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Global Collection



Global Packaging Machinery

February 2020



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About This Report

Scope

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

- filling and form/fill/seal machinery
- labeling and coding machinery
- wrapping, bundling, and palletizing machinery
- case forming, packing, and sealing machinery
- other packaging machinery, such as collators, bottling and canning machinery, and checkweighing machinery
- packaging machinery parts

Reported markets encompass:

- food
- beverages
- pharmaceuticals and personal care products
- other markets, including chemicals, textiles, paper, and durable goods

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

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

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 the 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.

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

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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 Packaging Machinery (FW75038) 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 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 10 | 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

Table 11 | 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.

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 Packaging Regulations

Global Pharmaceutical Packaging

Global Protective Packaging

Global Rubber Conveyor Belts

Medical Device Packaging

Retail-Ready Packaging

Rigid Bulk Packaging

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Packaging: United States

Packaging Machinery: United States

Warehousing & Storage Services: United States

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Trade Publications

American Machinist

Beverage Industry

Drives & Controls

Modern Materials Handling

Packaging Digest

Packaging Europe

Packaging Gateway

Packaging World

Agencies & Associations

Association for Packaging and Processing Technologies

Conveyor Equipment Manufacturers Association

Eurostat

About This Report

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

Statistisches Bundesamt (Germany)

United Nations Comtrade

United States Census Bureau

United States International Trade Commission