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Southeast Asia Packaging Machinery Market

EXECUTIVE SUMMARY



The Association for Packaging
and Processing Technologies



pmmi.org





The Association for Packaging
and Processing Technologies

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



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

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PMMI The Association for Packaging and Processing Technologies

12930 Worldgate Drive, Suite 200 | Herndon, VA 20170

Phone: (571) 612-3200 | pmmi.org/research

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Jorge Izquierdo, Vice President, Market Development, PMMI

Andrea Admana, Manager, Market Development, PMMI

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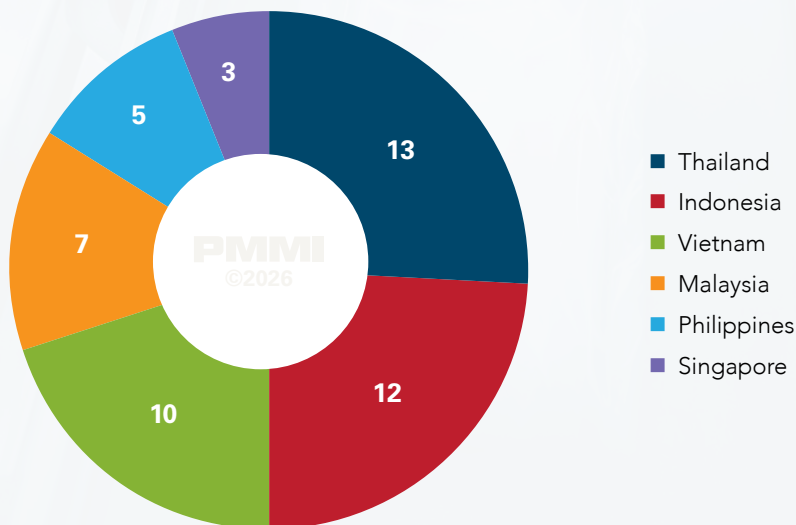


Executive Summary

This study was commissioned by PMMI in collaboration with Automate UK to provide a comprehensive, interview-based assessment of packaging and processing equipment demand across six major Southeast Asian markets. Conducted by Orissa International, it focuses on key end-user sectors, including food, beverage, pharmaceuticals, personal care, and industrial applications, with the objective of identifying operational priorities, pain points, investment plans, and vendor-selection criteria among multinational and local manufacturers.

The research combines extensive secondary sources, such as trade publications, market studies, and company reports, with primary interviews conducted with 50 Southeast Asian manufacturers, offering direct insights into operational needs, investment behavior, and supplier expectations.

Figure 1: Number of interviews conducted by market



Regional Market Landscape and Key Markets

The Southeast Asian market for packaging and processing equipment shows strong growth potential, increasing complexity, and intensifying competition. While the region is shaped by common drivers such as expanding food and beverage manufacturing, regulatory developments, and gradual technological upgrading, it remains highly diverse in terms of market maturity and investment dynamics. Indonesia, Thailand, and Vietnam stand out as the most attractive markets due to their scale, growth trajectories, and evolving demand patterns, while Malaysia, Singapore, and the Philippines play more moderate or specialized roles.

Competitive Environment and Regulatory Trends

Competition across Southeast Asia is intense and relatively consistent across markets. Chinese suppliers dominate due to their cost competitiveness and expanding capabilities, while European manufacturers maintain strong positions in higher value segments. Regional Asian players further reinforce competition through supply chain integration and geographic proximity. In contrast, North American suppliers have a relatively limited presence.

At the same time, regulatory developments are reshaping the market environment, particularly in relation to sustainability. Key trends include:



Implementation of extended producer responsibility frameworks



Policies aimed at reducing plastic waste and promoting recycling



Increasing emphasis on circular economy models and sustainable packaging solutions

Operational Priorities and Technology Adoption

Manufacturers across Southeast Asia demonstrate strong alignment in their operational priorities, with a clear focus on cost control, productivity, and efficiency. Automation is becoming increasingly important as companies respond to labor constraints, rising costs, and the need for consistent product quality. However, adoption levels vary across markets, reflecting differences in industrial maturity and internal capabilities.

Supplier Selection and Strategic Implications

Supplier selection across Southeast Asia is driven primarily by reliability, technical performance, and after sales support, with service capabilities emerging as a critical differentiator. Companies prioritize minimizing downtime and ensuring rapid technical assistance, often placing greater importance on service than on initial purchase price.

For North American suppliers, the region offers significant opportunities but requires a more localized and adaptive approach. Success will depend on:

- Strengthening local presence and service capabilities
- Aligning pricing and value propositions with market expectations
- Offering solutions that address practical operational needs and integration challenges

Ultimately, competing effectively in Southeast Asia requires not only strong technology, but also a clear understanding of local market conditions and the ability to deliver solutions that combine performance, affordability, and reliable support.



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Wallington, SM6 9AA,
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Miguel Hidalgo, D.F. 11570 Mexico
+ (52 55) 5545 4254

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For more information, contact:

Contact Jorge Izquierdo, VP of Market Development
Phone: 571-612-3199 Email: jizquierdo@pmmi.org

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