Mid-Year Update

2025

Fast Moving Consumer Goods

Surplus Asset Market Trends

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LIQUIDITY SERVICES

Fast Moving Consumer Goods Surplus Asset Market Trends Report

Mid-Year Update

Unlocking Opportunity in a Shifting Food and Beverage Landscape

In this mid-year update, we revisit Liquidity Services' "2025 FMCG Surplus Asset Market Trend Report" to find that manufacturers are confronting mounting pressure from regulatory mandates, digital disruption, and shrinking margins. The trends reshaping FMCG manufacturing in 2025 are making capital recovery through secondary equipment markets—and the alignment with sustainability goals and long-term resilience—more strategic than ever.

Sustainability as a Strategic Imperative

Sustainability has evolved from a competitive differentiator to a non-negotiable business requirement. To meet regulatory requirements and address rising consumer expectations, FMCG brands are adopting circular economy models, eco-friendly packaging, and carbon-neutral manufacturing practices (Huxley, 2025). According to Imagine FMCG (2025), 77% of consumers say they're willing to drop brands they perceive as greenwashing, placing new pressure on transparency and reporting.

Health and Wellness Drive Product Innovation

Post-pandemic preferences continue to shape the FMCG landscape. Demand remains strong for functional foods, low-sugar alternatives, and plant-based products, with 451,000 online searches for "plant-based" recorded in the first half of 2025 (Imagine FMCG, 2025). Trending product themes, such as "Chaos Packaging" (coffee in tubes, gravy in beer cans), "Imagined Worlds" (space-themed flavors), and "Affordable Affluence" (premium quality at value pricing), underscore this consumer evolution (VML Intelligence, 2025).

Digital Transformation and Direct Engagement

FMCG companies are leveraging digital tools and platforms to unlock personalization, streamline operations, and boost innovation:

- **Generative AI**: The FMCG sector is projected to see AI investments grow from $7.9 billion in 2023 to $57.7 billion by 2033, driven by its impact on product innovation and supply chain efficiency (Berckman et al., 2024; Terlecki, 2025).
- **Direct-to-Consumer (DTC)**: Challenger brands like Liquid Death and Fox's Burtons are bypassing traditional retail to forge closer customer relationships through digital channels.
- **Social Commerce**: Instagram and TikTok now play a pivotal role in driving impulse purchases, fueled by shoppable content and influencer partnerships (Vertex Resourcing, 2025).

Evolving Regulatory and Compliance Landscape

New laws are transforming the formulation and packaging of FMCG products. In the UK, for example, HFSS (High in Fat, Salt, and Sugar) regulations have prompted some companies to reformulate product recipes to avoid falling under the HFSS classification, enabling continued marketing with fewer restrictions. Meanwhile, in both the U.S. and Europe, manufacturers are contending with rising compliance costs driven by stricter labeling standards, sustainability regulations, and mandates related to Per- and Polyfluoroalkyl Substances (PFAS) and Extended Producer Responsibility (EPR) (Grayling, 2025; Goldfinger, 2025). To stay ahead, companies are investing in compliance technologies and building cross-functional regulatory teams.

Economic and Supply Chain Pressures

Although inflation is down significantly from its 2022 peak of 9.9% (Rudge, 2024), consumer price sensitivity remains high, with 87% of U.S. shoppers prioritizing affordability (Imagine FMCG, 2025). In parallel, transportation and logistics costs remain elevated, with 35% of FMCG manufacturers identifying them as a leading operational challenge (Goldfinger, 2025).

Global Trade and Purchasing Power Volatility

International trade developments and rising import costs are impacting pricing strategies, consumer demand, and operating margins across the FMCG industry. Retailers like Walmart and Target have publicly cited rising sourcing costs as a reason for select product price increases of up to 45% (Dodds, 2025; Reuter, 2025).

As a result, American households are expected to spend significantly more on essential goods, creating new pressures for FMCG companies to recalibrate forecasts and adjust portfolios. Companies with diverse product lines—such as Unilever and P&G—are better positioned to weather market shifts by leaning on stronger-performing categories to buffer underperforming ones (Ozan, 2025).

Future Outlook for 2025 and Beyond

Global Market Expansion

The global FMCG market, valued at $13.58 trillion in 2023, is projected to grow to $18.96 trillion by 2032, at a CAGR of 3.8% between 2025 and 2032 (Skyquest, 2025). Some key drivers are listed below.

Region	Key Drivers
Asia-Pacific	Rapid urbanization, e-commerce expansion
North America	Health trends, sustainability focus
Europe	Organic product demand, eco-consciousness
Latin America & Africa	Growing middle class, digital adoption

Source: IndustryARC, 2025; Sri, 2025

Challenges Ahead

- **Supply Chain Risks:** Continued pricing pressures on raw materials, manufacturing inputs, and logistics (Anderson & DiGiorgio, 2025)
- **Workforce Shortages:** Ongoing gaps in STEM and advanced manufacturing roles
- **Regulatory Shifts:** Expanding requirements for health labeling, carbon reporting, and waste reduction initiatives

Used FMCG Equipment Market: Mid-Year Snapshot

The global market for new food processing equipment was valued at $52.69 billion in 2023 and is expected to grow at a 4.0% CAGR through 2030 (Grand View Research, 2024). While direct data on used equipment is limited, adjacent trends indicate increasing relevance and opportunity in the secondary market.

Top Drivers of Used Equipment Demand

1. **Cost Optimization**
   Manufacturers facing economic uncertainty and elevated input costs are turning to used or refurbished machinery to preserve capital (Carias, 2025).
2. **Sustainability Commitments**
   Adopting second-hand equipment supports circular economy goals by extending asset lifecycles and minimizing waste. Retrofits and component reuse are now standard practices among ESG-forward organizations (Wanberg, 2025).
3. **Policy Incentives**
   Supportive legislation—such as the EU Green Deal—is encouraging sustainable procurement, including increased adoption of pre-owned industrial equipment.

Challenges and Considerations

- **Trust and Transparency:** Buyers require assurance regarding the condition, compliance, and provenance of equipment, particularly for high-value assets.
- **Operational Complexity:** Inventory management, pricing accuracy, and logistics for used equipment can be more complicated than for standardized new products.

Conclusion

While specific market data for the used FMCG equipment sector is limited, the direction is clear: rising operating costs, shifting supply chains, regulatory changes, and sustainability imperatives are collectively fueling demand for used and refurbished equipment.

To succeed, manufacturers must overcome trust and logistical hurdles by partnering with experienced industrial auctioneers and established resale platforms to extract the full value from surplus assets.

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