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World Food Processing Machinery

Industry Study with Forecasts for **2016 & 2021**

Study #2931 | November 2012 | \$5900 | 352 pages

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The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Gains will be driven mainly by increased demand for processed foods in developing nations, as well as a dietary shift toward higher value-added foods such as meat and chocolate.

World demand to rise 7.3% annually through 2016

Global sales of food processing machinery are expected to climb 7.3 percent per year to \$53.3 billion in 2016. The main impetus for gains will come from increased demand for processed foods in developing nations as personal incomes rise. On top of this, a dietary shift in countries like China and Brazil toward higher value-added foods such as meat and chocolate will prompt food manufacturers to broaden their operations and invest in additional manufacturing capacity in these areas. Furthermore, continuing recoveries in the economies of developed nations will cause the fixed investment environment to improve, encouraging food processors to upgrade their machinery.

Asia/Pacific region to be fastest growing market

The Asia/Pacific region will record the fastest demand gains from 2011 to 2016, averaging 9.5 percent per year. The strong Chinese market will be the primary driver of regional sales, as demand in the country will continue to advance at a rapid pace despite moderating from the 2006-2011 rate. Healthy growth in India, Indonesia, and Thailand will complement sales gains in China. Rising personal incomes will spur increased demand for processed foods and a dietary shift toward more costly, non-staple items, while advancing industrialization in these nations will make it more efficient to process basic

World Food Processing Machinery Demand, 2016 (\$53.3 billion)



Asia/Pacific
42%

Western Europe
17%

North America
15%

Central & South
America 12%

Other Regions
14%

photo: DePaul Industries

foods such as grains, fruits, vegetables, and nuts by machine rather than manually. Sales of food processing machinery in other developing areas will, generally speaking, climb at a healthy pace.

Growth in food processing machinery demand in the world's developed economies was much slower than in industrializing nations between 2006 and 2011, and sales gains in most developed nations will continue to trail the world average through 2016. As these nations have relatively stable dietary preferences and consistently high personal incomes, the food manufacturing industries in these countries are very mature, and as a result there will be fewer growth opportunities for food processing machinery manufacturers.

Bakery, pasta machinery to post largest value gains

The key industrial bakery and pasta machinery segment will post the largest value gains among all product types through 2016, reflecting the basic and essential nature of the food made by these units. Machinery for processing meat, poultry, and seafood will post the fastest growth in percentage terms, as rising incomes in many developed nations will shift consumption toward higher-value products like meat. This trend will be complemented by increasing meat consumption in developed nations as their economies continue to recover and families can afford to purchase more meat products.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Food Processing Machinery Outlook & Supply

Food processing machinery demand in China is expected to reach \$12.1 billion, outpacing the 2006-2011 pace. The increase is driven by dietary patterns becoming more health conscious over the previous period. As a result, processing firms to supply the market are likely to use the more meat, dairy, and chocolate/confectionery products will continue to be the fastest gains, reflecting the increasing demand for more non-staple processed food items.

Shipments of food processing machinery from facilities in China are projected to rise over 13 percent per year to \$12.1 in 2016, outpacing both the domestic market and the region as a whole. While gains in local sales of these products will continue to spur the majority of industry output increases, export sales opportunities, particularly to other developing nations in the Asia/Pacific region, will also improve, boosting machinery exports. As a result, the country's trade surplus is expected to rise to \$1.0 billion in 2016, equivalent to eight percent of shipments.

The majority of food processing machinery suppliers headquartered in China are small to medium-size enterprises, including Kunming Light Industry Machinery, Shanghai SENON Machinery, Shanghai Triowin Lab Technology, Shijiazhuang Xiaojin Machinery Manufacturing Company, Siping SSK Electronic Machinery Development and Zhongtian Haoyu Technology.

A number of foreign multinationals also maintain equipment manufacturing operations in the nation, including Bühler (Germany), Heat and Control (US), John Bean Technologies (Iceland), Satake (Japan), and SFK Systems (Denmark).

136

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TABLE VI-4

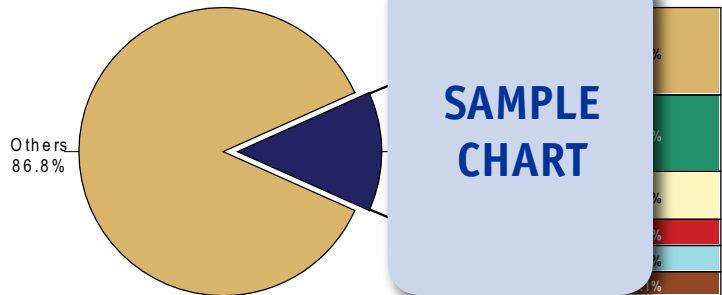
CHINA: FOOD PROCESSING MACHINERY DEMAND BY TYPE (million dollars)

Item	2001	2006	2011	2016	2021
Food Processing Machinery Demand	1				
Industrial Bakery Machinery					
Meat, Poultry, & Seafood Machinery					
Chocolate & Confectionery Machinery					
Beverage Production Machinery					
Dairy & Milk Machinery					
Fruit & Vegetable Machinery					
Other Food Processing Machinery					
Parts & Attachments					
% China					
A/P Food Processing Machinery	5				

SAMPLE
TABLE

CHART VIII-1

WORLD FOOD PROCESSING MACHINERY MARKET SHARE (\$37.4 billion, 2011)



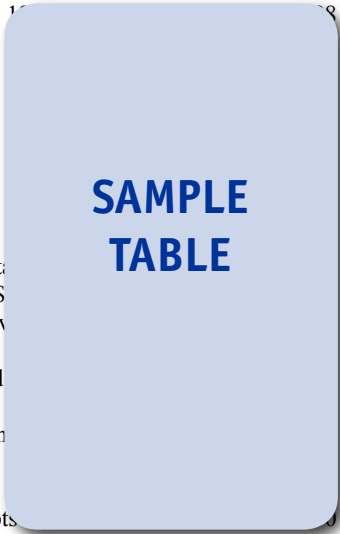
SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-3

CHINA: FOOD PROCESSING MACHINERY SUPPLY & DEMAND
(million dollars)

Item	2001	2006	2011	2016	2021
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2010\$)					
% fixed investment					
Gross Fixed Investment (bil 2010\$)					
Food & Beverage MVA (bil 2010\$)					
\$ food processing machinery/capita					
\$ food processing machinery/mil \$					
\$ food machinery/000\$ food & bev					
Food Processing Machinery Demand					
net exports					
Food Processing Machinery Shipmen					
% China					
A/P Food Processing Machinery Shpts					



COMPANY PROFILES

Bettcher Industries Incorporated
 6801 State Route 60
 Birmingham, OH 44816
 440-965-4422
<http://www.bettcher.com>

Annual Sales:
 Employment:

Key Products: *systems, and other products*

SAMPLE PROFILE

Bettcher Industries is a privately held manufacturer of food processing equipment and hand tools. The Company serves the food processing, foodservice, and industrial markets.

The Company participates in the world food processing machinery market via the manufacture of food processing equipment used in such locations as restaurants, hotels, and processing plants. Among Bettcher Industries' offerings are WHIZARD TRIMMER handheld circular trimmers designed for meat, poultry, seafood, and vegetable trimming applications. This line includes WHIZARD TRIMMER SERIES II modular trimmers in small, medium, and large sizes. Related products include WHIZARD model 210 universal blade sharpeners designed to sharpen WHIZARD trimmer blades. The Company also makes batter-breaders, such as AUTOMATIC BATTER-BREADING and OPTIMAX machines, which are engineered to bread foods three times faster than hand breading. Other products from the Company include AIRSHIRZ pneumatic meat and poultry scissors and WHIZARD TRIMVAC beef spinal cord removers.

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"China is the largest producer of food processing equipment in the world, with 2011 shipments of \$6.5 billion. From 2006 to 2011, production rose over 19 percent per year, well above the regional average and growing faster than domestic demand. The rapidly expanding domestic market supported most of the gains in manufacturing output, as much of the production in this nation is ..."

--Section VI, pg. 134

OTHER STUDIES

World Commercial Refrigeration Equipment

Global demand for commercial refrigeration equipment is forecast to rise at an accelerated pace of 4.6 percent per year through 2016 to \$32.5 billion. China will remain the fastest growing market, but gains will slow from their previous pace. Reach-ins and walk-ins will provide the best global growth opportunities. This study analyzes the \$26 billion world commercial refrigeration equipment industry, with forecasts for 2016 and 2021 by product, world region and for 21 major countries. The study also evaluates company market share and profiles industry players.

#2953December 2012 \$6200

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950December 2012 \$6100

Sensors

US sales of sensors are forecast to climb at a 6.1 percent annual rate through 2016 to \$14.9 billion. Process variable sensors will remain the largest category, while chemical property sensors and proximity and positioning sensors will post the fastest growth. Motor vehicles will once again be the leading sensor market as production rebounds from recessionary lows. This study analyzes the \$11.1 billion US sensors industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry competitors.

#2957October 2012 \$5100

World Material Handling Products

Global demand for material handling products is forecast to climb 4.0 percent annually through 2016 to \$123.6 billion. Opportunities will be best for sales of advanced equipment such as automated conveyors and automated guided vehicles. Among national markets, India and China will see the fastest gains. This study analyzes the \$101.4 billion global material handling product industry, with forecasts for 2016 and 2021 by product, market, world region and for 24 major countries. This study also evaluates company market share and profiles industry participants.

#2919 August 2012 \$6300

World Bearings

Global demand for bearings will rise 7.8 percent yearly to \$96 billion in 2016. The Asia/Pacific region will post the fastest gains and account for more than half of the world total. Unmounted ball bearings will remain the best selling type, followed closely by unmounted roller bearings, which will experience the fastest sales gains. This study analyzes the \$65.9 billion world bearings industry, with forecasts for 2016 and 2021 by product, market, world region and for 30 countries. The study also evaluates company market shares and profiles industry players.

#2903 July 2012 \$6300

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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