

MARKET RESEARCH REPORT ON THE PACKAGING SECTOR IN KENYA AND TANZANIA 2025



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ITALIAN TRADE AGENCY



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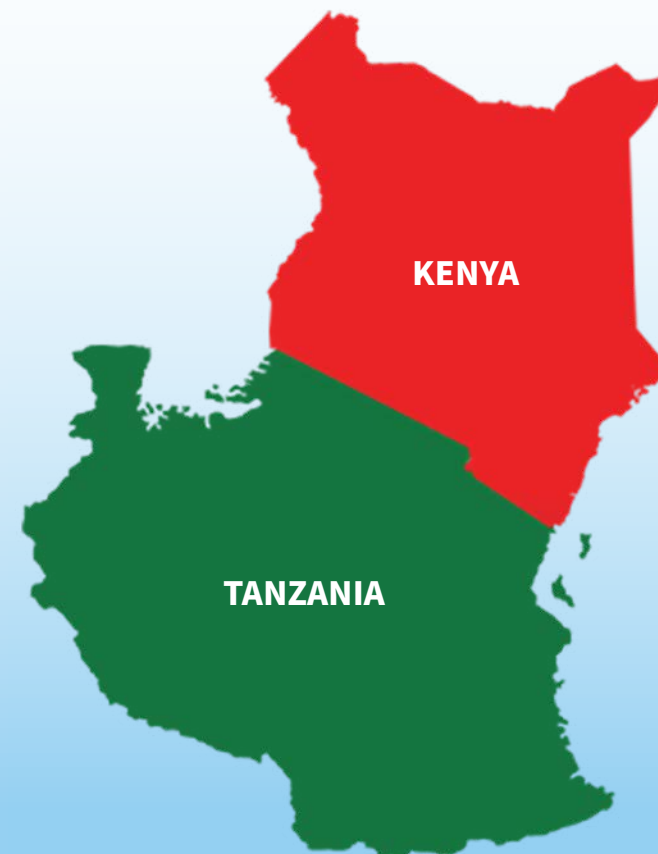
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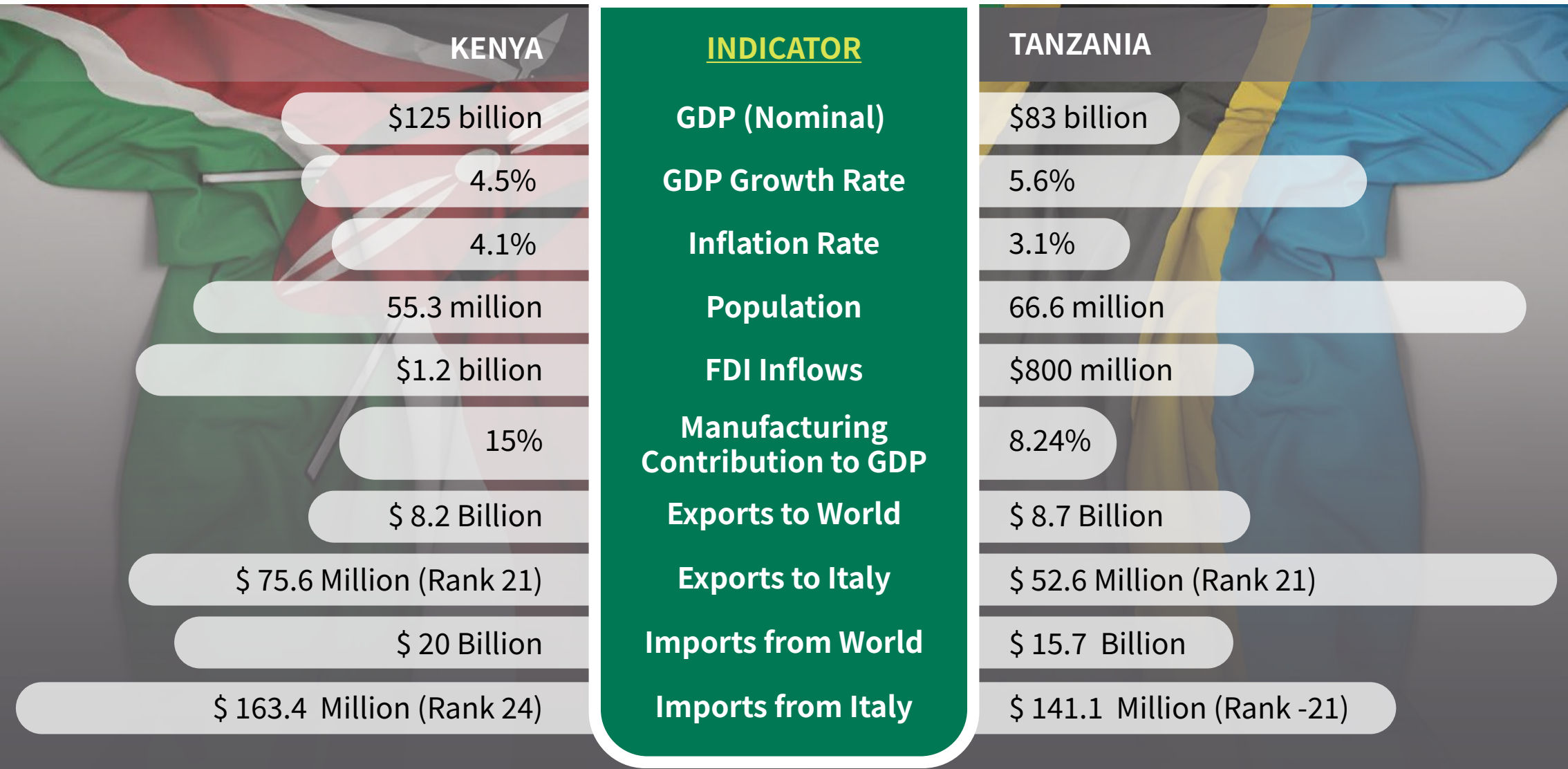


LIST OF ABBREVIATIONS

- EAC** - East African Community
- EPA** - Economic Partnership Agreement
- EU** - European Union
- FDI** - Foreign Direct Investment
- FMCG** - Fast-Moving Consumer Goods
- GDP** - Gross Domestic Product
- HDPE** - High-Density Polyethylene
- iCMS** - Integrated Customs Management System
- ITA** - Italian Trade Agency
- NESOI** - Not Elsewhere Specified or Included
- PET** - Polyethylene Terephthalate
- TANCIS** - Tanzania Customs Integrated System
- NTANCIS** - New Tanzania Customs Integrated System
- TIN** - Taxpayer Identification Number
- TRA** - Tanzania Revenue Authority
- VAT** - Value Added Tax

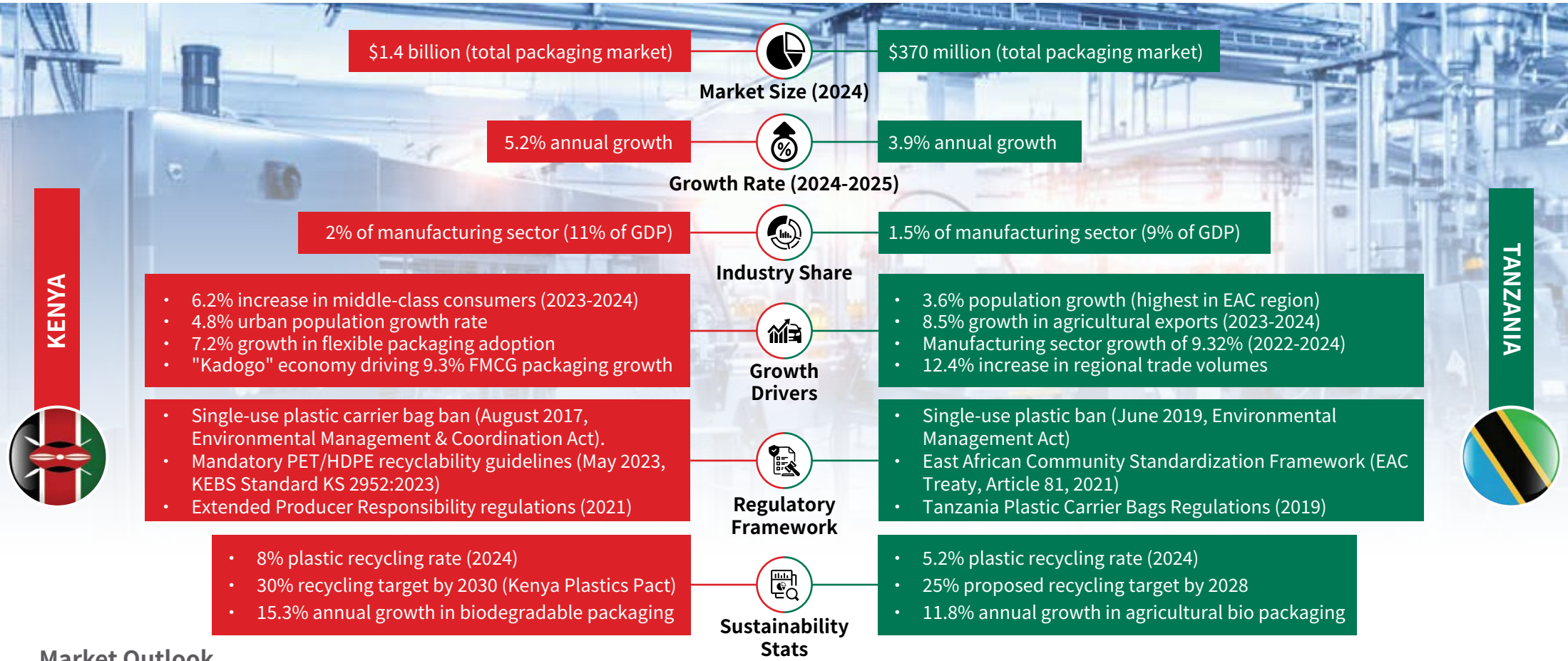


1. MACROECONOMIC PROFILES FOR 2024



Sources: Trade Data Monitor (2025), World Economics, World Bank, KNBS Economic Survey 2025 (2024-2025 data)

2. PACKAGING INDUSTRY OVERVIEW FOR KENYA AND TANZANIA

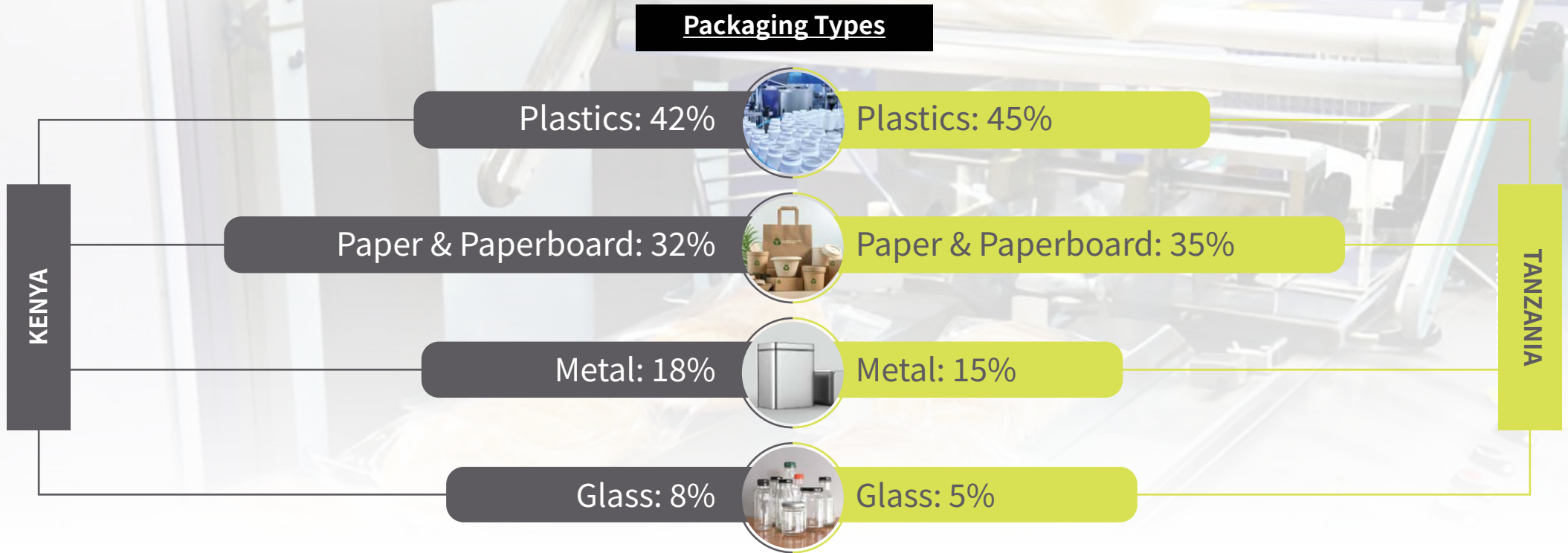


Market Outlook

- Kenya's \$1.4 billion packaging industry demonstrates advanced commercialization with 5.2% growth driven by structured retail (32% market share) and manufacturing expansions.
- Tanzania's \$370 million market, growing at 3.9%, leverages its strategic position as an East African trade hub with 12.4% growth in crossborder packaging demand.
- Both countries face similar sustainability challenges with Kenya's 8% and Tanzania's 5.2% plastic recycling rates significantly below their respective national targets of 30% and 25%.

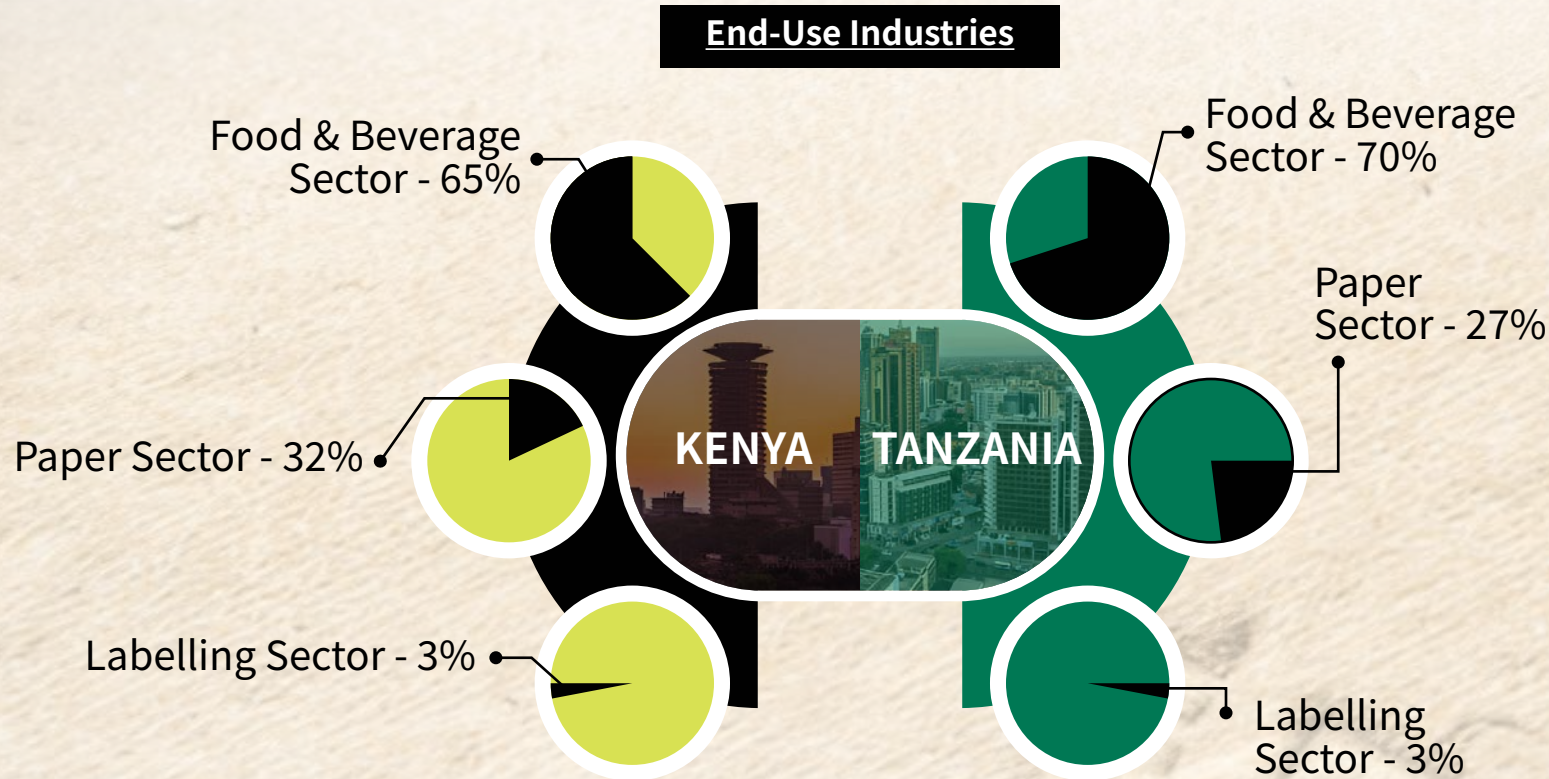


3. INDUSTRY SEGMENTS & USAGE



Industry Segments Outlook

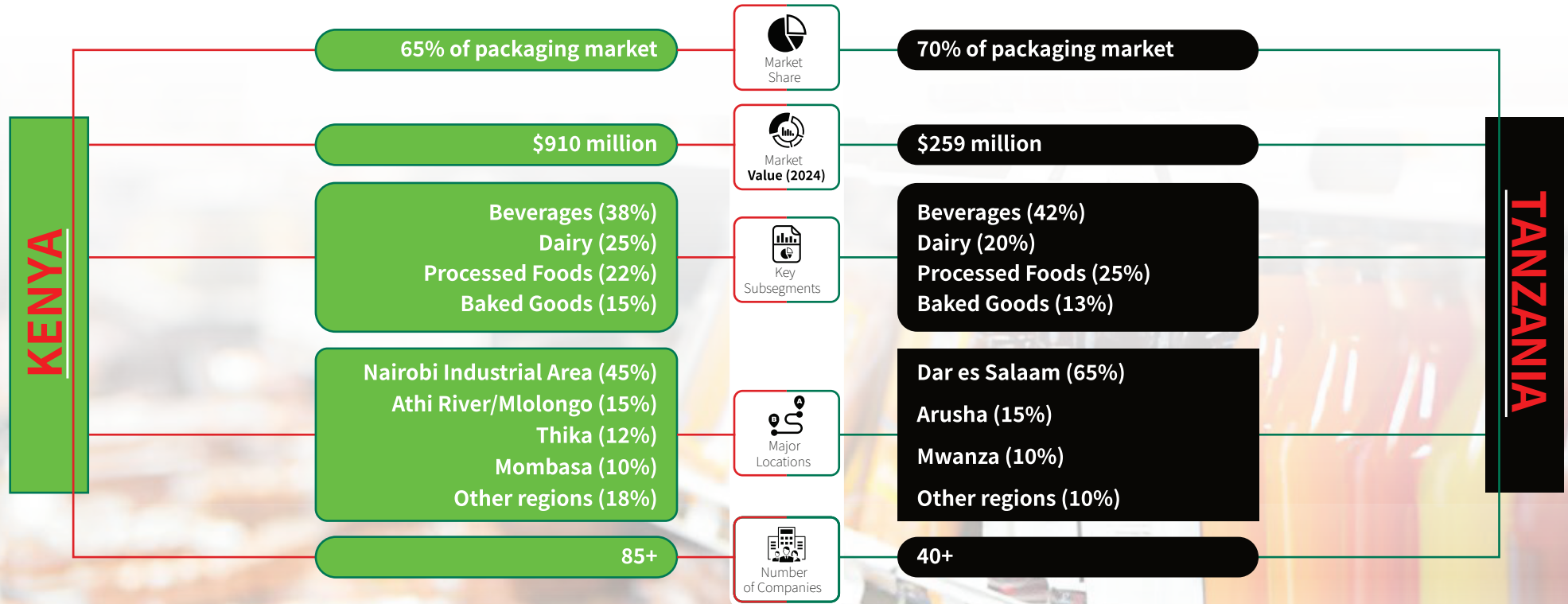
- Plastics dominate packaging materials (42-45%), while food & beverage represents the largest end-use sector (65-70%) in both countries.
- Kenya shows greater diversity in packaging materials with higher metal usage (18% vs 15%) and stronger paper sector development (32%).
- Tanzania's market emphasizes plastic solutions (45%) and food applications (70%), reflecting its agricultural economy and developing industrial base.



Industry Segments Outlook

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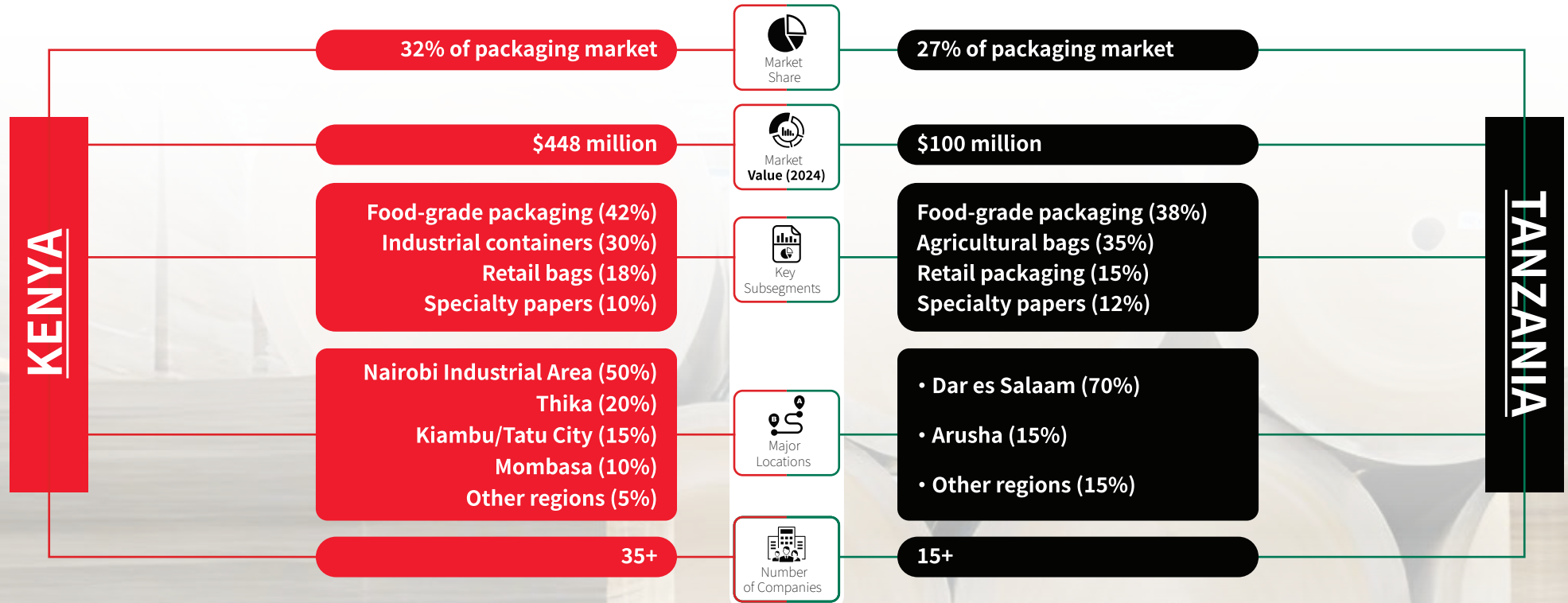
FOOD AND BEVERAGE SECTOR



Food & Beverage Sector Highlights

- Kenya's \$910M food packaging market is 3.5x larger than Tanzania's (\$259M), with beverages representing the dominant subsegment in both countries (38-42%).
- Nairobi Industrial Area houses 45% of Kenya's food packaging operations, while 65% of Tanzania's production is concentrated in Dar es Salaam.
- Dairy packaging shows stronger development in Kenya (25% vs 20% in Tanzania), while Tanzania leads in beverage packaging (42% vs 38% in Kenya).

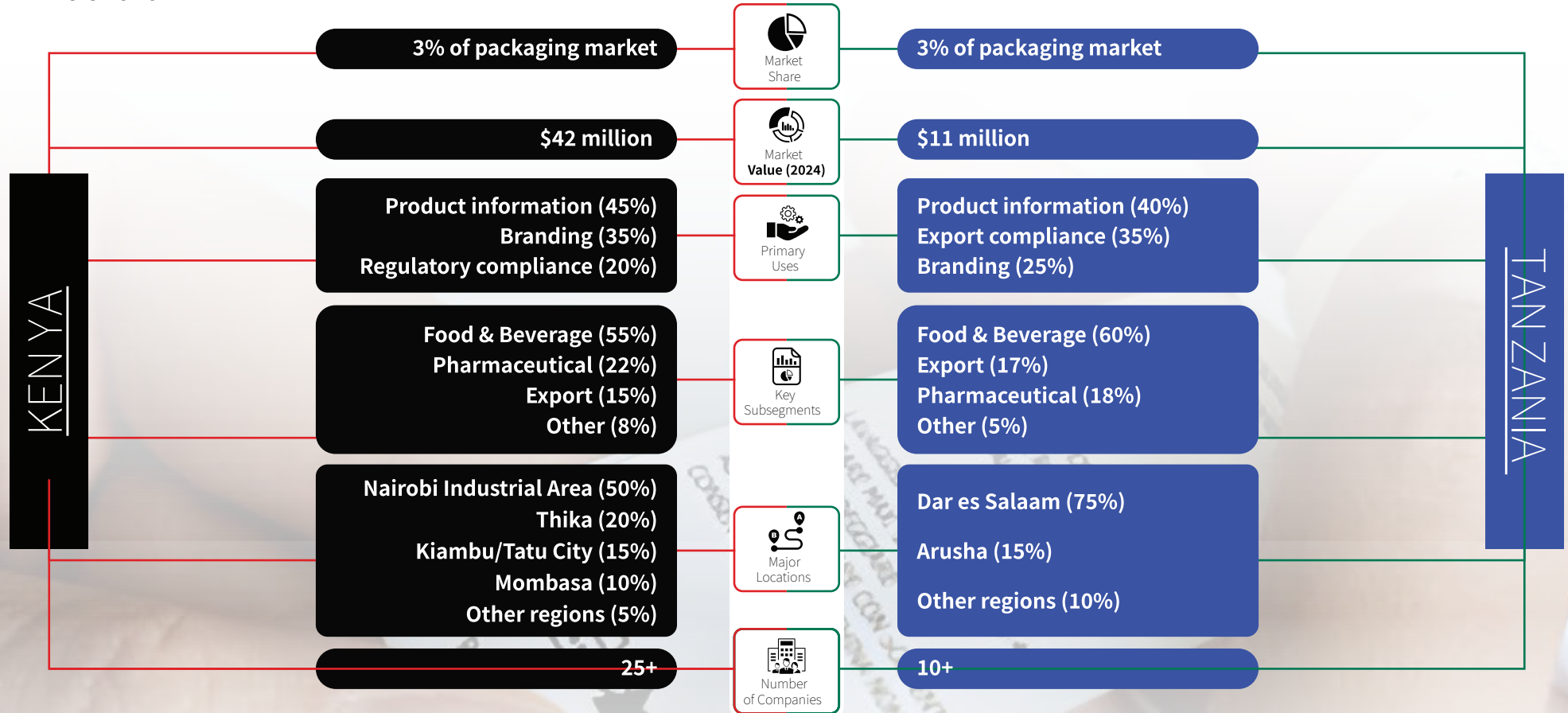
PAPER SECTOR



Paper Sector Highlights

- Kenya's paper packaging market (\$448M) is 4.5x larger than Tanzania's (\$100M), with food-grade applications leading in both countries (42% and 38% respectively).
- Industrial containers represent 30% of Kenya's paper packaging, while agricultural bags form 35% of Tanzania's market, reflecting different economic priorities.
- The paper sector is highly concentrated geographically, with 50% of Kenya's production in Nairobi Industrial Area and 70% of Tanzania's in Dar es Salaam.

LABELLING SECTOR



Labelling Sector Highlights

- The labelling sector represents 3% of packaging markets in both countries, with values of \$42M in Kenya and \$11M in Tanzania.
- Food & beverage industries drive label demand (55-60%), though Kenya shows stronger pharmaceutical applications (22% vs 18% in Tanzania).
- Export compliance represents a larger share of Tanzania's labelling applications (35% vs 20% regulatory compliance in Kenya), supporting agricultural exports.

Sources: Mordor Intelligence, IndexBox (2024-2025 data) Fortune Business Insights. (2024); Towards Packaging. (2025). Trade Data Monitor. (2025).

4. IMPORT STATISTICS - KENYA PRODUCTS: 8422



Kenya products: 8422, machines, for dishwashing, for cleaning, drying, filling, closing etc. Containers, for other packing etc., and for aerating beverages; parts thereof

SUBHEADING SA	DESCRIPTION	RANK & MARKET SHARE (%) 2024
8422	Machines, for dishwashing, for cleaning, drying, filling, closing etc. Containers, for other packing etc., and for aerating beverages; parts thereof	Rank 3 (12.2%) 3,709,508
842230	Machinery for filling, closing, sealing, capsuling or labeling bottles, cans, boxes or other Containers; machinery for aerating beverages	Rank 4 (7.12%) 927,286
842240	Packing or wrapping machinery (including heat-shrink wrapping machinery), Nesoi	Rank 3 (12.52%) 1,255,572
842290	Parts for machines for dishwashing, for cleaning, filling etc. Containers and for packing and wrapping; parts of machines for aerating beverages	Rank 2 (28.37%) 18.93
842211	Dishwashing machines, household type	Rank 6 (3.18%) 27,417
842219	Dishwashing machines, except household type	Rank 2 (23.24%) 1,319,763
842220	Machinery for cleaning or drying bottles or other containers	Rank 8 (0.11%) 400

Kenya Packaging Machinery Imports (HS Code 8422)

- Total imports reached €30.6 million in 2024, up 17.08% from 2023.
- Italy ranks 3rd overall with 12.2% market share (€3.7 million).
- Italy holds strongest position in industrial dishwashing (28.37% share, rank 2).
- Parts and components represent Italy's largest export value (€1.32 million).
- Packing/wrapping machinery showed highest growth at 58.92%.
- Italy ranks in top 3 positions in three key segments: parts, packing machinery, and general equipment.

KENYA IMPORTS FROM WORLD


Products : 8422, machines, for dishwashing, for cleaning, drying, filling, closing etc. Containers, for other Packing etc., and for aerating beverages; parts thereof

Year to Date : December , 2022 - 2024

	Partner Country	January - December (Value : EUR)			Market share (%)			Change 2024/2023	
		2022	2023	2024	2022	2023	2024	Amount	%
	World	40,776,818	26,133,702	30,597,067	100	100	100	4,463,365	17.08%
1	China	7,410,102	3,560,977	9,050,777	18.17	13.63	29.58	5,489,800	154.17%
2	India	7,113,175	6,267,043	7,678,535	17.44	23.98	25.1	1,411,492	22.52%
3	Italy	6,979,287	3,367,799	3,709,508	17.12	12.89	12.12	341,709	10.15%
4	Turkey	1,648,971	3,480,399	2,460,280	4.04	13.32	8.04	-1,020,119	-29.31%
5	Germany	9,387,865	3,238,115	1,708,105	23.02	12.39	5.58	-1,530,010	-47.25%
6	South Africa	672,775	463,655	1,044,297	1.65	1.77	3.41	580,642	125.23%
7	United States	124,365	164,028	862,200	0.31	0.63	2.82	698,172	425.64%
8	South Korea	144,622	384,202	524,015	0.36	1.47	1.71	139,813	36.39%
9	Poland	39,377	105,112	438,196	0.1	0.4	1.43	333,084	316.88%
10	Spain	787,560	106,442	416,333	1.93	0.41	1.36	309,891	291.14%
11	Taiwan	540,570	587,268	323,826	1.33	2.25	1.06	-263,442	-44.86%
12	France	181,885	190,132	281,149	0.45	0.73	0.92	91,017	47.87%
13	Netherlands	1,656,861	463,640	274,956	4.06	1.77	0.9	-188,684	-40.70%
14	Thailand	179,438	155,450	222,675	0.44	0.6	0.73	67,225	43.25%
15	Canada	155,545	249,128	176,007	0.38	0.95	0.58	-73,121	-29.35%

TANZANIA PRODUCTS: 8422



Tanzania Products: 8422, Machines, for Dishwashing, for Cleaning, Drying, Filling, Closing etc. Containers, for other Packing etc., and for Aerating Beverages; Parts thereof

SUBHEADING SA	DESCRIPTION	RANK & MARKET SHARE (%) 2024
8422	Machines, for dishwashing, for cleaning, drying, filling, closing etc. Containers, for other packing etc., and for aerating beverages; parts thereof	Rank 3 (15%) 9,461,785
842230	Machinery for filling, closing, sealing, capsuling or labeling bottles, cans, boxes or other Containers; machinery for aerating beverages	Rank 3 (13.61%) 6,813,053
842240	Packing or wrapping machinery (including heat-shrink wrapping machinery), Nesoi	Rank 3 (10.54%) 518,414
842290	Parts for machines for dishwashing, for cleaning, filling etc. Containers and for packing and wrapping; parts of machines for aerating beverages	Rank 2 (31.18%) 2,105,486
842211	Dishwashing machines, household type	Rank 16 (0.11%) 214
842219	Dishwashing machines, except household type	Rank 9 (0.5%) 1,693
842220	Machinery for cleaning or drying bottles or other containers	Rank 4 (2.7%) 22,924

Tanzania Packaging Machinery Imports (HS Code 8422)

- Total imports surged to €63.1 million in 2024, a remarkable 65.97% increase from 2023.
- Italy ranks 3rd overall with 15% market share (€9.46 million).
- Filling and labeling machinery (HS 842230) dominates with 79.32% of total imports, growing 107.09%.
- Italy holds strongest position in parts and components (31.18% market share, rank 2, €2.11 million).
- Most growth in bottle cleaning machinery (636.93% increase), though from a small base.
- Italy maintains top 3 positions in three strategic segments: complete systems, parts, and wrapping machinery.
- Industrial dishwashing segment decreased by 42.35%, with Italy ranking lower (9th position).

TANZANIA IMPORTS FROM WORLD



Products : 8422, machines, for dishwashing, for cleaning, drying, filling, closing etc. Containers, for other packing etc., and for aerating beverages; parts thereof

Year to Date : December , 2022 - 2024

	Partner Country	January - December (Value : EUR)			Market share (%)			Change 2024/2023	
		2022	2023	2024	2022	2023	2024	Amount	%
	World	35,740,696	38,012,456	63,088,163	100	100	100	25,075,707	65.97%
1	Germany	17,280,087	20,271,247	31,191,926	48.35	53.33	49.44	10,920,679	53.87%
2	China	5,902,900	8,253,777	11,855,274	16.52	21.71	18.79	3,601,497	43.63%
3	Italy	2,255,125	3,341,458	9,461,785	6.31	8.79	15	6,120,327	183.16%
4	Turkey	112,701	133,902	2,893,436	0.32	0.35	4.59	2,759,534	2060.86%
5	India	3,484,739	2,904,690	2,356,433	9.75	7.64	3.74	-548,257	-18.87%
6	Spain	73,850	37,635	1,243,474	0.21	0.1	1.97	1,205,839	3204.04%
7	France	2,073,434	894,086	944,528	5.8	2.35	1.5	50,442	5.64%
8	South Africa	736,026	348,791	794,085	2.06	0.92	1.26	445,294	127.67%
9	Denmark	29,631	15,864	554,893	0.08	0.04	0.88	539,029	3397.81%
10	Kenya	216,249	208,841	209,792	0.61	0.55	0.33	951	0.46%
11	United States	88,068	412,119	179,571	0.25	1.08	0.29	-232,548	-56.43%
12	UAE	990,510	182,830	168,201	2.77	0.48	0.27	-14,629	-8.00%
13	Taiwan	149,086	122,973	149,730	0.42	0.32	0.24	26,757	21.76%
14	Sweden	364,431	23,830	147,540	1.02	0.06	0.23	123,710	519.14%
15	Israel	0	108,736	122,613	0	0.29	0.19	13,877	12.76%

KENYA PRODUCTS : 8438



Kenya products : 8438, machinery, nesoi, for the industrial preparation of food or drink (excluding animal or fixed vegetable fats and oils); parts thereof

SUBHEADING SA	DESCRIPTION	RANK & MARKET SHARE (%) 2024
8438	Machinery, nesoi, for the industrial preparation of food or drink (excluding animal or fixed vegetable fats and oils); parts thereof	Rank 2 (22.4%) 12,483,111
843880	Machinery for the industrial preparation or manufacture of food or drink (not for the extraction etc. Of animal or fixed vegetable fats or oils) nesoi	Rank 1 (46.58%) 11,575,890
843830	Machinery for sugar manufacture	-
843810	Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products	Rank 7 (1.12%) 108,065 117,916
842290	Parts of machinery for the industrial preparation or manufacture of food or drink, nesoi	Rank 7 (2.49%) 523,835
843860	Machinery for the preparation of fruits, nuts or vegetables	Rank 2 (17.41%) 127,500
843850	Machinery for the preparation of meat or poultry	Rank 4 (8.12%) 29,907
843820	Machinery for the manufacture of confectionery, cocoa or chocolate	-
843840	Brewery Machinery	-

Kenya Food Processing Machinery Imports (HS Code 8438)

- Total imports reached €56.1 million in 2024, growing 10.77% from 2023.
- Italy ranks 2nd overall with 22.4% market share (€12.48 million).
- General food preparation machinery (HS 843880) dominates and doubled (102.39% growth) to €24.85 million, with Italy as market leader (46.58% share, €11.58 million).
- Italy ranks 1st in general food machinery (46.58% share) and 2nd in fruit/vegetable processing equipment (17.41% share).
- Sugar machinery imports declined 28.43% and bakery equipment fell 31.18%.
- Strongest growth in fruit/vegetable machinery (147.46%) and brewery equipment (64.91%).
- Italy has minimal presence in bakery equipment (1.12%) and parts/components (2.49%) despite their significant market size.

KENYA IMPORTS FROM WORLD

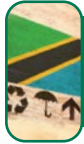


Products : 8438, machinery, nesoi, for the industrial preparation of food or drink (excluding animal or fixed vegetable fats and oils); parts thereof

Year to Date : December , 2022 - 2024

	Partner Country	January - December (Value : EUR)			Market share (%)			Change 2024/2023	
		2022	2023	2024	2022	2023	2024	Amount	%
	World	42,033,011	50,666,780	56,121,544	100	100	100	5,454,764	11%
1	India	16,335,995	28,962,859	23,647,529	38.87	57.16	42.14	-5,315,330	-18%
2	Italy	6,966,739	718,841	12,483,111	16.57	1.42	22.24	11,764,270	1,637%
3	Germany	4,276,407	1,631,611	8,148,630	10.17	3.22	14.52	6,517,019	399%
4	China	5,045,971	2,763,629	4,335,629	12.01	5.46	7.73	1,572,000	57%
5	South Africa	1,861,452	837,915	1,925,485	4.43	1.65	3.43	1,087,570	130%
6	Netherlands	1,829,777	7,868,717	1,366,278	4.35	15.53	2.43	-6,502,439	-83%
7	Paraguay	0	0	961,382	0	0	1.71	961,382	0
8	United States	92,061	4,343,005	606,180	0.22	8.57	1.08	-3,736,825	-86%
9	Pakistan	9,764	84,560	581,284	0.02	0.17	1.04	496,724	587%
10	Sri Lanka	5,119	26,030	426,170	0.01	0.05	0.76	400,140	1,537%
11	Spain	55,800	116,222	397,077	0.13	0.23	0.71	280,855	242%
12	Austria	118,658	2,268	296,783	0.28	0	0.53	294,515	12,986%
13	France	385,939	194,084	281,242	0.92	0.38	0.5	87,158	45%
14	United Kingdom	664,968	1,423,254	98,950	1.58	2.81	0.18	-1,324,304	-93%
15	Belgium	6,412	17,002	90,922	0.02	0.03	0.16	73,920	435%

TANZANIA PRODUCTS : 8438

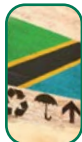


Tanzania products : 8438, machinery, nesoi, for the industrial preparation of food or drink (excluding animal or fixed vegetable fats and oils); parts thereof

SUBHEADING SA	DESCRIPTION	RANK & MARKET SHARE (%) 2024
8438	Machinery, nesoi, for the industrial preparation of food or drink (excluding animal or fixed vegetable fats and oils); parts thereof	Rank 5 (9.28%) 1,947,225
843880	Machinery for the industrial preparation or manufacture of food or drink (not for the extraction etc. Of animal or fixed vegetable fats or oils) nesoi	Rank 1 (45.3%) 1,510,870
843830	Machinery for sugar manufacture	-
843810	Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products	Rank 1 (43.09%) 351,958
842290	Parts of machinery for the industrial preparation or manufacture of food or drink, nesoi	Rank 5 (3.55%) 76,835
843860	Machinery for the preparation of fruits, nuts or vegetables	Rank 8 (0.04%) 1,061
843850	Machinery for the preparation of meat or poultry	Rank 9 (0.51%) 1,445
843820	Machinery for the manufacture of confectionery, cocoa or chocolate	Rank 8 (1.12%) 5,057
843840	Brewery Machinery	-

Tanzania Food Processing Machinery Imports (HS Code 8438)

- Total market contracted sharply to €21 million in 2024, declining 39% from 2023 and 65% from 2022.
- Italy ranks 5th overall with 9.28% market share (€1.95 million).
- Despite market contraction, Italy dominates two key segments: general food preparation machinery (45.3% share, €1.51 million) and bakery equipment (43.09% share, €352,000).
- Sugar machinery imports collapsed by 76% to €6.09 million, while brewery equipment surged 1,490% to €4.9 million.
- Italian companies have minimal presence in fruit/vegetable machinery (0.04%) despite 31% segment growth.
- Bakery equipment grew 95%, with Italy as market leader (43.09% share).
- Total market value shift suggests major completed projects in 2022 (€60.5 million) with subsequent normalization.

TANZANIA IMPORTS FROM WORLD


Products : 8438, machinery, nesoi, for the industrial preparation of food or drink (excluding animal or fixed vegetable fats and oils); parts thereof

Year to Date : December , 2022 - 2024

	Partner Country	January - December (Value : EUR)			Market share (%)			Change 2024/2023	
		2022	2023	2024	2022	2023	2024	Amount	%
	World	60,463,457	34,400,464	20,984,905	100	100	100	-13,415,559	-39.00%
1	Germany	12,559,002	297,137	5,027,605	20.77	0.86	23.96	4,730,468	1,592.02%
2	Spain	117,793	8,966,672	4,975,493	0.2	26.07	23.71	-3,991,179	-44.51%
3	China	2,537,279	3,331,855	3,139,234	4.2	9.69	14.96	-192,621	-5.78%
4	India	34,344,820	19,149,995	3,037,205	56.8	55.67	14.47	-16,112,790	-84.14%
5	Italy	602,410	251,260	1,947,225	1	0.73	9.28	1,695,965	674.98%
6	Vietnam	831,307	569,979	797,936	1.38	1.66	3.8	227,957	39.99%
7	Turkey	135,660	149,094	577,945	0.22	0.43	2.75	428,851	287.64%
8	Colombia	0	138,124	459,067	0	0.4	2.19	320,943	232.36%
9	South Africa	7,713,615	692,417	271,849	12.76	2.01	1.3	-420,568	-60.74%
10	Pakistan	15,972	16,911	246,395	0.03	0.05	1.17	229,484	1,357.01%
11	Morocco	0	0	128,542	0	0	0.61	128,542	0.00%
12	Uganda	223,396	83,168	126,097	0.37	0.24	0.6	42,929	51.62%
13	Kenya	34,424	28,796	89,749	0.06	0.08	0.43	60,953	211.67%
14	United States	68,789	22,497	34,824	0.11	0.07	0.17	12,327	54.79%
15	UAE	27,723	270,829	30,568	0.05	0.79	0.15	-240,261	-88.71%

KENYA PRODUCTS: 3923



Kenya products: 3923, articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics

SUBHEADING SA	DESCRIPTION	RANK & MARKET SHARE (%) 2024
3923	Articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics	Rank 6 (3.47%) (11,27,945)
392350	Stoppers, lids, caps and other closures, of plastics	Rank 17 (1.22%) 96, 801
392390	Articles for the conveyance or packing of goods, nesoi, of plastics	Rank 23 (0.15%) 10,092
392329	Sacks and bags (including cones), of plastics nesoi	Rank 3 (11.3%) 661,979
392330	Carboys, bottles, flasks and similar articles, of plastics	Rank 13 (0.93%) 53,495
392310	Boxes, cases, crates and similar articles, of plastics	Rank 23 (0.2%) 5,762
392321	Sacks and bags (including cones), of polymers of ethylene	Rank 4 (11.87%) 299,294
392340	Spools, cops, bobbins and similar supports, of plastics	Rank 8 (0.08%) 522

Kenya Plastic Packaging Products Imports (HS Code 3923)

- Total imports reached €32.49 million in 2024, recovering 8.18% from 2023.
- Italy ranks 6th overall with modest 3.47% market share (€1.13 million).
- Italy performs strongest in plastic bags segment, holding 3rd position (11.3% share, €662,000) in non-specific plastic bags and 4th position (11.87% share, €299,000) in polyethylene bags.
- Fastest growing segments: plastic spools/bobbins (237.25% increase), polyethylene bags (36.27%), and non-specific plastic bags (31.57%).
- Plastic bottles and flasks segment declined 14.27%, with minimal Italian presence (0.93%).
- Italy shows limited presence in plastic closures (1.22%) and boxes/crates (0.2%).

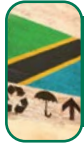
KENYA IMPORTS FROM WORLD


Products : 3923, articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of Plastics

Year to Date : December , 2022 - 2024

	Partner Country	January - December (Value : EUR)			Market share (%)			Change 2024/2023	
		2022	2023	2024	2022	2023	2024	Amount	%
	World	33,727,324	30,035,453	32,491,469	100	100	100	2,456,016	8.18%
1	China	6,242,874	5,926,455	8,770,999	18.5	19.7	27	2,844,544	48.00%
2	India	7,524,114	6,092,741	6,281,392	22.3	20.3	19.3	188,651	3.10%
3	Egypt	5,435,197	4,669,062	3,653,955	16.1	15.6	11.3	-1,015,107	-21.74%
4	Turkey	1,394,475	998,887	1,237,341	4.14	3.33	3.81	238,454	23.87%
5	UAE	1,474,535	1,082,581	1,167,238	4.37	3.6	3.59	84,657	7.82%
6	Italy	1,128,767	740,022	1,127,945	3.35	2.46	3.47	387,923	52.42%
7	Germany	886,867	1,232,097	1,076,607	2.63	4.1	3.31	-155,490	-12.62%
8	South Africa	1,419,163	1,182,022	965,448	4.21	3.94	2.97	-216,574	-18.32%
9	United Kingdom	778,204	697,651	875,842	2.31	2.32	2.7	178,191	25.54%
10	Sri Lanka	654,440	698,542	786,605	1.94	2.33	2.42	88,063	12.61%
11	Switzerland	207,939	482,892	649,981	0.62	1.61	2	167,089	34.60%
12	United States	352,255	1,566,473	612,679	1.04	5.22	1.89	-953,794	-60.89%
13	France	427,406	255,886	530,874	1.27	0.85	1.63	274,988	107.47%
14	Austria	44,499	64,249	501,353	0.13	0.21	1.54	437,104	680.33%
15	Taiwan	460,093	434,600	492,467	1.36	1.45	1.52	57,867	13.32%

TANZANIA PRODUCTS: 3923



Tanzania products: 3923, articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics

SUBHEADING SA	DESCRIPTION	RANK & MARKET SHARE (%) 2024
3923	Articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics	Rank 13 (0.94%) 335,452
392350	Stoppers, lids, caps and other closures, of plastics	Rank 6 (4.24%) 286,104
392390	Articles for the conveyance or packing of goods, nesoi, of plastics	Rank 13 (0.22%) 13,237
392329	Sacks and bags (including cones), of plastics nesoi	Rank 14 (0.21%) 2,621
392330	Carboys, bottles, flasks and similar articles, of plastics	Rank 24 (0.01%) 733
392310	Boxes, cases, crates and similar articles, of plastics	Rank 10 (0.72%) 32,030
392321	Sacks and bags (including cones), of polymers of ethylene	Rank 12 (0.16%) 727
392340	Spools, cops, bobbins and similar supports, of plastics	-

Tanzania Plastic Packaging Products Imports (HS Code 3923)

- Total imports grew to €35.68 million in 2024, increasing 21.03% from 2023.
- Italy ranks 13th overall with minimal 0.94% market share (€335,452).
- Plastic bottles segment dominates at 44.68% of market (€15.94 million), growing 35.79%, but Italy has negligible presence (0.01%).
- Italy performs best in closures/caps segment, ranking 6th with 4.24% market share (€286,104).
- All rigid packaging segments grew: bottles (35.79%), closures (19.52%), and boxes/crates (13.97%).
- Plastic bags segments declined significantly: non-specific bags (-22.60%) and polyethylene bags (-26.39%).
- Italian exports concentrated in closures segment (85% of total plastic packaging exports to Tanzania).

TANZANIA IMPORTS FROM WORLD















Products : 3923, articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of Plastics

Year to Date : December , 2022 - 2024

	Partner Country	January - December (Value : EUR)			Market share (%)			Change 2024/2023	
		2022	2023	2024	2022	2023	2024	Amount	%
	World	31,497,082	29,481,942	35,681,387	100	100	100	6,199,445	21.03%
1	Kenya	13,878,723	13,735,335	12,995,616	44.06	46.59	36.42	-739,719	-5.39%
2	China	2,949,719	3,244,377	6,519,441	9.37	11.01	18.27	3,275,064	100.95%
3	India	5,596,845	4,544,578	4,889,631	17.77	15.42	13.7	345,053	7.59%
4	Egypt	421,449	281,943	3,194,280	1.34	0.96	8.95	2,912,337	1,032.95%
5	Uganda	1,477,239	1,424,564	1,737,669	4.69	4.83	4.87	313,105	21.98%
6	South Africa	1,346,659	1,159,218	885,078	4.28	3.93	2.48	-274,140	-23.65%
7	UAE	1,475,770	604,594	769,561	4.69	2.05	2.16	164,967	27.29%
8	Germany	659,179	404,265	727,583	2.09	1.37	2.04	323,318	79.98%
9	Mauritius	66,372	664,604	692,400	0.21	2.25	1.94	27,796	4.18%
10	Spain	289,144	529,650	622,128	0.92	1.8	1.74	92,478	17.46%
11	Turkey	718,591	501,745	597,288	2.28	1.7	1.67	95,543	19.04%
12	Australia	404,594	441,253	5,811,600	1.29	1.5	1.63	5,370,347	1,217.07%
13	Italy	476,160	309,403	335,452	1.51	1.05	0.94	26,049	8.42%
14	Netherlands	209,159	304,960	298,695	0.66	1.03	0.84	-6,265	-2.05%
15	United Kingdom	460,449	428,046	185,965	1.46	1.45	0.52	242,081	-56.55%

5 . MARKET STRUCTURE & CUSTOMS PROCEDURES

CATEGORY	KENYA
 <p>Market Overview</p>	<ul style="list-style-type: none"> • Packaging market valued at \$2.19 billion with 2.38% annual growth. • Food & beverage packaging represents 65% of total market. • "Kadogo" economy creates high demand for small-unit packaging.
 <p>Key Industry Players</p>	<ul style="list-style-type: none"> • Ramco Plexus Ltd.: Leading flexible packaging manufacturer with 18% market share. • Flexipac Limited: Specializes in food-grade consumer packaging. • Silafrica Kenya: Major supplier of rigid packaging solutions to FMCG companies.
 <p>Distribution Infrastructure</p>	<ul style="list-style-type: none"> • Mombasa Port handles 80% of packaging material imports. • Distributor network covers 72% of retail market distribution. • Digital platforms reducing distribution costs by average 18%.
 <p>Import Requirements</p>	<ul style="list-style-type: none"> • iCMS electronic system processes 92% of imports. • Required documents must be submitted 7 days before arrival. • Pre-shipment inspection certification required for all packaging machinery.
 <p>Cost Factors</p>	<ul style="list-style-type: none"> • Import tariffs: 25% on most finished packaging products. • Additional fees add approximately 21.5% to import value. • Clearance times average 7-14 days for packaging materials.
 <p>Recommended Entry Approach</p>	<ul style="list-style-type: none"> • Joint ventures reduce market entry time by average 65%. • Distributor partnerships require 12-18 month development. • Special Economic Zones offer 10-year tax incentives for manufacturers.

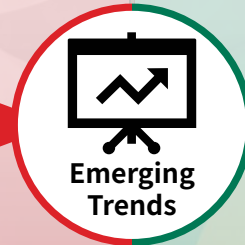
CATEGORY	TANZANIA
 <p>Market Overview</p>	<ul style="list-style-type: none"> • Packaging market valued at \$370 million with 3.85% annual growth • Agricultural export packaging comprises 58% of market demand • Export-oriented packaging focused on meeting international standards
 <p>Key Industry Players</p>	<ul style="list-style-type: none"> • Industrial Packaging Ltd.: Primary supplier of plastic packaging and labels • Mondi Group: International firm with significant Tanzania operations • Georgetown Group: Provides integrated design and packaging production services
 <p>Distribution Infrastructure</p>	<ul style="list-style-type: none"> • Dar es Salaam Port processes 65% of packaging-related imports • Standard Gauge Railway development reducing transport costs by 22% • Distribution primarily concentrated along coastal and northern corridors
 <p>Import Requirements</p>	<ul style="list-style-type: none"> • TANCIS system transitioning to upgraded NTANCIS in 2025 • All importers must provide TIN number under new system • Mandatory use of licensed customs agents adds 3-5% to import costs
 <p>Cost Factors</p>	<ul style="list-style-type: none"> • Four-tier tariff structure impacts different packaging materials variably • Strategic products receive inconsistent tariff application • Clearance times average 12-21 days for packaging materials
 <p>Recommended Entry Approach</p>	<ul style="list-style-type: none"> • Local partnerships essential for navigating regulatory environment • Government procurement represents 24% of packaging market • EAC market access strategies create 30% larger target market

6. EMERGING TRENDS AND OPPORTUNITIES FOR ITALY

KENYA

TANZANIA

- Sustainability focus: Kenya Plastics Pact targeting 30% recycling by 2030.
- Digital packaging technologies supporting e-commerce growth.
- New PET/HDPE recyclability standards implementation.
- Consolidation among local manufacturers.



- Digital customs systems (TANCIS) streamlining imports
- Standard gauge railway reducing freight costs
- Agricultural export emphasis driving packaging innovation
- Growing participation in regional packaging exhibitions

- Advanced flexible packaging machinery for FMCG brands
- Technical training partnerships with industry associations
- Energy-efficient equipment commanding market premium.
- Italian Trade Agency promotion via Propak East Africa



- Agricultural processing and packaging equipment
- Cold chain preservation technologies for exports
- Knowledge transfer for EU export compliance
- Early market positioning before Chinese dominance

- Low plastic recycling rate (8%) despite high waste generation
- Intensifying local competition with reduced profit margins
- Raw material cost volatility affecting production planning
- Complex certification requirements adding to import costs



- Limited logistics infrastructure increasing operational costs
- Regulatory hurdles for foreign equipment investments
- Lower purchasing power affecting premium equipment sales
- Less developed technical maintenance capabilities

7. SOME OF THE ITALIANS BRANDS IN KENYA AND TANZANIA



ILPRA
Tray sealing, filling and thermoforming machines for food and medical packaging.



PFM
Horizontal and vertical form-fill-seal packaging machines for food industries.



Ronchi Mario
Bottle unscramblers, filling lines and capping systems for liquid products.



IMA
Automatic machines for pharmaceutical, cosmetic, food, tea and coffee packaging.



Reda
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Cama
Secondary packaging technology for food, confectionery and non-food industries.



Sacmi
Packaging solutions for beverage, food and pharmaceutical industries.



VERIPACK
Food packaging systems specializing in high-quality tray sealing solutions.



ACMA
Packaging machines for confectionery, food and personal care products.



Galdi
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Marchesini
Packaging machines for pharmaceutical and cosmetic industries.



Ballestra
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SMI Group
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Milkita Group
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Pietribiasi
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G.D
High-technology machinery for cigarette making and packing.



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TESTIMONIALS

Industry voices speak to the transformative impact of Italian packaging technology in East Africa's evolving market landscape. Business leaders across Kenya and Tanzania share their experiences with Italian machinery and solutions:

“Highlands Drinks Limited manufacturing facility in Nyeri boasts of several state-of-the-art beverage manufacturing equipment. Amongst this equipment are several equipment from Italian OEMs; including Rotary PET Stretch Blowers, Automated PET bottle fillers, Automated Fly bar Shrink wrappers and PET bottles capping equipment.

We are generally happy with the Italian equipment that we have in our factory. They are robust and efficient and are relatively easy to operate and maintain. A small pain point, though, that manufacturers can consider looking at is the high levels of customization, especially on the control systems of most Italian equipment. Despite the fact that the control systems are also robust and do not readily fail, when they fail, the control parts are not readily available in the Kenyan market. They must be gotten from the Italian OEM. This leads to long down times during this isolated periods, especially because of another fact that the Italian OEMs do not keep these parts also but manufacture them when ordered”

***Naman Kimathi, Head of Manufacturing
Highlands Drinks Limited, Kenya***

“Centaza Plastics Limited is a family business located in Dar es Salaam, Tanzania. Established in 1994 Centaza Plastics began production with 2 very small extrusion lines, and a basic printing machine – all of which are still in operation today. Over the years we have expanded our production capability having 3 Central impression flexographic printing presses that are made in Italy. We have a 6+1 colour Flexotecnica, 6 colour Manzoni, and an 8 colour Ofem printing press. We also have a Solvent Recycling plant supplied by IST (IST Italia Sistemi Tecnologici SpA) which we use to recycle our waste solvents – making our print production more environmentally friendly and at the same time reduce our wastage. We are very happy with the durability and easy of use of our Italian made manufacturing machines which have proven their longevity over and over again.”

***Mushtaqali Waliji, Director
Centaza Plastics Ltd, Tanzania***

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MARKET RESEARCH REPORT ON THE PACKAGING SECTOR IN KENYA AND TANZANIA 2025



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