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Global Collection

Global Food Processing Machinery

March 2020



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About This Report

Scope

This report forecasts to 2023 global demand for food processing machinery by product and world region in nominal US dollars at the manufacturer level. Product segments include:

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

World regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, and regional demand (including product segments) are provided for 2008, 2013, and 2018. Finally, global production is segmented by major world region and provided for 2008, 2013, 2018, and 2023.

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 chiller 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

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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.

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

Global Food Processing Machinery (FW75029) is based on [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 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 and Packaged Facts

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

Industry Codes

Table 9 | 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

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Table 10 | 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,

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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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Global Cups & Lids

Global E-Commerce

Global Material Handling Equipment

Global Packaging Regulations

Global Packaging Machinery

Global Rubber Conveyor Belts

Meat, Poultry, & Seafood Packaging

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Association for Packaging and Processing Technologies

Conveyor Equipment Manufacturers Association

Eurostat

Institute of Packaging Professionals

The Mechanical Engineering Industry Association (VDMA – Germany)

Ministry of Statistics and Programme Implementation (India)

National Bureau of Statistics (China)

Statistics Bureau of Japan

Statistics Canada

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United Nations Comtrade

United States Census Bureau

United States International Trade Commission