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# Food Processing Machinery: United States

September 2017



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# About This Report

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## Scope & Method

This report forecasts US food processing machinery demand and shipments in nominal US dollars at the manufacturers' level to 2021. Total demand is segmented by machinery product in terms of:

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

Excluded from the scope of this report are:

- machinery designed for and used primarily in nonmanufacturing settings (eg, farms and grocery stores) 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 (eg, employee lunchroom microwave ovens)
- refrigeration equipment designed for food storage applications (as opposed to processing line chiller and freezers)
- packaging and associated line machinery (eg, bottling and filling equipment)
- used food processing machinery
- related services such as equipment rebuilding
- retrofitting systems integration.

To illustrate historical trends, total demand is provided in annual series from 2006 to 2016; shipments and the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report 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

## About This Report

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.

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.

## 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 including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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 | Industry Codes Related to Food Processing Machinery

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
333294	Food Product Machinery Manufacturing	3556	Food Products Machinery
423830	Industrial Machinery and Equipment Merchant Wholesalers	5084	Industrial Machinery and Equipment

Source: US Census Bureau

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## Resources

### The Freedonia Group

*Global Food Processing Machinery*, September 2017

### Freedonia Industry Studies

*Food & Beverage Natural Colors Market in the US*, July 2017

*Packaging Films Market in the US*, July 2017

*Converted Flexible Packaging Market in the US*, May 2017

*Food & Beverage Hydrocolloids Market in the US*, May 2017

*Poultry Packaging Market in the US*, March 2017

*Meat Packaging Market in the US*, February 2017

*World Wine Packaging*, July 2016

*World Agriculture Equipment*, April 2016

*Aseptic Packaging*, March 2016

*Food Containers: Rigid & Flexible*, February 2016

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American Society of Baking

ASTM International

Food Processing Suppliers Association

Institute of Food Technologists

International Association for Food Protection

North American Meat Institute

United States Census Bureau

United States Department of Agriculture

United States Department of Labor

United States Food and Drug Administration

United States International Trade Commission