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# World Packaging Machinery

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Industry Study with Forecasts for **2012 & 2017**

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Study #3063 | September 2013 | \$6200 | 424 pages

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*Global growth for packaging machinery will stem from expanding fixed investment spending, production output, and packaging demand, plus rising living standards in developing nations.*

## Global demand to climb 4.6 percent through 2017

Growth in worldwide demand for packaging machinery is expected to climb at a 4.6 percent annual pace through 2017 to \$41.8 billion. An improved business climate -- which will be reflected in expanding fixed investment spending, manufacturing output, and packaging demand -- will drive gains in equipment sales through 2017. Machines used to package chemicals, pharmaceuticals, and personal care products will post the fastest sales gains in percentage terms. Purchases of packaged pharmaceuticals and consumer goods -- and associated equipment demand -- will be boosted by rising living standards in developing nations. Food production is the largest packaging equipment market, amounting to about 40 percent of total global sales.

## Value of labeling & coding equipment to grow fastest

The increasing need for pharmaceutical, food, and beverage manufacturers to ensure the safety of their products throughout the supply chain will result in labeling and coding equipment being the fastest growing of any major product type in value terms. However, filling and form/fill/seal machines will remain the most widely used type of packaging equipment through 2017, with demand bolstered by their extensive use in the food processing market. Developing markets will provide the best growth opportunities for suppliers of packaging equipment through 2017. The Asia/

## World Packaging Machinery Demand (\$41.8 billion, 2017)



Pacific region will expand 5.7 percent annually, led by the sizeable national markets of India and China. China and India together will account for 21 percent of global packaging machinery demand in that year. Central and South America will also record a strong sales performance through 2017, though from a much smaller existing market base. Increasing personal incomes in these regions will provide the greatest impetus to equipment sales, supported by healthy gains in packaging demand, manufacturing output, and fixed investment spending. The US is currently the largest national market for packaging equipment worldwide, although it will be surpassed in size by the much faster growing Chinese market by 2017.

## Machinery shipments to rise rapidly in Asia/Pacific

Packaging machinery shipments will rise the fastest in the Asia/Pacific region through 2017. Not only will smaller firms headquartered in the area raise production, but foreign multinationals will also continue to build manufacturing facilities in Asia to be nearer to their customers as the region accounts for a growing share of global sales. Nevertheless, West European production will grow the most in dollar terms, fueled by strong demand for the technologically sophisticated equipment that these countries produce. The region will remain the biggest packaging equipment supplier, accounting for over half of world industry output in 2017.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### South Korea: Outlook & Suppliers

Demand for packaging equipment in South Korea is for \$1.0 billion, below the 2012 market performance. The market is expected to be stimulated by the 2017-2022 performance as by renewed equipment purchases. On the other hand, the major markets for packaging machinery will decelerate over the next five years as they demonstrate increasing market maturity.

In percentage terms, purchases of packaging equipment for pharmaceuticals and personal care products manufacturing is expected to boast the strongest performance by far, fueled by rapid growth in pharmaceutical shipments. The food processing market for packaging machinery will see the weakest gains in percentage terms due to sluggish output in this market, but it will still be the largest major market in 2017, accounting for 28 percent of total sales.

Shipments of packaging equipment from facilities in South Korea are expected to grow. South Korea's trade will be driven by rising demand of key export markets that provide strong competitive output increases.

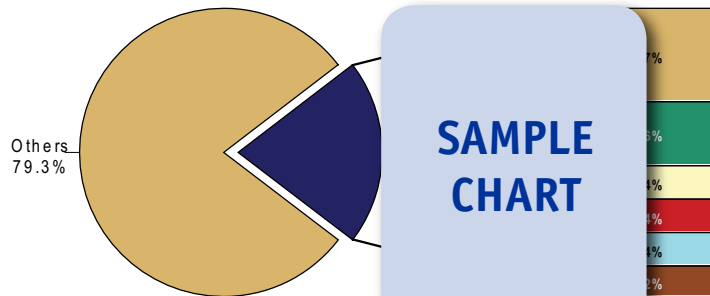
Important suppliers include DC Pack, Firmin, and Seoul A manufactures packaging

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**TABLE VI-10**  
**SOUTH KOREA:**  
**PACKAGING MACHINERY DEMAND BY PRODUCT & MARKET**  
 (million dollars)

Item	2002	2007	2012	2017	2022
Asia/Pacific Pkg Machinery Demand % South Korea					
South Korea Pkg Machinery Demand By Product:					
Filling & Form/Fill/Seal					
Labeling & Coding					
Wrapping, Bundling, & Palletizing					
Case Forming, Packing, & Sealing					
Other Machinery					
Parts					
By Market:					
Food					
Beverages					
Pharmaceuticals/Personal Care					
Chemical Products					
Other Markets	110	215	250	295	370

**CHART VIII-1**  
**WORLD PACKAGING MACHINERY MARKET SHARE, 2012**  
 (\$33.4 billion)

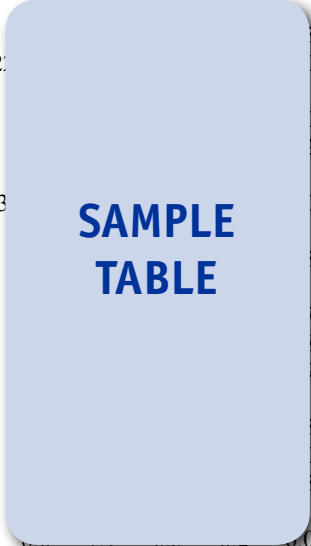


## Sample Profile, Table & Forecast

**TABLE VI-9**

**SOUTH KOREA: PACKAGING MACHINERY SUPPLY & DEMAND**  
(million dollars)

Item	2002	2007	2012	2017	2022
Population (million persons)	2				
per capita GDP					
Gross Domestic Product (bil 2011\$)					
% fixed investment					
Gross Fixed Investment (bil 2011\$)	3				
Packaging Demand (bil \$)					
\$ machinery/capita					
\$ machinery/000\$ fixed investment					
\$ machinery/000\$ packaging					
Packaging Machinery Demand net exports					
Packaging Machinery Shipments					
% South Korea					
Asia/Pacific Packaging Machinery Shpts	49357345	10850	14050	18600	



### COMPANY PROFILES

#### Ishida Company Limited

44 Sanno-cho, Shogoin  
 Sakyo-ku, Kyoto 606  
 Japan  
 81-75-77  
 http://ww

Annual S  
 Employ

Key Pro s, label machines,  
 and weig

Ishida manufactures weighing and packaging equipment for the manufacturing, inspection, distribution, and retail industries. The Company is privately held.

Packaging machinery from Ishida includes bag makers, wrappers, case packers, label machines, and weighing and inspecting equipment. These products are used to package snack foods and other dry, processed foods; fresh foods; frozen foods; and certain nonfood items.

Bag makers made by Ishida are used in snack food packaging applications. Specific models include ATRIA D-motion vertical form/fill/seal (FFS) machines, ATLAS vertical FFS machines, and ASTRO-S intermittent-motion vertical FFS machines. The Company produces automatic wrappers for food processing, retail, and other applications. Among these products are WM-4000-B food processing units, which feature automatic film changing and tray identification capabilities; and WM-4000-DF retail models for wrapping various tray shapes. Ishida's case packers include ACP-GENE fully automatic types, which are designed for high speed and flexible box packaging applications. Among

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**OTHER STUDIES**

**Protective Packaging**

US protective packaging demand is projected to increase 4.5 percent per year to \$6.4 billion in 2018. E-commerce fulfillment will drive gains for protective mailers, air pillows and bubble packaging. Insulated shipping containers will benefit from temperature-sensitive pharmaceutical handling requirements and storage temperature requirements. This study analyzes the \$5.1 billion US protective packaging industry, with forecasts for 2018 and 2023 by function, market and product. The study also evaluates company market share and profiles industry players.

#3142 ..... March 2014..... \$5300

**Active & Intelligent Packaging**

US active and intelligent packaging demand is forecast to increase 8.0 percent annually to \$3.5 billion in 2017. Intelligent packaging will record double digit annual gains, led by time-temperature indicator labels. Gas scavengers, susceptor packaging and self-venting packaging will be among the fastest growing active packaging types. This study analyzes the \$2.4 billion US active and intelligent packaging industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3117 ..... January 2014 ..... \$5100

**Foodservice Disposables**

US demand for foodservice disposables is forecast to climb 3.6 percent per year to \$19.7 billion in 2017. Packaging products such as containers and lids and domes will achieve the fastest gains and will remain the largest category. Eating and drinking places will remain the dominant market while the retail and vending segment will grow the fastest. This study analyzes the \$16.5 billion US foodservice disposables industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3081 ..... September 2013..... \$5300

**World Medical Device Packaging**

World demand for medical device packaging is projected to increase 5.9 percent annually to \$25.7 billion in 2017. The US will remain the largest market while China will provide the largest and broadest sales opportunities. Pouches, trays and clamshell packs will continue to lead sales among container types. This study analyzes the \$19.3 billion world market for medical device packaging, with forecasts for 2017 and 2022 by product, raw material, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#3056 ..... August 2013 ..... \$6100

**Meat, Poultry & Seafood Packaging**

Demand for meat, poultry, and seafood packaging is forecast to increase 3.2 percent annually to \$9.7 billion in 2017. Flexible packaging will outpace rigid, based on solid prospects for pouches and high barrier film. Poultry will be the fastest growing packaging application based on poultry's low cost and good nutritional profile. This study analyzes the \$8.2 billion US meat packaging industry, with forecasts for 2017 and 2022 by technology, product, application, and market. The study also evaluates company market share and profiles industry players.

#3028 ..... May 2013..... \$5100

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