

2026

Fast Moving Consumer Goods

Surplus Asset Market Trends | Report

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Plant closures are accelerating. Sustainability rules are tightening. And the secondary market for food and beverage processing equipment is about to become very interesting. If you are buying or selling capital assets in the FMCG sector, the convergence of regulatory pressure, digital transformation, and supply chain restructuring is creating opportunities and urgency that won't wait.

The Sustainability Shift Isn't Theoretical Anymore

Corporate sustainability initiatives have moved from nice-to-have concepts to required practice across FMCG supply chains. This transformation is primarily driven by two regulatory forces: Extended Producer Responsibility (EPR) laws and PFAS bans (Parkinson, 2025), both of which are reshaping manufacturers' views of their equipment.

Consider what's happening right now. California will finalize the rules for the Plastic Pollution Prevention and Packaging Producer Responsibility Act (SB 54) in 2026. Washington producers just met a January 1, 2026, deadline to appoint a Producer Responsibility Organization. Across seven U.S. states, the Circular Action Alliance is serving as the designated PRO, fundamentally changing the economics of packaging compliance (Greenberg Glusker, 2025; Melissa and Bayer, 2025). Meanwhile, the European Union is accelerating its own regulations around per- and polyfluoroalkyl substances (PFAS), creating similar pressures across the Atlantic (Eurofins, 2025).

The practical impact? Firms face a choice: retool production lines to meet new recyclability standards or dispose of non-compliant assets. Either way, legacy equipment is flooding the secondary market (Parkinson, 2025; Melissa and Bayer, 2025; Eurofins, 2025).

And here's where opportunity meets necessity. The refurbished general equipment market was valued at \$24.3 billion in 2024 and is projected to reach \$39.8 billion by 2033, with a 5.8% compound annual growth rate (Verified Market Research, 2025).



Companies aren't just buying refurbished equipment to save money, though cost matters. They're also discovering that refurbishment reduces waste and energy use, helping them meet sustainability goals while maximizing ROI under economic constraints.

This creates a virtuous cycle. As demand grows for renewables, circular packaging, and recycled content, refurbished and pre-owned equipment becomes more acceptable—even desirable—within ESG roadmaps (Markets and Markets, 2025). Major FMCG companies are now openly positioning circular packaging and refurbished equipment as practical levers for reducing Scope 3 emissions and controlling costs, rather than as compromises.

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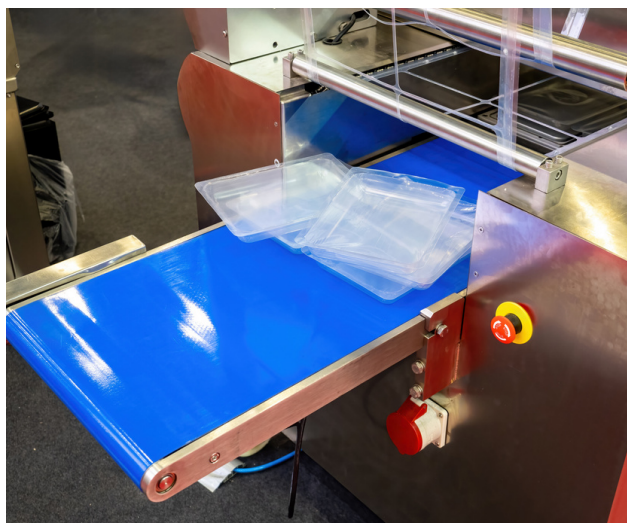


Digital Transformation Is Splitting the Market in Two

The numbers tell a decisive story: According to Rockwell Automation's (2025) recent survey, more than 70% of FMCG manufacturers now say that investments in AI, robotics, and simulation are not optional, but essential for their long-term survival. This isn't about running pilot projects anymore. Companies are deploying automation-ready, connectable solutions at scale across their operations.

What changed in 2025? FMCG leaders made a strategic pivot. Instead of experimenting with technology at the margins, they're now budgeting for controls modernization (PLCs, HMIs), predictive maintenance systems, and vision quality assurance as core operational investments. AI isn't a line item that gets cut when budgets tighten, it's permanent strategic guidance for 2026 (Spring Global, 2025).

This shift is creating a two-tier market for surplus equipment. Late-model fillers, form-fill-seal (FFS) machines, case packers, palletizers, and vision-enabled labelers—anything that's automation-ready and connectable—now commands premium pricing in secondary markets. Meanwhile, legacy equipment that can't integrate with modern control systems is being disposed of as surplus at lower values. (Spring Global, 2025).



You can see this playing out in real time. Multiple auctions throughout late 2025 and January 2026 across beverage and food processing lines show the divergence: smart equipment sells fast at strong prices, while older analog systems clear at significant markdowns (AllSurplus, 2025; Rabin, 2025).

Plant Closures Are Creating a Buyer's Market—with Caveats

A wave of plant closures is reshaping the surplus equipment landscape. Throughout late 2025 and into early 2026, packaging and food & beverage companies have been announcing shutdowns and releasing everything from labeling and capping machines, to die cutters, palletizers, chillers, and compressors into secondary markets.

The list reads like a who's who of the industry. Graphic Packaging closed its East Angus, Quebec, facility. Printpack shuttered its Elgin, Illinois, flexible packaging plant. Inline Plastics exited Gladwin, Michigan, while International Paper rationalized sites in Compton, California, and Louisville, Kentucky. Smurfit WestRock announced additional consolidations across North America and Europe. On the food & beverage side, TreeHouse Foods, Del Monte, and Reyes Coca-Cola Bottling are all shedding capacity, and their surplus processing and bottling assets are entering auctions and private sales (Paper Money, 2025; Intellizence, 2025).

This isn't limited to North America. For example, Nestlé is downsizing its German operations, closing its Neuss facility by mid-2026 and selling the Conow site in its entirety, citing overcapacity and price-sensitive consumers (Just-Food, 2025). Similarly, Unilever pushed through an even more dramatic restructuring, cutting approximately 6,000 jobs in Q1 2025 while separating its ice cream business (Ur Rehman, 2025).

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Here's what these moves have in common: Companies are retiring legacy packaging and filling lines at older facilities while concentrating investments in modernized, automation-standardized sites elsewhere (Carter, 2025). The result? Equipment gets reshuffled between locations, and what doesn't fit the new standardized profile becomes surplus.

That surplus is showing up everywhere. Major industrial auction houses are running ongoing multi-industry events featuring dedicated process and packaging sales—liquids, creams, pharma/food crossover lots with utility and end-of-line assets. Scan the late 2025 and Q1 2026 auction calendars, and you'll find complete food & beverage lines: canning equipment, confectionery systems, distilling apparatus, all looking for new homes (AllSurplus, 2025; Rabin, 2025).

The Consumer Reality Driving It All

Behind every plant closure and equipment sale is a fundamental shift in consumer behavior. Late-2025 data tells a sobering story: retail sales are cooling as consumers, especially those in lower- to middle-income households, pull back on spending (Adams et al., 2025; Measey, 2025; Morgan Stanley, 2025).

Where are shoppers cutting? They're trading down. Private-label brands gained significant ground throughout late 2025 and that momentum is carrying into 2026 (Numerator, 2025). The math is simple: 61% of consumers now say private-label brands offer above-average value for money, and 39% actively purchase them to save money (Numerator, 2025).

This isn't just changing what's on shelves, it's changing what's on factory floors. When consumers demand lower prices, manufacturers face relentless pressure to cut costs. Logistics expenses have become the top operational challenge for both manufacturers and retailers, which is precisely why the market for cost-effective, surplus equipment is heating up even as consumer spending cools down.



What to Watch in 2026: Surplus Asset Outlook

- **High auction volume persists; more complete lines enter the market.** Plant consolidations and portfolio pruning are expected to continue, with buyers chasing turnkey lines to avoid new equipment lead times.
- **Price bifurcation widens in packaging equipment.** Late-model, automation-ready units are expected to command stronger resale values, while non-digitized legacy gear clears at discounts.
- **Cold chain assets shift toward energy-efficient, compliant systems.** Facility upgrades should release older refrigeration racks, blast freezers, and conveyors for auction and private sale, while buyers prioritize refrigerant compliance and sensor-based monitoring.
- **ESG and circularity accelerate the adoption of refurbished equipment.** Disposition packages with service logs, schematics, and energy profiles will improve sales velocity and returns.

Regional dynamics matter:

- **North America:** Tariff uncertainty and labor gaps keep automation retrofits in high demand; surplus flows remain elevated (Business Research Insights, 2025).
- **Europe:** Energy costs and sustainability rules spur modernization; Nestl Germany underscores ongoing site adjustments (Just-Food, 2025).
- **APAC:** FMCG and e-commerce growth drive fast procurement of surplus lines to localize capacity; brands seek flexible, modular assets for SKU proliferation (Johnson et al., 2025).

Implications for Buyers and Sellers

- **For Buyers:** Prioritize connectable, automation-ready lines to minimize retrofit costs. Watch early 2026 auction calendars for complete beverage and food processing lines that compress commissioning timelines.
- **For Sellers:** Bundle documentation maintenance logs, controls schematics, energy data and market ESG value to widen buyer pools and raise realized values. Take advantage of Q1/Q2 budget cycles when buyer activity historically increases to sell your surplus.

The refurbished equipment market is professionalizing, driven by regulatory mandates, sustainability imperatives, and economic constraints. The question isn't whether to engage with the secondary market. It's whether you'll do so strategically or reactively.

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