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Packaging Machinery: Europe

February 2020



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About This Report

Scope

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

- filling and form/fill/seal
- labeling and coding
- wrapping, bundling, and palletizing
- case forming, packing, and sealing
- other packaging machinery such as accumulators, collators, and feeders; bottling and canning line equipment; and cartoning machinery
- packaging machinery parts

Total demand is also segmented by market as follows:

- food
- beverage
- pharmaceuticals and personal care products
- chemical products
- other markets such as durable manufacturing industries, transportation and distribution companies, and contract packagers

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.

Machinery that is used to manufacture packaging products, rather than to package end use products, is excluded from the scope of this report.

Also excluded from the scope of this report are certain products sometimes considered to be packaging machinery, including converting equipment (like blow molders, can making machinery, extruders, and other equipment used to form packages, unless an integral part of a packaging machine such as form/fill/seal equipment) and associated line equipment like conveyors. Used packaging machines of all types and related services such as equipment rebuilding, retrofitting, and systems integration are excluded from the scope.

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.

About This Report

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

Table 6 | 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 packaging machinery markets

Source: The Freedonia Group

Table 7 | 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 packaging machinery market

Source: The Freedonia Group

Sources

Packaging Machinery: Europe (FE75038) is based on *Global Packaging Machinery*, a comprehensive industry study published by The Freedonia Group. Reported 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

About This Report

- 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 8 | HS Codes Related to Packaging Machinery

HS Code	Definition
8422	Machinery for packaging and bottling
8422.20	Machinery; for cleaning or drying bottles or other containers
8422.30	Machinery; for filling, closing, sealing, capsuling or labeling bottles, cans, bags or other containers, machinery for aerating beverages
8422.40	Other machinery; for packing or wrapping
8422.90	Parts of machinery of heading no. 8422

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.

About This Report

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 Packaging Machinery

Freedonia Industry Studies

Cannabis Packaging Opportunities

Converted Flexible Packaging

Food & Beverage Packaging Innovation

Global Cups & Lids

Global E-Commerce

Global E-Commerce Packaging

Global Machine Tools

Global Material Handling Equipment

Global Pharmaceutical Packaging

Global Protective Packaging

Global Rubber Conveyor Belts

Medical Device Packaging

Retail-Ready Packaging

Rigid Bulk Packaging

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Adhesives & Sealants: United Kingdom

Beverages: United States

Bulk Packaging: United States

E-Commerce: Canada

E-Commerce: United States

Food Containers: United States

Global Demographics

Global Food E-Commerce

Global Housing

Global Macroeconomy

Global Pharmaceutical Packaging

Packaging: United States

Packaging Films: United States

Processed Food: United States

Recovered Packaging: United States

Warehousing & Storage Services: United States

Freedonia Custom Research

Trade Publications

American Machinist

Beverage Industry

Drives & Controls

Modern Materials Handling

Packaging Digest

Packaging Europe

Packaging Gateway

Packaging World

Agencies & Associations

The Association for Packaging and Processing Technologies

Conveyor Equipment Manufacturers Association

European Committee for Standardization

European Industrial Packaging Association

European Organization for Packaging and the Environment

Eurostat

Flexible Packaging Europe

Institute of Packaging Professionals

International Monetary Fund

The Mechanical Engineering Industry Association (VDMA – Germany)

National Fire Protection Association

Organisation for Economic Co-Operation and Development

Robotics Industries Association

Statistisches Bundesamt (Germany)

World Bank