

# ATPA's Monthly Regulatory Monitoring Report



**Your insider briefing in the Toy Industry  
in Asia Pacific**

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**ASIA  
TOY & PLAY  
ASSOCIATION**

## ***Regional Monitoring Report – August 2025***

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**Disclaimer:**

*The information contained in this report is intended to provide a general overview of regulatory developments that may impact the toy industry across Asia-Pacific. While the Asia Toy and Play Association (ATPA) strives to ensure the accuracy and completeness of the information, regulations are subject to frequent changes, amendments, and interpretations by local authorities. This report is for informational purposes only and should not be considered as legal, regulatory, or compliance advice. This report is intended for the internal use of ATPA members only. Reproduction, distribution, or sharing of this document beyond the recipient's organization is prohibited without prior written approval from ATPA.*

## Intellectual Property Rights Updates

### Australia

#### Australian IP Report 2025: Key Trends and Insights

In July 2025, IP Australia released its Australian IP Report 2025, providing insights into global intellectual property (IP) trends relevant to the Toy & Play industry.

#### Key Findings:

- **Non-Resident Filings:** In 2024, non-resident trademark filings increased by 9.0%, led by China, with a surge in household goods sold via e-commerce platforms. Non-resident patent applications also grew substantially, driven by China, contributing to a 5.2% increase in standard patent applications compared to 2023. Design right filings reached a new high, increasing by 8.9% over 2023, indicating a rising awareness of design right importance.
- **China's Rising IP Influence:** China's IP filings in Australia have seen dramatic increases in patents (5.2%), trademarks (45.4%), and designs (65.5%), surpassing the United States as the leading overseas source of trademark applications.
- **Key Sector Developments:** The EV sector is growing significantly, with China leading in patent growth (75% annually). Small and medium enterprises (SMEs) increasingly recognize the strategic value of IP, with research indicating trademarks boost startup valuations by 20-22%.
- **International Treaties:** Australia played a key role in the WIPO Treaty on Genetic Resources and Traditional Knowledge, mandating disclosure in patent applications, and the Riyadh Design Law Treaty, simplifying international design protection.
- **Patent Strategy Research:** Research indicates small innovators benefit from accelerated patent processing, while large corporations prefer application delays. Patent grant delays create market uncertainty.
- **Copyright and AI:** Australia's Copyright and AI Reference Group highlights the urgent global need to address AI's impact on the copyright value chain.

### India

#### Surge in IP Filings Due to Reforms

On July 22, 2025, a Ministry of Commerce & Industry press release highlighted a substantial 44% increase in India's intellectual property (IP) filings over the past five years, with total applications rising from 4.77 lakh in 2020-21 to nearly 6.9 lakh in 2024-25. This growth is attributed to strategic policy reforms, widespread digitization, and sustained awareness campaigns.

The government has revamped IP laws to simplify processes, reduce compliance burdens, and foster innovation. Notable changes include:

- **Patents:** Mandatory online filing, reduced fees for digital submissions, simplified procedures for working statements and priority documents, and a shortened examination request deadline from 48 to 31 months.

- **Trademarks:** Consolidation of 74 forms into eight, formal inclusion of sound marks, and streamlined processes for well-known marks and user registration.
- **Designs:** Alignment with international Locarno classification standards and optimized application processing.
- **Copyright:** Eased compliance for software registration and increased transparency for copyright societies.

To encourage IP creation, significant fee reductions have been introduced for startups, MSMEs, and educational institutions, including an 80% reduction for patents, 75% for designs, and 50% for trademarks. Expedited examination provisions have been extended to these sectors, as well as to female innovators, government departments, and international filers. A new “Certificate of Inventorship” has been launched to recognize inventors.

India’s IP filing system has undergone a complete digital transformation, with over 95% of patent and trademark applications now filed online. New digital tools include an AI-powered trademark search system and the IP Sarthi chatbot. The Indian adaptation of WIPO’s IP Diagnostics tool assists small businesses in managing IP assets.

The National Intellectual Property Awareness Mission (NIPAM) conducted over 9,500 awareness programs, reaching more than 25 lakh students and faculty. Modernization efforts include a 233% increase in sanctioned strength and nearly 196% increase in working manpower at the Patent Office since 2014. As of July 2025, 697 GI applications have been registered, with Uttar Pradesh, Tamil Nadu, and Maharashtra leading.

#### **Growth in IP Filings:**

Type of Filing	Increase
Geographical Indications (GIs)	380%
Designs	266%
Patents	180%
Copyright	83%
Trademarks	28%
Semiconductor Layout Designs	20%

### **Singapore**

#### **Updates to Patent and Trade Mark Fees**

Effective September 1, 2025, the Intellectual Property Office of Singapore (IPOS) has implemented several updates to its official fees, as detailed in Circular No. 1/2025. These adjustments impact both patent and trademark applicants.

**Key Changes:**

- **Patent Applications:** For examination requests made on or after September 1, 2025, the excess claim fee has increased from SGD 40 to SGD 80 for each claim exceeding 15. Excess claim fees are payable when requesting examination and, from April 1, 2026, upon responding to each Written Opinion if the number of excess claims increases. The fee for requesting an Examination Review Report increased from SGD 1420 to SGD 2150 on September 1, 2025, and will further increase to SGD 3200 on April 1, 2026. Patent renewal fees have also increased.
- **Trademark Applications:** The application fee for trademarks with specifications not fully adopted from IPOS' pre-approved database increased from SGD 380 to SGD 410 per class. The fee for applications using only pre-approved specifications remains SGD 280 per class. The application fee for international registrations or subsequent designations for Singapore increased from SGD 380 to SGD 410 per class, regardless of specification adoption. Trademark renewal fees and official fees for amending national trademark applications have also increased.

## Sustainability Updates

### United Nations

#### Global Plastic Treaty Negotiations End Inconclusively

The August 2025 Geneva meeting, aimed at finalizing a global plastic treaty, concluded without an agreement, marking the second consecutive failure to reach a consensus. Representatives from 184 countries were involved in the negotiations, which sought to address plastic production caps, management of plastic products and hazardous chemicals, and financing for treaty implementation in developing nations.

A draft treaty was rejected by over 100 countries for being “unambitious” and “inadequate” due to its voluntary measures and failure to cover the full life cycle of plastics, including the omission of articles on health and product phase-outs. Environmental groups and many nations advocated for stronger, legally binding measures to cut plastic production and protect health. Concerns were raised regarding the significant presence of fossil fuel and chemical industry lobbyists, with a Center for International Environmental Law (CIEL) investigation identifying 234 such lobbyists at the talks.

The UN Environment Assembly's March 2022 resolution had called for a legally binding global plastics treaty by the end of 2024, incorporating both binding and voluntary approaches across the full life cycle of plastic. The path forward for negotiations remains uncertain, with calls for a revised process to achieve a robust, legally binding agreement.

### Indonesia

#### Indonesia Aims for Sustainable Plastic Waste Management by 2045

Indonesia is implementing strategies for plastic waste management from 2025 to 2045, focusing on



sustainable packaging and circular economy goals. These strategies are based on the 9R principles: Refuse, Rethink, Reduce, Reuse, Repair, Refurbish, Remanufacture, Repurpose, Recycle, and Recover.

Indonesia generated over 4.22 million tonnes of plastic waste in 2023, with 44% mismanaged. The National Roadmap and Action Plan Circular Economy Indonesia 2025–2045 prioritizes plastic packaging in retail, setting milestones for redesign, reuse, collection, recycling, and sustainable management, all based on the 9R principles. Key national policies include the Solid Waste Management Act (2008), Government Decree No. 81/2012, and Presidential Decree No. 97/2017, focused on waste reduction and improved management.

The Ministry of Environment and Forestry (MoEF) Decree No. P.75/2019 encourages Extended Producer Responsibility (EPR), though its current implementation remains voluntary and limited. Plans for a plastic excise tax have been delayed due to economic uncertainties. Permendag No. 83/2020 governs plastic waste imports, imposing conditions for responsible management without outright banning imports.

Challenges include archipelagic geography, climatic factors, rapid urbanization, fragmented recycling infrastructure, inconsistent policy enforcement, and low public awareness. The way forward emphasizes strengthening enforcement, revisiting the plastic excise tax design, establishing binding EPR policies, involving the informal waste sector, regulating plastic waste imports, promoting green public procurement, investing in recycling technologies, supporting public-private partnerships, increasing public awareness, and continuous monitoring.

The anticipated Global Plastics Treaty could significantly support Indonesia by enhancing capacity building, providing guidelines for EPR, funding waste management, facilitating the transition of the informal sector, regulating plastic waste trade, fostering technology transfer, raising awareness, and enabling data collection and transparency.

## Philippines

### **Bill on Circular Economy (S. No. 306): core provisions and relevance to toy products/packaging**

The Philippine Senate is considering S. No. 306 – the “Philippine Circular Economy Promotion Act,” introduced by Senator Loren Legarda in the Twentieth Congress (First Regular Session). The bill (attached) establishes a national framework to transition from a linear to a circular economy and applies to producers and consumers across value chains of goods, products, services, and processes in the Philippine economy.

#### Key provisions

- Institutional framework: Creates a Circular Economy Inter-Agency Council (CE-IAC) to coordinate and oversee implementation and provide annual progress reports.
- Single-use plastics (SUP): Full phase-out five (5) years after effectivity; a national transition plan to be formulated within one (1) year covering SUP reduction programs, EPR schemes, greener product standards, R&D for alternatives, collection/recovery, and a just transition for workers.

- Extended Producer Responsibility (EPR): EPR schemes are part of the mandated transition plan for phasing out SUPs.
- Product & packaging design: Requires designs/materials that prioritize durability, reuse, recyclability, and non-toxic/low-toxicity, with standards for packaging and a prohibition on over-packing; electric/electronic products must avoid toxic/harmful substances as defined by law or treaty.
- Monitoring & enforcement: Establishes a Circular Economy Monitoring and Accountability Framework (CEMAF); non-compliance can lead to warnings, fines (₱50,000–₱500,000), permit suspension/cancellation, and disqualification from incentives/procurement; LGU non-compliance can trigger administrative sanctions.
- Innovation & incentives: Provides for a Regulatory Sandbox, a Circular Innovation Hub, and a Circular Economy Incentive Code to harmonize fiscal/non-fiscal incentives; also creates a Circular Economy Implementation Fund (CEIF).
- IRR & phasing: Implementing Rules and Regulations (IRR) within 120 days of effectivity, with phased implementation defined in the IRR (including the five-year SUP transition).

## Labour Issues Updates

### Thailand

#### **Mass Exodus of Cambodian Migrant Workers Causes Labor Shortage**

In late July 2025, Thailand faced a severe labor shortage due to a mass exodus of Cambodian migrant workers, triggered by heightened Thai-Cambodian border tensions and rumors of insecurity. Approximately 400,000 Cambodian workers returned home within five days, with 150,000 departing on the first day alone. Cambodian migrant workers are a critical component of Thailand's foreign workforce, with an estimated 500,000 legally employed and a total of 1 to 1.2 million including undocumented workers. They are vital to sectors such as agriculture, construction, food processing, and services. The sudden departure has created an acute labor deficit, especially in border provinces like Chanthaburi, Trat, and Surin, where Cambodian workers constitute 70-80% of the workforce, forcing businesses to scale back production and operations. Authorities may explore importing labor from Laos and Myanmar as immediate alternatives, though logistical and sectoral challenges are anticipated. Long-term strategies may involve shifting production models towards technology and capital to reduce reliance on foreign labor.

#### **Thailand Introduces E-Work Permit System for Foreign Professionals**

In 2025, Thailand's Ministry of Labor launched a new e-work permit system, aiming to modernize and streamline the process for foreign professionals working in the country. This digital transformation replaces the traditional "blue book" work permit with a secure, credit card-sized ID featuring barcodes and QR codes. Applications and renewals are now submitted via the Ministry of Labor's online platform, reducing paperwork and in-person visits. The new digital format aims to



reduce fraud risks, ensuring that only authorized individuals work legally in Thailand. Existing “blue book” permits remain valid until their expiration. The full rollout and initial issuance of e-work permits are expected in the near future. Companies under the Board of Investment (BOI), Eastern Economic Corridor (EEC), or Industrial Estate Authority of Thailand (IEAT) will also eventually adopt this system. Permits are tied to specific work locations, requiring applications to be filed with the relevant provincial Labor Department.

Foreign nationals intending to work in Thailand must secure an e-work permit alongside a valid Non-Immigrant B Visa or equivalent. Certain occupations, such as manual labor or roles reserved for Thai nationals, remain prohibited. Non-compliance carries severe penalties, including fines up to 100,000 THB, imprisonment, or deportation. The BT.32 form must be filed through the Ministry of Labor’s electronic platform, including employment contracts, passport copies, educational qualifications, company registration documents, and a medical certificate. Processing typically takes 7–10 business days in Bangkok, with longer timelines in other provinces. Permits must be renewed annually before expiration, and changes in job role, employer, or location must be reported to the Ministry of Labor to amend the work permit.

The e-work permit system does not consolidate multiple jobs under one permit. Expats with multiple roles will still require individual permits for each position, with employers providing supporting documentation for each application. While the digital platform enhances accessibility, the core requirements for obtaining a work permit remain unchanged. For BOI-promoted companies, the e-work permit will likely integrate with or complement the existing BOI Single Window system, maintaining expedited processing and relaxed requirements. ATPA members should ensure thorough preparation and compliance with these updated regulations to facilitate smooth operations for their foreign workforce in Thailand.

## **Vietnam**

### **New Work Permit Regulations Streamline Procedures in Vietnam**

On August 7, 2025, Vietnam issued Decree No. 219/2025/ND-CP, updating work permit regulations for foreign workers. Effective in August 2025, the decree streamlines procedures, reduces processing times, and expands exemptions from work permit requirements. It replaces previous regulations, including Decree No. 152/2020/ND-CP and Decree No. 128/2025/ND-CP.

Key changes include:

- Licensing authority shifts to Provincial People’s Committees (PPCs).
- An integrated online processing system for work permits and criminal record certificates is introduced, potentially reducing processing times from five to three weeks.
- The mandatory job posting on official portals is abolished; employers can post recruitment notices on public or company platforms at least five days before application submission.
- The number of work permit exemption categories has increased from 14 to 15, with a new exemption for foreign workers in priority sectors such as finance, science, technology, innovation, and digital transformation.
- Experience requirements for experts and technicians have been relaxed, especially in prioritized sectors.
- Work permits issued in one province can now be valid for multiple provinces, provided proper notification is given.
- The decree unifies the criteria for work permit revocation and specifies the documents required for

determining permit duration.

Existing work permits remain valid until expiry, but all new applications will be processed under Decree No. 219/2025/ND-CP. Businesses should review hiring criteria, adjust recruitment timelines, update HR procedures, and monitor permit documentation to ensure compliance.

## Trade Policy Updates

### US

#### Updated Tariff Requirements

As of August 4, 2025, significant updates have been made to tariffs impacting imports from multiple countries, including China, Canada, and Mexico, implemented since February 1, 2025. These changes introduce new duties and modify existing ones, often resulting in cumulative tariff burdens.

- **China (including Hong Kong):** Tariffs increased from 10% to 20% on March 4, 2025. All goods under all HTS numbers are subject to these tariffs. Effective April 5, 2025, a 10% tariff went into effect (125% paused until August 12, 2025). The cumulative tariff calculation is Normal Duty + 20% (IEEPA) + 10% (Universal/Reciprocal) = Normal Duty + 30%. With Section 301, it becomes Normal Duty + 25% (Section 301) + 20% (IEEPA) + 10% (Universal/Reciprocal) = Normal Duty + 55%. With Section 232 Steel/Aluminum or Copper, it is Normal Duty + 50% (Section 232) + 20% (IEEPA) = Normal Duty + 70%.
- **All Other Countries:** Rates range from 10% to 41%, with increases effective August 7, 2025.
- **European Union Countries:** Tariffs are capped at 15%. If a product's normal duty is greater than 15%, no additional universal/reciprocal tariffs apply. If less than 15%, the difference is assessed up to the 15% cap. The cumulative tariff calculation is Normal Duty + (difference between normal duty and 15%), not to exceed 15% total.
- **Brazil:** 50%. The cumulative tariff calculation is Normal Duty + 50%.

These tariffs and duties are cumulative, applying on top of any Section 301, antidumping, countervailing duties, and normal duty rates. Universal/reciprocal tariffs do not apply to goods already subject to Section 232 duties or to goods from Mexico or Canada already subject to IEEPA fentanyl tariffs.

### India

#### US Imposes Tariffs, India Considers Countermeasures

In August 2025, the United States imposed 50% tariffs on Indian steel, aluminum, and derivatives, which India has labeled as “unfair and unjustified.” These tariffs, initially at 25% and increased by another 25% in August 2025, are reportedly a punitive measure related to India's purchases of Russian oil. India is considering retaliatory tariffs on certain US goods in response.

- Indian leaders, including Prime Minister Narendra Modi and Defence Minister Rajnath Singh,

have emphasized India's economic strength and rapid growth, criticizing external attempts to undermine its competitiveness.

- US President Donald Trump stated that trade negotiations with India will not proceed until the tariff issue is resolved.
- Moody's has projected a potential slowdown in India's GDP growth if the 50% tariffs persist, affecting sectors such as chemicals, textiles, diamonds, machinery, and furniture.

### **India and US Continue Trade Deal Talks Despite Tariff Issues**

As of August 14, 2025, India and the United States are continuing negotiations for a mutually beneficial trade agreement, despite existing US tariffs. Key areas of focus include artificial intelligence (AI), digital transformation, and innovation-driven startups. The ongoing dialogue aims to finalize an agreement that supports trade and investment between both nations.

### **FTP 2025 Boosts India's Export Promotion Schemes**

India's Foreign Trade Policy (FTP) 2025 expands export promotion schemes like RoDTEP and district export hubs. This initiative aims to simplify procedures and increase India's global export competitiveness. The Commerce Ministry is preparing a ₹25,000 crore export support mission, including WTO-compliant schemes to aid exporters, diversify markets, and ease trade finance, in response to rising US tariffs.

## **Indonesia**

### **Indonesia Updates Import Policy with MOT Regulation 16**

Effective August 29, 2025, Indonesia's Ministry of Trade (MOT) Regulation No. 16 of 2025 will update the country's import licensing, reporting compliance, and goods classification. This new regulation replaces previous guidelines to provide enhanced clarity and better align with current global trade dynamics, including U.S. tariff policies.

## **Malaysia**

### **U.S. Imposes 19% Reciprocal Tariff on Malaysia**

As of August 7, 2025, the U.S. reciprocal tariff rate imposed on imports from Malaysia is 19%. This tariff is part of President Trump's reciprocal tariffs, which have raised the overall U.S. effective tariff rate to an estimated 18.6%, the highest since 1934. The tariffs were implemented under the July 31, 2025, Executive Order, "Further Modifying the Reciprocal Tariff Rates," which built upon the initial Liberation Day Executive Order. This increase in the U.S. effective tariff rate could impact the cost of goods imported into the U.S., potentially affecting the supply chain and pricing strategies for ATPA members with operations or trade flows involving the U.S.

## **Myanmar**

### **US Implements 40% Reciprocal Tariff on Myanmar Imports**

On August 7, 2025, the United States implemented a 40% reciprocal tariff on imports from Myanmar. This tariff is part of a broader initiative affecting over 60 trading partners, with tariffs ranging from 10-41%.

- The tariffs, initially announced in an Executive Order on July 31, 2025, aim to address

persistent US trade deficits. A baseline 10% tariff had been in effect since April 5, 2025.

- These tariffs were imposed under the International Emergency Economic Powers Act (IEEPA).
- Eleven trading partners, including the United Kingdom, European Union, Japan, Korea, Vietnam, Malaysia, Indonesia, Philippines, Thailand, Cambodia, and Pakistan, have reportedly reached trade agreements with the US, but Myanmar is not among them.
- Goods loaded onto a vessel before August 7, 2025, and entered for consumption before October 5, 2025, remain subject to the 10% baseline tariff.
- Goods transshipped to evade these tariffs will incur a 40% tariff, along with potential fines and penalties. Mitigation or remission of penalties for transshipment will not be allowed.

The 40% reciprocal tariff on imports from Myanmar will significantly increase the cost of goods for ATPA members sourcing from or importing into the US from Myanmar. Accurate country of origin determinations are now critically important, and ATPA members should review their supply chains and sourcing strategies to assess the impact of these tariffs.

### **New Zealand**

#### **US Imposes Higher Tariffs on New Zealand Goods**

Effective August 4, 2025, the United States increased its import duty on most New Zealand goods to 15 percent, up from the previous 10 percent baseline implemented in April. This “reciprocal tariff” decision, attributed by the U.S. to New Zealand’s trade surplus, has been met with disappointment by New Zealand’s Finance Minister Nicola Willis and Trade Minister Todd McClay. Both officials have pledged to protest the decision with their U.S. counterparts, with McClay seeking an “urgent call” with the U.S. Trade Representative to advocate for New Zealand exporters. New Zealand recorded a trade surplus of about NZ\$900 million on NZ\$9.3 billion of goods exports for the year ending March 2025. While New Zealand’s merchandise trade surplus with the U.S. was approximately NZ\$900 million for the year ending March 2025, the overall trade surplus, including services, is significantly larger. This development poses a challenge for the Luxon government, particularly as it seeks to highlight its economic management record.

### **Philippines**

#### **Philippines’ Economy and Trade Regulations in 2025**

In 2024, the Philippine economy grew by 5.6%, driven by household consumption and infrastructure investments. Forecasts project similar growth for 2025 and 2026, supported by a strong labor market and low inflation. New Zealand-Philippines trade reached a record NZ\$1.63 billion in the year ending March 2025, an 18.1% increase. New Zealand exports to the Philippines grew by 19.2% to NZ\$1.18 billion, with dairy, travel, and meat as key contributors.

On June 26, 2025, the Philippine Budget Secretary announced a revised GDP growth target for 2025, lowering it from 6-8% to 5.5-6.5%, citing “heightened global uncertainties.”

The Philippines’ trade landscape in 2025 is marked by evolving regulations and digital transformation. Total trade exceeded \$115 billion in 2024.

- **Import Regulations:** Tariff rates are based on Harmonized System (HS) Codes, with reduced or zero tariffs for products from ASEAN and RCEP member countries. The Bureau of Customs (BOC) strictly enforces accurate classification and valuation. New digital tools, such as the BOC e-Submission Portal, are mandatory for high-value consignments, requiring electronic pre-submission of all documentation before port arrival. Import permits are required from agencies like the Department of Agriculture (DA), Food and Drug Administration (FDA), and Department of Trade and Industry (DTI), depending on the goods. Imported products must comply with Philippine National Standards (PNS) or international equivalents.
- **Export Regulations:** All exporters must file an Export Declaration (ED) via the TradeNet platform, supported by commercial invoices, packing lists, bills of lading/airway bills, and certificates of origin. Certain commodities, such as metallic ores and agricultural products, require clearance from regulatory bodies like the Mines and Geosciences Bureau (MGB) and the Bureau of Plant Industry (BPI). VAT zero-rating applies to qualified exporters under the CREATE Act, but new guidelines on proof of direct export transactions must be strictly followed to avoid disputes.

Businesses should be aware of inherent trade risks, including geopolitical and economic volatility, supply chain disruptions, and regulatory compliance risks. The full implementation of RCEP offers access to a vast market with streamlined trade rules and lower tariffs. Digital trade platforms like TradeNet and BOC's E2M Customs System enable faster, more efficient trade processing. Growing global demand for environmentally friendly products presents opportunities for sectors like organic agriculture and solar technologies. The government's "Build Better More" plan aims to upgrade seaports, airports, and logistics hubs.

The Philippine government is committed to digital trade reform. Key initiatives include TradeNet, BOC E2M, and the ASEAN Single Window.

Importers and exporters should regularly check websites of the Bureau of Customs, DTI, and other relevant agencies for regulatory changes. Businesses should invest in training, conduct risk assessments, leverage trade preferences, and seek professional guidance.

## South Korea

### Korea's Trade Strategy Meeting and US Tariff Implications

On August 18, 2025, Korea's Minister for Trade, Yeo Han-koo, convened a strategy meeting at the Korea Chamber of Commerce and Industry to discuss trade policy directions and ensure competitiveness in global markets. The meeting focused on establishing trade policy directions and strategies to enhance South Korea's competitiveness in global markets. This gathering underscores South Korea's commitment to proactive trade policies and engagement within regional economic cooperation frameworks, particularly in preparation for upcoming Asia-Pacific Economic Cooperation (APEC) business events. The objective is to maximize economic benefits and foster sustainable growth through collaboration between government and private sectors.

On August 1, 2025, President Trump announced a comprehensive trade deal with South Korea. South Korea has secured a reduced tariff rate of 15% on its exports to the U.S. The agreement includes South Korea accepting American products, including automotive and agricultural goods,

into its markets with no accompanying import duties. South Korea will establish a \$350 billion fund for selected investments in the U.S., including the purchase of up to \$100 billion worth of energy products. This agreement signals South Korea's clear desire for continued American trade presence, even at the cost of substantial economic concessions. American protectionism, including tariffs on key sectors like semiconductors, will likely continue as long as the Trump administration is in office, leading to heightened costs across Asia and necessitating proactive strategies for businesses, including diversifying trade partners and re-evaluating supply chains.

## Thailand

### US-Thailand Tariff Agreement and Measures on Transshipment

Effective August 7, 2025, the United States reduced its reciprocal tariff rate on goods from Thailand from 36% to 19%. This adjustment follows extensive negotiations between the Thai government and the US trade representative, as outlined in an executive order issued on July 31, 2025 (EST). The US Secretary of Commerce and the US Trade Representative will continue to monitor these tariff measures, with potential for further adjustments. This new rate positions Thailand competitively among ASEAN countries.

US Customs and Border Protection (CBP) introduced a punitive 40% duty rate on goods found to be routed through third countries to evade reciprocal tariffs. Approximately 90% of tariff lines (around 10,000 items) for US goods will be exempted from import duties, covering items not domestically produced or with insufficient supply.

Thailand has been assigned a 19% tariff rate. This rate was secured on August 1, 2025, after Thailand agreed to a ceasefire agreement, highlighting the influence of geopolitical factors on trade negotiations. The new tariffs and varying trade arrangements across ASEAN nations are expected to lead to an upheaval of traditional supply-chain frameworks, impacting the sourcing of materials and manufacturing processes for toy companies operating in or through Thailand. The 19% tariff on goods from Thailand to the U.S. will likely increase the cost of toys manufactured in Thailand for the U.S. market, potentially affecting competitiveness. ASEAN countries are expected to seek stronger trade links beyond the U.S. and China, exploring partnerships with the EU, Canada, the Pacific, and Africa to reduce over-reliance on a few key partners.

## South Korea

### Regulatory Update Overview

#	Title	By	Description	Status
24	Partial Amendment to the Act on Promotion of Transition to Circular	Kang Deukgu (DPK) and 10 others	This amendment aims to reduce the formulation cycle of the "Formulation and Implementation of Master Plans for Circular Economy" from 10 to 5 years. This change is being introduced to proactively address the significant increase in plastic use during the COVID-19 pandemic and to better respond to international plastic agreements. It also aims to enhance the government's ability to	Sent to the Environment and Labor Committee on 6 August 2025



#	Title	By	Description	Status
	Economy and Society		manage the growing importance of resource recycling for construction waste, electronics, discarded clothing, and animal waste.	

## Policy Updates

### Ministry of Environment

- The ME held a midterm sharing session on July 30 under the “Memorandum of Understanding (MOU) for Leading Enterprises in the Distribution Industry on the Circular Economy,” a voluntary initiative with major retail and logistics companies to reduce packaging materials used in distribution. The MOU, signed in March 2024 with 19 leading firms, including online retailers and department stores, commits participants to establish and implement self-driven plans for packaging resource circulation. At the event, the ME reviewed the progress made, highlighted successful practices, and encouraged broader industry adoption. During the session, five companies were recognized with awards for outstanding performance. Kurly, the Grand Prize recipient, has replaced plastic packaging with eco-friendly materials, while Coupang, the Excellence Award recipient, has reduced plastic packaging thickness by 10%. Kim Go-eung, Director General of the Resources Circulation Bureau at the ME, stated, “The ME will continue to actively support the distribution industry’s transition toward a circular economy.”

### Presidential Committee on Policy Planning: 123 National Policy Tasks

- On 13 Aug 2025, the Presidential Committee on Policy Planning (PCPP) conducted a public briefing to present the five-year national governance plan, key national policy tasks, and proposed organizational reforms. The PCPP, established on 16 Jun 2025 to support the Lee Jaemyung administration in the absence of a presidential transition committee, formally concluded its mandate with a disbandment ceremony held on 14 Aug 2025. The PCPP announced 5 Governance Objectives; 23 Strategies; 123 National Policy Tasks; and 564 Action Tasks. (See below.) National Future Strategy Commission (TBD) is to be formed; National Policy Office of the President’s Office will take the key in execution; and Office of Policy Coordination will assess the National Policy Tasks. (See below.)
- ATPA-relevant points:
  - Formulate Circular Economy Ecosystem (Ministry of Environment; 2025- 2028)
  - Draft a lifecycle plastic-free roadmap (2H 2025) that includes reduction, manufacturing, and recycling.
  - Reinforce mandatory renewable material usage to match that of the international standards.
  - Expand Circular Economy 100 (CE 100).
  - Mandatory renewable material usage for PET to be increased to 30% by 2030.

- Adopt K-Eco Design for sustainable product design.
- Systemize reparability assessment by 2025.
- Foster improvement of material and structure of packing materials for easy recycling.
- Include toys and disposable cups to EPR subjects.

## Trade Agreement Updates

Country	Updates
<b>Indonesia, US, Cambodia, Malaysia, Thailand, Bangladesh, Sri Lanka</b>	Indonesia and the United States reached a trade agreement on July 15, 2025, reducing tariffs to 19%. However, similar tariff rates were extended to competitors like Cambodia, Malaysia, Thailand, Bangladesh, and Sri Lanka. In exchange, Indonesia will abolish tariffs on most US imports, lift Non-Tariff Barriers, and increase US purchases by over USD 22 billion.
<b>Indonesia – EU (CEPA)</b>	On 13 July 2025, the EU and Indonesia announced a political agreement on the Comprehensive Economic Partnership Agreement (CEPA) in Brussels. Indonesian and EU counterparts also exchanged letters to set the final steps to conclude the talks. The European Commission indicates an aim to finalise the deal by September 2025. This is not yet a legal signing of the treaty text; the final legal text will be published before signature and ratification.
<b>US, Japan</b>	The U.S. and Japan finalized a trade agreement on July 31, 2025, averting a 25% tariff increase on Japanese products. Japan will invest approximately \$550 billion in the U.S., while the U.S. will reduce tariffs on Japanese cars to 15%. Japan will also increase access for American agricultural products. Further negotiations are expected to achieve a fully enforceable agreement.
<b>China, New Zealand</b>	The China-New Zealand Free Trade Agreement (FTA), originally signed in 2008, continues to be enhanced through ongoing negotiations and upgrades. The recent upgrade protocol refines rules of origin, technical barriers to trade, e-commerce, government procurement, competition policy, and environmental considerations. These developments signify a continued commitment to deepening economic cooperation.
<b>Canada, Philippines</b>	Negotiations for a Free Trade Agreement (FTA) between the Philippines and Canada are progressing, aiming to reduce tariffs and enhance bilateral trade between the two nations.

Country	Updates
<b>Singapore, EFTA</b>	Singapore and the European Free Trade Association (EFTA) concluded negotiations on the EFTA–Singapore Digital Economy Agreement (ESDEA) on July 10, 2025. This agreement establishes a framework for digital connectivity, secure cross-border data flows, and interoperability between digital markets.
<b>China, ASEAN, Thailand</b>	Discussions between China and ASEAN nations are underway to upgrade the China-ASEAN Free Trade Area (CAFTA) to version 3.0. This upgrade aims to enhance economic and trade relations, with negotiations focusing on new tariff reduction lists, trade in goods, and dispute resolution mechanisms.
<b>India – EU FTA</b>	Negotiations with India are a high political priority for the EU and therefore the pace of the round is drastically increased. Next round (13th) is planned for second week of September and the following one in October in Brussels. During last round good progress on several chapters (services, investment, digital) but the key areas of tariff and non-tariff (including QCOs) are still open. Objective is still to achieve a commercially meaningful agreement by the end of the year.

## Extended Producer Responsibility Updates

### India

#### EPR Registration Now Mandatory for Importers of Plastic Raw Materials

On 2 July 2025, the Central Board of Indirect Taxes & Customs (CBIC) issued Instruction No. 21/2025-Customs, directing customs officers to verify proof of registration on the Centralized Extended Producer Responsibility (EPR) Portal for Plastic Packaging at the time of clearing consignments of plastic raw materials.

This follows the Plastic Waste Management (Amendment) Rules, 2024, which broadened the definition of “importer” to include any entity importing:

- Plastic packaging,
- Commodities with plastic packaging,
- Carry bags or plastic sheets,
- Plastic raw materials (e.g., resins, pellets),
- Intermediate materials used in manufacturing plastic packaging (e.g., films, preforms).

What This Means for Toy Companies:

- Toy companies that import plastic raw materials—including resins and preforms used in molding or packaging—are now required to be registered on the EPR Plastic Packaging Portal. Customs clearance of such materials will only be allowed upon verification of this registration.

### **India Updates and Strengthens EPR Regulations**

In July 2025, India updated its ‘Guidelines on Extended Producer Responsibility for Plastic Packaging (Plastic Waste Management Rules),’ initially enforced in 2021. These guidelines formalize the obligations of producers under EPR, establishing requirements for registration, reporting, and compliance with recycling and collection targets for plastic waste. Additionally, the Indian government’s 2025 E-Waste Management Rules, amending the 2022 framework, enhance accountability, digital tracking, and environmental safety in e-waste management.

#### **Key Points:**

- The plastic packaging rules apply to rigid, flexible (single-layer or multilayer), and multilayered plastic packaging, as well as plastic sheets used for carrier bags.
- Obligated parties, including producers, importers, and brand owners, must register with the Central Pollution Control Board (CPCB) via their online portal.
- Companies must adhere to mandatory recycling targets for plastic, phased in as follows: 30-50% by 2024-2025, 40-60% by 2025-2026, 50-70% by 2026-2027, and 60-80% by 2027-2028 onwards.
- Companies are required to submit annual records detailing the plastic packaging placed on the Indian market.
- Producers, importers, refurbishers, and recyclers of e-waste must register on the Central Pollution Control Board (CPCB) EPR Portal. Unregistered entities will face severe penalties.
- Producers must purchase digital EPR certificates from authorized recyclers, based on the volume of e-waste generated, which are essential for annual compliance.
- The rules set higher e-waste recycling goals, requiring producers to recover at least 60% (by weight) of their electronic products sold in the previous financial year, with targets increasing annually.
- The scope of covered electronics has been broadened to include devices such as laptops, phones, medical devices, photovoltaic panels, and lighting equipment.
- Non-compliance with EPR targets or operating without valid registration can result in fines ranging from ₹1 lakh to ₹1 crore per violation, with severe cases potentially leading to license revocation and legal action.

The 2025 EPR rules are compulsory for electronics manufacturers, importers and brand owners, online marketplaces selling electronic goods, refurbishers and repair centers, and authorized recyclers and dismantlers. To ensure compliance, businesses should register on the CPCB EPR portal, determine EPR liability, partner with authorized recyclers, purchase and upload EPR certificates, and

file annual returns by March 31st of each calendar year.

For ATPA members involved in manufacturing, importing, or selling electronic toys and play equipment in India, compliance with these updated regulations is crucial to avoid penalties, enhance brand reputation, meet B2B buyer requirements, and align with corporate sustainability objectives.

## Indonesia

### Indonesia Mandates Extended Producer Responsibility for Plastic Packaging

As part of the 2025–2029 National Medium-Term Development Plan, Indonesia has upgraded its Extended Producer Responsibility (EPR) program from voluntary to mandatory for manufacturers using plastic packaging. This requires companies to take full responsibility for waste generated by their products, especially single-use plastics. The mandate applies to businesses across various sectors, including food and beverage, retail, manufacturing, cosmetics, and services, that utilize plastic packaging. Companies must develop and implement collection and recycling plans for their plastic waste and submit regular reports to the government. The initiative aims to meet national waste management targets by 2029 and address the environmental impact of slow-to-decompose single-use plastics. The Ministry of Environment and Forestry is also supporting waste-to-energy projects, though these are considered a last resort due to their cost and complexity. This mandatory EPR system is expected to create a more equitable playing field, ensuring all enterprises contribute to waste management efforts.

## Toy Safety Updates

### Taiwan

#### Amendments to the Legal Inspection Requirements for Toys (Plastic puzzle ground mats)

The Bureau of Standards, Metrology and Inspection (BSMI), to safeguard consumer rights, has proposed listing plastic puzzle ground mats as commodities subject to mandatory inspection. If implemented the new requirements will be effective as of 1st July 2026. Since puzzle mats are produced by similar manufacturers and already fall under the scope of CNS 15493, BSMI proposes excluding them from the toy inspection regime and instead regulating them under the new category of plastic puzzle ground mats.

#### Scope of Regulation

- Products impacted: Plastic puzzle ground mats
- HS/CCCN codes: 3918.10.90.90.5-C; 9503.00.93.90.3-A
- Inspection standard: CNS 15493 (2015) – Safety requirements of plastic puzzle ground mats
- Inspection focus: Testing for plasticizer, heavy metal, and formamide contamination to address public health concerns for infants and children

#### Conformity Assessment

- The designated conformity assessment procedure is the Declaration of Conformity (DoC). This will require manufacturers and importers to ensure compliance with CNS 15493 and submit the necessary declarations before products can be placed on the market.

**Implications for Industry**

- Toy inspection scope will be updated to exclude puzzle mats, which will instead be inspected as ground mats.
- Companies manufacturing or importing puzzle mats will need to align their compliance procedures with CNS 15493 and the DoC process before July 2026.