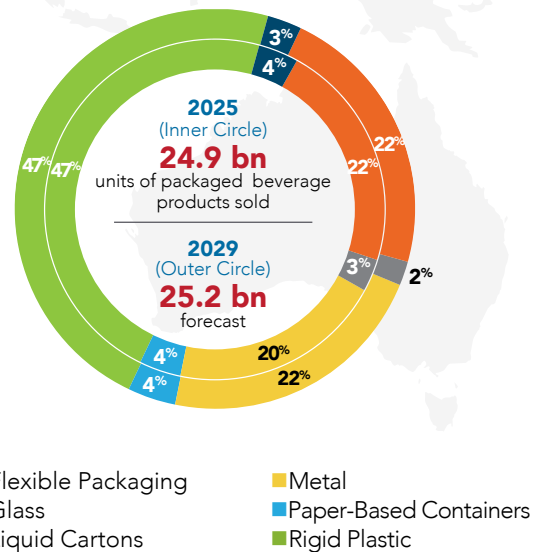
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in France



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in France



Data Source: © Euromonitor International 2026

TOP COMPANIES | FRANCE

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	32.5	Coca-Cola Entreprises SA	19.0	Others	13.8
Other Private Label	10.6	Others	11.7	L'Oréal SA	5.8
Others	10.4	Nestlé Waters France SAS	8.3	Gemey Maybelline Garnier SNC	4.5
Galec - Centre Distributeur Edouard Leclerc	3.7	Orangina Suntory France SAS	7.4	Cosmétique Active International (CAI)	4.4
Carrefour SA	3.5	Neptune SA	6.9	Laboratoires LaScad	4.1
Auchan France	2.9	Other Private Label	5.3	Procter & Gamble France SNC	4.1
Fleury Michon, Groupe	2.8	PepsiCo France SNC	5.2	Unilever France SA	3.8
Casa Tarradellas SA	2.7	Red Bull France SASU	4.8	Pierre Fabre SA, Laboratoires	3.4
ITM Entreprises SA	2.6	Danone, Groupe	4.8	Christian Dior SA, Parfums	3.1
Bigard SA, Groupe	2.4	Société Anonyme des Eaux Minérales d'Evian (SAEME)	3.2	Beiersdorf (France) SA	2.6
Barilla France SA	2.0	Carrefour France SA	2.7	Colgate-Palmolive France SA	2.6
Panzani SAS	2.0	Eckes-Granini France SNC	2.5	Henkel France SA	2.4
Bonduelle Groupe SA	1.4	Galec - Centre Distributeur Edouard Leclerc	2.2	Chanel SA	2.4
Brioche Pasquier SA	1.3	Innocent SAS	1.9	Yves Rocher SA	2.3
Labeyrie Fine Foods SAS	1.2	Teisseire France SAS	1.9	GlaxoSmithKline SAS	1.9
Picard Surgelés SA	1.1	Fruité Entreprises SA	1.8	Guerlain SAS	1.9
Madrangé SA	0.9	ITM Entreprises SA	1.4	Other Private Label	1.9
Paulet SA	0.8	Système U Centrale Nationale SA	1.2	Clarins SA	1.8
LDC - Société Lambert-Dodard-Chancereul	0.8	Andros SAS	0.9	NAOS SAS	1.8
McCain Alimentaire Sarl	0.8	Auchan France	0.9	Vendôme SA, Laboratoires	1.5
Findus France SAS	0.8	Nerios Groupe	0.6	Kiko SpA	1.4
Kellogg Produits Alimentaires SA	0.7	Mc Energy SAS	0.4	Paco Rabanne - Groupe Puig SA	1.3
Groupe Aoste	0.7	Vitagermine SAS	0.4	Estée Lauder (France) SA	1.2
Delpeyrat Groupe	0.7	Wattwiller Société des Domaines SA	0.4	Yves Saint Laurent Parfums	1.0
Andros SAS	0.6	EMIG SAS	0.4	Coty France SA	1.0

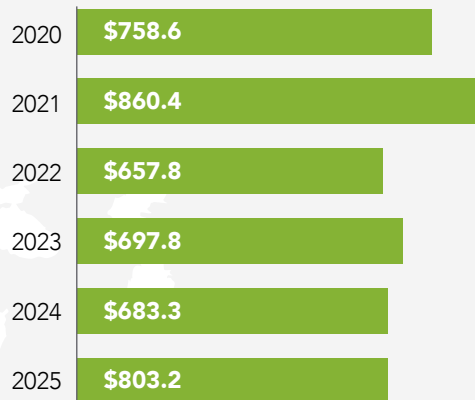
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

GERMANY

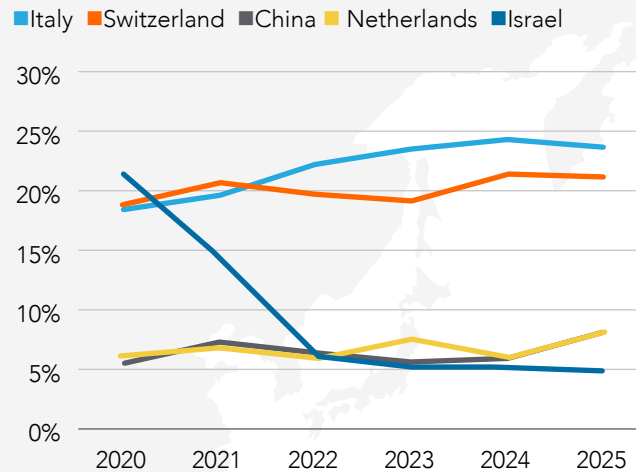


Packaging Machinery Imports (US Millions)



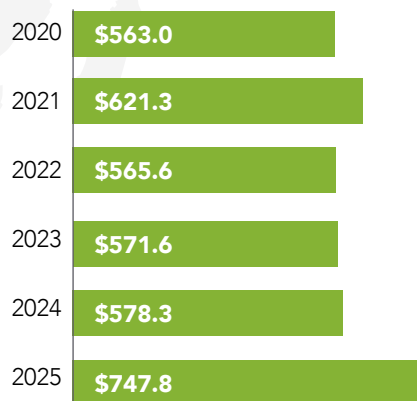
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



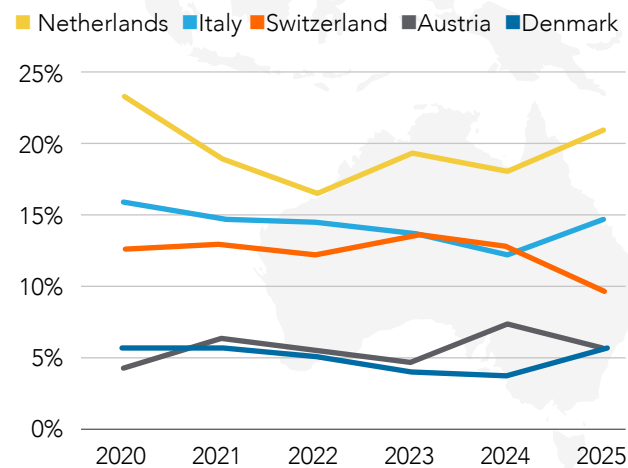
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



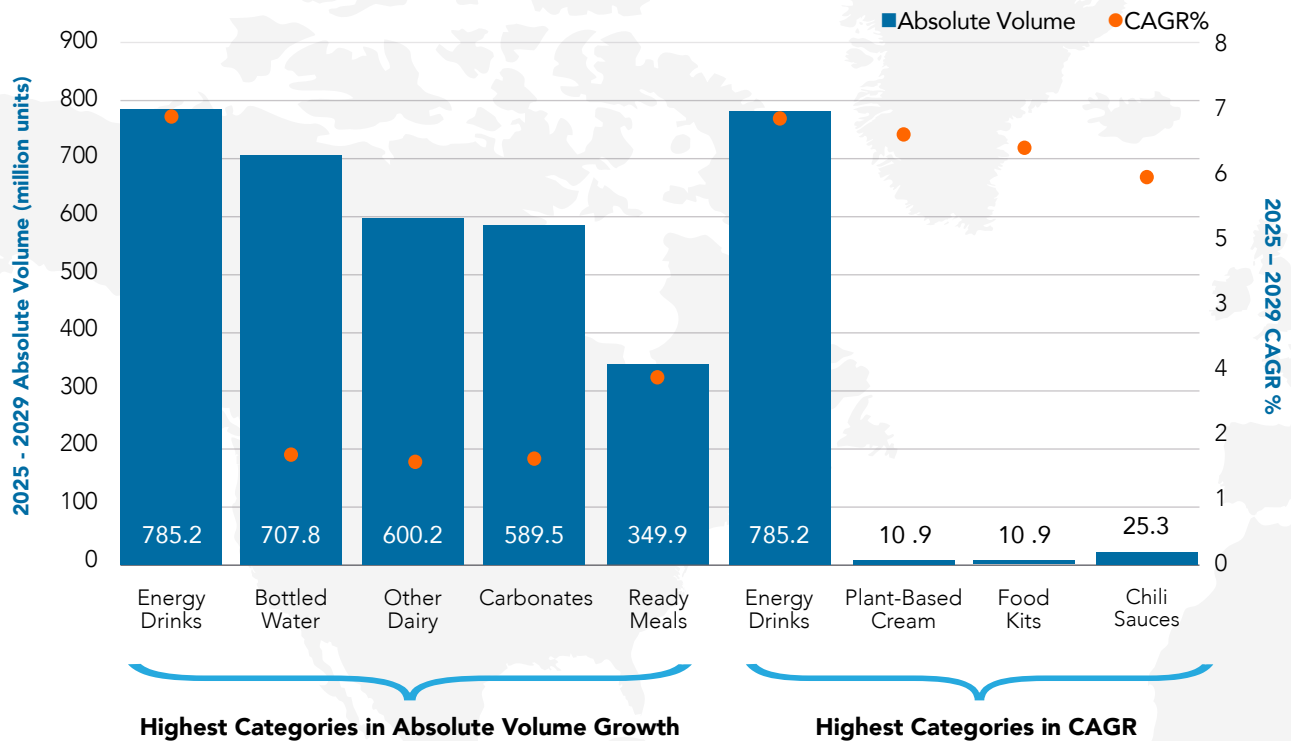
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



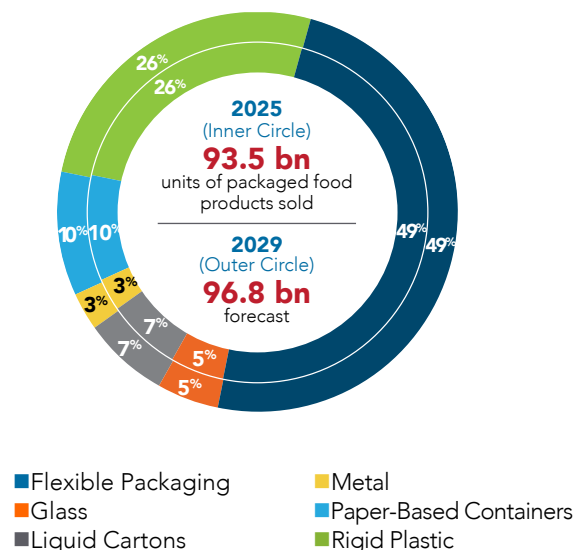
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE GERMANY



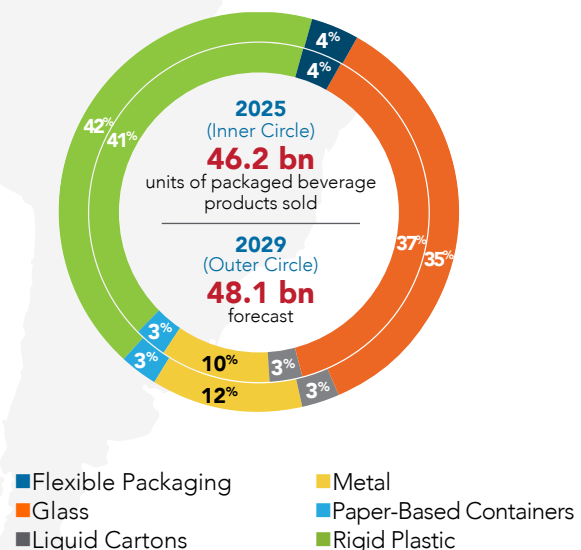
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Germany



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Germany



Data Source: © Euromonitor International 2026

TOP COMPANIES | GERMANY

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2024	Company Name	Retail Value RSP 2024
Artisanal	23.8	Others	37.8	Others	18.2
Aldi Einkauf GmbH & Co oHG	15.3	Coca-Cola GmbH	11.5	L'Oréal Deutschland GmbH	10.7
Others	13.3	Red Bull Deutschland GmbH	5.2	Beiersdorf AG	7.6
Other Private Label	12.5	Aldi Einkauf GmbH & Co oHG	4.2	Procter & Gamble Germany GmbH & Co Operations oHG	5.8
Rewe Markt GmbH	7.8	Lidl Stiftung & Co KG	3.4	Coty Deutschland GmbH	5.1
Lidl Stiftung & Co KG	5.0	Other Private Label	3.3	Henkel AG & Co KGaA	4.5
Harry-Brot GmbH	3.4	PepsiCo Deutschland GmbH	3.1	dm-Drogerie Markt GmbH & Co KG	4.0
Iglo Deutschland GmbH	1.8	Rewe Markt GmbH	2.7	Unilever Deutschland GmbH	3.7
Lieken AG	1.6	Danone Waters Deutschland GmbH	2.4	Dirk Rossmann GmbH	3.3
Edeka Zentrale AG & Co KG	1.1	Gerolsteiner Brunnen GmbH & Co KG	2.3	GlaxoSmithKline Healthcare GmbH	2.7
Bofrost Dienstleistungs GmbH & Co KG	1.1	Eckes-Granini Deutschland GmbH	2.3	Cosnova GmbH	2.6
Rügen Fisch AG	0.9	Paulaner Brauerei GmbH & Co KG	1.7	Other Private Label	2.3
Rügenwalder Wurstfabrik Carl Müller GmbH & Co KG	0.8	Schweppes Deutschland GmbH	1.7	Estée Lauder Cos GmbH	2.2
Kuchenmeister GmbH	0.7	SodaStream GmbH	1.1	LVMH Perfumes & Cosmetics GmbH	1.7
Dr August Oetker Nahrungsmittel KG	0.7	Pfanner Getränke GmbH, Hermann	1.0	CP Gaba GmbH	1.6
Conditorei Copenrath & Wiese GmbH & Co KG	0.7	Edeka Zentrale AG & Co KG	0.9	Chanel GmbH	1.4
Newlat GmbH	0.6	Adelholzener Alpenquellen GmbH	0.9	Puig Deutschland GmbH	1.0
Wiesenhof Geflügel Kontor GmbH	0.6	Vilsa-Brunnen O Rodekohl GmbH & Co	0.8	Johnson & Johnson GmbH	1.0
Barilla Deutschland GmbH	0.5	Capri Sun GmbH	0.8	Aldi Einkauf GmbH & Co oHG	1.0
Appel Feinkost GmbH & Co KG	0.5	Hansa Heemann AG	0.7	Dr Kurt Wolff GmbH & Co KG	0.8
Unilever Deutschland GmbH	0.5	Mineralbrunnen Überkingen-Teinach AG	0.7	Kao Germany GmbH	0.8
Bonduelle Deutschland GmbH	0.4	Franken Brunnen GmbH & Co KG	0.7	Rituals Cosmetics Germany GmbH	0.7
McCain Deutschland GmbH	0.4	innocent Alps GmbH	0.6	Mäurer & Wirtz GmbH & Co KG	0.7
Zur Mühlen Gruppe	0.4	Global Drinks Partnership GmbH	0.6	Reckitt Benckiser Deutschland GmbH	0.6
Frosta AG	0.4	DrinkStar GmbH	0.6	Philips GmbH	0.6

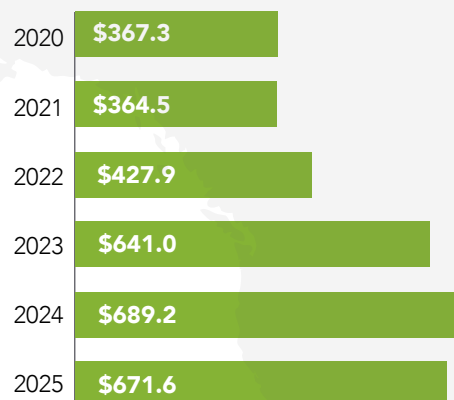
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

INDIA

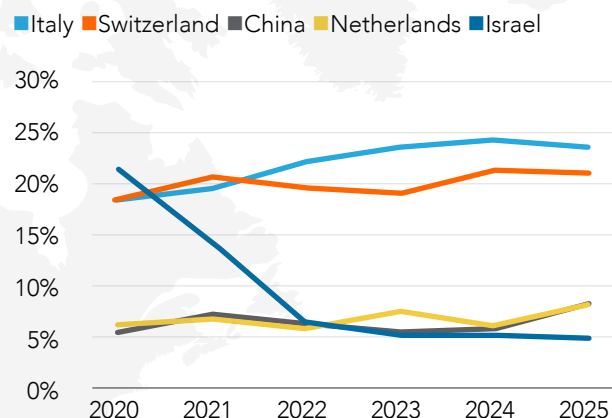


Packaging Machinery Imports (US Millions)



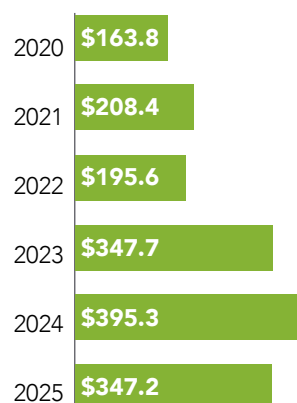
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



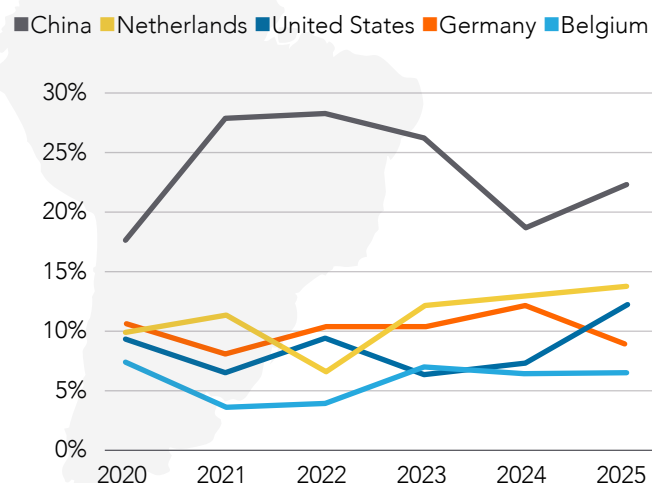
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



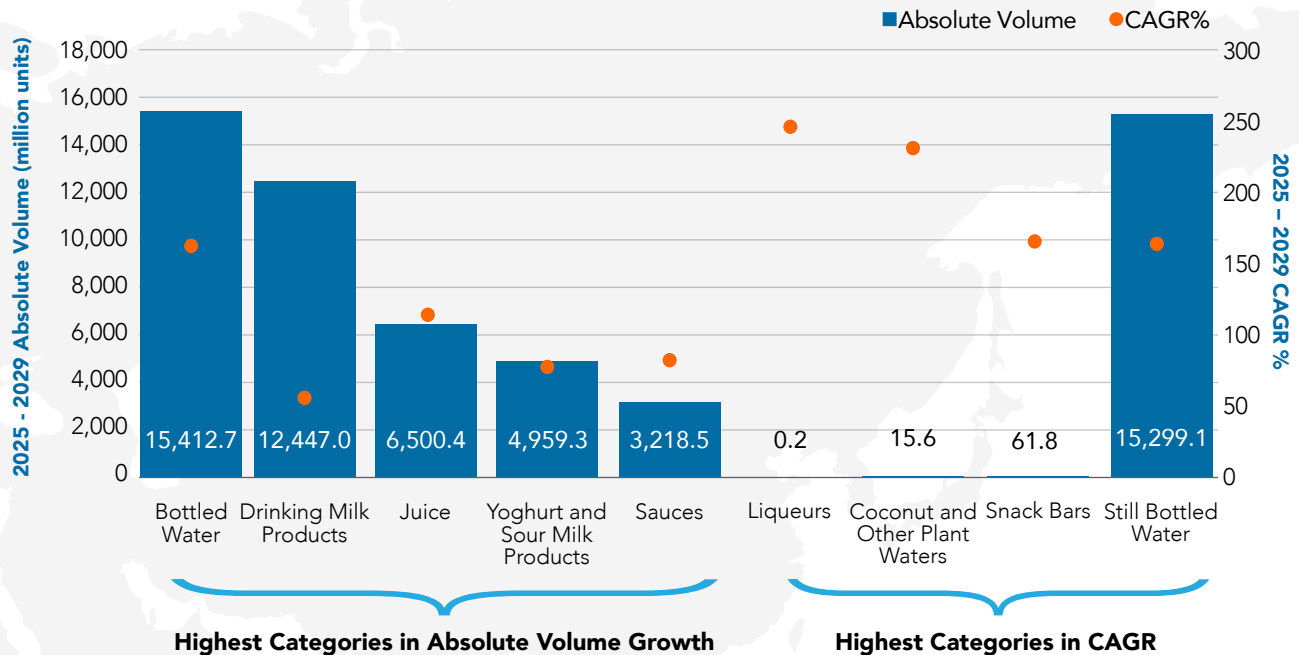
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



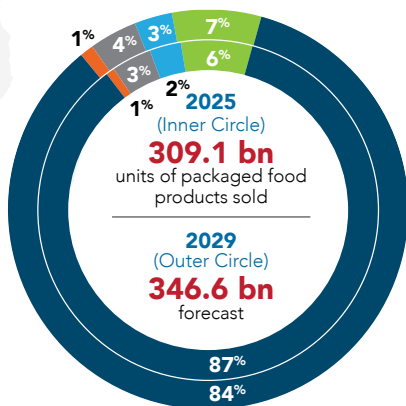
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE INDIA



Data Source: © Euromonitor International 2026

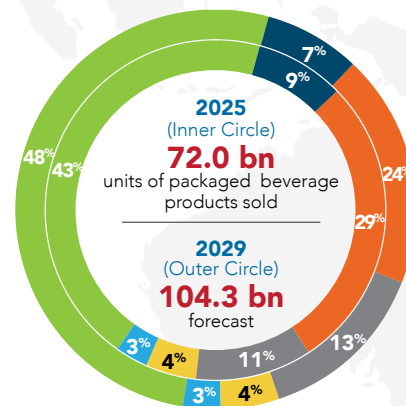
Volume Share of Food Packaging in India



Flexible Packaging
Liquid Cartons
Glass
Paper-Based Containers
Rigid Plastic

Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in India



Flexible Packaging
Glass
Liquid Cartons
Paper-Based Containers
Rigid Plastic
Metal

Data Source: © Euromonitor International 2026

TOP COMPANIES | INDIA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Others	68.2	Others	42.4	Others	23.9
Artisanal	7.5	Coca-Cola India Pvt Ltd	19.8	Hindustan Unilever Ltd	19.1
Nestlé India Ltd	4.0	PepsiCo India Holdings Pvt Ltd	19.4	L'Oréal India Pvt Ltd	5.2
KRBL Ltd	2.6	Parle Agro Pvt Ltd	4.5	Marico Ltd	4.3
ITC Ltd	2.2	Dabur India Ltd	3.9	Colgate-Palmolive India Ltd	3.9
Adani Wilmar Ltd	1.8	Red Bull GmbH	2.9	Dabur India Ltd	3.0
Britannia Industries Ltd	1.8	Parle Bisleri Pvt Ltd	2.9	Godrej Consumer Products Pvt Ltd	2.9
Other Private Label	1.6	Rakyan Beverages Pvt Ltd	1.2	Reckitt Benckiser (India) Pvt Ltd	2.8
Kellogg India Pvt Ltd	1.2	Dhariwal Industries Pvt Ltd	0.7	Himalaya Drug Co, The	2.7
LT Foods Ltd	1.1	Pioma Industries Pvt Ltd	0.7	Honasa Consumer Pvt Ltd	2.4
Amar Singh Chawal Wala	0.9	UB Group	0.5	Wipro Consumer Care & Lighting Ltd	2.1
Marico Ltd	0.5	Hindustan Unilever Ltd	0.4	Gillette India Ltd	2.1
Lotte India Corp Ltd	0.4	ITC Foods Ltd	0.4	Johnson & Johnson (India) Ltd	2.0
Patanjali Ayurved Ltd	0.4	Hamdard Wakf Laboratories Ltd	0.2	Patanjali Ayurved Ltd	1.8
CG Foods India Pvt Ltd	0.3	Mondelez India Foods Pvt Ltd	0.1	Nivea India Pvt Ltd	1.5
Amir Chand Jagdish Kumar (Exports) Ltd	0.3	Tunip Agro Pvt Ltd	0.1	Procter & Gamble Home Products Pvt Ltd	1.4
PepsiCo India Holdings Pvt Ltd	0.3			Emami Ltd	1.2
McCain Foods India Pvt Ltd	0.3			ITC Ltd	1.1
Dream Bake Pvt Ltd	0.3			Dot & Key Wellness Pvt Ltd	1.1
Weikfield Products Co (India) Pvt Ltd	0.3			Galderma India Pvt Ltd	1.0
Indo Nissin Foods Pvt Ltd	0.3			Elca Cosmetics Pvt Ltd	0.8
Modern Food Enterprises Pvt Ltd	0.3			Vini Cosmetics Pvt Ltd	0.8
Hindustan Unilever Ltd	0.3			GlaxoSmithKline Consumer Healthcare Ltd	0.7
MTR Foods Pvt Ltd	0.2			Lotus Herbals Pvt Ltd	0.6
Bambino Agro Industries Ltd	0.2			Hygienic Research Institute	0.6

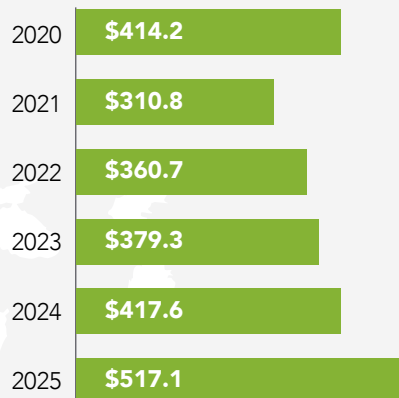
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

INDONESIA

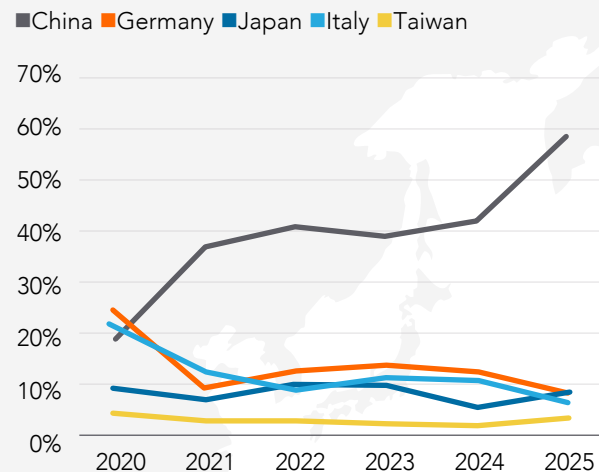


Packaging Machinery Imports (US Millions)



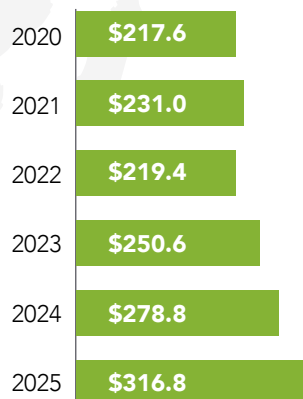
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



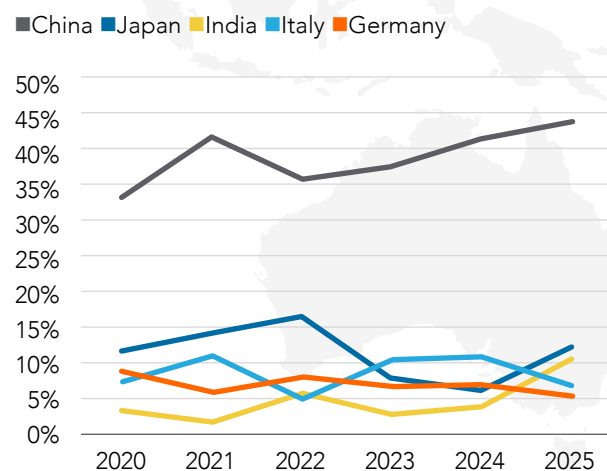
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



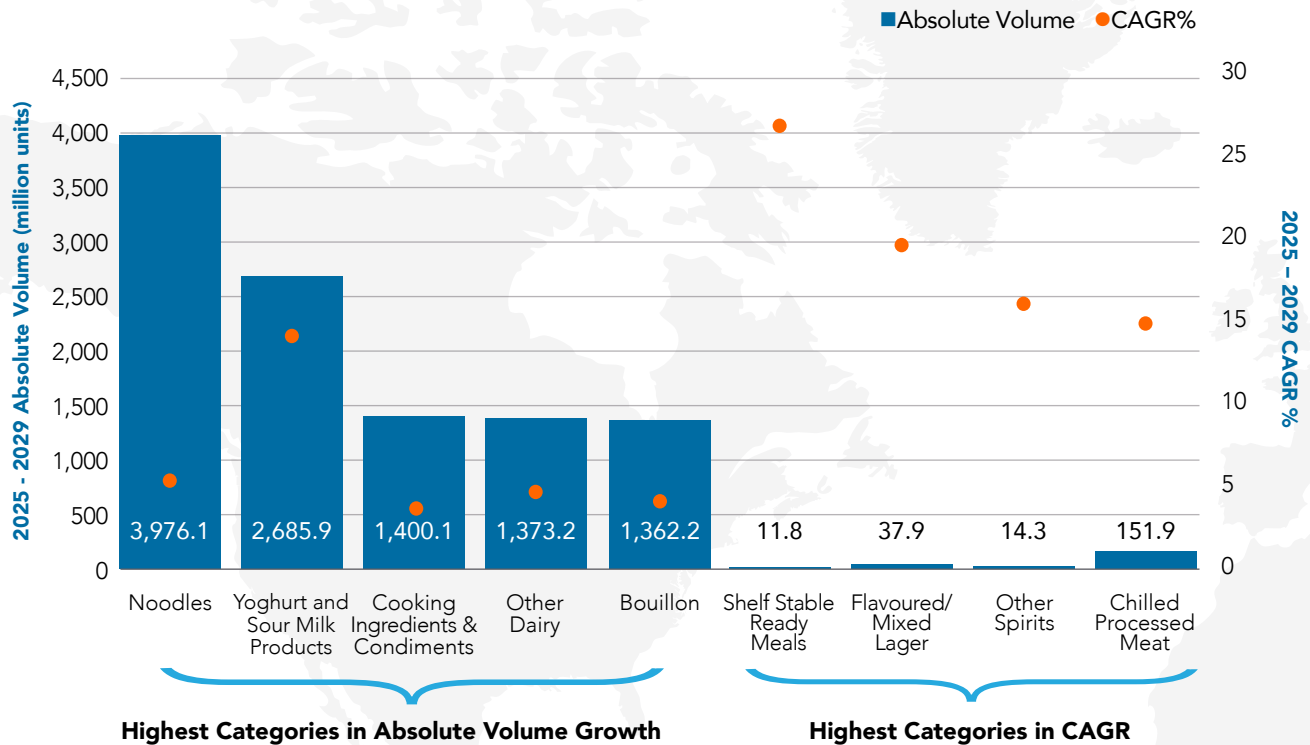
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



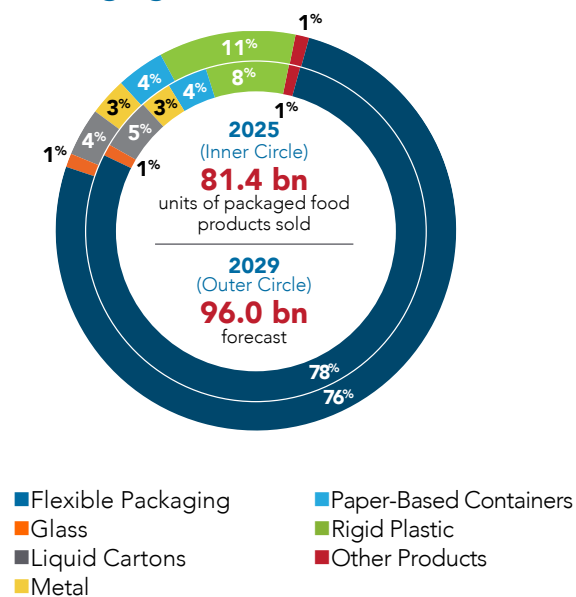
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE INDONESIA



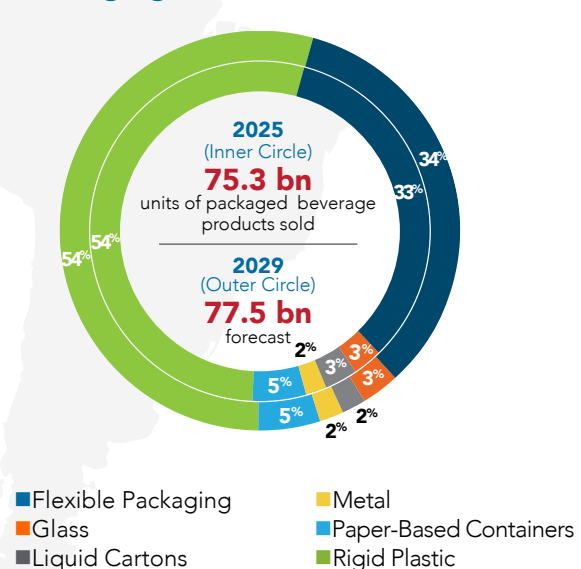
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Indonesia



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Indonesia



Data Source: © Euromonitor International 2026

TOP COMPANIES | INDONESIA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Others	55.1	Others	16.1	Others	33.4
Indofood Sukses Makmur Tbk PT	12.3	Danone Aqua PT	14.1	Unilever Indonesia Tbk PT	10.5
Artisanal	7.1	Tirta Fresindo Jaya PT	13.2	L'Oréal Indonesia PT	8.6
Other Private Label	3.8	Tirta Alam Segar PT	9.7	Procter & Gamble Home Products Indonesia PT	6.7
Sayap Mas Utama PT	3.0	Coca-Cola Indonesia PT	8.1	Paragon Technology & Innovation PT	6.2
Primafood International PT	2.6	Sinar Sosro PT	5.0	May Sun Yvan PT	3.1
Alam Makmur Sembada PT	2.6	Amerta Indah Otsuka PT	3.5	Mandom Indonesia Tbk PT	1.6
So Good Food PT	2.2	CS2 Pola Sehat PT	3.3	Lion Wings PT	1.5
Prima Andalan Djaja Internusa PT	1.8	Kino Indonesia Tbk PT	2.0	Suntone Wisdom Indonesia PT	1.5
Macroprima Pangan Utama PT	1.5	Sariguna Primatirta Tbk PT	1.8	PZ Cussons Indonesia PT	1.3
Nippon Indosari Corp PT	1.0	Lasalle Food Indonesia PT	1.7	Sayap Mas Utama PT	1.2
Jakarana Tama PT	0.7	Tirta Sukses Perkasa PT	1.5	Kao Indonesia PT	1.0
Madusari Nusaperdana PT	0.6	Garuda Beverage Sukses PT	1.5	Beiersdorf Indonesia PT	1.0
Heinz ABC Indonesia PT	0.6	Sinde Budi Sentosa PT	1.4	Ultra Prima Abadi PT	1.0
Maya Muncar PT	0.5	Djojonegoro C-1000 PT	1.4	Nayue Kosmetik Indonesia PT	1.0
ABC President Indonesia PT	0.4	Santos Jaya Abadi PT	1.3	Vitapharm PT	0.9
Canning Foods Indonesia PT	0.4	Asia Health Energi Beverages PT	1.3	Beaute Haul Indonesia PT	0.9
Dunia Bintang Walet PT	0.3	Ultrajaya Milk Industry & Trading Co Tbk PT	1.3	HEBE Beauty Style PT	0.9
Lotte Indonesia PT	0.3	Nutrifood Indonesia PT	1.1	Kinocare Era Kosmetindo PT	0.8
Nestlé Indonesia PT	0.3	Heinz ABC Indonesia PT	1.0	ERHA Clinic Indonesia PT	0.8
Denis Frères SA	0.3	Sari Enesis Indah PT	0.9	Eka Jaya Internasional PT	0.8
Korinus PT	0.3	ABC President Indonesia PT	0.8	Tempo Scan Pacific Tbk PT	0.8
Forisa Nusapersada PT	0.3	Oasis Waters International PT	0.8	Johnson & Johnson Indonesia PT	0.8
Sierad Produce Tbk PT	0.3	Unilever Indonesia Tbk PT	0.7	Sterling Products Indonesia PT	0.7
Eloda Mitra PT	0.2	Akasha Wira International Tbk PT	0.7	Bina Karya Prima PT	0.7

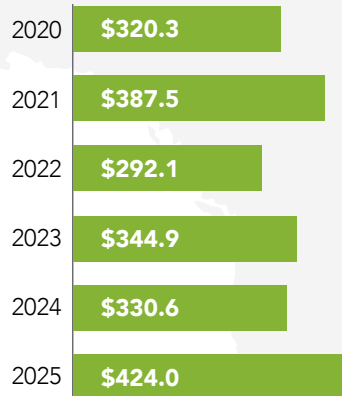
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

ITALY

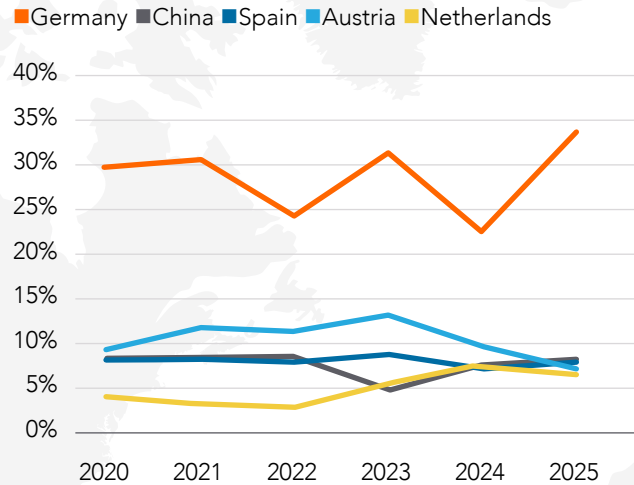


Packaging Machinery Imports (US Millions)



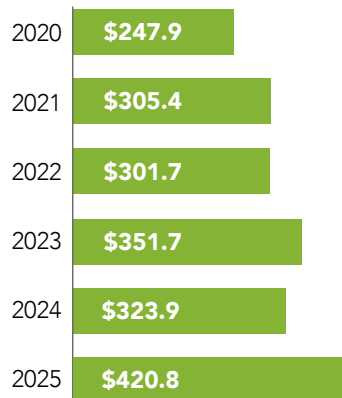
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



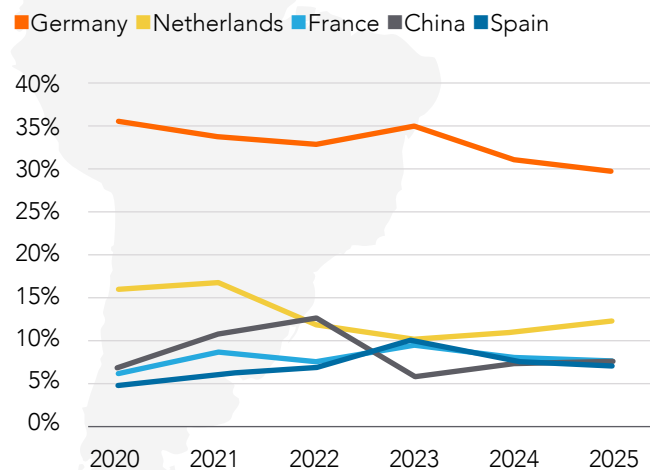
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

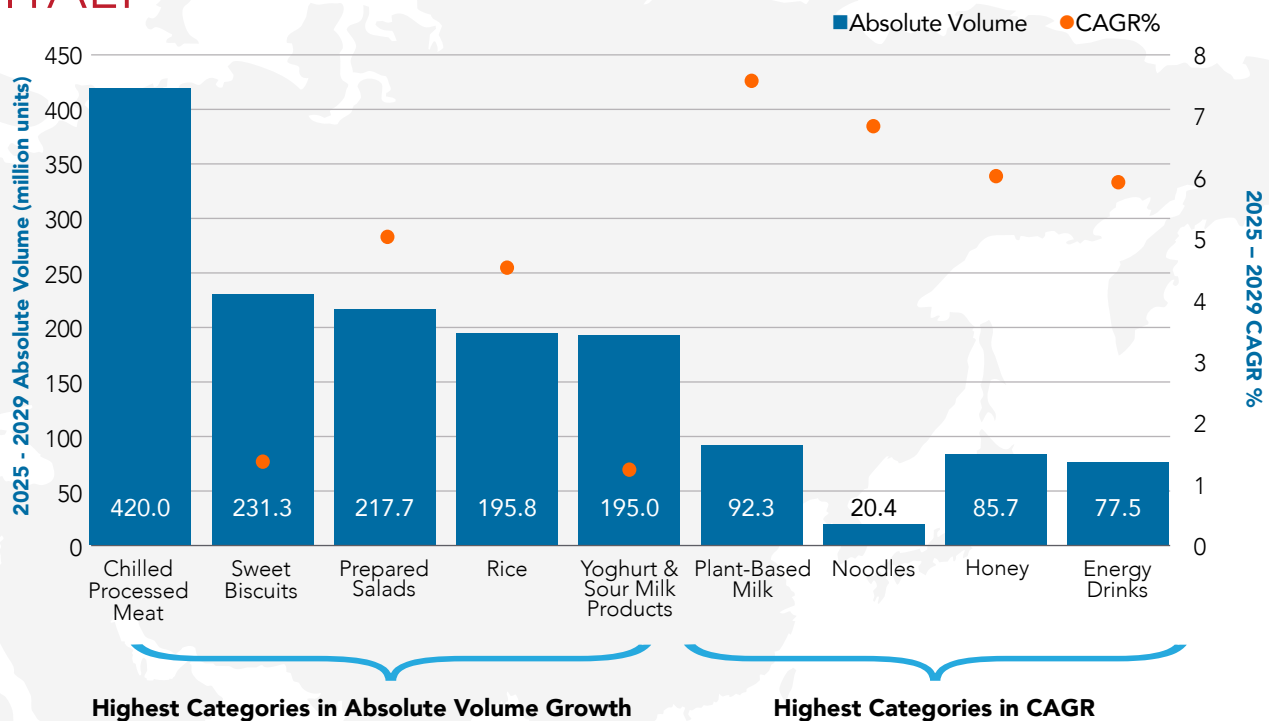
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

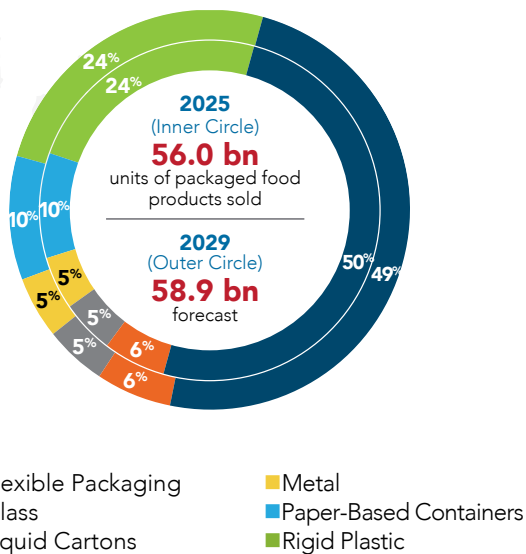
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

ITALY



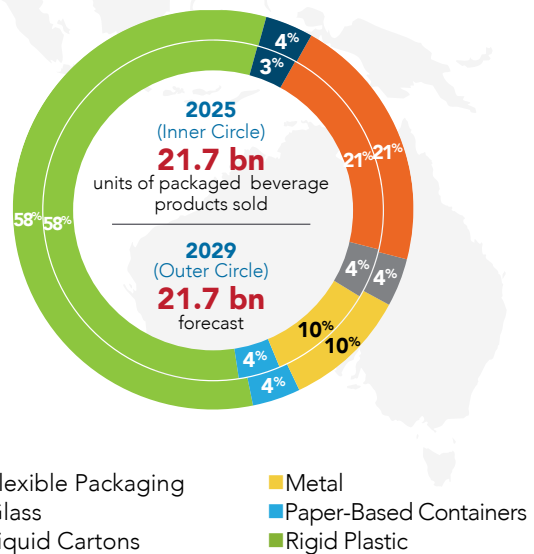
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Italy



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Italy



Data Source: © Euromonitor International 2026

TOP COMPANIES | ITALY

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	39.6	Others	16.2	Others	22.6
Others	18.0	Coca-Cola HBC Italia Srl	15.9	L'Oréal Italia SpA	13.6
Coop Italia scarl	3.2	Other Private Label	12.7	Procter & Gamble Italia SpA	5.4
Barilla Alimentare SpA	3.1	Acqua Minerale San Benedetto SpA	9.5	Unilever Italia Srl	3.9
CONAD - Consorzio Nazionale Dettaglianti Scrl	2.5	Fonti Di Vinadio SpA	5.9	Beiersdorf SpA	3.8
Esselunga SpA	2.2	San Pellegrino SpA	5.7	Christian Dior SpA, Parfums	2.7
Bauli SpA	1.8	PepsiCo Beverages Italia Srl	3.2	Società Italo Britannica L Manetti - H Roberts & C SpA	2.6
Consorzio del Prosciutto di Parma	1.8	CoGeDi International SpA	3.2	Coty Italia SpA	2.6
AIA - Agricola Italiana Alimentari SpA	1.6	Ferrero SpA	3.1	Estée Lauder Srl	2.3
Other Private Label	1.5	Red Bull Srl	2.6	Kiko SpA	2.0
Piatti Freschi Italia SpA	1.3	Ferrarelle SpA	2.6	Chanel Srl	2.0
Gesco Consorzio Cooperativo Società Cooperativa Agricola	1.3	Conserve Italia - Consorzio Cooperative Conserve Italia scarl	2.3	Colgate-Palmolive SpA	1.8
Carrefour Italia GS SpA	1.1	Zuegg SpA	1.8	Shiseido Group Italy SpA	1.6
CSI, Cia Surgelati Italiana SpA	1.1	Parmalat SpA	1.4	Other Private Label	1.6
Ferrarini SpA	1.1	Acque Minerali d'Italia SpA	1.3	Pierre Fabre Italia SpA	1.4
Ferrero SpA	1.1	Rauch Italia Srl	1.2	GlaxoSmithKline SpA	1.3
Rovagnati SpA	0.9	AQUA Vera SpA	1.2	Yves Rocher Italia Srl	1.2
Giuseppe Citterio Salumificio SpA	0.8	Coop Italia scarl	1.0	Cosnova Italia Srl	1.2
Auchan SpA	0.8	CONAD - Consorzio Nazionale Dettaglianti Scrl	1.0	LVMH Perfumes & Cosmetics Italia SpA	1.1
Grandi Salumifici Italiani SpA	0.7	Lete SpA	0.9	Clarins Italia SpA	1.0
Eurospin Italia SpA	0.7	Royal Unibrew A/S	0.8	Mirato SpA	1.0
Pastificio Rana SpA	0.7	Sorgente Santa Croce SpA	0.8	Henkel Italia Srl	0.9
Kellogg Italia SpA	0.6	Davide Campari Milano NV	0.7	Puig Italia Srl	0.9
Despar Italia Carl	0.6	Refresco Italy Spa	0.7	Collistar SpA	0.8
Nestlé Italiana SpA	0.5	Esselunga SpA	0.6	Deborah Group	0.7

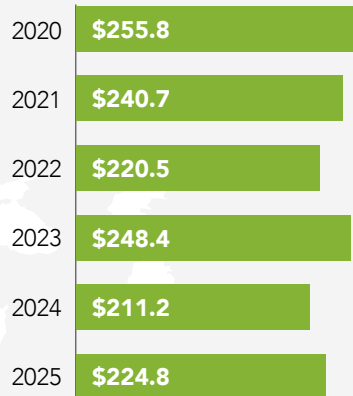
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

JAPAN



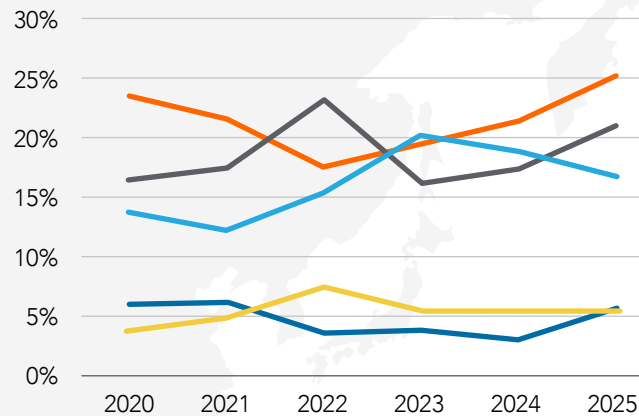
Packaging Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

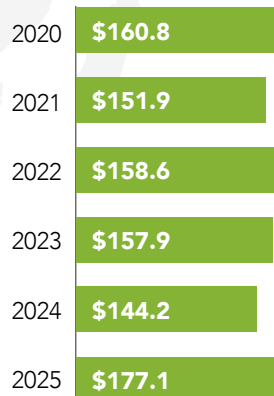
IMPORT MARKET SHARE BY COUNTRY

Germany China Italy Israel Vietnam



Source: PMMI with data from Trade Data Monitor

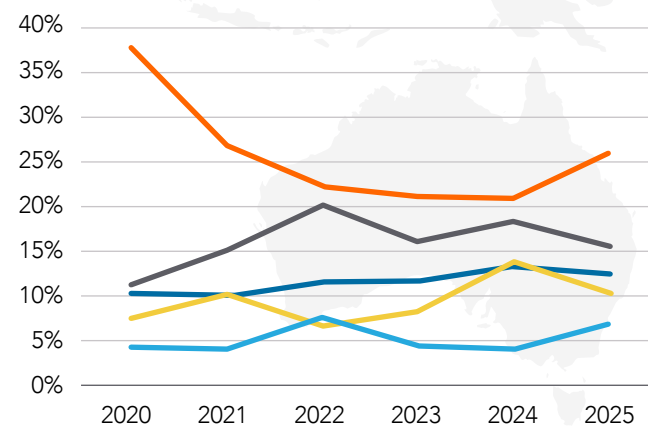
Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY

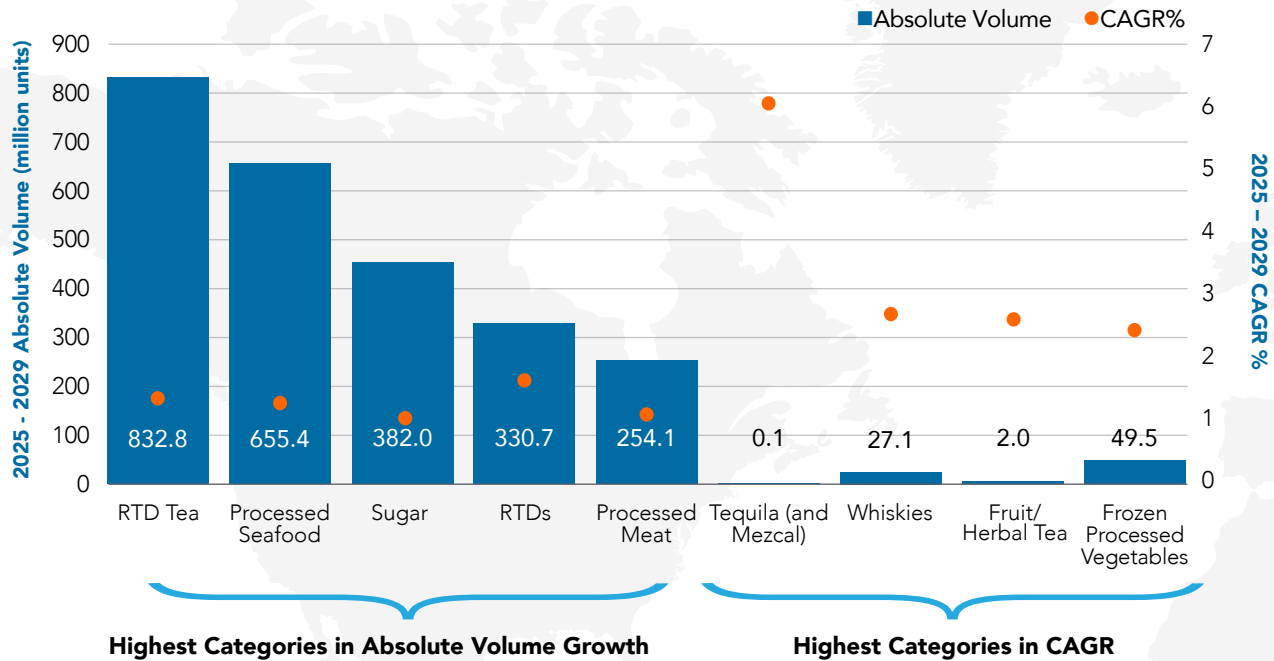
Germany China United States Netherlands Denmark



Source: PMMI with data from Trade Data Monitor

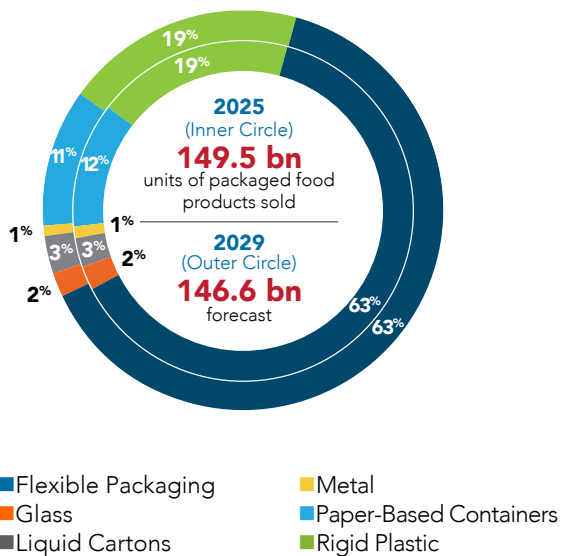
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

JAPAN



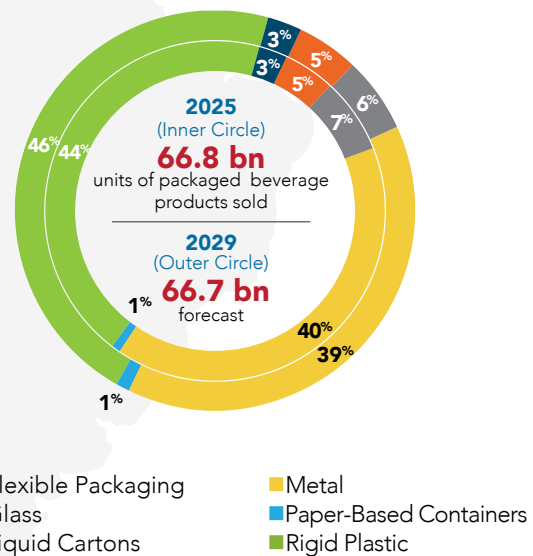
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Japan



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Japan



Data Source: © Euromonitor International 2026

TOP COMPANIES | JAPAN

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Others	26.7	Coca-Cola (Japan) Co Ltd	23.7	Others	19.5
Generics	20.8	Suntory Beverage & Food Ltd	17.7	Shiseido Co Ltd	10.4
Private Label	11.2	Others	16.3	Kao Corp	10.0
Yamazaki Baking Co Ltd	7.1	Asahi Soft Drinks Co Ltd	10.8	Kosé Corp	8.0
JA Group (Japan Agricultural Cooperatives)	5.5	ITO EN Ltd	8.8	Kanebo Cosmetics Inc	3.5
Artisanal	5.4	Kirin Beverage Corp	8.1	Lion Corp	3.0
Nissin Food Products Co Ltd	2.3	Otsuka Holdings Co Ltd	2.5	P&G Japan Ltd, The	2.6
Toyo Suisan Kaisha Ltd	2.2	Kagome Co Ltd	2.4	Unilever Japan KK	2.1
Shikishima Baking Co Ltd	2.0	Private Label	1.9	Rohto Pharmaceutical Co Ltd	1.9
Fuji Baking Co Ltd	2.0	Dydo Drinco Inc	1.7	Nivea-Kao Co Ltd	1.7
Itoham Foods Inc	1.0	Red Bull Japan Co Ltd	1.1	Fancl Corp	1.7
NH Foods Ltd	1.0	Morinaga Milk Industry Co Ltd	0.9	DHC Corp	1.6
Prima Meat Packers Ltd	0.9	UCC Ueshima Coffee Co Ltd	0.8	Pola Inc	1.5
Hagoromo Foods Corp	0.7	Pokka Sapporo Food & Beverage Ltd	0.6	L'Oréal Japan Ltd	1.4
Sanyo Foods Co Ltd	0.7	Otsuka Foods Co Ltd	0.5	Earth Corp	1.3
Sagamiya Foods Co Ltd	0.6	Nestlé Japan Ltd	0.4	Orbis Co Ltd	1.3
Shinmei Co Ltd	0.5	Megmilk Snow Brand Co Ltd	0.4	Sunstar Inc	1.3
Kitoku Shinryo Co Ltd	0.5	Ehime Inryou Co Ltd	0.3	FineToday Co Ltd	1.3
Maruha Nichiro Corp	0.5	Nac Co Ltd	0.2	Mandom Corp	1.2
TableMark Co Ltd	0.5	Aqua Clara Inc	0.2	Kracie Holdings Ltd	1.2
Kobeya Baking Co Ltd	0.5	Zaiho Group	0.1	Private Label	1.2
Myojo Foods Co Ltd	0.5	CJ Japan Corp	0.1	Chanel KK	1.0
Marudai Food Co Ltd	0.4	Nippon Del Monte Corp	0.1	Hoyu Co Ltd	1.0
Ace Cook Co Ltd	0.4	Mizkan Group Corp	0.1	I-ne Co Ltd	0.9
Sato Food Co Ltd	0.4	Yakult Honsha Co Ltd	0.1	Estée Lauder Group Cos KK	0.9

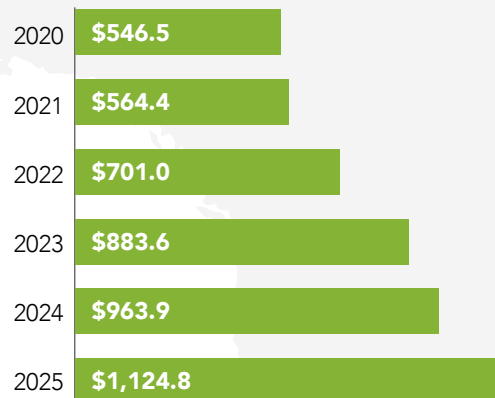
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

MEXICO

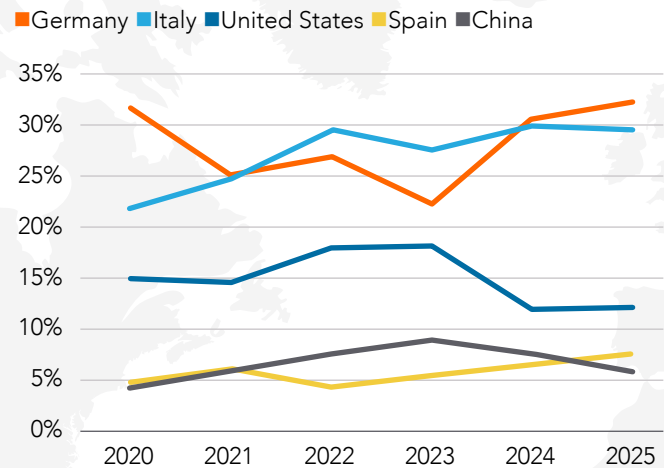


Packaging Machinery Imports (US Millions)



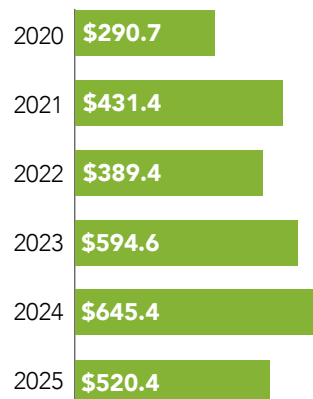
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



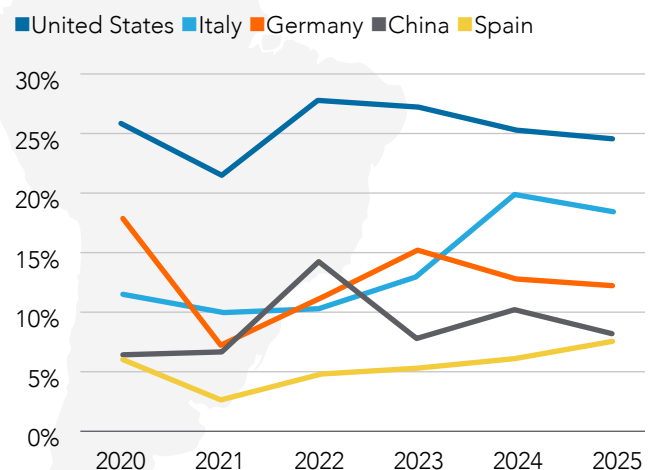
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

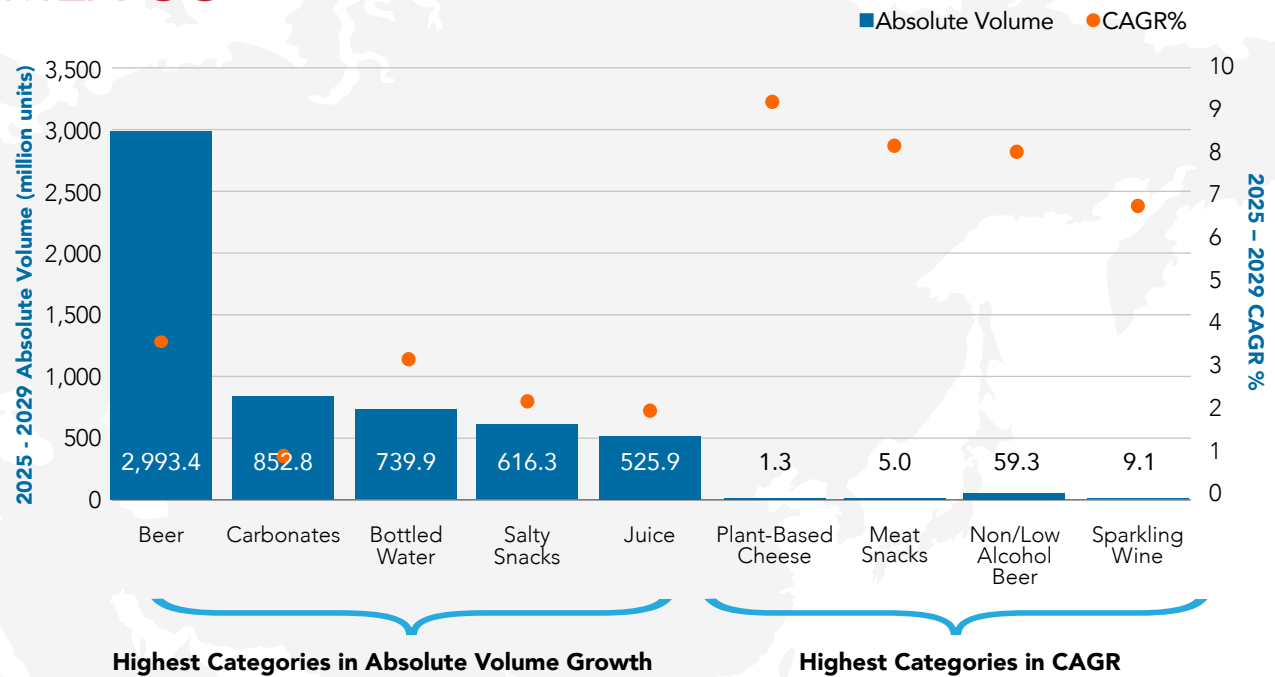
IMPORT MARKET SHARE BY COUNTRY



Source: PMMI with data from Trade Data Monitor

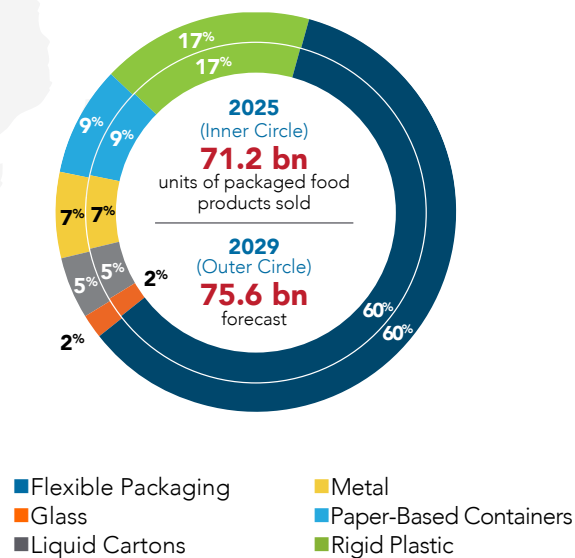
TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE

MEXICO



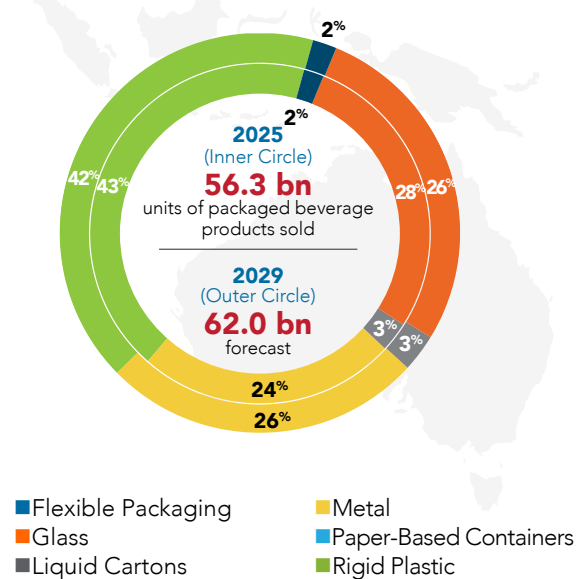
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Mexico



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Mexico



Data Source: © Euromonitor International 2026

TOP COMPANIES | MEXICO

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	55.7	Coca-Cola Mexico	51.3	Others	14.0
Grupo Bimbo SAB de CV	10.4	Pepsi-Cola Mexicana SA de CV	11.0	Frabel SA de CV	11.6
Others	7.6	Others	10.3	Unilever de México S de RL de CV	10.3
Sigma Alimentos SA de CV	3.2	Jugos del Valle SA de CV	4.3	Colgate-Palmolive de México SA de CV	8.0
Toyo Suisan Kaisha Ltd	2.3	Grupo Peñafiel SA de CV	4.0	Procter & Gamble de México SA de CV	7.0
Other Private Label	1.9	Jumex SA de CV, Grupo	3.4	BDF México SA de CV	3.6
Kellogg de México SA de CV	1.8	Consorcio Aga SA de CV	2.4	Natura Cosméticos México SA de CV	3.6
Fábrica de Pastas Alimenticias La Moderna SA de CV	1.6	Laboratorios Pisa SA de CV	1.8	Betterware de Mexico SAPI de CV	3.5
Pescados Industrializados SA de CV	1.5	Danone de México SA de CV	1.5	Mary Kay Cosméticos de México SA de CV	3.3
Qualtia Alimentos SA de CV	1.2	Sociedad Cooperativa Trabajadores de Pascual SCL	1.3	Genomma Lab Internacional SAB de CV	3.3
Grupo Bafar SAB de CV	1.1	Ajemex SA de CV	1.0	Puig México SA de CV	2.1
Conservas La Costeña SA de CV	0.9	Nestlé México SA de CV	1.0	Kimberly-Clark de México SAB de CV	2.0
Grupo Marítimo Industrial SA de CV	0.8	Qualamex SA de CV	0.9	Parfumerie Versailles SA de CV	1.9
Sabormex SA de CV	0.6	Electropura S de RL de CV	0.8	Belcorp México SA de CV	1.8
Herdez SAB de CV, Grupo	0.6	Comercializadora Eloro SA de CV	0.7	Laboratorios Grisi Hermanos SA de CV	1.7
Schettino Hermanos S de RL de CV	0.5	Embotelladora Mexicana SA de CV	0.6	Johnson & Johnson de México SA de CV	1.7
Mexicana de Arroz SA de CV	0.5	Grupo Lala SAB de CV	0.4	House of Fuller SA de CV	1.4
Barilla México SA de CV	0.5	Genomma Lab Internacional SAB de CV	0.4	LVMH Perfumes & Cosmetics de México SA de CV	1.4
Productos Verde Valle SA de CV	0.5	Private Label	0.4	Henkel Mexicana SA de CV	1.3
American Beef SA de CV	0.4	Red Bull S de RL de CV	0.3	Coty México SA de CV	1.3
Saljamex SA de CV	0.4	Corporativo Fopa SA de CV	0.3	Avon Cosmetics SA de CV	1.3
Arroz SOS de Mexico SA de CV	0.4	Unifoods SA de CV	0.2	Estée Lauder Cosméticos SA de CV	1.3
Mondelez México S de RL de CV	0.4	Casa Cuervo SA de CV	0.2	Arabela SA de CV	1.1
D'Gari SA de CV	0.4	Kraft Foods de México S de RL de CV	0.2	Perfumes y Esencias Fraiche SA de CV	0.7
ConAgra Foods de México SA de CV	0.3	Campbell de México SA de CV	0.2	Other Private Label	0.7

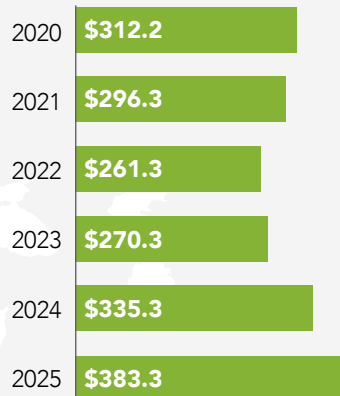
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

POLAND



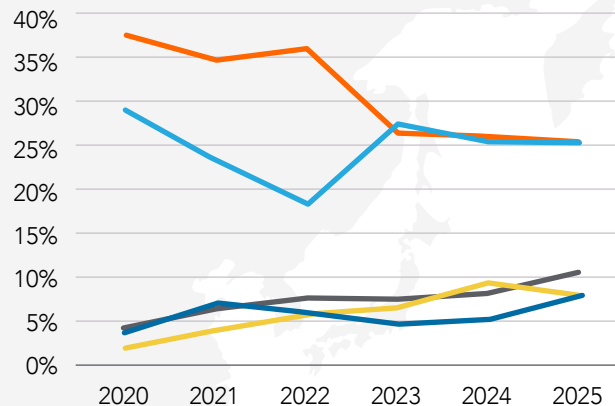
Packaging Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

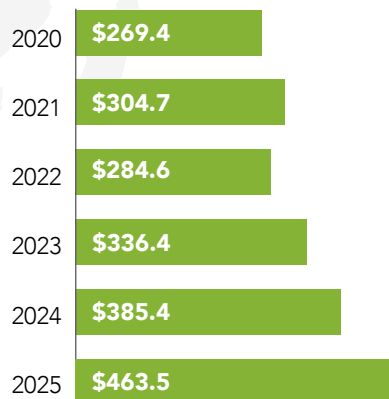
IMPORT MARKET SHARE BY COUNTRY

Germany Italy China Netherlands Spain



Source: PMMI with data from Trade Data Monitor

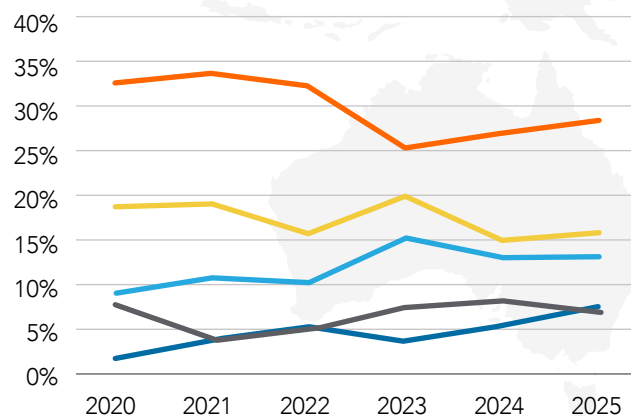
Processing Machinery Imports (US Millions)



Source: PMMI with data from Trade Data Monitor

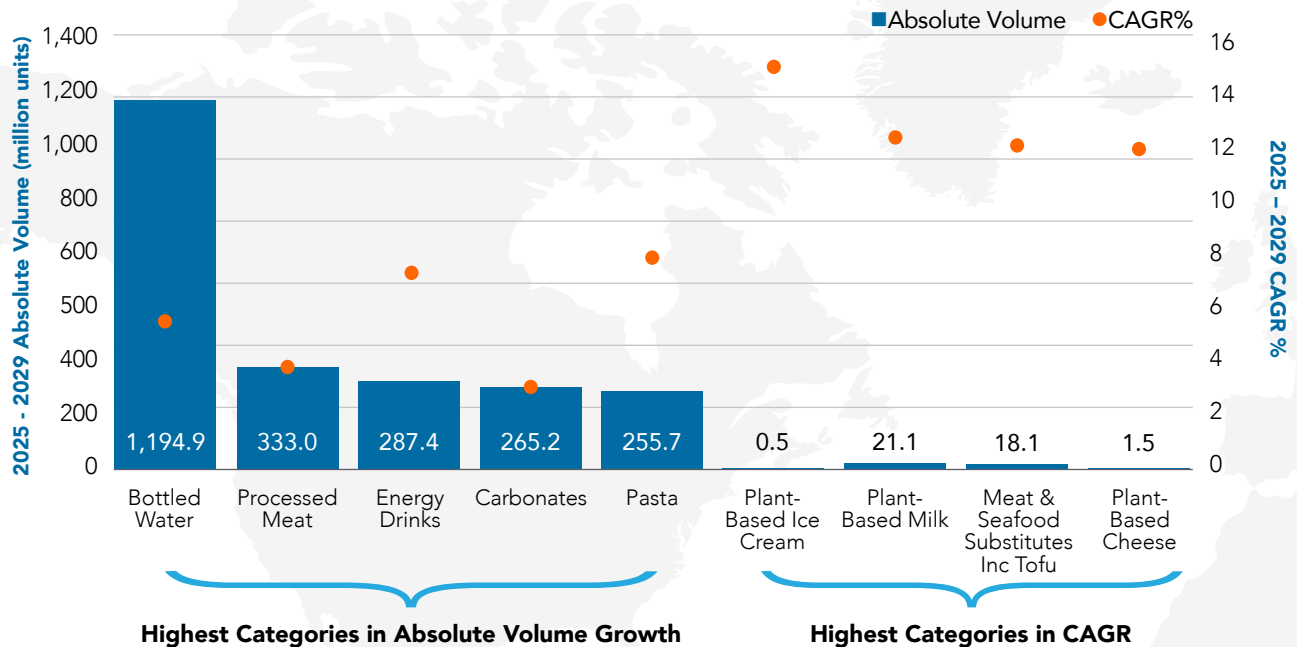
IMPORT MARKET SHARE BY COUNTRY

Germany Netherlands Italy United States France



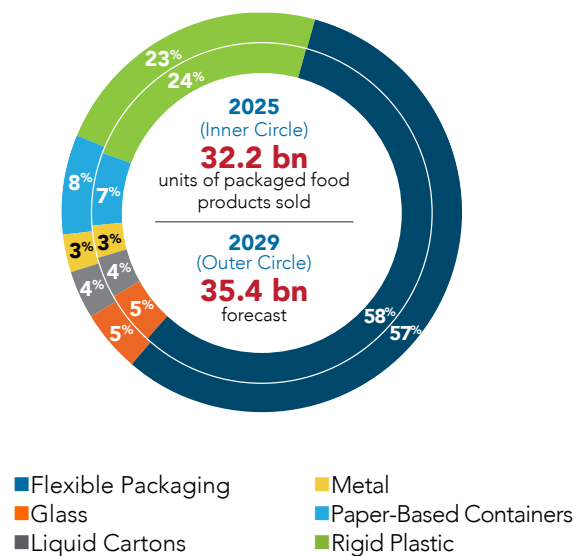
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE POLAND



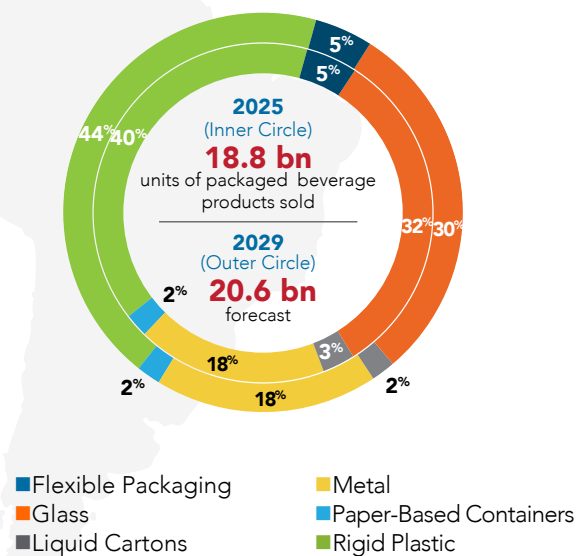
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Poland



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Poland



Data Source: © Euromonitor International 2026

TOP COMPANIES | POLAND

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	31.9	Coca-Cola HBC Polska Sp zoo	16.2	Others	23.8
Others	10.4	Others	15.0	L'Oréal Polska Sp zoo	13.2
Jeronimo Martins Polska SA	8.8	MWS Sp zoo Sp k	11.7	Nivea Polska Sp zoo	5.3
Auchan Polska Sp zoo	4.7	Pepsi-Cola General Bottlers Poland Sp zoo	8.3	Colgate-Palmolive Polska Sp zoo	4.8
Animex Foods Sp zoo Sp k	4.6	Zywiec Zdroj Sp zoo	6.7	Procter & Gamble DS Polska Sp zoo	4.4
Lidl Polska Sklepy Spozywcze Sp zoo Sp k	4.0	Jeronimo Martins Polska SA	4.5	Henkel Polska Sp zoo	3.3
Carrefour Polska Sp zoo	3.9	FoodCare Sp zoo	2.8	Unilever Polska SA	2.5
Sokolow SA	3.5	Red Bull Sp zoo	2.7	Other Private Label	2.5
Other Private Label	3.4	ZL Naleczow Zdroj Sp zoo SKA	2.6	Kosmetyki Naturalne Bielenda Sp zoo	2.1
Tarczynski SA	2.4	Other Private Label	2.6	Eveline Cosmetics SA Sp k	1.9
Lmeat Lukow SA	1.8	Nestlé Waters Polska SA	2.4	Avon Cosmetics Polska Sp zoo	1.8
La Lorraine Polska Sp zoo	1.6	Hortex Holding SA	2.2	Ziaja Ltd Zaklad Produkcji Lekow Sp zoo	1.6
Nestlé Polska SA	1.6	Spoldzielnia Pracy Muszynianka	2.0	Coty Polska Sp zoo	1.5
Lubella Sp zoo SKA	1.3	Lidl Sp zoo Sp k	1.6	Johnson & Johnson Poland Sp zoo	1.5
Chipita Poland Sp zoo	1.0	Ustronianka Sp zoo	1.4	Sarantis Polska SA	1.3
Lisner Sp zoo	0.9	Oshee Polska Sp zoo	1.3	Laboratorium Kosmetyczne Dr Irena Eris SA	1.2
Unilever Polska SA	0.7	Herbapol Lublin SA	1.1	Onlybio.life SA	1.2
Hortino Zaklad Przetwórstwa Owocowo-Warzywnego Lezajsk Sp zoo	0.7	Jurajska SA	1.0	Jeronimo Martins Polska SA	1.2
Makarony Polskie SA	0.7	Orangina Schweppes Polska Sp zoo	0.9	Rossmann SDP Sp zoo	1.1
Frosta Sp zoo	0.6	Zbyszko Co Sp zoo	0.9	GlaxoSmithKline Consumer Healthcare Sp zoo	1.1
Kaufland Polska Markety Sp zoo Spk	0.6	Forever Young Kombucha Sp zoo	0.9	Mary Kay Cosmetics Poland Sp zoo	1.0
Dan Cake Polonia Sp zoo	0.6	Premium Rosa Sp zoo	0.8	Puig SL	0.9
Benus Sp zoo	0.6	Colian Sp zoo	0.7	Oceanic SA	0.8
Superfish SA	0.5	Auchan Polska Sp zoo	0.7	Estée Lauder Poland Sp zoo	0.7
Drosed SA	0.5	Fortuna Sp zoo	0.7	Chanel SA	0.7

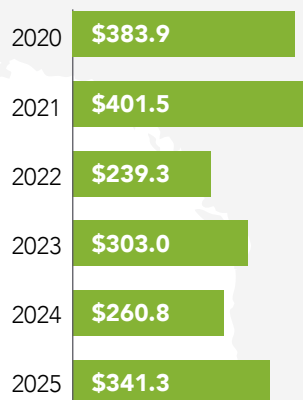
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

SOUTH KOREA

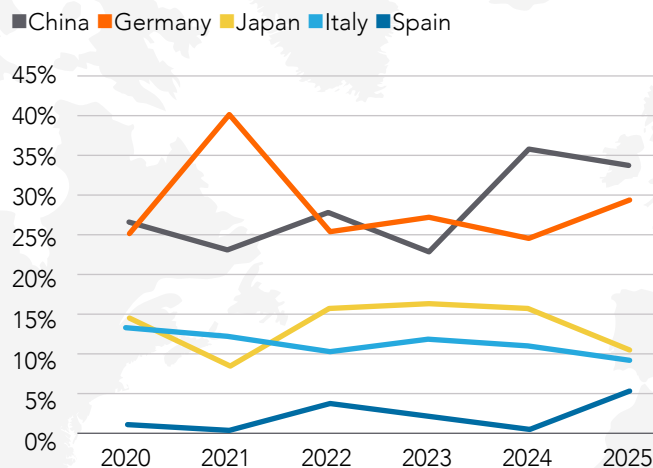


Packaging Machinery Imports (US Millions)



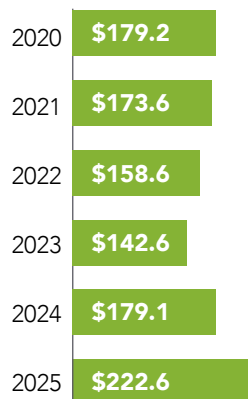
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



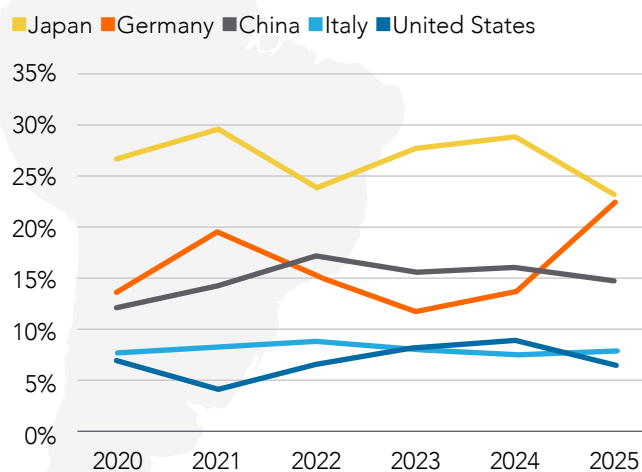
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



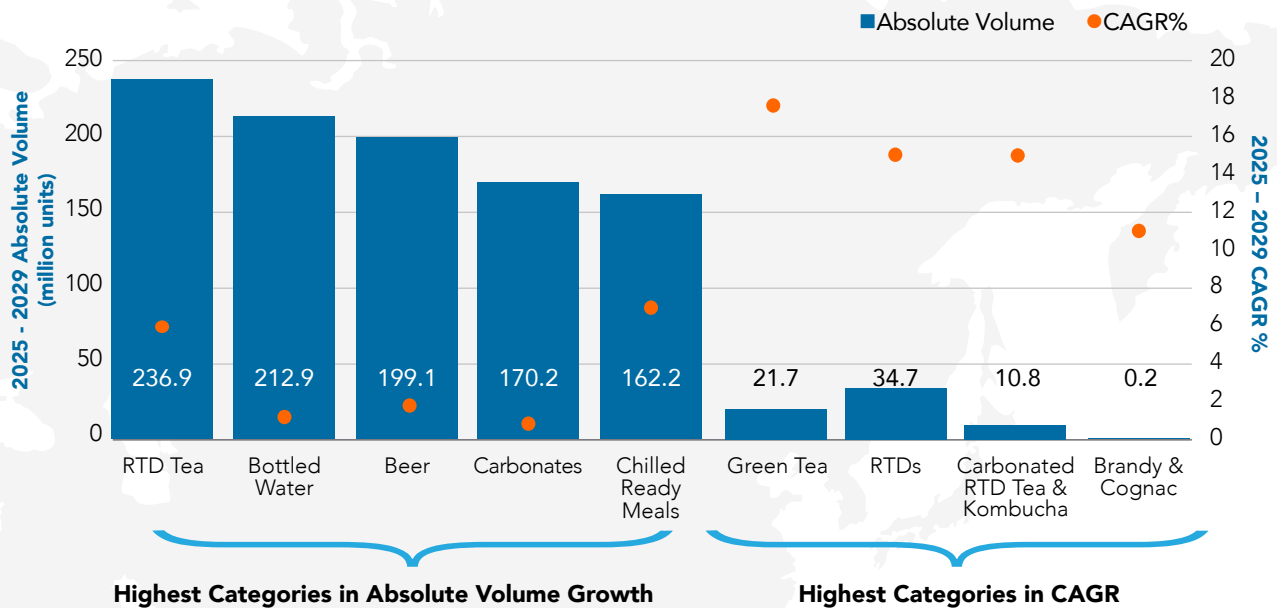
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



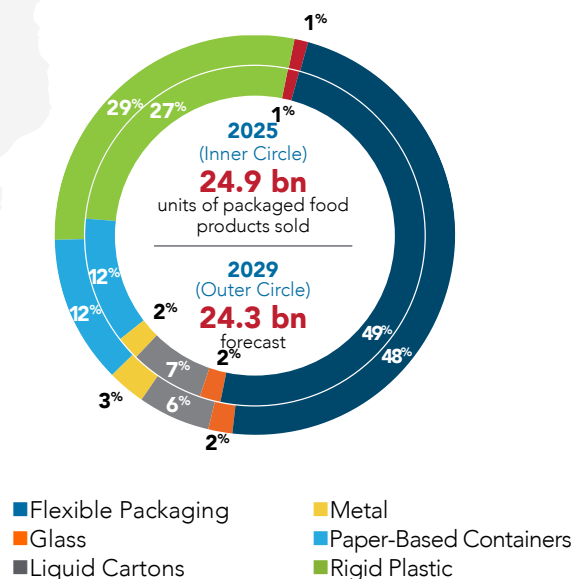
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE SOUTH KOREA



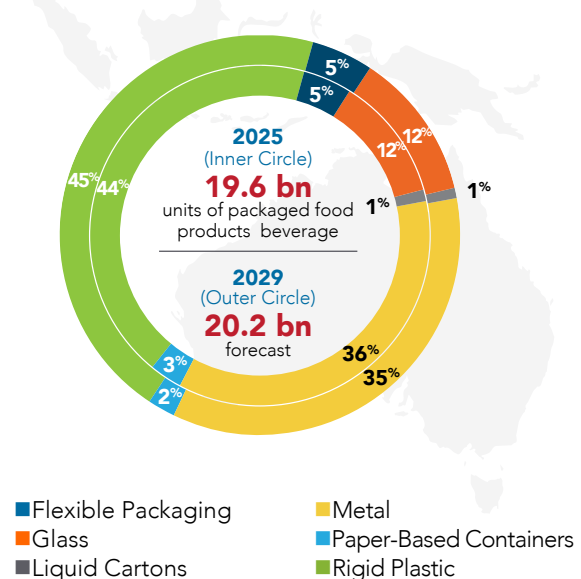
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in South Korea



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in South Korea



Data Source: © Euromonitor International 2026

TOP COMPANIES | SOUTH KOREA

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	21.7	Lotte Chilsung Beverage Co Ltd	25.5	Others	26.1
Others	14.4	Others	25.0	LG H&H Co Ltd	15.7
CJ Cheiljedang Corp	11.6	Coca-Cola Korea Co Ltd	16.0	AmorePacific Corp	14.9
Nongshim Co Ltd	10.0	Kwang Dong Pharm Co Ltd	7.4	L'Oréal Korea Co Ltd	3.8
Ottogi Foods Co Ltd	6.1	Dongsuh Foods Co Ltd	4.3	Elca Korea Co Ltd	3.7
National Agricultural Cooperative Federation	5.7	Donga Otsuka Co Ltd	3.4	Procter & Gamble Korea Inc	2.5
Dongwon F&B Co Ltd	4.5	Woongjin Food Co Ltd	2.1	Chanel Korea Co Ltd	2.2
SPC Samlip Co Ltd	3.6	Nongshim Co Ltd	2.1	Aekyung Industrial Co Ltd	1.8
Other Private Label	3.5	Maeil Dairies Co Ltd	1.9	Clio Cosmetics Co Ltd	1.6
Lotte Wellfood Co Ltd	2.8	Coupang Corp	1.6	Amway Korea Co Ltd	1.2
Pulmuone Co Ltd	2.1	Paldo Co Ltd	1.4	CJ Olive Young Corp	1.1
Sam Yang Foods Co Ltd	1.7	Dongwon F&B Co Ltd	1.2	Tonymoly Co Ltd	1.0
Paldo Co Ltd	1.5	Other Private Label	1.0	Estée Lauder Cos Inc	1.0
Sajo Daerim Corp	1.5	Binggrae Co Ltd	0.9	Johnson & Johnson Korea Co Ltd	0.8
Orion Corp	1.4	Namyang Dairy Products Co Ltd	0.8	Innisfree Corp	0.8
Daesang Corp	1.3	Hite Jinro Co Ltd	0.8	Carver Korea Co Ltd	0.7
Harim Co Ltd	1.3	Haitai HTB Co Ltd	0.6	Lush Korea Co Ltd	0.7
Dongsuh Foods Co Ltd	1.1	CJ Cheiljedang Corp	0.5	Beiersdorf Korea Ltd	0.6
Nong Shim Kellogg Co	1.0	Lingtea Inc	0.3	Atomy Co Ltd	0.6
Moguchon Corp	0.7	Pulmuone Mineral Water	0.3	Shiseido Korea Co Ltd	0.6
Jinju Ham Co Ltd	0.4	LG H&H Co Ltd	0.3	Aesop Korea Ltd	0.6
Hansung Enterprise Co Ltd	0.4	Teazen Co Ltd	0.3	Gwoonsesang Cosmetics Co Ltd	0.6
Sajo Industrial Co Ltd	0.3	Seoul Dairy Cooperative	0.3	Puig Korea Ltd	0.6
Haitai Confectionery & Foods Co Ltd	0.3	E-Mart Inc	0.3	F&Co Co Ltd	0.6
Yuseung Mool San Co Ltd	0.3	KT&G Corp	0.3	Christian Dior Couture Korea Ltd	0.6

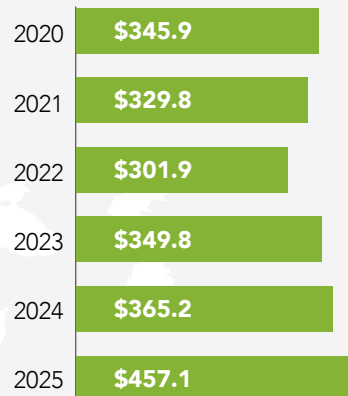
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

SPAIN

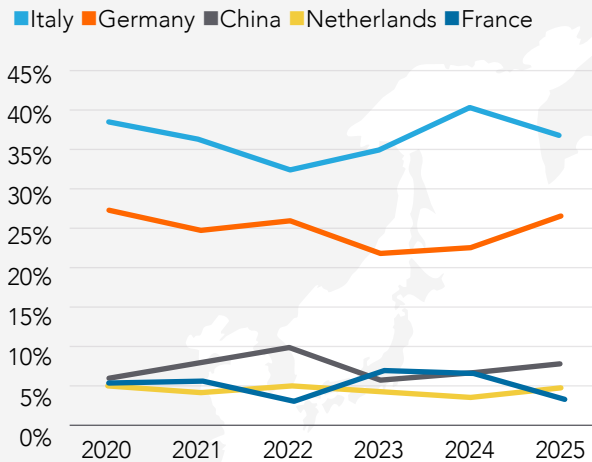


Packaging Machinery Imports (US Millions)



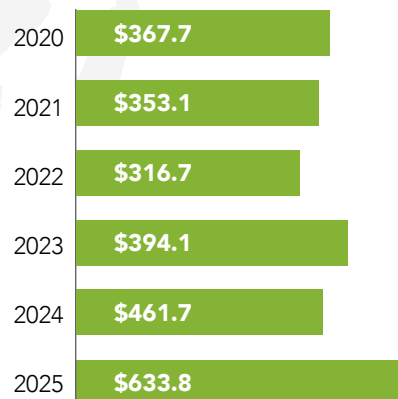
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



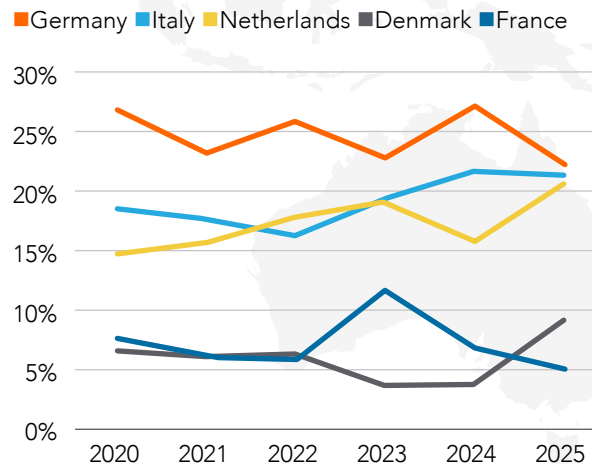
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



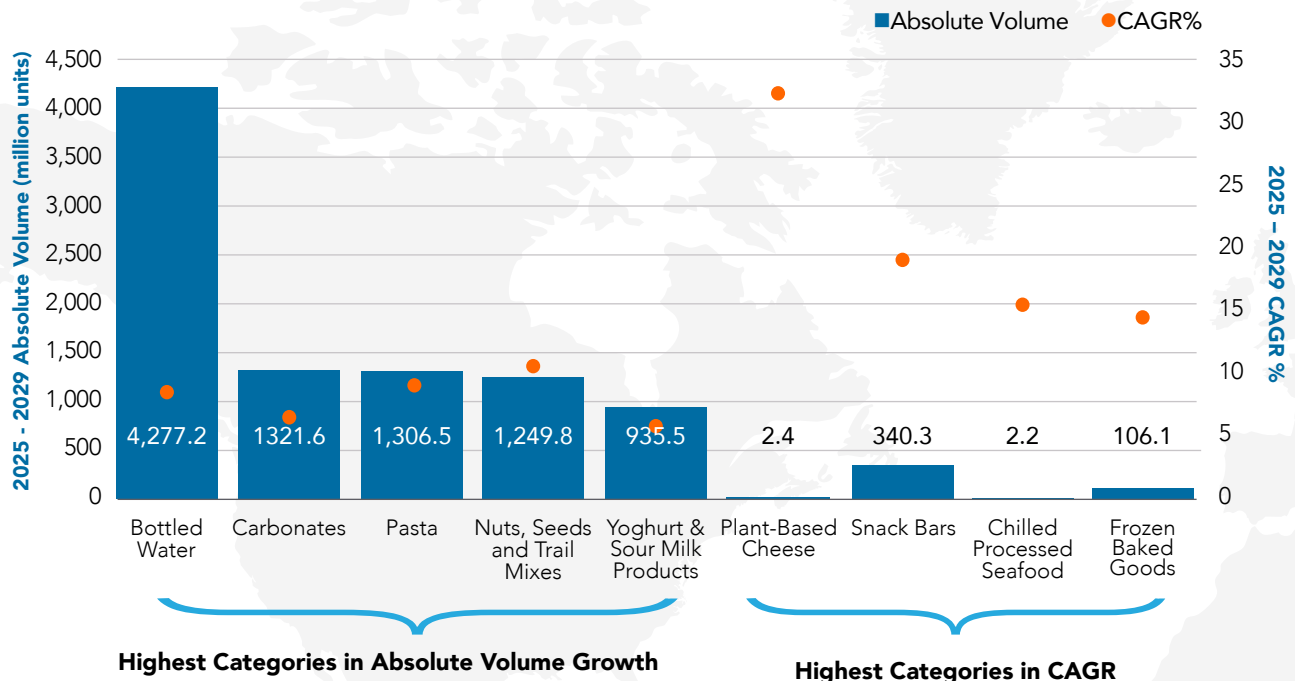
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



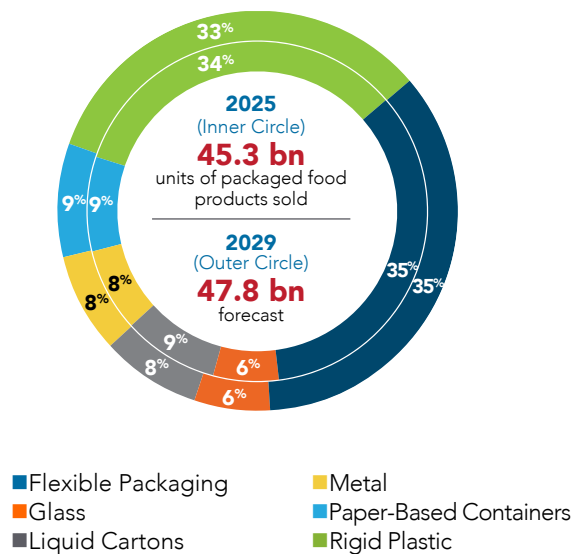
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE SPAIN



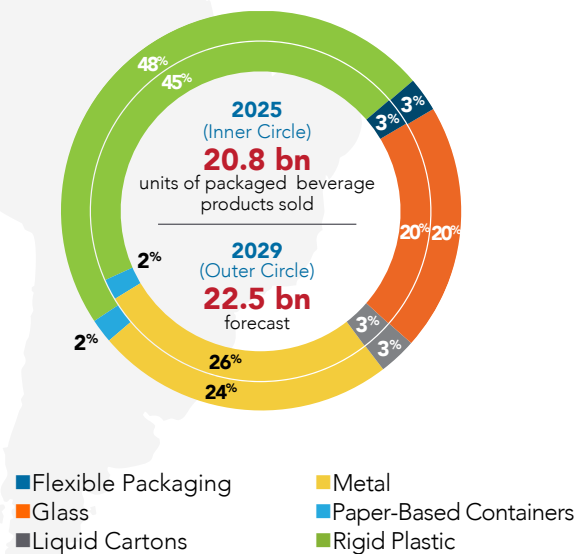
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Spain



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Spain



Data Source: © Euromonitor International 2026

TOP COMPANIES | SPAIN

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	16.6	Cía Servicios de Bebidas Refrescantes SL	27.5	Others	21.7
Others	16.5	Others	22.6	L'Oréal España SA	14.4
Other Private Label	15.2	Mercadona SA	11.0	Mercadona SA	7.8
Mercadona SA	14.2	Aguas Danone SA	4.0	Puig SL	5.8
Centros Comerciales Carrefour SA	6.6	Other Private Label	3.5	Procter & Gamble España SA	5.6
Campofrío Food Group SA	3.6	Centros Comerciales Carrefour SA	3.3	Beiersdorf SA Spain	3.6
Elpozo Alimentación SA	2.4	Schweppes SA	3.1	Coty Beauty Spain SL	3.4
El Corte Inglés SA	2.0	Cía de Bebidas Pepsico SA	2.9	Unilever España SA, Grupo	2.8
Vicky Foods Products SLU	1.9	Calidad Pascual SAU	2.6	Estée Lauder SA	2.6
Eroski, Grupo	1.7	Agua Mineral San Benedetto SA	2.3	Centros Comerciales Carrefour SA	2.3
Bimbo SA	1.5	Vichy Catalán (Grupo) SA	2.1	Other Private Label	2.2
Auchan Retail España SA	1.4	Damm SA	1.9	Colgate-Palmolive España SA	2.1
Panrico SA	1.2	Nestlé Waters España SA	1.9	Pierre Fabre Ibérica SA	1.9
Calvo Conservas SL	1.0	J García Carrión SA	1.5	Henkel Ibérica SA	1.5
Herba Ricemills SLU	0.9	Balneario y Aguas de Solán de Cabras SA	1.3	ISDIN SA	1.4
Casa Tarradellas SA	0.8	Red Bull España SA	0.9	Haleon Spain SA	1.3
Comercial Gallo SA	0.8	Kaiku Corporación Alimentaria SL	0.9	LVMH Iberia SL	1.2
Kellogg España SA	0.7	Gestion Fuente Liviana SL	0.7	Future Cosmetics SA	1.2
Consum S Coop V Ltda	0.6	Eckes-Granini International	0.6	Inditex SA	1.0
Noel Alimentaria SAU	0.5	Juver Alimentación SA	0.5	Kiko Retail España SL	1.0
Conservas Garavilla SA	0.5	Coca-Cola Europacific Partners plc	0.5	Johnson & Johnson SA	0.9
Hijos de Carlos Albo SA	0.4	PepsiCo Foods AIE	0.5	Chanel España SA	0.8
Alimentación Argal SA, Grupo	0.4	Eneryeti Company SL	0.4	Shiseido Spain SA	0.7
Angulas Aguinaga SA	0.4	Aguas de Vilafior SA	0.4	AC Marca SA	0.7
Gallina Blanca SA	0.4	Fontaga SA	0.3	Comercial Farlabo España SL	0.7

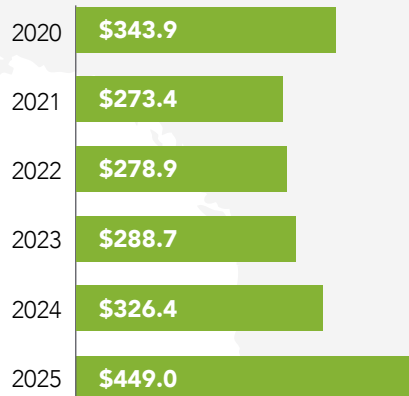
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

THAILAND

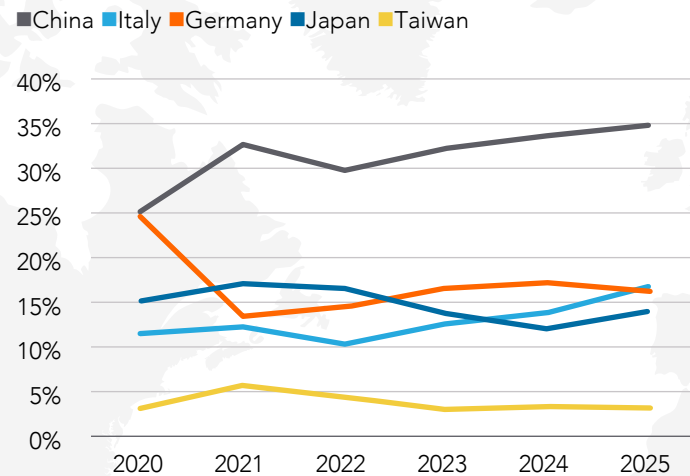


Packaging Machinery Imports (US Millions)



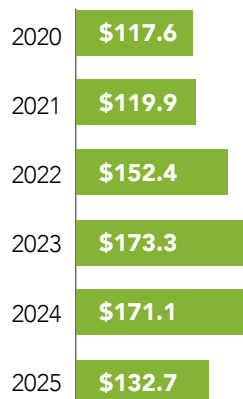
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



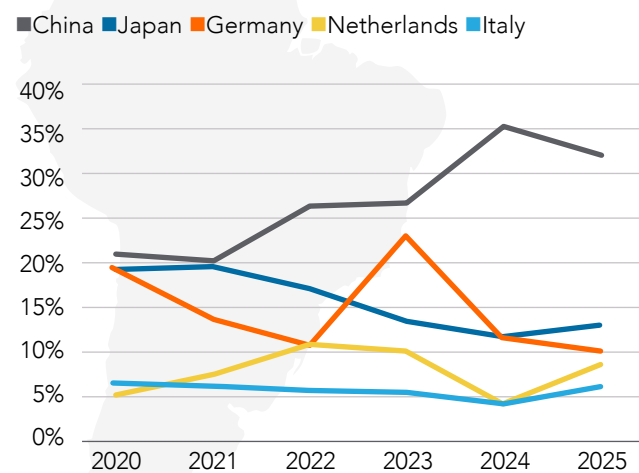
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



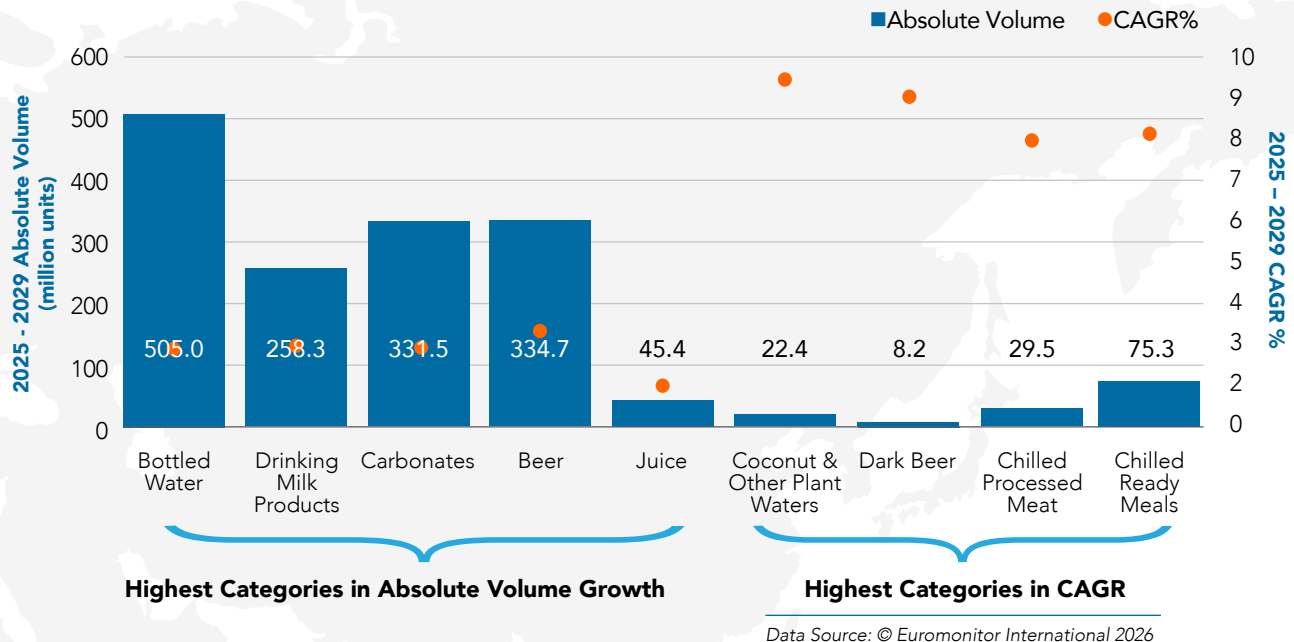
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY

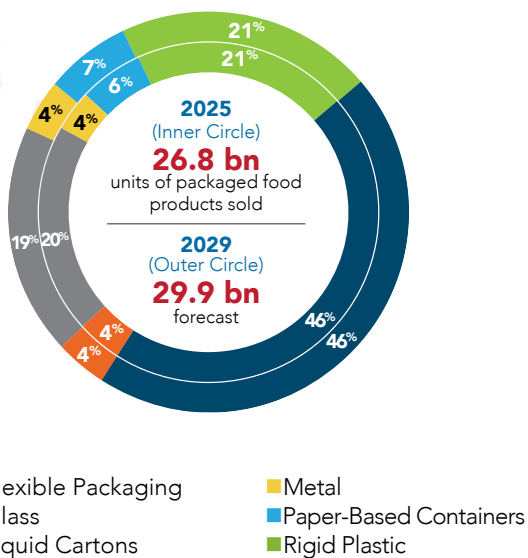


Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE THAILAND

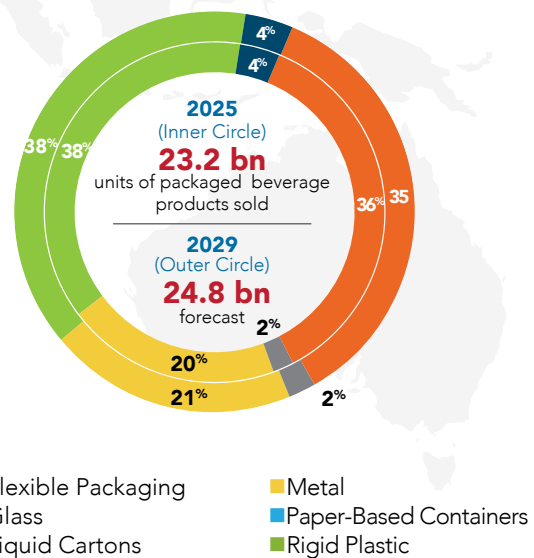


Volume Share of Food Packaging in Thailand



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Thailand



Data Source: © Euromonitor International 2026

TOP COMPANIES | THAILAND

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Others	32.6	Coca-Cola (Thailand) Ltd	21.9	Others	35.5
Artisanal	10.1	Others	11.7	L'Oréal Thailand Co Ltd	10.0
Thai President Foods Public Co Ltd	5.8	Pepsi-Cola (Thai) Trading Co Ltd	10.1	Unilever Thai Holdings Ltd	7.3
President Bakery PCL	5.3	Boon Rawd Brewery Co Ltd	6.9	Beiersdorf Thailand Co Ltd	5.1
CP Intertrade Co Ltd	4.7	Serm Suk PCL	5.8	Procter & Gamble Mfg Thailand Ltd	4.3
Charoen Pokphand Foods PCL	4.7	Nestlé (Thai) Ltd	5.5	Colgate-Palmolive Thailand Ltd	2.9
CPRAM Co Ltd	4.0	TC Pharmaceutical Industry Co Ltd	5.4	Neo Corporate Co Ltd	2.3
Other Private Label	3.8	Osotspa Co Ltd	5.1	Shiseido (Thailand) Co Ltd	1.9
Thai Preserved Food Co Ltd	3.4	Oishi Group PCL	4.0	Elca (Thailand) Co Ltd	1.8
CP Axtra Public Co Ltd	2.8	Ajinomoto (Thailand) Co Ltd	3.4	Johnson & Johnson (Thailand) Ltd	1.7
Bangsue Chia Meng Rice Mill Co Ltd	2.5	Carabao Tawandang Co Ltd	3.2	Lion Corp (Thailand) Ltd	1.7
Hi-Q Food Products Co Ltd	2.1	Ichitan Group PCL	2.4	Amway (Thailand) Ltd	1.4
Wan Thai Foods Industry Co Ltd	1.6	Tipco Foods (Thailand) PCL	1.3	Osotspa Co Ltd	1.2
Patum Rice Mill & Granary PCL	1.4	FoodStar Inc	1.3	OP Natural Products Co Ltd	1.2
S & P Syndicate PCL	1.1	House Osotspa Food Co Ltd	1.2	Kao Industrial (Thailand) Co Ltd	1.1
Asia Inter Rice Export Co Ltd	1.0	Aje Thai Co Ltd	1.2	Other Private Label	1.1
European Foods PCL	1.0	Thai Beverage PCL	0.9	Karmarts PCL	1.0
Surapon Foods PCL	0.9	Malee Sampran Plc	0.9	Henkel Thailand Co Ltd	1.0
Sam Yang Foods Co Ltd	0.9	Thai Pure Drinks Ltd	0.8	Better Way (Thailand) Co Ltd	0.9
S Khonkaen Foods PCL	0.8	Doi Kham Food Product Co Ltd	0.7	Giffarine Skyline Unity Co Ltd	0.9
Sitthinan Co Ltd	0.8	General Beverage Co Ltd	0.7	Chanel (Thailand) Ltd	0.8
Sandee Rice Co Ltd	0.8	Sappe Plc Co Ltd	0.5	Smooth E Co Ltd	0.7
Royal Food Co Ltd	0.7	Suntory PepsiCo Beverage (Thailand) Co Ltd	0.5	Sanofi-Aventis Thailand Ltd	0.7
Brunchtime Co Ltd	0.5	ICC International PCL	0.5	Rojukiss International PCL	0.7
Nestlé (Thai) Ltd	0.5	Uni-President (Thailand) Co Ltd	0.5	Amore Pacific (Thailand) Co Ltd	0.6

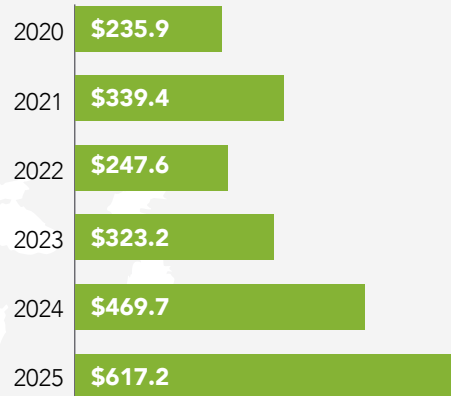
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

TURKEY

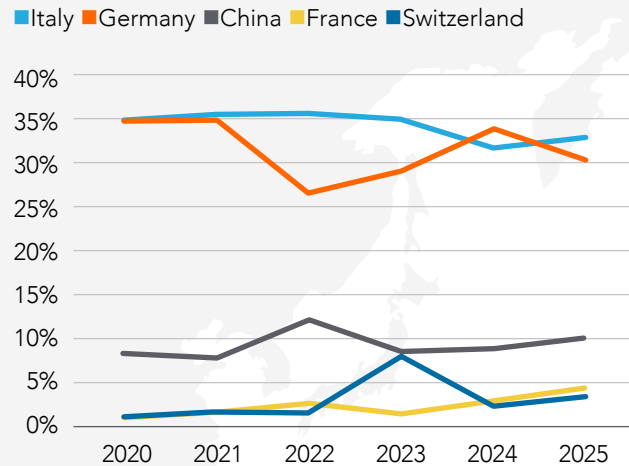


Packaging Machinery Imports (US Millions)



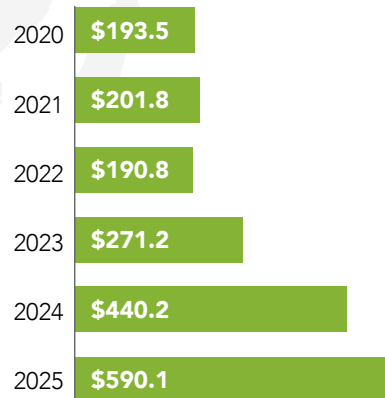
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



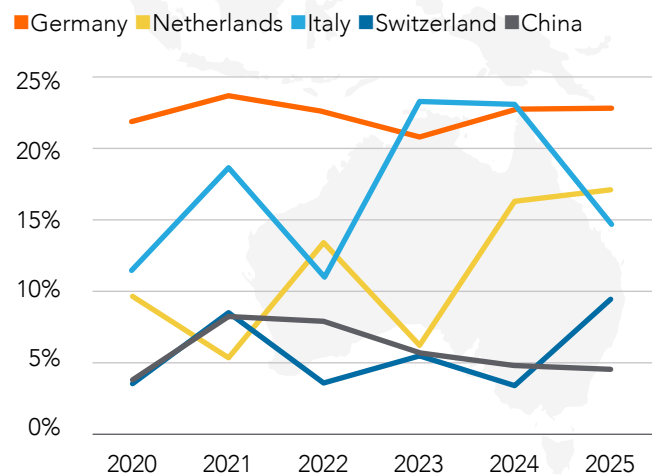
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



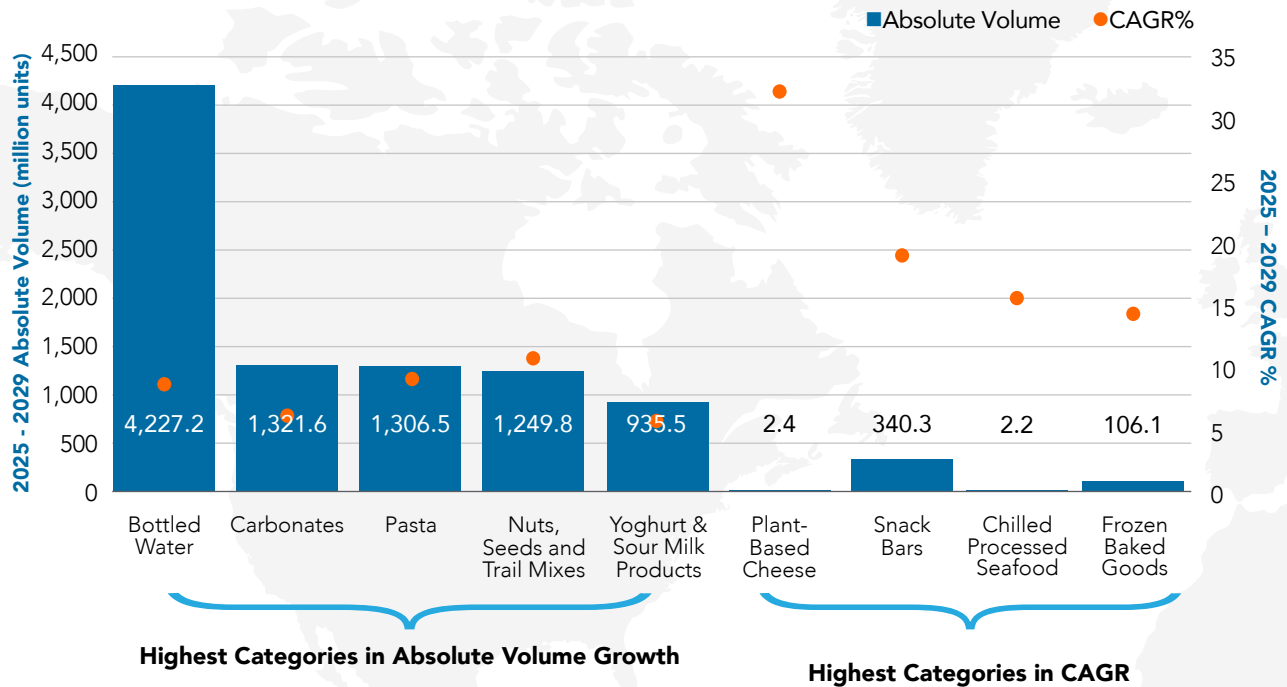
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



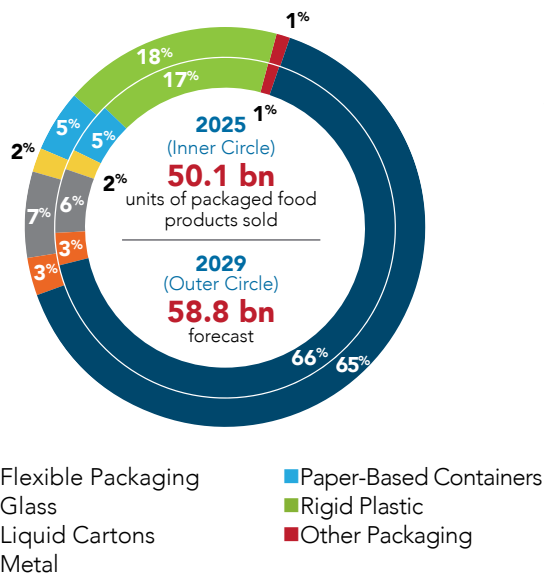
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE TURKEY



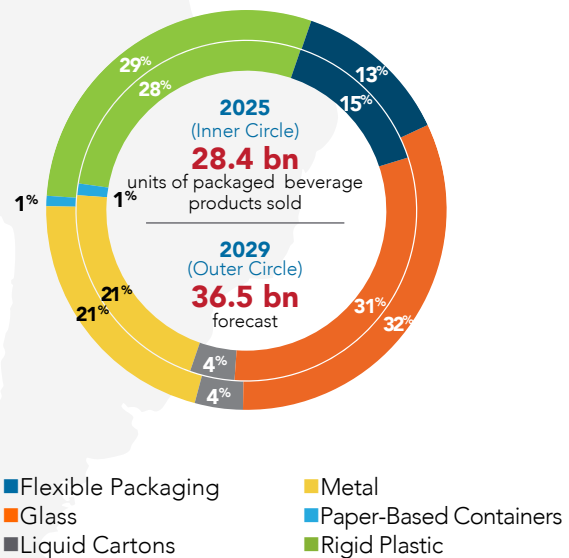
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in Turkey



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in Turkey



Data Source: © Euromonitor International 2026

TOP COMPANIES | TURKEY

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	64.4	Coca-Cola İçecek AS	30.1	Others	16.0
Others	8.3	Pepsi-Cola International Tanitim Ltd	14.5	L'Oréal Türkiye Kozmetik San ve Tic AS	10.2
Other Private Label	4.5	Others	13.8	Unilever San ve Tic Türk AS	6.4
BİM Birlesik Magazacilik AS	2.9	Other Private Label	6.1	Nivea Beiersdorf Turkey Kozmetik San Ve Tic AS	5.0
Namet Gıda San ve Tic AS	1.5	Erbak-Uludag Mesrubatlari AS	5.6	Naturel Kozmetik Ticaret AS	4.5
Pinar Entegre Et ve Un Sanayi AS	1.4	Sirmagrup Icecek San ve Tic AS	3.6	Procter & Gamble Tuketim Mallari Sanayi Ltd Skt	4.3
Barilla Gıda San ve Tic AS	1.2	Red Bull Gıda Dagitim ve Pazarlama Ticaret Ltd Sti	3.6	Gillette San ve Tic AS	3.7
Nuhun Ankara Makarnasi San ve Tic AS	1.2	Nestlé Waters Gıda ve Mesrubat San Tic AS	2.9	Colgate-Palmolive Temizlik Urunleri San ve Ticaret AS	3.6
Kerevitas AS	1.1	Beypazari Karakoca Dogal Mineralli Su Isletmesi Ltd Sti	2.6	Other Private Label	3.5
A101 Yeni Magazacilik AS	1.0	Suayp Demirel ith ihr Taah ve Tic	2.6	Kosan Kozmetik Sanayi AS	3.3
Dardanel Onentas Gıda Sanayii AS	1.0	Dimes Gıda San ve Ticaret AS	1.9	Türk Henkel Kimya San ve Tic AS	3.0
UNMAS AS	0.9	Yildiz Holding AS	1.7	Avon Kozmetik Urunleri San ve Tic AS	2.9
Pladis Ltd	0.8	Kizilay Maden Sulari AS	1.6	Evyap Sabun Yag Gliserin San ve Tic AS	2.7
Trakya Et ve Sut AS	0.7	Danone Tikvesli Gıda ve Icecek San ve Tic AS	1.3	Farmasi Enternasyonel Tic AS	2.5
Durum Gıda San ve Tic AS	0.7	Çakırmelikoglu Madensuyu Isletmesi Sanayi Ticaret AS	1.0	GlaxoSmithKline Plc	2.2
Eti Gıda San ve Tic AS	0.7	Nestlé Gıda Sanayii AS	1.0	Johnson & Johnson Sihhi Malzeme San ve Tic AS	2.1
Basak Tuketim ve Gıda AS	0.6	Çay Isletmeleri Genel Müdürlüğü	0.8	Estée Lauder Cos Inc	2.0
Halk Ekmek AS	0.6	Oguz Gıda San ve Tic AS	0.6	Kopas Kozmetik Pazarlama San AS	1.8
Konya Seker San ve Tic AS	0.6	Pinar Süt Mamülleri San ve Tic AS	0.6	Erkul Dagitim Pazarlama Tic AS	1.8
Reis Tarımsal Urunler San ve Tic AS	0.5	BİM Birlesik Magazacilik AS	0.6	Azmüsebat Çakmak ve Tiras Biçagi San ve Ticaret AS	1.5
Sok Marketler Tic AS	0.5	Anele Gıda San ve Tic AS	0.5	Wella AG	1.0
Migros Tic AS	0.4	Tamek Gıda ve Konsantre Sanayi AS	0.5	Dogus Grubu	1.0
Pinar Süt Mamülleri San ve Tic AS	0.3	Monster Energy Türkiye	0.4	Hunca Kozmetik Sanayii AS	0.8
Sölen Çikolata Gıda San Ve Tic AS	0.3	Gurok Group	0.3	Sephora Kozmetik AS	0.7
Nestlé Gıda Sanayii AS	0.3	Capri Sun Group Holding AG	0.2	LC Waikiki Magazacilik Hizmetleri Tic AS	0.7

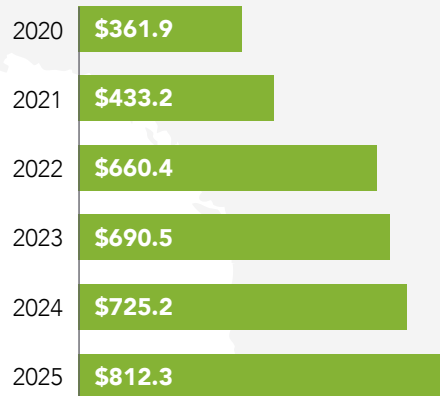
Data Source: © Euromonitor International 2026

IMPORT STATISTICS

UNITED KINGDOM

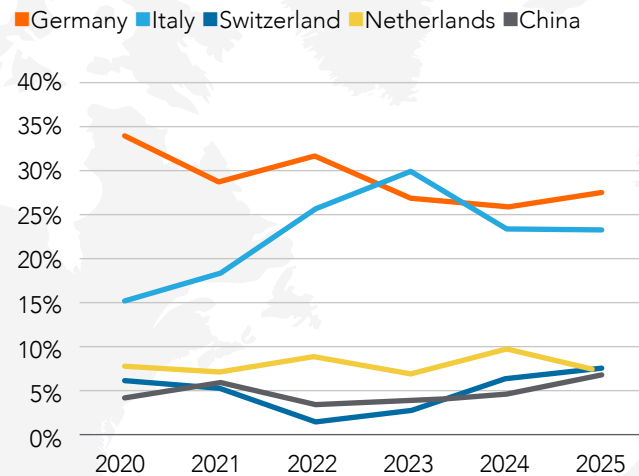


Packaging Machinery Imports (US Millions)



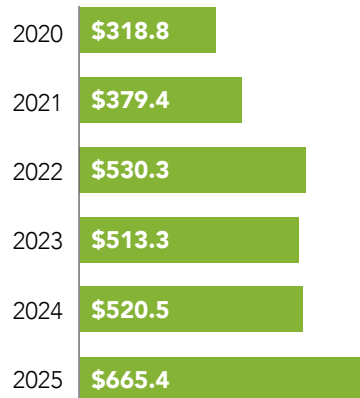
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



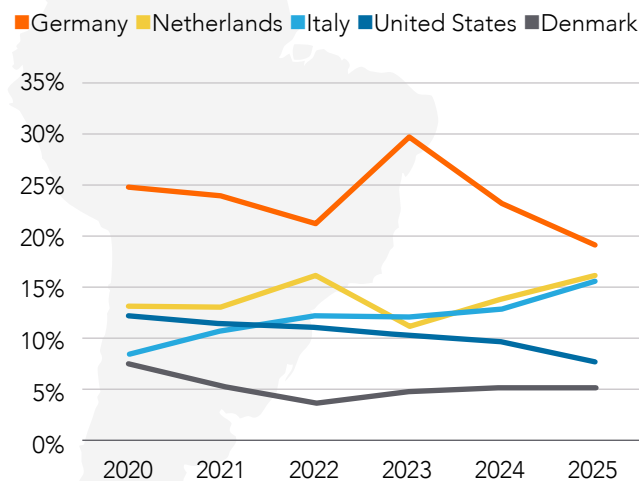
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



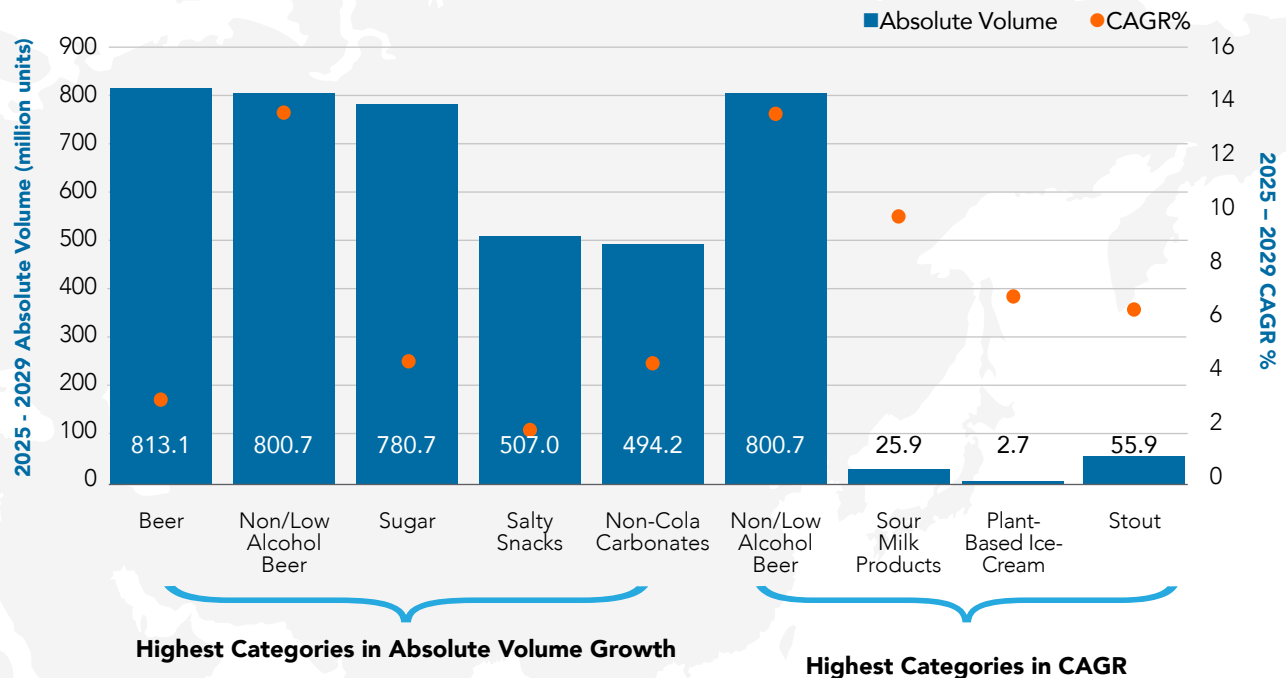
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



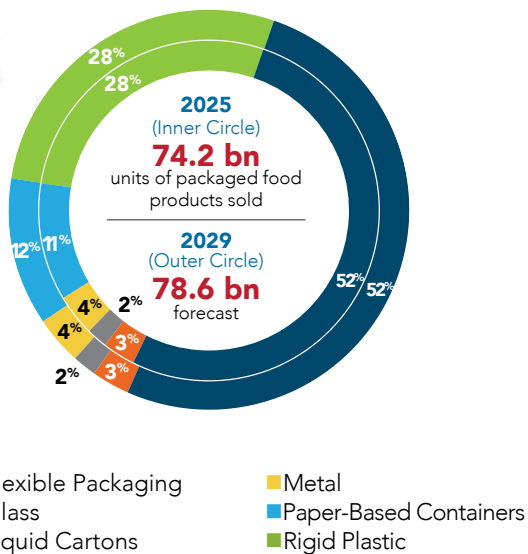
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE UNITED KINGDOM



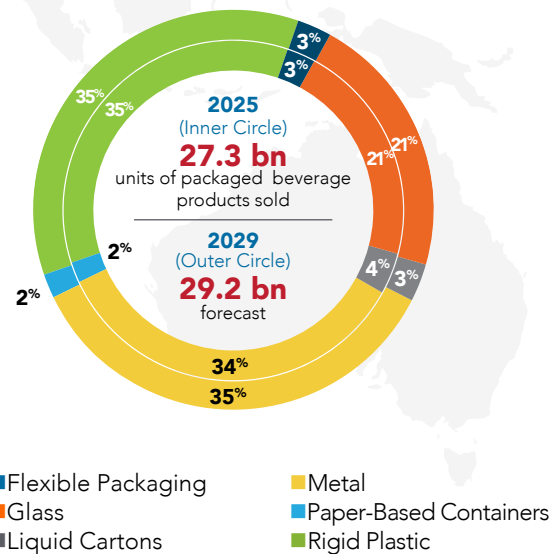
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in United Kingdom



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in United Kingdom



Data Source: © Euromonitor International 2026

TOP COMPANIES | UNITED KINGDOM

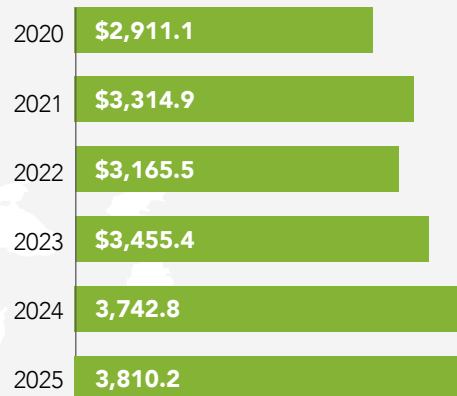
Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Other Private Label	14.5	Coca-Cola Enterprises Ltd	25.5	Others	21.3
Tesco Plc	13.6	Others	20.4	L'Oréal (UK) Ltd	12.2
Others	10.7	Britvic Soft Drinks Ltd	11.5	Procter & Gamble UK Ltd	7.3
J Sainsbury Plc	9.0	Red Bull Co Ltd	6.4	Unilever UK Ltd	6.5
Artisanal	8.5	Lucozade Ribena Suntory Ltd	5.5	Estée Lauder Cosmetics Ltd	5.6
Asda Group Ltd	7.2	Tesco Plc	3.6	Boots UK Ltd	3.6
Wm Morrison Supermarkets Plc	5.5	Danone Waters (UK & Ireland) Ltd	3.0	Colgate-Palmolive UK Ltd	2.7
Warburtons Ltd	2.4	Nestlé Waters UK Ltd	2.8	Beiersdorf UK Ltd	2.7
Marks & Spencer Plc	2.4	J Sainsbury Plc	2.5	Coty UK Ltd	2.6
Iceland Group Plc	2.1	Innocent Drinks Co Ltd	2.3	Puig UK Ltd	1.8
Iglo Birds Eye Frozen Foods	2.0	Asda Group Ltd	2.1	Other Private Label	1.8
Kellogg Co of Great Britain Ltd	1.8	Barr (AG) Plc	2.0	GlaxoSmithKline Plc	1.5
Premier Foods Group Ltd	1.7	Tropicana UK Ltd	1.6	PZ Cussons Plc	1.3
McCain Foods (GB) Ltd	1.6	Other Private Label	1.4	Johnson & Johnson Ltd	1.2
Waitrose Ltd	1.4	Highland Spring Ltd	1.2	L'Occitane Ltd	1.0
Hovis Ltd	1.3	Arla Foods Ltd	1.2	Clarins UK Ltd	1.0
Pilgrim's Pride Ltd	1.2	Nichols Plc	1.2	Chanel Ltd	0.9
Bernard Matthews Ltd	1.1	Fevertree Ltd	0.7	Christian Dior (UK) Ltd, Parfums	0.9
Princes Ltd	0.9	Clearly Drinks Ltd	0.6	Body Shop Plc, The	0.8
Weetabix Ltd	0.9	Naked Juice Co	0.5	Rimmel International Ltd	0.8
Heinz Co Ltd, HJ	0.9	Dash Brands Ltd	0.3	Elemis Ltd	0.7
Young's Seafood Ltd	0.8	Euro Food Brands Ltd	0.3	Charlotte Tilbury Beauty Ltd	0.7
Cereal Partners UK Ltd	0.7	Boost Drinks Ltd	0.3	Lush Cosmetics Ltd	0.6
Quaker Trading Ltd	0.7	All Market Europe Ltd	0.3	Shiseido UK Co Ltd	0.6
Unilever Foods UK Ltd	0.6	Emmi AG	0.3	Henkel Ltd	0.6

Data Source: © Euromonitor International 2026

IMPORT STATISTICS UNITED STATES

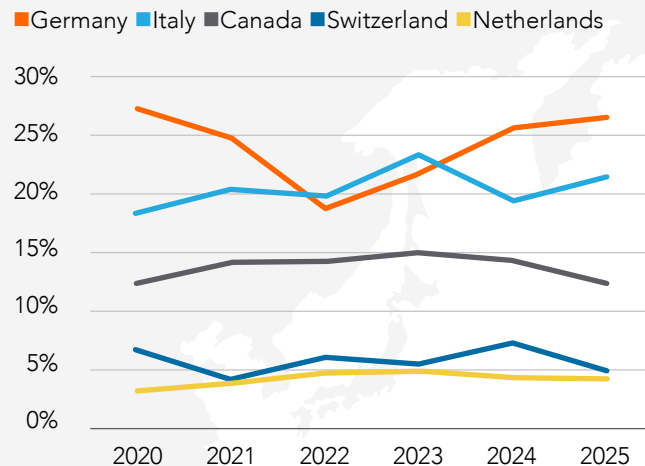


Packaging Machinery Imports (US Millions)



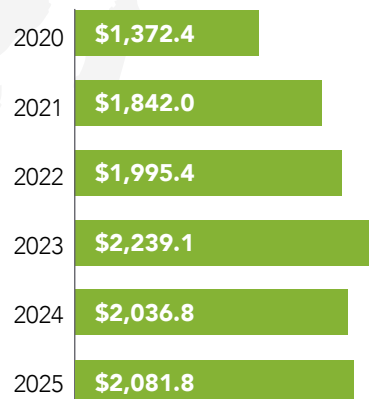
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



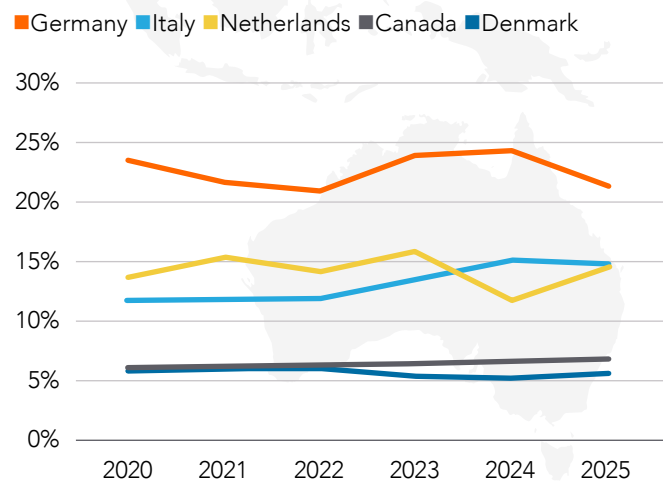
Source: PMMI with data from Trade Data Monitor

Processing Machinery Imports (US Millions)



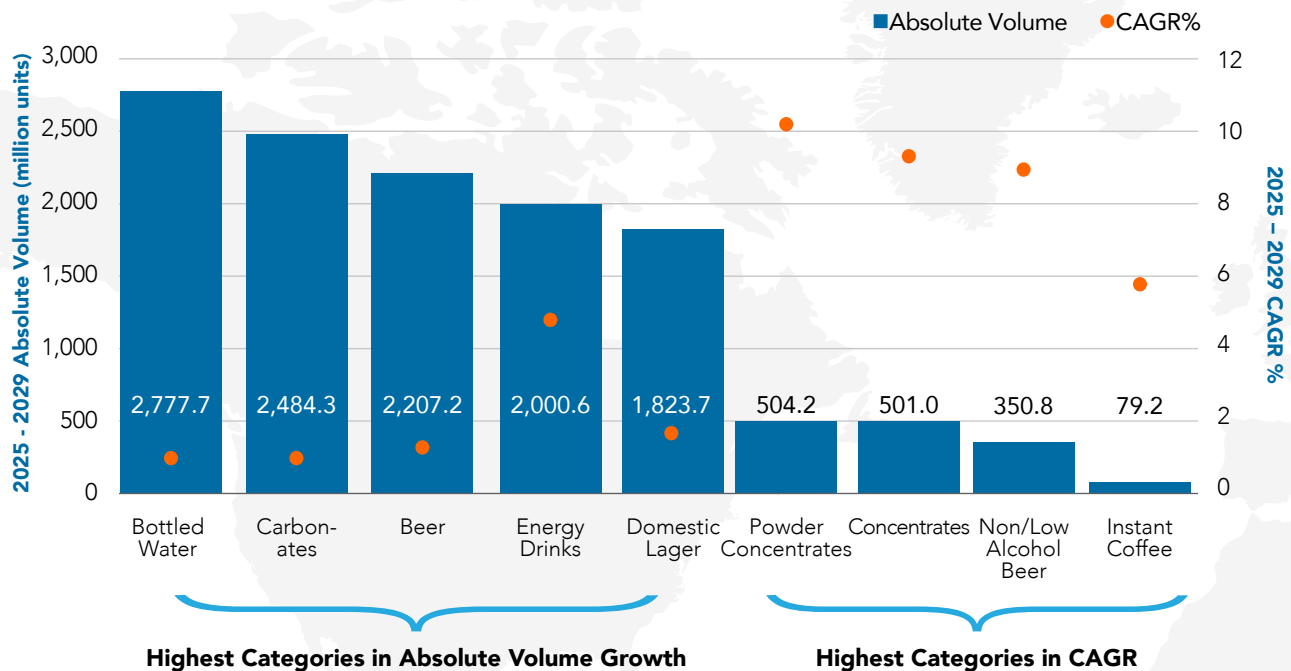
Source: PMMI with data from Trade Data Monitor

IMPORT MARKET SHARE BY COUNTRY



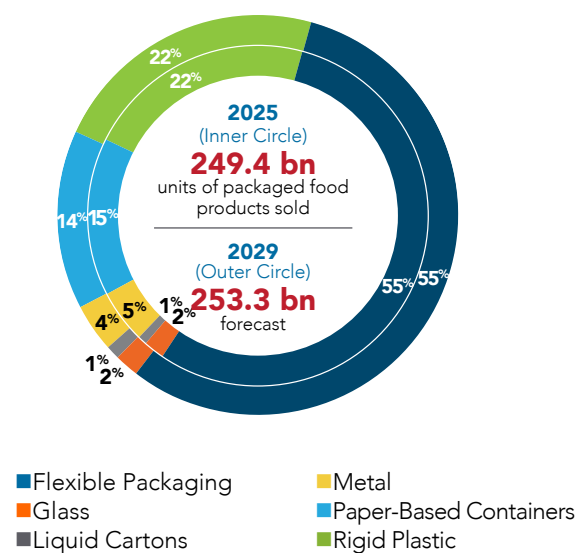
Source: PMMI with data from Trade Data Monitor

TOP PRODUCT CATEGORIES OF FOOD AND BEVERAGE UNITED STATES



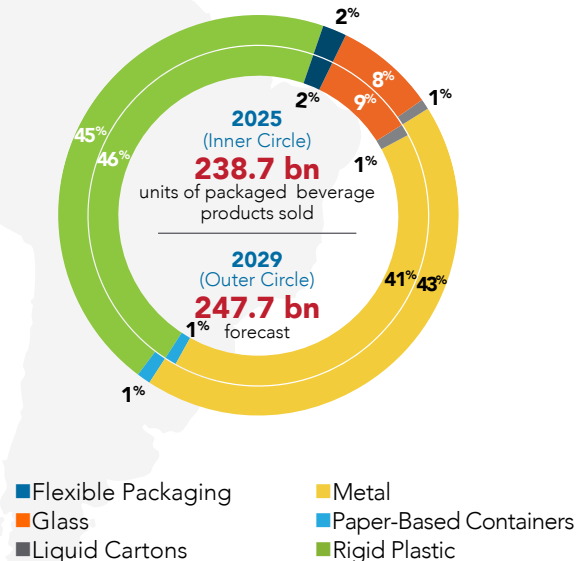
Data Source: © Euromonitor International 2026

Volume Share of Food Packaging in United States



Data Source: © Euromonitor International 2026

Volume Share of Beverage Packaging in United States



Data Source: © Euromonitor International 2026

TOP COMPANIES | UNITED STATES

Staple Foods		Soft Drinks		Beauty & Personal Care	
Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025	Company Name	Retail Value RSP 2025
Artisanal	21.5	Coca-Cola Co, The	17.5	Others	18.1
Private Label	21.1	Others	17.4	L'Oréal USA Inc	12.7
Others	18.6	Private Label	10.4	Procter & Gamble Co, The	9.8
Tyson Foods Inc	3.5	PepsiCo Inc	8.5	Unilever Home & Personal Care USA	6.4
Kraft Heinz Co	2.9	Keurig Dr Pepper Inc	7.8	Estée Lauder Cos Inc	5.2
Bimbo Bakeries USA Inc	2.8	Gatorade Co Ltd, The	5.5	Johnson & Johnson Consumer Products Inc	3.5
General Mills Inc	2.0	Monster Beverage Corp	5.1	Colgate-Palmolive Co	2.4
Flowers Foods Inc	2.0	Red Bull North America Inc	4.5	Coty Inc	2.4
Hormel Foods Corp	1.7	BlueTriton Brands Inc	2.7	LVMH Perfums & Cosmetics USA Inc	2.4
WK Kellogg Co	1.4	Pepsi-Lipton Tea Partnership	1.4	Bath & Body Works Inc	2.1
Smithfield Foods Inc	1.3	North American Coffee Partnership, The	1.3	Other Private Label	1.9
ConAgra Brands Inc	1.3	Energy Brands Inc	1.3	elf Beauty Inc	1.5
Post Consumer Brands LLC	1.1	Tropicana Products Inc	1.2	Puig Prestige Beauty	1.4
Kellanova	1.0	Celsius Holdings Inc	1.2	Chanel USA Inc	1.3
Hostess Brands LLC	1.0	Kraft Heinz Co	1.1	Church & Dwight Co Inc	1.0
McKee Foods Corp	1.0	AriZona Beverage Co LLC	0.9	Mary Kay Inc	1.0
Quaker Oats Co, The	0.8	Talking Rain Beverage Co	0.9	Beiersdorf Inc	1.0
Sara Lee Bakery Group	0.8	Ocean Spray Cranberries Inc	0.8	Haleon Plc	0.9
Del Monte Foods Inc	0.7	BA Sports Nutrition LLC	0.8	John Paul Mitchell Systems Inc	0.9
Goya Foods Inc	0.7	National Beverage Corp	0.7	Zenlen Inc	0.9
Johnsonville Sausage LLC	0.7	Congo Brands LLC	0.6	Victoria's Secret & Co	0.8
Toyo Suisan Kaisha Ltd	0.7	Unilever Bestfoods North America	0.6	Suave Brands Co LLC	0.8
Campbell's Co, The	0.6	Olipop Inc	0.5	Edgewell Personal Care Brands LLC	0.8
Nongshim America Inc	0.6	DS Services of America, Inc	0.4	Fenty Beauty LLC	0.7
Barilla Alimentare SpA	0.6	Vita Coco Inc	0.4	Inter Parfums Inc	0.7

Data Source: © Euromonitor International 2026

PACKAGING & PROCESSING MACHINERY IMPORT DUTIES & OTHER TAXES



IMPORT TARIFFS

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.

In addition to tariffs into export markets, the U.S. MFN tariff is noted at the top of each table for comparison purposes. Given U.S. tariff levels remain fluid, separate tables specific to U.S. imports have been added to the Guide outlining various additional U.S. tariffs in place as of 24 August 2026.

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 U.S. trade actions against China. As a result, the applied tariff rates for US-manufactured equipment may be higher than China’s MFN rates.

Exporting countries reviewed for possible lower preferential tariffs: 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... 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 <i>Included for comparison to tariffs applied in foreign markets</i>	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 2026.				
Argentina	12.6%	Free or 12.6%	Free or 12.6%	12.6%
Imports from EU	11.8%	Free or 11.8%	Free or 11.8%	11.8%
Imports from MX	10.1%	Free or 10.1%	Free or 10.1%	10.1%
Imports from U.S	12.6%	Free or 12.6%	Free or 12.6%	Free or 12.6%
Australia	5%	5%	Free	5%
Imports from CA, CN, JP, KR, MX, U.S.	Free	Free	Free	Free
Brazil	12.6%	Free* or 12.6%	Free* or 12.6%	12.6%
Imports from EU	11.8%	Free or 11.8%	Free or 11.8%	11.8%
Imports from MX	Free or 10.1%	Free or 10.1%	Free or 10.1%	10.1%
Canada**	Free	Free	Free	Free
Chile	6%	6%	6%	6%
Imports from CA, CN, EU, UK, JP, KR, MX, U.S.	Free	Free	Free	Free
China	8%	6%, 8%, or 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	5.5%	5.5% or 6.5%	6.9%	4.6% or 5.7%
Colombia	Free	Free or 5%	Free or 5%	5%
Imports from CA, MX, EU, UK, KR, U.S.	Free	Free	Free	Free
European Union	1.7%	1.7%	1.7%	1.7%
Imports from ARG, BR CA, JP, KR, MX, UK, U.S.****	Free	Free	Free	Free
India*****	27.74%*****	27.74%*****	27.74%*****	27.74%*****
Imports from JP, KR	Free	Free	Free	Free
Imports from UK	Free	Free	Free	Free or 5%
Indonesia	5%	5%	5%	5%
Imports from CN, JP, KR, U.S.	Free	Free	Free	Free
Japan	Free	Free	Free	Free

> CONTINUED

Destination Market	8422.20	8422.30	8422.40	8422.90
Malaysia	Free	Free	Free	Free
Mexico Imports from EU, CA*****, JP, UK, U.S.	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, CA, EU, KR, MX, UK, U.S.	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%	15%	5%
Singapore	Free	Free	Free	Free
South Africa	Free	Free	Free	Free
South Korea Imports from CA, CN, EU, UK, U.S. Imports from JP	8% Free 6%	8% Free Free, 4%, or 6%	8% Free 5.3%, 6%, or 8%	8% Free 4%, 6%, or 8%
Switzerland	Free	Free	Free	Free
Taiwan	4%	3%	3%	2.5%
Thailand	Free	Free	Free	Free
Türkiye 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 <i>Included for comparison to tariffs applied in foreign markets</i>	Free	Free	Free	2.3%	2.8%	Free	Free	Free or 2.8%
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 2026.								
Argentina	12.6%	Free or 12.6%	12.6%	12.6%	12.6%	12.6%	Free or 12.6%	12.6%
Imports from EU	11.8%	Free or 11.8%	11.8%	11.8%	11.8%	11.8%	Free or 11.8%	11.8%
Imports from MX	10.1%	Free or 10.1%	10.1%	10.1%	10.1%	10.1%	Free or 10.1%	10.1%
Imports from U.S.	12.6%	Free or 12.6%	12.6%	12.6%	12.6%	12.6%	Free or 12.6%	Free
Australia	Free or 5%	5%	5%	5%	5%	5%	5%	5%
Imports from CA, CN, JP, KR, MX, UK, U.S.	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%	12.6%
Imports from MX	10.1%	Free, 11.2%	11.2%	Free	Free or 11.2%	Free	Free or 11.2%	Free
Imports from EU	11.5%	Free*, 11.5% or 11.8%	11.5%	11.8%	11.8%	11.5%	Free, 11.5%, or 12.6%	11.5%
Canada **	Free	Free	Free	Free	Free	Free	Free	Free
Chile	6%	6%	6%	6%	6%	6%	6%	6%
Imports from, CA, CN, EU, JP, KR, MX, UK, U.S	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	1.4%	Free	Free	Free	Free	Free	Free	Free
Imports from JP	4.8%	4.4%	5.5%	3.8%	3.8%	5.5%	4.6%	Free
Colombia	Free or 5%	Free	10%	Free	Free or 5%	10%	Free or 5%	5%
Imports from CA, EU, KR, MX, UK, U.S.	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 U.S.****	Free	Free	Free	Free	Free	Free	Free	Free
Imports from ARG, BR, CA, JP, KR, MX, UK,	Free	Free	Free	Free	Free	Free	Free	Free
India*****	27.74%*****	27.74%*****	27.74%*****	27.74%*****	27.74%*****	27.74%*****	27.74%*****	27.74%*****
Imports from JP, KR	Free	Free	Free	Free	Free	Free	Free	Free
Imports from UK	Free	Free	Free	Free	Free	Free	Free	Free or 5%
Indonesia	5%	Free or 5%	5%	10%	5%	5%	5%	5%
Imports from CN, JP, KR, U.S	Free	Free	Free	Free	Free	Free	Free	Free
Japan	Free	Free	Free	Free	Free	Free	Free	Free
Malaysia	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
Mexico	Free or 15%	Free	Free or 15%	Free	Free or 15%	Free or 5%	Free	Free
Imports from CA*****, EU, JP, UK, U.S	Free	Free	Free	Free	Free	Free	Free	Free
New Zealand							Free or 5%	Free or 5%
Imports from CA, CN, EU, MX, KR, JP, UK	Free	Free	Free	Free	Free	Free	Free	Free
Norway	Free	Free	Free	Free	Free	Free	Free	Free
Panama						Free or 10%		
Imports from CA, EU, KR, MX, UK, U.S.	Free	Free	Free	Free	Free	Free	Free	Free
Peru	Free	Free	Free	Free	Free	Free	Free	Free
Philippines							Free or 3%*****	
Imports from CN, JP, KR	Free	Free	Free	Free	Free	Free	Free	Free
Russia	Free	Free	Free	Free	Free	Free	Free	Free
Saudi Arabia	15%	5%	5%	5%	5%	5%	5%	15%
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 CA, CN, EU, UK, U.S	Free	Free	Free	Free	Free	Free	Free	Free
Imports from JP	6% or 8%	6%	6%	6%	6%	6%	6% 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
Türkiye	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%		10%	1%	10%	5%	1% or 5%	
Imports from CA, EU, UK	Free	Free	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 - 5%	
Imports from CA, CN, EU, JP, KR, MX, UK	Free	Free	Free	Free	Free	Free	Free	Free

Notes for HS Codes 8422 and 8438

- * For imports into **Brazil**, the MFN tariff is 12.6% which remains 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.
- ** On 22 August, **Canada** announced the intent to implement retaliatory tariffs by 8 September on certain U.S. origin imports in response to 50% Section 338 tariffs implemented on 21 August. As of 24 August, the list of products in scope of Canadian retaliation is not yet published. There is a risk that some U.S.-origin food processing and packaging machinery may be targeted given (a) certain Canadian-origin equipment is included in the scope U.S. Section 338 tariffs and (b) statements by the Prime Minister Carney that scope of previous retaliation lists will inform development of Canada's pending retaliation list.
- *** Most U.S. machinery imports into **China** are assessed retaliatory duties in addition to the current MFN rate. These retaliatory duties are in response to U.S. tariff actions (e.g., Section 301 China forced technology transfer policies tariffs applied under Trump's first term as well as IEEPA tariffs applied in 2025). China's retaliatory duties may be as high as 35% depending on the tariff code.
- **** Imports into **the EU** from the United States are duty-free as of 1 July 2026 under the U.S.-EU Turnberry Agreement. Preferential market access for U.S. origin products will sunset by 31 December 2029 if an extension is not adopted by the EU. .
- ***** Imports into **India** are subject to multiple import taxes along with the base customs duty. The "MFN rate" noted in the tables above is an all-inclusive calculated rate including the base customs duty + Integrated Goods and Services Tax (IGST) + 10% Social Welfare Surcharge (SWS).
- ***** On 1 July 2026, the U.S. Trade Representative (USTR) announced that the U.S. did not agree to renew the USMCA/CUSMA/T-MEC trade agreement in its current form. As such, the agreement is scheduled to expire in 2036 unless the deal is renewed. Despite U.S. decision not to renew at this time, USMCA remains in place for US, Canadian and Mexican importers.
- ***** 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

	8422.20	8422.30	8422.40	8422.90	8438.10	8438.20	8438.30	8438.40	8438.50	8438.60	8438.80	8438.90
U.S. MFN	Free	Free	Free	Free	Free	Free	Free	2.3%	2.8%	Free	Free	Free or 2.8%
From Canada	USMCA compliant Free	USMCA compliant Free or 50% for 8422.30.91, 8422.40.91, and 8422.90.91			USMCA compliant Free			USMCA compliant Free 50% for 8438.40 USMCA compliant Free	USMCA compliant Free	USMCA compliant Free		USMCA compliant Free
	Non-USMCA compliant 10%	Non-USMCA compliant 10% or 60% for 8422.30.91, 8422.40.91, and 8422.90.91			Non-USMCA compliant 10%			Non-USMCA compliant 62.3% for 8438.40	Non-USMCA compliant 12.8%	Non-USMCA compliant 10%		Non-USMCA compliant Free or 12.8%
From Mexico	USMCA compliant Free Non-USMCA compliant 10%							USMCA compliant Free Non-USMCA compliant 12.3%	USMCA compliant Free Non-USMCA compliant 12.8%	USMCA compliant Free Non-USMCA compliant 10%		USMCA compliant Free Non-USMCA compliant 10% or 12.8%
From China	37.5%			20% or 37.5%	20%			22.3%	40.3%	37.5%		20% or 40.3%
From EU, Taiwan	10% (net of MFN tariff rate)											
From Japan, Korea, and Switzerland	12.5% (net of MFN tariff rate)											
From India and UK	10%							12.3%	12.8%	10%		10% or 12.8%

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 on imports from Canada and Mexico:** duty-free
- **Section 301 tariffs / forced technology transfer 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%. List 4A has been reduced to 7.5% as of February 2020, in addition to List 1 of 25% applied since July 2018.
- **Section 301 tariffs / forced labor on 59 countries plus the EU-27**
 - Additional 10% tariff on 15 markets that have reciprocal trade agreements and/or impose a forced labor prohibition but do not adequately enforce such ban. These 15 markets include Argentina, Bangladesh, Canada, Cambodia, EU, Ecuador, El Salvador, Guatemala, Indonesia, Malaysia, Mexico, Pakistan, Taiwan, and the UK.
 - For EU and Taiwan, Section 301 Forced Labor tariffs are 10% net/inclusive of MFN.
 - Additional 12.5% Section 301 tariff on all 45 other countries subject to the [investigation](#).
 - For Japan, Korea, and Switzerland, Section 301 Forced Labor tariffs are 12.5% net/inclusive of MFN.
- **Section 301 tariffs / Brazil unreasonable acts:** 25% tariff on most imports

from Brazil, except packing or wrapping machinery (not elsewhere specified or included) of 8422.40.9181 which was exempted. All other food processing and packaging machinery of 8422 and 8438 are not included in the list of exempted products.

- **Section 338 tariffs / Canadian discrimination:** As of 22 August 2026, 50% tariff on imports of a variety of goods from Canada whether or not they are USMCA-compliant. Food processing and packaging machinery subject to the Section 338 tariffs are 8422.30.91, 8422.40.91, 8422.90.91, and 8438.40.

Other tariffs

- As of 24 August, pending tariff actions that could result in further tariffs applied on imported machinery include Section 301 investigation on structural excess capacity and Section 232 Investigation on robotics and industrial machinery
- Section 232 tariffs on steel and aluminum may impact other tariff codes for derivatives including some machinery within our sector. These tariffs are not reflected above as machinery and equipment classified under 8422 and 8438 are not currently subject to Section 232 steel/aluminum tariffs.
 - **Steel and aluminum tariffs:** 50% on the full value of article made entirely of non-U.S. steel/aluminum, except for imports from the UK, which are subject to 25%.
 - Steel and aluminum derivative tariffs: 25% on the full value of derivative articles substantially made of steel/aluminum, except for imports from the UK which are subject to 15%.

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	COO		MFN	Section 301 China	Section 301 Forced Labor	Section 301 Brazil ² Unreasonable Acts	Section 301 Excess Capacity	Section 232 Steel/Aluminum	Section 338 Canadian Discrimination ³	Total Applied Tariff							
Parts of machines for aerating beverages	8422.90	CN		Free	7.5% or 25%	12.5%				Only machinery of 8422.90.91 in scope: 50%	20% or 37.5%							
		CA	USMCA compliant			10%					Free or 50% for 8422.90.91							
			Not USMCA compliant								10% or 60% for 8422.90.91							
		EU	10%															
		Brazil	12.5%		25%	37.5%												
Machinery for the industrial preparation or manufacture of food or drink, n.e.s.	8438.80	CN		Free	25%	12.5%					37.5%							
		CA	USMCA compliant			10%					Free							
			Not USMCA compliant								10% (net of MFN tariff rate)							
		EU	10%															
		Brazil	12.5%		25%	37.5%												
		Wire of iron or nonalloy steel	7217		CN						Free	25%				50% on the full customs value of the product		25% + 50% on the full customs value of the product
					CA	USMCA compliant												50% on the full customs value of the product
Not USMCA compliant	50% on the full customs value of the product																	
EU	50% on the full customs value of the product																	
Brazil	50% on the full customs value of the product																	
Flat rolled stainless steel products	7219			CN		Free	25%					50% on the full customs value of the product						
		CA	USMCA compliant		50% on the full customs value of the product													
			Not USMCA compliant				50% on the full customs value of the product											
		EU	50% on the full customs value of the product															
		Brazil	50% on the full customs value of the product															

¹Section 301 tariffs applied only on select Chinese imports.

²Section 301 Brazil tariffs exempted on machinery of 8422.40.9181.

³Section 338 Proposed tariffs applied only on select Canadian imports.

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. US-Argentina Agreement on Reciprocal Trade: Preferential ROO for this agreement have not yet been established. Substantial transformation applies.
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 an 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); CTSB = 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: CTSB 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: CTSB 8438.90: CTH Canada-Colombia FTA ROO for imports from CA: 8422.11-8422.40: CTSB 8422.90: CTH 8438.10-8438.80: CTSB 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 Trade Agreement 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. US-EU Agreement on Reciprocal Trade: Preferential ROO for this agreement have not yet been established. Substantial transformation applies.
Indonesia	US-Indonesia Agreement on Reciprocal Trade: Preferential ROO for this agreement have not yet been established. Substantial transformation applies.
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".

CTH = Change the heading (4-digits); CTSB = 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	US-Panama FTA ROO for imports from US: 8422.11 – 8422.40: CTSB 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: CTSB 8438.90: CTH Canada-Panama FTA ROO for imports from CA: 8422.11 – 8422.40: CTSB 8422.90: CTH 8438.10 – 8438.80: CTSB 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: CTSB 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: CTSB 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: CTSB
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 U.S. 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 charge is subject to a minimum fee of USD 33.58 and a maximum fee of USD 651.50. MPF for informal entries is a set fee and ranges from USD 2.69 – 12.09 per shipment. Most U.S. FTA partners are exempt from MPF collection. Harbor Maintenance Fee: 0.125% of 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 Import Processing Charges: Ranging from 0 AUD to 192 AUD depending on the consignment value and document type Biosecurity Fee: 46 AUD for shipments by air to 68 AUD for shipments by sea.
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: 14%; 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% minimum of CIF + duty. Varies by member state. EU Member States' standard VAT rates
India	Landing charge: Variable landing charges apply based on CIF value of goods. This charge is applied on top of the all-inclusive calculated rate noted in the above import duty tables. The fees and taxes captured in the all-inclusive calculated duty include the Integrated Goods and Services tax (IGST) and the Social Welfare Surcharge (SWS) levy. The specific rates for these fees are noted below for reference. IGST: 18% of CIF + duty SWS levy: 10% of duty
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, 8438.90.19, 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. Goods Clearance Fee (IETF): As of 1 April 2026, high-value imports will be charged NZ\$51.81 (GST exclusive) if transported by air and NZ\$118.44 (GST exclusive) if transported by sea. Biosecurity Fee: 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.

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: 22% 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. Service Fee: 0.15% based on the value of the incoming goods including insurance and shipping with a minimum of 15 SAR and a maximum of 500 SAR. Goods exempt from customs duties receive a preferential cap of 130 SAR. 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 fees: 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 161.80 per bill of lading, TRY 1,605.80 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	Customs clearance fee: VND 20,000 per declaration for the clearance of imported goods. VAT: 8% of CIF + duty. Note that the standard VAT rate is 10%, however the rate is temporarily reduced to 8% of CIF + duty until 31 December 2026.

GLOBAL PACKAGING MEDIA & ASSOCIATION CONTACTS



Packaging Publications/Media

ASIA PACIFIC

Asia Food Beverages (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)
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 Imballaggio (Italy)
Resegna de Imballaggio (Italy)

SwissPack (Switzerland)
UPAKOVKA (Ukraine)
PACINFO (Ukraine)
Potato Processing International (Europe)
Packaging News (UK)
Pakkaus (Finland)
Dei Ernährungs Industrie (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)
BakeryandSnacks.com (UK)
Confectionery News (UK)
Food Marketing & Technology/ DrinkWorld FoodBev Media (UK)
Packaging Europe (UK)
Sustainable Packaging News (UK)
The Drinks Business (UK)
The Spirits Business (UK)
Food Navigator (Europe)

LATIN AMERICA

Abrenews (Brazil)
Editorial Emma Fiorentino (Argentina)
El Empaque + Conversion (Mexico / Latin America)
Embanews (Brazil)
EnvaPack (Mexico / Latin America)
Food Navigator (Latin America)
O Auto-Adesivo (Brazil)
Pack (Brazil)
Projeto Pack (Brazil)
Revista Enfasis Packaging (Argentina)
Revista IAE (Argentina)

> CONTINUED

NORTH AMERICA

All About Beer
Baking & Snack
Baking Business / World Grain / Food
Beauty Packaging
Beer Business Daily
Beer Marketer's Insights
Beverage Daily
Beverage Industry
Beverage Master
BevNET Magazine
Board Converting News
Brewbound
Brewer Magazine
BXP (Brand Experience Magazine)
Canadian Grocer
Canadian Packaging
Candy Industry
Cannabis Business Times
Cheese Market News
Commercial Baking
ConfectioneryNews
Contract PHARMA
Control Global
Craft Beer & Brewing Magazine
Dairy Foods
Dairy Processing
DairyReporter
DC Velocity
Design News
Design World
Fierce Pharma
Flexible Packaging
Food Business News
Food Business Review
Food Dive
Food Engineering
Food in Canada
Food Manufacturing
Food Navigator USA
Food Processing
Food Safety Magazine
Food Technology
Fruit and Vegetable Magazine
Industrial Equipment News
Industry Today
Industry Week
Inside Climate News
Logistics Management/Material Handling Network
Pharma Logistics IQ
Machine Design
Manufacturing Dive
Manufacturing Leadership
Manufacturing Tomorrow
Marijuana Moment
Marijuana Venture Magazine
Meat + Poultry
Meatingplace
Medical Product Outsourcing
Medtech Insight
Modern Materials Handling
National Provisioner
Nutraceuticals World
Outsourced Pharma
Packaging Digest
Packaging Dive
Packaging Gateway
Packaging Impressions
Packaging Strategies
Packaging Technology Today
Paper, Film & Foil Converter Magazine Packaging & Converting Intelligence
Pet Age
Pet Food Processing
Petfood Industry
Pharma Manufacturing
Pharmaceutical Executive
Pharmaceutical Manufacturing
Pharmaceutical Technology
PharmaVOICE
Plant Engineering
Plastics Technology
Plastics Today
Potato Business
Prepared Foods
Processing Magazine
Produce Processing
ProFood World
Progressive Grocer
Psychedelia Magazine
RDG Media
Refrigerated & Frozen Foods
Resource Recycling
RetailWire
SeaFood News
SeafoodSource
Snack Food & Wholesale Bakery
Snack Magazine
Spudman
Supply Chain & Demand Executive/Food Logistics The Logistics of Logistics
SupplyChainBrain
Sustainability Magazine
Sustainable Business Times
Tea & Coffee Trade Journal
The Packer
Wine Business Monthly
Wine Industry Network
World Packaging News

PACKAGING ASSOCIATIONS

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

PACKAGING ASSOCIATIONS

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



UPCOMING INTERNATIONAL PACKAGING AND PROCESSING MACHINERY TRADESHOWS



AFRICA PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
Propak West Africa	8-10 September 2026	Lagos (Nigeria)	The largest exhibition for packaging, plastics, printing, and food-processing
Paper Middle East	15-17 September 2026	Cairo (Egypt)	International Exhibition for Paper, Corrugated board, Paperboard and Tissue paper industries
PRINT 2 PACK	15-17 September 2026	Cairo (Egypt)	International Exhibition for Printing & Packaging Industries
MOROCCO SIEMA	22-24 September 2026	Casablanca (Morocco)	International food processing, packaging, and machinery 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
FoodAfrica	7-10 December 2026	Cairo (Egypt)	The premier trade exhibition for the food and beverage industry in Africa and the Middle East.
Propak East Africa	2-4 March 2027	Nairobi (Kenya)	East Africa's leading exhibition & conference for packaging, printing, food-processing and plastic industry members
Nigeria agrofood	16-18 March 2027	Lagos (Nigeria)	International Trade Show on Agriculture & Livestock, Food, Beverage & Packaging Technology and Food, Beverages & Hospitality
Nigeria plastprintpack	16-18 March 2027	Lagos (Nigeria)	Nigeria's International Plastics, Printing and Packaging Trade Show
Printpack Alger	27-29 April 2027	Algiers (Algeria)	International Printing and Packaging Trade Fair for Algeria and the Maghreb
Ethiopia agrofood	20-22 May 2027	Addis Ababa (Ethiopia)	AgroFood Ethiopia focuses on agricultural technology and machinery, tractors, seeds, animal production, horticulture, greenhouse technology, service companies.
Ethiopia plastprintpack	20-22 May 2027	Addis Ababa (Ethiopia)	International Plastic, Printing & Packaging Trade Exhibition
ProPak MENA	1-3 June 2027	Cairo (Egypt)	ProPak MENA is Africa's processing & packaging event for the F&B manufacturing industry
SenePack	17-19 June 2027	Dakar (Senegal)	The main international trade fair in West Africa, focusing on Food Packaging
Plastex	9-12 January 2028	Cairo (Egypt)	The largest plastics and rubber exhibition in the Middle East and North Africa
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
East Pack Surabaya	1-4 July 2026	Surabaya (Indonesia)	International Exhibition on Processing, Packaging, Automation, Handling for Food & Beverage, Pharmaceutical and Cosmetic
foodpro	26-29 July 2026	Melbourne (Australia)	Australia's Leading Trade Event for Food Processing, Packaging and Innovation
AsiaFood Expo	9-12 September 2026	Manila (Philippines)	International exposition on food processing, packaging, handling, machinery, equipment and technology
VietnamPrintPack	16-19 September 2026	Ho Chi Minh (Vietnam)	Vietnam International Printing & Packaging Industry Exhibition
Allpack Indonesia	20-23 October 2026	Jakarta (Indonesia)	International Exhibition on Processing, Packaging, Automation, Handling for Food & Beverage, Pharmaceutical and Cosmetic
TOKYO PACK	14-16 October 2026	Tokyo (Japan)	Japan International Packaging Exhibition
IPEX Indonesia	20-23 October 2026	Jakarta (Indonesia)	International Exhibition on Pharmaceutical, Ingredients, Contract manufacturing, Processing, Technology, Packaging machinery, Equipments and Services
Lankapak	23-25 October 2026	Colombo (Sri Lanka)	The premier international packaging, processing, printing & plastic exhibition in Sri Lanka.
SIAL Interfood	4-6 November 2026	Jakarta (Indonesia)	The leading food and beverage exhibition in Indonesia
interpack China	16-18 November 2026	Shanghai (China)	International Food Processing and Packaging Technology Exhibition
PLASPAK Indonesia	17-20 November 2026	Jakarta (Indonesia)	International Plastic, Printing & Packaging Trade Exhibition
NEPCON NAGOYA	25-27 November 2026	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.
Converttech Japan	16-18 December 2026	Tokyo (Japan)	Professional exhibition of Coating, Laminating, Printing and Slitting
ProPak Philippines	24-26 February 2027	Manila (Philippines)	International Processing & Packaging Exhibition for the Philippines
PACKINNO	4-6 March 2027	Guangzhou (China)	China's leading platform for packaging machinery, materials, and solutions
Sino-Pack	4-6 March 2027	Guangzhou (China)	China's premier trade fair for smart packaging, logistics, and innovative packaging materials.

ASIA & PACIFIC PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
ProPak Vietnam	10-12 March 2027	Ho Chi Minh (Vietnam)	International Processing & Packaging Exhibition for Vietnam
Food Pack Asia	10-13 March 2027	Bangkok (Thailand)	Food Pack ASIA features Food Processing & Drink Technologies, Packaging Technology, Confectionery machinery & Bakery Equipment, Hotel & Restaurant Equipment, Food & Beverage
APPEX	16-19 March 2027	Melbourne (Australia)	Australia's largest processing & packaging expo
LUXE PACK Shanghai	14-15 April 2027	Shanghai (China)	Exhibition for Luxury Goods Packaging - beauty, alcohols, jewelry, fine food, tobacco, fashion, etc.
CPHI Japan	21-23 April 2027	Tokyo (Japan)	International tradeshow for Pharmaceutical Ingredients in Japan and wider Asian-Pacific region
ProPak Asia	9-12 June 2027	Bangkok (Thailand)	Asia's premier international trade exhibition for food, drink, pharmaceutical, and consumer goods processing and packaging technology
ProPak China	22-24 June 2027	Shanghai (China)	Premier trade fair for China's processing and packaging industry
INTERPHEX Japan	30 June - 2 July 2027	Tokyo (Japan)	INTERPHEX JAPAN gathers the latest technologies and services across pharmaceutical manufacturing, biotechnology and regenerative medicine
Pack Print International	15-18 September 2027	Bangkok (Thailand)	International Packaging and Printing exhibition for Asia
Japan Pack	6-8 October 2027	Tokyo (Japan)	Connecting with a variety of new technologies that improves productivity and efficiency, and bringing together innovative products and solutions to solve problems.
LOUPE Asia	30 November - 3 December 2027	Shanghai (China)	LOUPE Asia is the largest label, flexible packaging (shrink sleeves and pouches), and inline carton converting event in the region, driven by the strength and expansion of the Chinese market.
Myanmar PlasPrintPack	14-17 December 2027	Yangon (Myanmar)	Myanmar International Plastics, Printing & Packaging Industry Exhibition
Korea Pack	18-21 April 2028	Seoul (South Korea)	KOREA PACK is Korea's largest and most influential exhibition dedicated to the packaging industry

SOUTH ASIA PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
ProPak India	26-28 August 2026	Delhi (India)	Showcases top suppliers, innovative sustainable machinery, live product demonstrations, and exceptional conferences
3P Pakistan	3-5 September 2026	Lahore (Pakistan)	Pakistan's premier International Plastic, Printing, Packaging, and Pharma Industry Exhibition
BAPA FoodPro	10-12 September 2026	Dhaka (Bangladesh)	International Exhibition of food products and beverages, food processing machinery, food packaging machinery and related technology
Plastic, Packaging & Print Asia	12-14 September 2026	Karachi (Pakistan)	International Plastic, Packaging, Print Machinery & Technology Show Exhibition & Conference
Anuga FoodTec India	29 September - 1 October 2026	Mumbai (India)	South Asia's leading international trade fair for food and beverage processing and packaging technology
PackPlus South	3-5 December 2026	Bangalore (India)	India's Total Packaging, Processing and Supply Chain event that brings together seven established niche shows dedicated to distinct segments
PLASTIVISION India	21-25 January 2027	Mumbai (India)	International plastic packaging and printing exhibition and conference
IPF Bangladesh	30 March - 2 April 2027	Dhaka (Bangladesh)	Bangladesh International Plastics, Printing, Packaging Industry Fair
Plasti & Pack Pakistan	8-10 July 2027	Karachi (Pakistan)	International Plastic & Packaging Industry exhibition
PAMEX	1-4 February 2028	Mumbai (India)	Packaging on Printing and Allied Machinery Industries

CENTRAL & EASTERN EUROPE PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
TAROPAK	23-25 September 2026	Poznan (Poland)	The most important packaging and logistic industry event in Central and Eastern Europe
Eurasia Packaging	13-16 October 2026	Istanbul (Turkey)	International Packaging Industry Fair
WorldFood Ukraine	28-30 October 2026	Kyiv (Ukraine)	International Food & Drink Technology exhibition
Packaging Poland	17-19 November 2026	Warsaw (Poland)	This is a unique meeting place for industry leaders, showcasing modern solutions and the latest trends.
Warsaw Pack	13-15 April 2027	Warsaw (Poland)	International Trade Fair for Packaging Technology and Packaging Equipment
RosUpack	15-18 June 2027	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
EMPACK	27-28 January 2027	Zurich (Switzerland)	The largest packaging trade fair in Switzerland
ISM Manufacturing	31 January - 3 February 2027	Cologne (Germany)	The international supplier fair for confectionery and snacks
Paris Packaging Week (ADF, PCD, PLD)	3-4 February 2027	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.
Anuga FoodTec	23-26 February 2027	Cologne (Germany)	The fair that unites all aspects of food and beverage production
Empack Dortmund	24-25 February 2027	Dortmund (Germany)	National Trade fair for packaging products, machines & services for the sales regions of North-Rhine Westphalia, North Germany & BeNeLux

WESTERN EUROPE PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
Packaging Innovations and Empack Birmingham	24-25 February 2027	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
COSMOPACK	18-20 March 2027	Bologna (Italy)	Cosmopack is the leading international event focused on the entire beauty supply chain
IFE Manufacturing	5-7 April 2027	London (UK)	UK's largest and most respected Food and Drink tradeshow
Food & Drink Expo	12-14 April 2027	Birmingham (UK)	Food & Drink Expo, incorporating The Restaurant Show, provides buyers from the retail, wholesale, foodservice, manufacturing and hospitality sectors
Empack Nederland	14-15 April 2027	's- Hertogenbosch (Netherlands)	Empack Nederland is the leading packaging trade fair in the Benelux.
Macfrut	20-22 April 2027	Rimini (Italy)	International exhibition of Plants, Technologies and Services for the Production, Conditioning, Marketing and Transport of fruit and vegetables.
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)	ACHEMA is the world's leading platform for the life science and process industries
ALL4PACK	29 June - 1 July 2027	Paris (France)	The trade fair for all types of packaging and packaging production for all industries
FachPack	21-23 September 2027	Nuremberg (Germany)	European trade fair for packaging, technology and processing
LOUPE Europe	5-8 October 2027	Barcelona (Spain)	The world's largest event for labels and package printing, and converting
Scanpack	26-29 October 2027	Gothenburg (Sweden)	Scanpack is the only international platform located in Scandinavia for anyone who delivers or utilizes packaging solutions.

WESTERN EUROPE PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
Empack Mechelen	27-28 October 2027	Mechelen (Belgium)	Empack brings exhibitors and visitors together to discover the latest trends and developments regarding packaging technology and packaging machines.
Prod&Pack	16-18 November 2027	Lyon (France)	The only industrial competition that brings together all the solutions for producing, packaging, packing, and shipping
VSPACK	7-9 December 2027	Cognac (France)	Trade show dedicated to Packaging Innovation for Wines and Spirits.
PacTec, FoodTec & PlastExpo Nordic	15-16 March 2028	Helsinki (Finland)	The trade events for the packaging, food and drink, and plastics industries
IPACK-IMA	29 May - 1 June 2028	Milan (Italy)	IPACK-IMA is the fair specializing in food and non-food processing and packaging
drinktec	11-15 September 2028	Munich (Germany)	World's Leading Trade Fair for the Beverage and Liquid Food Industry
interpack	10-15 June 2029	Dusseldorf (Germany)	The focus is on packaging materials, packaging machines and related process technology for the food, beverage, confectionery, bakery, pharmaceutical, cosmetics, non-food and industrial goods sectors

LATIN AMERICA PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
EXPO PACK Guadalajara	8-10 June 2027	Guadalajara (Mexico)	EXPO PACK brings together packaging and processing professionals from across Latin America to discover the latest innovations, connect with leading suppliers and explore solutions driving the future of the industry
Fispal Tecnologia	22-25 June 2027	São Paulo (Brazil)	International Packaging, Processing trade show for the Food and Beverage industries.
ENVASE	14-17 September 2027	Buenos Aires (Argentina)	Show for International Machinery and Equipment for Food and Beverages Processing
Andina Pack	9-12 November 2027	Bogotá (Colombia)	Tradeshow in Converting, Processing and Packaging sectors in Andean and Caribbean region.
EXPO PACK México	6 -9 June 2028	Mexico City (Mexico)	EXPO PACK brings together packaging and processing professionals from across Latin America to discover the latest innovations, connect with leading suppliers and explore solutions driving the future of the industry

MIDDLE EAST PACKAGING TRADESHOWS

SHOW	DATE	LOCATION	DESCRIPTION
SaudiFood Manufacturing	27-29 September 2026	Jeddah (Saudi Arabia)	Saudi Arabia's first and only F&B manufacturing gathering
Gulfood Manufacturing	3-5 November 2026	Dubai (UAE)	The region's definitive platform for advancing food security through industrial strength, bringing the full F&B manufacturing ecosystem together from next-generation ingredients to advanced processing, packaging, automation, and supply-chain
ISRAFOOD	17-18 November 2026	Tel Aviv (Israel)	The premier platform for the food and beverage industry in Israel
AgroPack Iraq	23-26 November 2026	Erbil (Iraq)	The largest agrofood event in Iraq
Iran Print Pack & Paper	7-10 December 2026	Tehran (Iran)	A colorful trade platform for print, packaging, paper, machinery, materials and international business partnerships

MIDDLE EAST PACKAGING TRADESHOWS *(continued)*

SHOW	DATE	LOCATION	DESCRIPTION
Propack Jeddah	8-10 December 2026	Jeddah (Saudi Arabia)	Propack Jeddah is the foremost global trade event for processing and packaging in Saudi Arabia
Oman Plast	8-10 December 2026	Muscat (Oman)	International Plastics, Rubber, Petrochemicals, Chemicals, Fertilizers, Plastics Recycling, Printing and Packaging Industry Exhibition & Conference
Saudi Print & Pack	26-29 April 2027	Riyadh (Saudi Arabia)	International Trade Exhibition for Printing & Packaging Technologies

ESG AND ITS RELEVANCE TO PACKAGING AND PROCESSING MACHINERY AND TECHNOLOGIES

What is ESG?

ESG¹ 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.



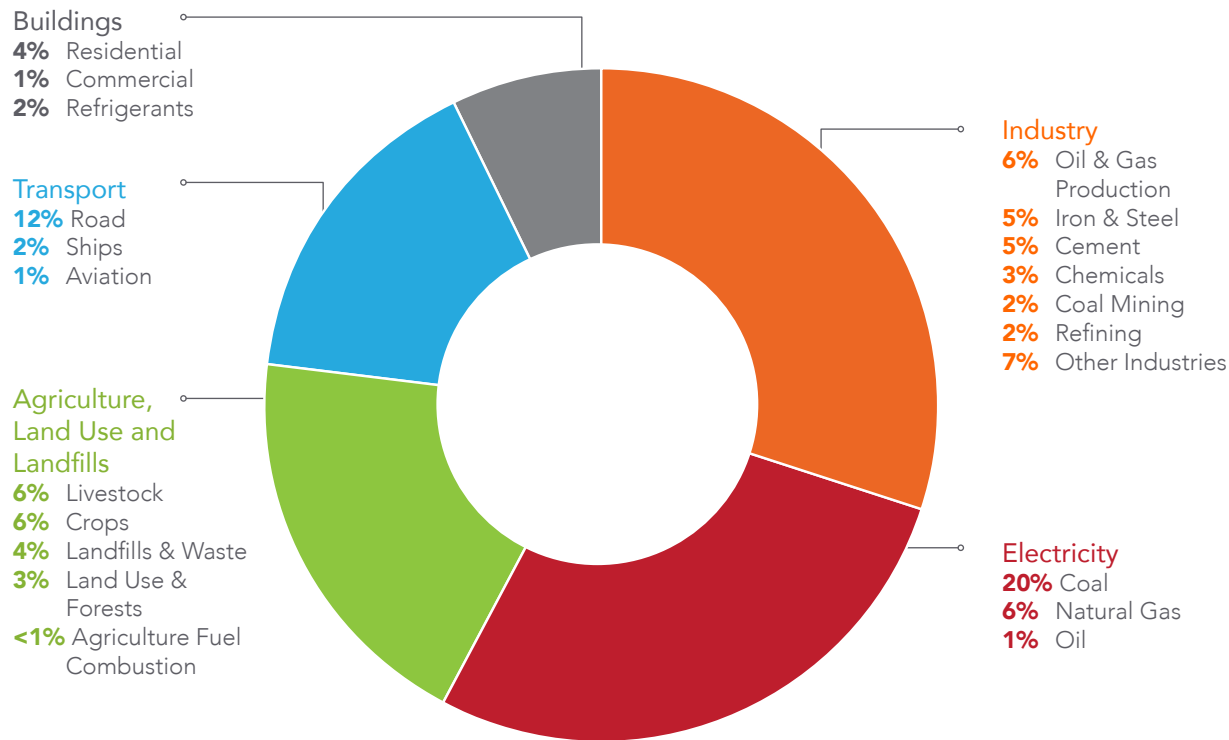
Governance: Focuses on how the company is managed, including:

- 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 emissions², and emissions from the manufacturing sector are projected to increase 17% between 2024 and 2050³. To combat this, many countries are implementing regulations to become climate neutral by 2050. Since 2002, at least 38 countries⁴ have introduced mandatory ESG disclosure requirements, including key PMMI export markets such as **China, EU, and the United Kingdom**. It is important for OEMs 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

¹What is environmental, social, and governance?, IBM (January 2024)
²Global Greenhouse Gas Emissions: 1990-2022 and Preliminary 2023 Estimates, Rhodium Group (November 2024)
³Emissions of Greenhouse Gases in the Manufacturing Sector, Congressional Budget Office (February 2024)
⁴The 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 OEMs’ operations⁵.

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

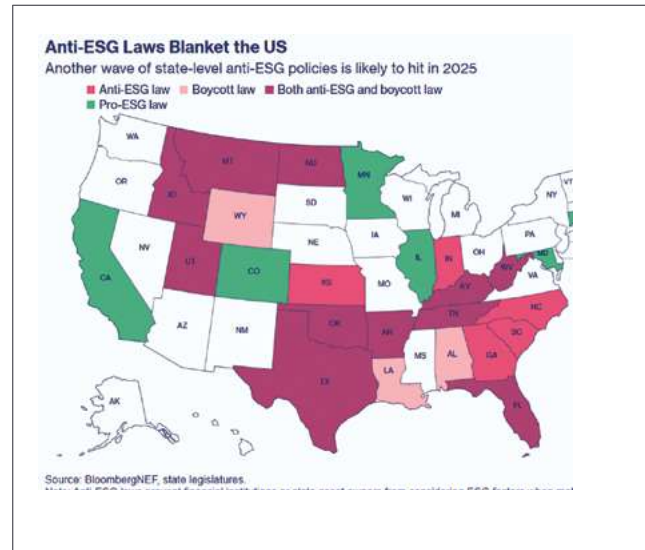
ESG IN THE UNITED STATES AND ROLE OF THE U.S.

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 wind⁶.

⁵ESG and the Manufacturing Industry, IBM (January 2024)
⁶Fact Sheet: President Donald 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 business⁹.



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 2050¹⁰.

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 change¹¹.

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 requirements¹². 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, OEMs should collaborate with customers to ensure they are aware of and can comply with all ESG related requirements.

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

⁸CS/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 investments¹³. In Brazil, ESG reporting will be mandatory for all publicly traded companies starting in 2026. As the ESG landscape in Latin America evolves, OEMs 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. OEMs' customers may require more information to comply with these regulations and requirements. Please see Annex A for relevant regulations that may impact OEMs 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.

¹³Why 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 Border 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 falling 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-compliant, 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 are on 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

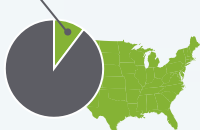


With annual industry growth in the United States expected to be only about 2% for the foreseeable future, equipment manufacturers may want to expand sales into international markets. While exporting can help a company dramatically expand its top and bottom line, it is a very complex, time-consuming endeavor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

Basic guide to exporting by the U.S. Department of Commerce
Government programs to help U.S. exporters finance selling overseas
The Export-Import Bank
Small Business Administration
Department of Agriculture
Regulations, export controls, industry and regional information
National Customs Brokers and Freight Forwarders Association of America
California Inland Empire District Export Council

WEBSITE:

<http://www.unzco.com/basicguide/>
www.exim.gov
www.sba.gov
www.usda.gov
www.export.gov
www.ncbfaa.org
www.cieDecember.org/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, automobiles, 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 certificate 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 Agriculture's 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
Anuga FoodTec	February 23-26, 2027	Cologne (Germany)
EXPO PACK Guadalajara	June 8-10, 2027	Guadalajara (Mexico)
ProPak Asia	June 9-12, 2027	Bangkok (Thailand)
Gulfood Manufacturing	November 2027	Dubai (UAE)
Andina Pack	November 9-12, 2027	Bogota (Colombia)

INTERNATIONAL TRADE SHOW ASSISTANCE PROGRAM

With this PMMI member benefit, general member companies exhibiting for the first time at qualified trade shows outside of North America (or returning after a hiatus of three show cycles), 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, (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 eligible 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



PMMI HEADQUARTERS
12930 Worldgate Dr.
Suite 200
Herndon, VA 20170
(571) 612-3200
info@pmmi.org
www.pmmi.org

PMMI LATIN AMERICA
Homero 418 Piso 3
Col. Miguel Chapultepec
Miguel Hidalgo, CDMX
11570 Mexico
(52-55) 5545-4254



APPMA | Australian Packaging
& Processing Machinery
Association
PO Box 18,
Mooroolbark, VIC, 3138
www.appma.com.au



Automate UK
New Progress House,
34 Stafford Road,
Wallington, SM6 9AA,
United Kingdom
www.automate-uk.com



Korea Packaging Machinery
Association (KPMA)
84, Gasan digital 1-ro, Geumcheon-gu,
Seoul, Republic of Korea, 08590
(Acehighend Tower 8-cha, #405)
www.kpmasite.or.kr



UCIMA - Italian Packaging Machinery
Manufacturers Association
Stradello Fossa Buracchione, 84, 41126
Baggiovra MO Italy
www.ucima.it