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Import-Export Launch Checklist

A US-focused first-shipment workbook: a 7-step roadmap, 2026 budget tiers, a landed-cost worksheet, Incoterms responsibilities, the customs document stack, supplier vetting, and pre-shipment QC gates.

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A US-Focused First-Shipment Workbook

This workbook is meant to be filled out before you pay a deposit — not read and set aside. Work top to bottom: pick one product and one market, classify it, vet a supplier, build a real landed-cost sheet, assign every logistics step a named owner, lock quality gates, then review the numbers after the first container clears. Each sheet below corresponds to one step in the roadmap.

The 7-Step Roadmap

One product, one market, one first shipment. Complete each step before moving to the next — never wire money out of sequence.

Step	What to Do	Key Output
1	Choose a business model and a first product	One product, one country, one buyer profile
2	Set up the legal and compliance folder	Entity + EIN + 6-digit HS code + compliance folder
3	Find and vet a supplier	Shortlist of 2-3 vetted suppliers with samples
4	Build a landed-cost sheet before you order	Landed cost, break-even, and required working capital
5	Set up logistics, Incoterms, and documents	Named owners per stage + complete document stack
6	Run quality control before the balance payment	Approved golden sample + written inspection plan
7	Review results after the first container clears	Supplier scorecard + a reorder trigger

2026 Budget Tiers

Common starting cash ranges for a first shipment. These are not promises — they move with order volume, port, and certification scope.

Launch Type	Ballpark Cash	Fits	Does Not Fit
Sample + micro lot	\$2,000 - \$5,000	Simple home or soft goods, no major certs	Electronics, toys, cosmetics, food contact
First sellable PO	\$8,000 - \$25,000	Private-label basics with inspection	Mold-heavy or regulated goods
Certified product	\$20,000+	Toys, electrical, kids' products	Anyone quoting only factory price

Where your money goes: sample + deposit + freight + duty + brokerage always come ahead of inventory. Keep 20% of the budget liquid for storage fees or a customs hold.

Landed-Cost Worksheet

Landed cost is the total to get one unit from the factory to the customer's hands. Fill in the estimate column for every bucket — including the two most-often-forgotten ones: brokerage and returns allowance.

Cost Bucket	Your Estimate	Notes
FOB / EXW unit price		Per unit, at the quoted Incoterm
Tooling and sampling (amortized)		Mold + sample cost spread across the run
Testing and certification		Lab reports, agency permits
Inland trucking + ocean/air freight		Factory to port to your door
Duty + MPF + HMF		Look up the real HTS rate - never a guess
Customs brokerage		Booking fee per entry
ISF (ocean)		Importer Security Filing
Warehouse storage		Per CBM or per month
Inspection		Pre-shipment inspection fee
Defects / returns allowance		The bucket most beginners forget
Domestic last-mile delivery		Inland leg the buyers ignore

Duty rule: look up the real rate in the HTS (hts.usitc.gov) and confirm with your broker — never estimate a tariff percentage. If your margin only survives by assuming unrealistically cheap shipping, pivot.

Incoterms & Who Carries the Risk

Term	What the Seller Covers	Good for a First Import?	Main Pitfall
EXW	Goods loaded at the factory door	No - looks cheapest, is often the most expensive	You handle every step
FOB	Export clearance and loading onto the ship	Yes - a common default	You pay the main voyage
CIF	Freight and insurance to your port	Maybe	Port only - not inland delivery
DDP	Everything, including duty	Only with a trusted supplier	Duty liability pushed onto the supplier

Most first-time importers start with FOB or DDP. Quote on one Incoterm so supplier prices compare fairly, and confirm in writing who files the customs entry.

The Customs Document Stack

Missing one doc halts everything. Write the English description specifically — material, use, piece count — never “apparel” or “parts”.

Document	What It Does
Commercial Invoice	Describes goods, value, and HS code
Packing List	Quantities, weights, and dimensions
Bill of Lading / Air Waybill	The contract of carriage
Certificate of Origin	Origin for duty and preference
Test / certification report	Proves compliance for regulated goods
ISF (ocean)	Importer Security Filing before sailing

Pre-Shipment Prep Folder

Set this up before your first purchase order. A single missing permit strands a container at the port for weeks, and the fix is always cheaper at the origin than at the border.

- [ ] 1. Legal entity + EIN registered, business bank account open.
  Evidence: Invoice uses the company name, not a personal name.
- [ ] 2. 6-digit HS code confirmed and written on the invoice.
  Evidence: HTS lookup, confirmed with your customs broker.
- [ ] 3. Customs bond in place for ocean freight.
  Evidence: Bond number on file before the ship sails.
- [ ] 4. Compliance folder holds supplier license, factory-audit report, and test reports.
  Evidence: Folder complete before the first PO.
- [ ] 5. Freight forwarder and customs broker both named in writing.
  Evidence: Contract states who files the customs entry.
- [ ] 6. 20% cash buffer held beyond inventory spend.
  Evidence: Buffer untouched, kept liquid.

Supplier Vetting Pipeline

Selection is a six-stage funnel, not a search. Do not buy from the first quote — the cheapest factory is usually the most expensive one to fix.

- [ ] 1. Catalog search narrowed to Verified / High-demand suppliers.
  Evidence: A shortlist of at least 3.

- [ ] 2. Live-video factory walkthrough completed.
  Evidence: Entrance sign, warehouse, and QC station on camera.

- [ ] 3. Business license cross-checked against an official registry.
  Evidence: Legal name and 18-digit USCI match GSXT / IAF CertSearch.

- [ ] 4. Physical sample received and signed off.
  Evidence: A signed golden-sample spec sheet.

- [ ] 5. Small trial order placed and inspected.
  Evidence: Pilot shipment passes pre-shipment inspection.

- [ ] 6. Commercial terms written down: tooling ownership, defect handling, reinspection cost.
  Evidence: In the contract, not a verbal promise.

Quality Control Gates

Never release the balance payment on quote confidence alone. Enforce a written pass/fail gate and a retained sample before the container ships.

- [ ] 1. Golden sample approved and specs locked.
  Evidence: Signed spec sheet with material, size, and finish.

- [ ] 2. AQL acceptance/rejection limits agreed in writing.
  Evidence: AQL 2.5 chosen before production starts.

- [ ] 3. During-production check booked.
  Evidence: A scheduled mid-run inspection date.

- [ ] 4. Pre-shipment inspection booked before the balance is due.
  Evidence: A timestamped, photo-rich inspection report.

- [ ] 5. Retained sample kept for comparison against the bulk.
  Evidence: Sample stored and labeled.

- [ ] 6. Invoice, packing list, carton counts, and specs aligned.
  Evidence: No mismatch that triggers a customs hold.

External Sources & References

Verify HS codes, permits, tariffs, and Incoterms against these official sources.

U.S. Customs and Border Protection (CBP) - Basic Import & Export

https://www.cbp.gov/trade/basic-import-export

Official import/export guidance: entry requirements, the ISF, and common grounds for a customs hold.

U.S. Customs and Border Protection (CBP) - Trade

https://www.cbp.gov/trade

Product classification guidance and labeling requirements for goods entering the United States.

Trade.gov - Export Solutions

https://www.trade.gov/export-solutions

Export licensing, documentation, and market-entry guidance for outbound shipments.

USITC - Harmonized Tariff Schedule (HTS)

https://hts.usitc.gov/

Search current U.S. tariff rates at the 10-digit level to confirm the duty on your product — never guess a percentage.

ICC - Incoterms 2020

https://iccwbo.org/business-solutions/incoterms-rules/incoterms-2020/

The official rules defining when cost, control, and risk transfer between buyer and seller.

WCO - What is the Harmonized System?

https://www.wcoomd.org/en/topics/nomenclature/overview/what-is-the-harmonized-system.aspx

The six-digit HS code framework that your duty, permits, and licensing all hang off.

U.S. Census Bureau - Foreign Trade Data

https://www.census.gov/foreign-trade/data/index.html

Historical export volumes by category and country — useful for validating a niche before you commit.

ISO 2859-1 - Sampling procedures for inspection

https://www.iso.org/standard/39589.html

The AQL sampling standard used at the pre-shipment inspection gate.

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Need Help With Your First Shipment?

Run the China side — sourcing, vetting, inspection, consolidation, and origin-side export documents — with a team that publishes its fees. We help US importers land a compliant first shipment.

CONTACT US

Website	www.leelinegroup.com
Email	info@leelinegroup.com
Call / WhatsApp	+86-13986152456
Office	Room 2302, Building 1, Zhongguancun Science and Technology Building, No. 602 Sixin Avenue, Hanyang District, Wuhan City, Hubei Province

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