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# World Food Processing Machinery

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Industry Study with Forecasts for **2019 & 2024**

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Study #3275 | June 2015 | \$6300 | 442 pages

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*Gains will be driven in part by numerous food and beverage firms in developing areas transitioning from manual to mechanical food processing in order to increase output and develop new products.*

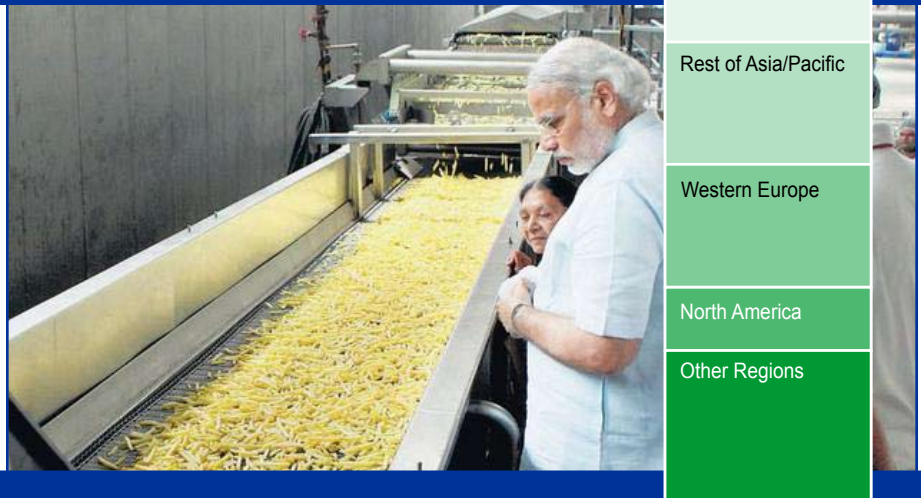
## World demand to rise 7.6% annually through 2019

Global demand for food processing machinery is projected to advance 7.6 percent per annum to \$73 billion in 2019. Growth will be driven by industrializing nations, where strong consumer demand for processed foods is emerging.

In developing economies, rising personal incomes will lead to an increase in the number of households that can afford processed foods, resulting in a dietary shift which will generate related processing machinery demand. In response to the demand for more processed foods, numerous food and beverage firms in developing areas will transition from manual to mechanical food processing in order to increase output and develop new products. Farmers in these regions are gaining access to the capital needed to invest in large-scale animal and dairy production, leading to an increase in local beef, pork, chicken, seafood, and dairy product availability and related processing equipment demand. China alone is projected to account for nearly 40 percent of all new food processing machinery demand through 2019.

Other factors also favor demand for food processing equipment in developing nations. In some cases, government programs aimed at bolstering local meat, poultry, fish, milk, and dairy production -- such as those in Indonesia and Russia -- will contribute to equipment market gains. In recent years, multinational corporations have built new plants and

## World Food Processing Machinery Demand, 2019 (\$73 billion)



launched initiatives to improve the quality of dairy, meat, poultry, and seafood, and encourage sustainability and standardization. Finally, because city dwellers consume more processed foods than residents in rural areas, urbanization will contribute to sales gains as well.

## West European market to post significant growth

Although Western Europe's food processing machinery market is forecast to advance at a below-average pace through 2019, the region is still expected to post significant gains. Following a period of turmoil, sales of processing equipment are expected to rebound in

several West European countries, including France, Spain, and the United Kingdom. The replacement of older equipment will be a major driver of growth. In addition, changing consumer preferences in Western Europe will encourage food and beverage firms to develop new products and invest in new processing equipment. During the last decade, for example, healthy, organic, and exotic foods and beverages have become much more popular in the region. Western Europe's food and beverage industry is export-oriented and will benefit greatly from increasing worldwide demand for processed foods. As exports of these goods rise, suppliers will invest in new production capacity.

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# Sample Text, Table & Chart

## WESTERN EUROPE

### Germany: Food Processing Machinery Outlook

Through 2019, demand for food processing machinery is forecast to advance at a slower rate than the 2009-2014 period. This is due to the need for more efficient machinery to maintain competitiveness in a global market. Companies are expected to invest in new processing machinery and many outdated machines are being replaced. This period is expected to contribute to the growth of the machinery industry in East and the Africa/Mideast region improve, countries in these regions import more processed foods from Germany. To satisfy increasing demand abroad, German food and beverage companies will purchase new machinery. Additionally, these firms will develop new products to satisfy changing consumer preferences, and this requires new equipment. However, imports of processed foods from other countries and nearby (e.g., Turkey) countries with lower production costs are expected to increase in the future and German consumers will buy more products from abroad. Additionally, German food and beverage companies will invest in production facilities abroad, meaning less machinery will be needed at home.

A number of segments of the food processing machinery are projected to record impressive growth through 2019. Chocolate and confectionery machinery makes up a somewhat larger portion of product sales in Germany than in Western Europe as a whole. A number of large suppliers of chocolate and confectionery goods are based in the country, including Herza, Reutter Sweets, Stollwerck, and Storck. Foreign companies have invested heavily in this industry as well, and Italy's Ferrero Rocher is a local industry leader. As the discretionary incomes of households in Germany continue to rise, spending on chocolate and confectionery goods will increase, generating additional demand for associated processing equipment. The growth in exports of confectionery goods is expected to continue through 2019.

SAMPLE  
 TEXT

TABLE VI-7

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

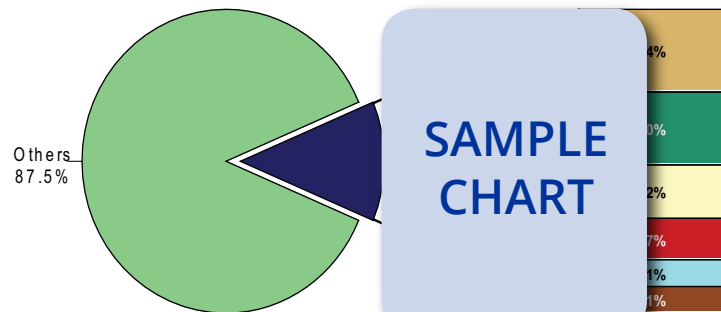
Item	2004	2009	2014	2019	2024
Population (millions)					
per capita GDP					
Gross Domestic Product (bil 2013\$)					
% fixed investment					
Gross Fixed Investment (bil 2013\$)					
Food & Beverage MVA (bil 2013\$)					
Food					
Beverage					
\$ food processing machinery/capita					
\$ food processing machinery/mil \$ GFI					
\$ food machinery/000\$ food & bev MVA					
Food Processing Machinery Demand					
net exports					
Food Processing Machinery Shipments					
% India					
A/P Food Processing Machinery Shipments					

SAMPLE  
 TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD FOOD PROCESSING MACHINERY MARKET SHARE  
 (\$50.5 billion, 2014)



SAMPLE  
 CHART

## Sample Profile & Table, & Study Coverage

**TABLE VII-4**  
**BRAZIL: FOOD PROCESSING MACHINERY DEMAND BY TYPE**  
 (million dollars)

Item	2004	2009	2014	2019	2024
Food Processing Machinery Demand					
Industrial Baking Machinery					
Meat, Poultry, & Seafood Machinery					
Beverage Production Machinery					
Chocolate & Confectionery Machinery					
Dairy & Milk Machinery					
Fruit, Nut, & Vegetable Machinery					
Other Food Processing Machinery					
Parts & Attachments					
% Brazil					
C&S America Food Processing Machinery					

Source: The Freedonia Group, Inc.



**COMPANY PROFILES**

**Bettcher Industries Incorporated**  
 6801 State Route 60  
 Birmingham, OH 44889  
 440-965-4422  
 http://www.bettcher.com

Annual Sales:  
 Employment:

Key Products: \_\_\_\_\_ items, 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, industrial, and medical markets.

The Company is involved in the world food processing machinery industry through the production of food processing equipment used in restaurants, hotels, and processing plants, among other locations. Among Bettcher Industries' offerings are WHIZARD TRIMMER handheld circular trimmers designed for seafood, poultry, meat, 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. Another meat trimmer from Bettcher Industries is the BETTCHER QUANTUM system for beef and pork processing applications. The Company also makes OPTIMAX batter-breader machines, which are engineered to bread foods three times faster than hand breaded. Other products from the Company include AIRSHIRZ pneumatic meat and poultry scissors, and WHIZARD TRIMVAC trimming and vacuuming units that can be used to extract white chicken meat in the sub-tender area and under the

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**STUDY COVERAGE**

This Freedonia study, *World Food Processing Machinery*, presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) for supply and demand, as well as demand by type, in six regions and 20 countries. The study also considers key market environment factors, details the industry structure, evaluates company market share and profiles 45 global industry players.

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## Related Studies

### World Packaging Machinery

This study analyzes the world packaging machinery industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by machinery type (e.g., filling and form/fill/seal; labeling and coding; wrapping, bundling and palletizing; case forming, packing and sealing), market (e.g., food, beverages, pharmaceuticals and personal care products, chemicals products), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.  
**#3323..... September 2015.....\$6400**

### World Pumps

Global demand for fluid handling pumps is projected to increase 5.5 percent annually to \$84 billion in 2018. The Asia/Pacific region will remain the largest market and the second fastest growing, behind Central and South America. The key positive displacement and centrifugal pump segments will offer the best growth opportunities. This study analyzes the \$64.4 billion world pump industry, with forecasts for 2018 and 2023 by product, market, world region, and for 35 countries. The study also evaluates company market share and profiles industry participants.  
**#3231.....January 2015.....\$6500**

### World Commercial Refrigeration Equipment

Global demand for commercial refrigeration equipment will rise 4.7 percent annually through 2018 to \$36.5 billion. The US will remain the largest national market, while China remains the fastest growing. Reach-in and walk-in refrigerators and freezers will be some of the fastest growing products. This study analyzes the \$29 billion world commercial refrigeration equipment industry, with forecasts for 2018 and 2023 by product, world region, and for 21 countries. The study also evaluates company market share and profiles industry players.  
**#3225.....October 2014.....\$6400**

### World Material Handling Products

Global material handling product demand will rise 5.0 percent annually through 2018 to \$142 billion. India and China will grow the fastest as material handling products supply growing manufacturing and distribution activity. Automated storage and retrieval systems and automated guided vehicles will grow the fastest. This study analyzes the \$111 billion world material handling product industry, with forecasts for 2018 and 2023 by product, market, world region, and for 29 countries. This study also evaluates company market share and profiles industry participants.  
**#3196..... September 2014.....\$6400**

### Commercial Refrigeration Equipment

US demand for commercial refrigeration equipment is expected to rise 3.1 percent per year through 2018 to \$10.7 billion. Transportation refrigeration equipment will remain the largest and fastest growing segment, spurred by more opportunities for US-based food producers in foreign markets and by ongoing warehouse consolidation. This study analyzes the \$9.2 billion US commercial refrigeration equipment industry, with forecasts for 2018 and 2023 by market and product. The study also evaluates company market share and profiles industry players.  
**#3159..... May 2014.....\$5100**

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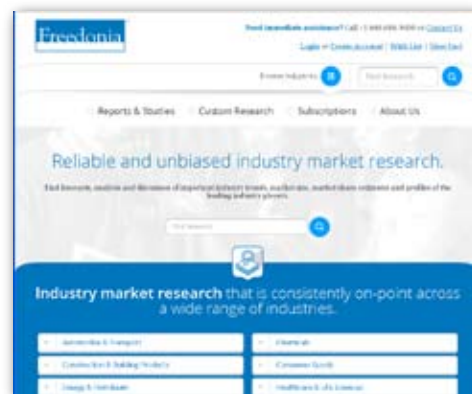
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