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# Packaging Machinery: United States

February 2020



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# About This Report

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## Scope

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

- filling and form/fill/seal
- labeling and coding
- case forming, packing, and sealing
- wrapping, bundling, and palletizing
- 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 companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Packaging Machinery: United States* (FF75038) 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
- 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 6 | NAICS & SIC Codes Related to Packaging Machinery

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
333993	Packaging Machinery Manufacturing	3565	Packaging 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 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

## About This Report

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 Packaging Machinery*

### Freedonia Industry Studies

*Cannabis Packaging Opportunities*

*Converted Flexible Packaging*

*Food & Beverage Packaging Innovation*

*Global Cups & Lids*

*Global E-Commerce*

*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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*Cups & Lids: United States*

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*Foodservice Disposables: United States*

*Global Food E-Commerce*

*Global Pharmaceutical Packaging*

*Packaging: United States*

*Packaging Films: United States*

*Processed Food: United States*

*Produce Packaging: United States*

*Protective Packaging: United States*

*Warehousing & Storage Services: United States*

### Freedonia Custom Research

### Trade Publications

*American Machinist*

*Beverage Industry*

*Drives & Controls*

*Modern Materials Handling*

## About This Report

*Packaging Digest*  
*Packaging Gateway*  
*Packaging World*

### **Agencies & Associations**

American National Standards Institute  
The Association for Packaging and Processing Technologies  
ASTM International  
Conveyor Equipment Manufacturers Association  
Institute of Packaging Professionals  
National Fire Protection Association  
Occupational Safety and Health Administration  
Robotics Industries Association  
United States Census Bureau  
United States Department of Agriculture  
United States Food and Drug Administration  
United States International Trade Commission