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US Collection

Food Processing Machinery: United States

March 2020



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About This Report

Scope

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

- industrial baking machinery
- meat, poultry, and seafood machinery
- beverage production machinery
- dairy and milk machinery
- chocolate and confectionery 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

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

Sources

Food Processing Machinery: United States (FF75029) is based on *Global Food Processing 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
- 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 5 | NAICS & SIC Codes Related to Food Processing Machinery

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
333241	Food Product Machinery Manufacturing	3556	Food Products Machinery

Source: US Census Bureau

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

About This Report

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 in the US

Converted Flexible Packaging

Food & Beverage Packaging Innovation

Global E-Commerce

Global Material Handling Equipment

Global Packaging Machinery

Global Rubber Conveyor Belts

Meat, Poultry, & Seafood Packaging

Retail-Ready Packaging

Rigid Bulk Packaging

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Agricultural Equipment: United States

Beverages: United States

Canned Foods: United States

Cheese: United States

Dairy Products: United States

Frozen Foods: United States

Global Food E-Commerce

Grain-Based Foods: United States

Meat & Poultry Products: United States

Meat & Poultry Retail: United States

Packaging: United States

Packaging Machinery: United States

Processed Food: United States

Restaurants & Foodservice: United States

Snack Foods: United States

Warehousing & Storage Services: United States

Freedonia Custom Research

Trade Publications

Beverage Industry

Food Manufacturing

Food Processing

Food Quality & Safety

Agencies & Associations

American National Standards Institute

American Society of Baking

Association for Packaging and Processing Technologies

ASTM International

Conveyor Equipment Manufacturers Association

Institute of Packaging Professionals

United Nations Comtrade

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration

United States International Trade Commission