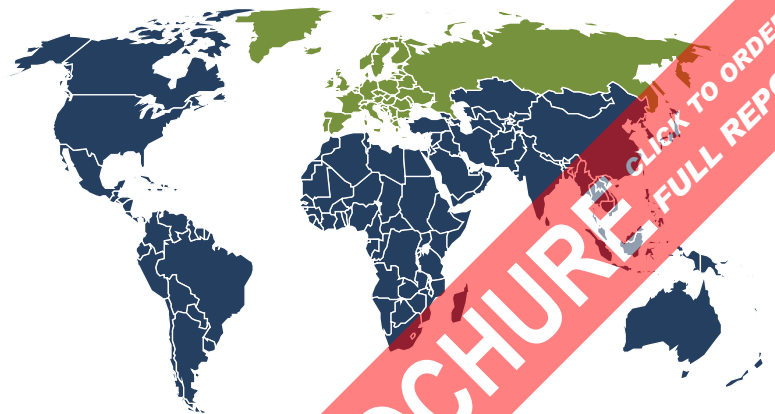




Freedonia Focus Reports
Global Collection

Food Processing Machinery: Europe

March 2020



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About This Report

Scope

This report forecasts to 2023 food processing machinery demand and shipments in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- industrial baking machinery
- meat, poultry, and seafood machinery
- chocolate and confectionery machinery
- dairy and milk machinery
- beverage production machinery
- fruit, nut, and vegetable machinery
- other food processing machinery such as drying, mixing, and oil extraction equipment
- parts and attachments

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; shipments and the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Excluded from the scope of this report are:

- machinery designed for and used primarily in nonmanufacturing settings (e.g., farms, food service operations, grocery stores, and other settings where the capabilities of industrial-grade equipment are warranted) such as milking machines, restaurant cooking and heating equipment, and retail bakery ovens and bread slicers
- non-industrial food processing machinery used in food and beverage manufacturing facilities (e.g., residential or commercial-type microwave ovens installed in employee lunchrooms)
- refrigeration equipment designed for food storage applications (as opposed to processing line chillers and freezers)
- packaging and associated line machinery (e.g., bottling and filling equipment, case loading machines, conveyors, and labeling and coding equipment)
- used food processing machinery
- related services such as equipment rebuilding
- retrofitting systems integration

About This Report

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2018.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 5 | Countries in Western Europe

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium	Greenland	Luxembourg	Spain*
Channel Islands	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City
Germany*	Italy*	Portugal	

*Major food processing machinery markets

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

*Major food processing machinery markets

Source: The Freedonia Group

Sources

Food Processing Machinery: Europe (FE75029) is based on *Global Food Processing Machinery*, a comprehensive industry study published by The Freedonia Group. Reported

About This Report

findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Food Processing Machinery

HS Code	Definition
8434.20	Dairy machinery
8434.90	Milking machines & dairy machinery; parts thereof
8435.10	Presses, crushers & similar machinery; used in the manufacture of wine, cider, fruit juices or similar beverages
8435.90	Parts for presses, crushers & similar machinery used in the manufacture of wine, cider, fruit juices or similar beverages
8437.10	Machines for cleaning, forting, or grading seed, grain, or dried leguminous vegetables
8437.80	Machinery; for use in the milling industry or for the working of cereals or dried leguminous vegetables (other than farm-type machinery)
8437.90	Parts for machinery for cleaning, sorting, or grading seed, grain, or dried leguminous vegetables or for milling or working cereals or dried leguminous vegetables (other than farm-type machinery)
8438.10	Industrial machinery for bakery & for the manufacture of macaroni, spaghetti, or similar products
8438.20	Industrial machinery for the manufacture of confectionery, cocoa, or chocolate
8438.30	Industrial machinery for sugar manufacture
8438.40	Industrial brewery machinery
8438.50	Industrial machinery for the preparation of meat or poultry
8438.60	Industrial machinery for the preparation of fruits, nuts, or vegetables
8438.80	Industrial machinery used in the preparation or manufacture of food or drink, NEC
8438.90	Parts for machinery used in the industrial preparation or manufacture of food or drink

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Food Processing Machinery

Freedonia Industry Studies

Commercial Refrigeration Equipment

Converted Flexible Packaging

Food & Beverage Packaging Innovation

Global Cups & Lids

Global E-Commerce

Global Material Handling Equipment

Global Packaging Machinery

Global Rubber Conveyor Belts

Meat, Poultry, & Seafood Packaging

Retail-Ready Packaging

Rigid Bulk Packaging

Freedonia Focus Reports

Agricultural Equipment: United Kingdom

Beverages: United States

Canned Foods: United States

Dairy Products: United States

Fast Food: United States

Food Processing Machinery: Canada

Frozen Foods: United States

Global Food E-Commerce

Grain-Based Foods: United States

Industrial Rubber Products: United Kingdom

Meat & Poultry Products: United States

Packaging: United States

Processed Food: United States

Restaurants & Foodservice: United States

Freedonia Custom Research

Trade Publications

Beverage Industry

Food Manufacturing

Food Processing

Food Quality & Safety

Agencies & Associations

Association for Packaging and Processing Technologies
Association of Chocolate, Biscuit and Confectionery Industries of Europe
Association of Poultry Processors and Poultry Trade in the EU
ASTM International
Conveyor Equipment Manufacturers Association
European Committee for Standardization
European Dairy Association
European Livestock and Meat Trades Union
Eurostat
Food Processing Suppliers Association
Institute of Food Technologists
Institute of Packaging Professionals
International Association for Food Protection
International Association of Plant Bakers
The Mechanical Engineering Industry Association (VDMA – Germany)
North American Meat Institute
Statistisches Bundesamt (Germany)
Union of European Soft Drinks Associations
United Nations Comtrade