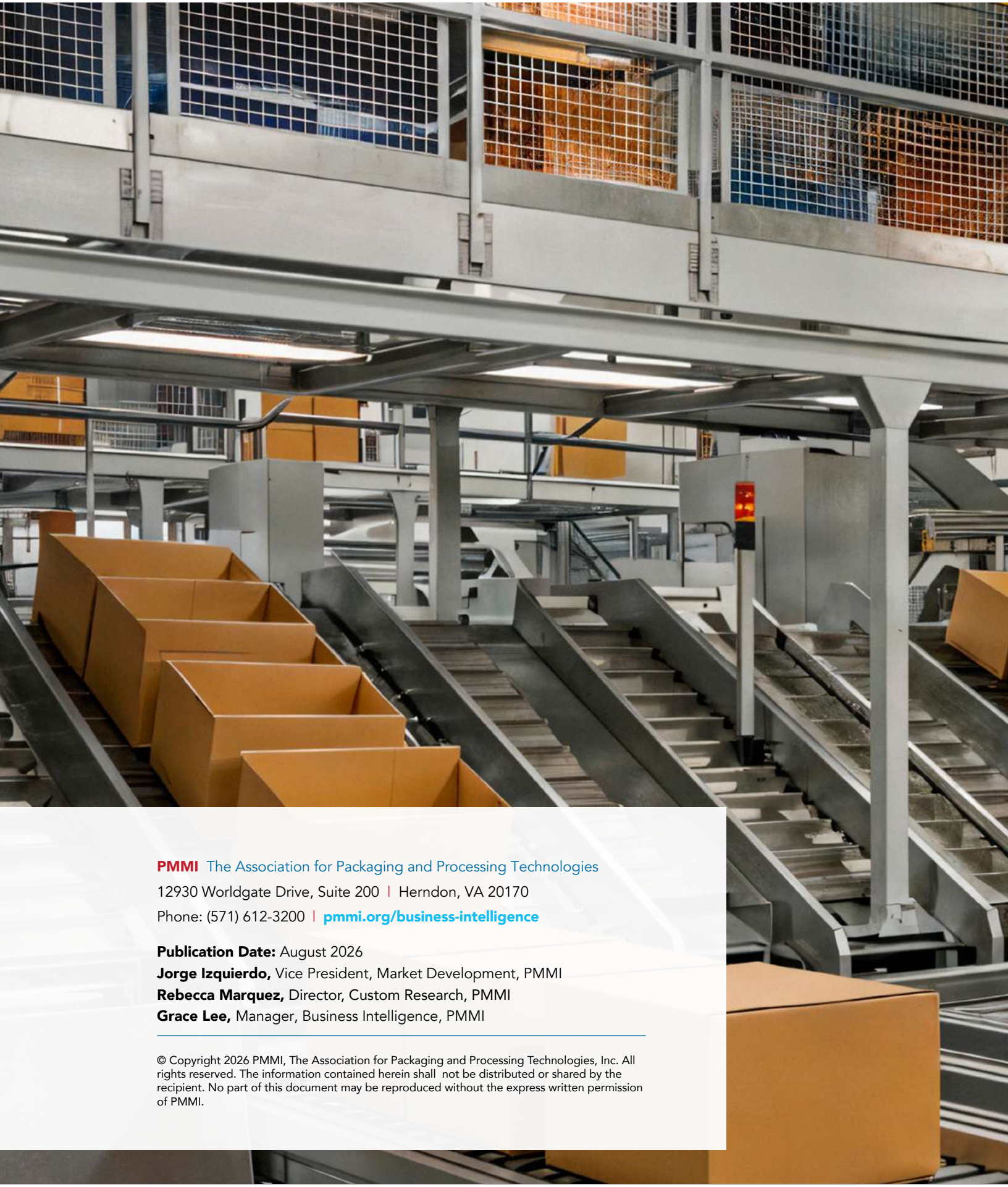
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Packaging State of the Industry Report

EXECUTIVE SUMMARY

2026

PMMI Business Intelligence



PMMI The Association for Packaging and Processing Technologies
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How To Use This Report

Thank you for taking the time to read our State of the Industry Report. This report provides a comprehensive overview of the packaging machinery market, highlighting key statistics and trends by industry segment and machine type. For those interested in a more in-depth analysis, the PMMI Business Intelligence Dashboard provides a powerful tool for exploring the data in greater detail.

The dashboard enables you to filter and analyze the market by end-user industries, machine categories, sub-machine types, and even specific years. You can customize your view to focus on a select number of machines, compare various sub-machine types within an industry, or examine trends across different sectors. This flexibility enables you to view the figures that matter most to you.

PMMI Dashboard Highlight

Looking for more detailed insights? The PMMI State of the Industry Dashboard complements this report by offering interactive access to the full dataset — with significantly more granularity. Available to PMMI members, the dashboard allows users to:

- **Machine Type and Subcategory** – View shipment values and growth projections by main machine types and their detailed subcategories (e.g., depalletizing, load stabilization).
- **Industry Filters** – Filter by specific industry sectors to view only relevant machine shipments and projections.
- **Country View** – Toggle between U.S. and Canada data.
- **Shipment Value Tables** – Compare shipment values by industry and subcategory side by side.

To access the dashboard, visit the **PMMI State of the Industry Dashboard** at: pmmi.org/content/soti-dashboard







CONTENTS

8 • EXECUTIVE SUMMARY

8 **Summary of the US Packaging Machinery Industry**
9 **End-User Investment Activity Across Market Sectors**
10 **US Market Sector Overview**
10 US Industry Breakdown
11 US Industry Forecast
12 **US Packaging Machinery Overview**
13 US Machinery Breakdown
14 Forecasted Machinery Growth
16 **Summary of the Canadian Packaging Machinery Industry**
17 **Parts & Services**
17 Overview
18 Forecast
19 **US Imports & Exports**
22 **Canada Imports & Exports**
22 A Snapshot of 2025
23 Canada Reshapes Its Packaging Machinery Import Mix
24 **Total US Market**
25 **Total Canada Market**
25 **Distribution Channels**
26 **Trend Overview**

27 • MACROECONOMY & FORECAST

27 **The Normalization of Uncertainty**
28 **Differences in Forecast Between Editions**
29 US Market
31 Parts & Services

32 • MARKET TRENDS

32 **Market Trends Explored in Detail in this Section**
33 **Shifting Buyer Behavior**
33 Internal Complexity Meets Investment Hesitation
34 Higher Expectations, Less Structure
34 Declining Loyalty and Supplier Implications
35 **Product Virality**
36 **Big Data & AI**
36 An Overview
37 AI in Internal Operations
38 Marketing in the Age of AI
39 Structuring Content for AI-Driven Discovery
40 **Used Machinery & Asset Preservation**
40 A Limited, Opportunistic Market
40 Retrofit Over Replace
41 Where Used Equipment Adds Value
42 **OBBB: Accelerated Depreciation**
43 **Carbon Emission Goals by Major Players**

44 **US Regulatory Landscape**
45 How Regulations are Impacting Machinery
45 States With Regulations Impacting Packaging
46 **Rising Cost of Gas**
46 Material Reduction As a Cost and Operational Strategy
47 Reducing Material Across Every Level of Packaging

48 • END OF LINE DEEP DIVE
48 **Introducing a New Focus on End-of-Line Machinery**
49 **End-of-Line Packaging Machinery**
49 **End-of-Line Packaging in Warehouse Automation**
49 Warehouse Automation Overview
50 Spending Looks at the Downstream Processes
51 **Right Fit Packaging**
52 **Expanding Beyond the End of the Line**
52 AMRs and AGVs are Creating New Opportunities for Suppliers
53 Market Growth Makes Pallet Movement the Next Logical Step
54 A Case Study on Robotic Arms
55 **Cartoning, Multipacking & Case Packing**
55 Case Packing Preferences
56 Flexibility, Automation Tradeoffs, and Material Variability Effects on Machines
57 Bottlenecks and Shrinking Cases
58 Machine Sector Overview
58 US Sub Machines
59 **Palletizing & Load Stabilization**
59 Steady Demand, Labor-Driven Automation
59 Robotic Systems and Cobots
60 Simplicity vs Flexibility Tradeoffs
61 Machine Sector Overview
62 US Sub Machines

63 • INDUSTRY STATISTICS
63 **Market Sector Overview**
64 **Cross-Industry Investment & Closure Landscape**
65 **Major Announcements Highlights**
66 **Sector Outlook – Forecast & Trends**
66 Food
72 Beverage
81 Household, Industrial, Agricultural Chemicals
85 Pharmaceuticals
92 Personal Care, Toiletries & Cosmetics
95 Other End-User Sectors

97 • MARKET STATISTICS BY MACHINERY
97 **Bagging, Pouching & Wrapping Equipment**
Form/Fill/Seal (Horizontal, Vertical, Other)
Pre-made Bag Loading & Sealing
Wrapping Equipment
99 **Cartoning, Multipacking & Case Packing**
Cartoning Equipment
Multipacking Equipment





Case or Tray Erect/Load/Seal (Integrated)
Case or Tray Erectors & Formers
Case or Tray Loaders
Case Sealers
Case Packing Equipment, Other

100 **Coding, Labeling, Printing, & Reading Equipment**
Coding & Marking (Ink Jet, Laser, Other)
Labeling Machines
Standalone Printers

102 **Conveying, Feeding & Handling**
Accumulators
Conveyors (Infeed & Discharge, Modular, Roller, Tabletop, Other)
Product & Package Handling
Feeding & Inserting Equipment

103 **Filling, Capping & Closing**
Liquid Fillers (Gravity Fillers, Net Weight Fillers, Piston Fillers, Pressure Fillers, Others)
Dry Fillers (Net Weight Fillers, Others)
Cappers
Rigid container closing equipment

105 **Inspection & Testing Equipment**
Packaging & Material Testing Equipment
Packaging Inspection Equipment
Process Inspection Equipment
QA Lab

106 **Palletizing & Load Stabilization**
Palletizing, Pallet Conveying, Dispensers & Slip Sheets
Load Stabilization
Depalletizing

107 **Specialty Equipment**

109 **Tray, Clamshell & Blister Packaging Equipment**
Thermoform/Fill/Seal Equipment
Pre-made Tray/Cup/Bowl Packaging Equipment
Blister & Clamshell Packaging Equipment

111 • APPENDIX

111 **Risks Associated with Forecast**

112 **Research Methodology**

114 **Segmentations For Market Sizes and Forecasts**

116 **Definitions of Machine Types**

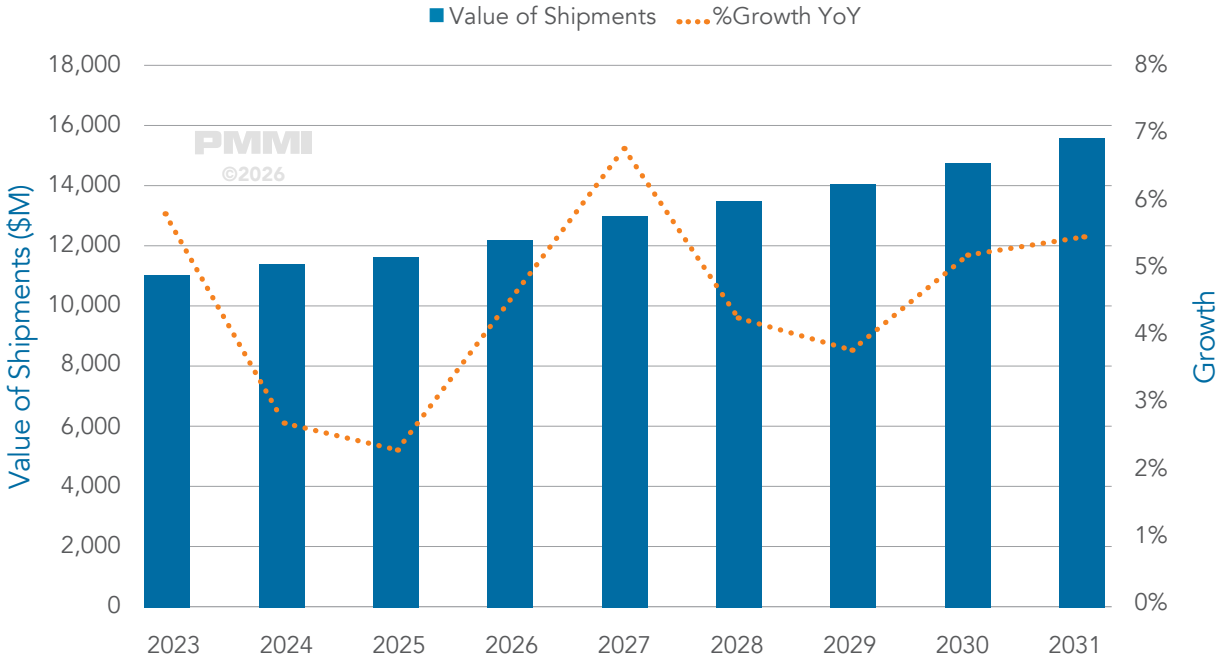
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Executive Summary

SUMMARY OF THE US PACKAGING MACHINERY INDUSTRY

In 2027, US Packaging Machinery sales to reach **$13bn**

Fig. 1 US Packaging Machinery Forecast



PMMI members can visit https://www.pmmi.org/content/soti-dashboard to explore interactive forecast data by machine type, subcategory, industry, and more

As 2026 closes, the packaging machinery market is showing early signs of recovery following a highly disrupted 2025. While growth remains moderate, market conditions have stabilized enough for companies to begin moving forward with previously delayed investments.

Importantly, this shift does not reflect a fully resolved macroeconomic environment. Ongoing geopolitical tensions, including the conflict in Iran, and continued trade volatility in the US, have prolonged the uncertainty facing manufacturers. As a result, many companies can no longer defer capital decisions and are moving ahead with investment despite these challenges.

Consequently, 2026 activity has been driven less by improving conditions than by a growing need to act. Backlogs accumulated during prior periods are being worked through, and delayed projects are gradually being released. Persistent labor constraints also support demand for automation, particularly solutions that improve efficiency within existing operations. Interviews conducted for this study indicate that buyers remain highly price-sensitive and risk-aware, prioritizing technologies that can be deployed quickly and deliver clear returns within shorter timeframes.

While sentiment has improved compared with 2025, decision-making remains disciplined. Investment is increasingly targeted and incremental, with a continued focus on retrofits, brownfield upgrades, and modular solutions rather than large-scale greenfield expansion.

Looking ahead to 2027, growth is expected to strengthen as this backlog of deferred investment is more fully realized. Projects delayed over the past two years are likely to move forward, supporting a stronger investment cycle. As uncertainty becomes a more normalized operating condition rather than a temporary disruption, investment behavior is expected to shift from reactive to more forward-looking, allowing the market to return to a typical growth trajectory.

END-USER INVESTMENT ACTIVITY ACROSS MARKET SECTORS

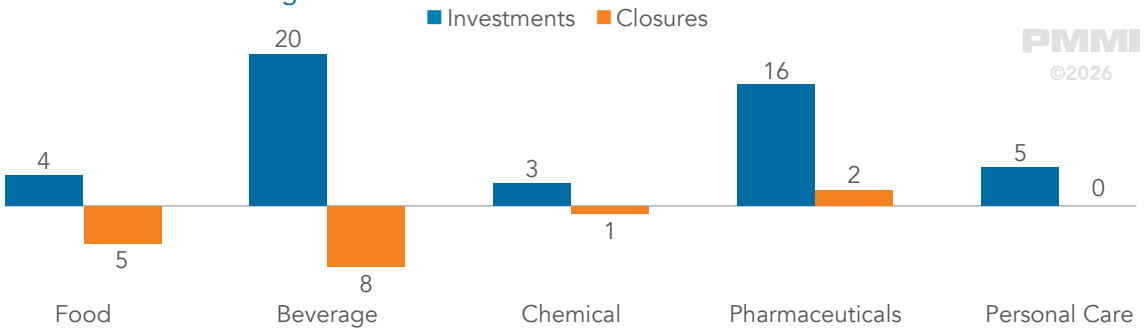
Expansion outpaces contraction

Announced investment activity from major players in 2025 remained positive but increasingly concentrated among large-scale industry players. With 48 investments into new or existing plants compared to 16 closures, expansion continued to outpace contraction; however, activity was uneven across sectors and reflected targeted capital deployment rather than broad-based growth.

Pharmaceutical manufacturing dominated investment activity in dollar terms (see Figure 2), driven by demand for GLP-1 therapies and broader reshoring initiatives, while other sectors showed more mixed dynamics. Food and beverage markets exhibited ongoing consolidation, with major players investing in core facilities and distribution infrastructure while continuing to rationalize legacy assets. Personal care remained relatively stable, whereas investment in chemicals was more cautious, likely due to funding and policy uncertainty.

Overall, the announced activity suggests that leading manufacturers are prioritizing efficiency, scale, and strategic growth areas rather than uniformly expanding capacity. While this dataset reflects the behavior of major players, it highlights a broader shift toward a more focused, capital-disciplined manufacturing environment heading into 2026.

Fig. 2 2025 Plant Investment & Closure Announcements



> To see the complete list of company announcements tracked here, see Market Statistics by Industry

MARKET SECTOR OVERVIEW – INDUSTRY BREAKDOWN

Food

Food was the largest end-market for packaging machinery, accounting for approximately 43.8% of total US shipment value in 2025, estimated at $5.1 billion. The sector was projected to add roughly $2.0 billion by 2031, reaching approximately $7.1 billion, with a CAGR of 5.7% for 2025–2031. Growth was driven by health and wellness shifts toward higher protein and greater product variety, demand for smaller portions and precision packaging, and tighter freshness and shelf-life expectations, even as beef and protein supply dynamics added pressure.

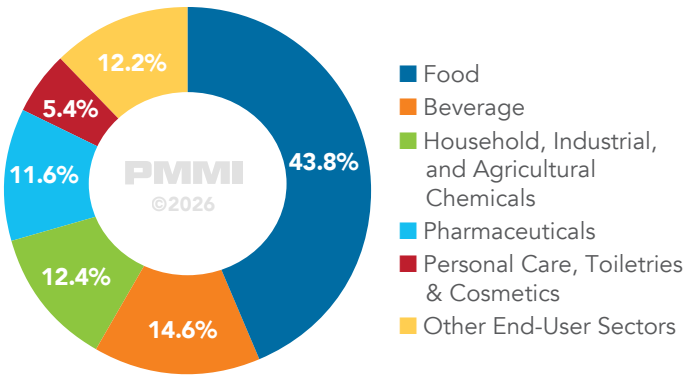
Beverage

Beverage represented approximately 14.6% of total US shipment value in 2025, equivalent to an estimated $1.7 billion. Shipments were expected to grow to roughly $2.4 billion by 2031, adding about $663 million at a CAGR of 5.6% for 2025–2031. Growth was led by dairy investment and the rise of functional beverages, alongside growing SKU and format complexity and incremental sustainability demands, and was partially offset by softening demand for alcoholic beverages.

Household, Industrial, & Agricultural Chemicals

Household, industrial, and agricultural chemicals accounted for approximately 12.4% of the total US shipment value in 2025, estimated at $1.5 billion. The sector was projected to reach roughly $1.8 billion by 2031, an increase of about $347 million and a CAGR of 3.6% for 2025–2031. Spending was shaped by market volatility, a growing emphasis on safety, and the need for maintenance and reliability in corrosive operating environments, with material-reduction trends gradually changing packaging formats.

Fig. 3 US Packaging Machinery Value by Industry - 2025 ($11.7B)



PMMI members can visit https://www.pmmi.org/content/soti-dashboard to explore interactive forecast data by machine type, subcategory, industry, and more



Pharmaceuticals

Pharmaceuticals accounted for approximately 11.6% of total US shipment value in 2025, an estimated $1.4 billion. Shipments were projected to grow to roughly $1.9 billion by 2031, adding about $502 million at a CAGR of 5.4% for 2025–2031. Growth was driven by surging GLP-1 demand and the reshoring of production, along with expansion into adjacent nutraceutical and protein-based health markets, while high regulatory barriers to entry kept the sector stable and high-margin.

Personal Care

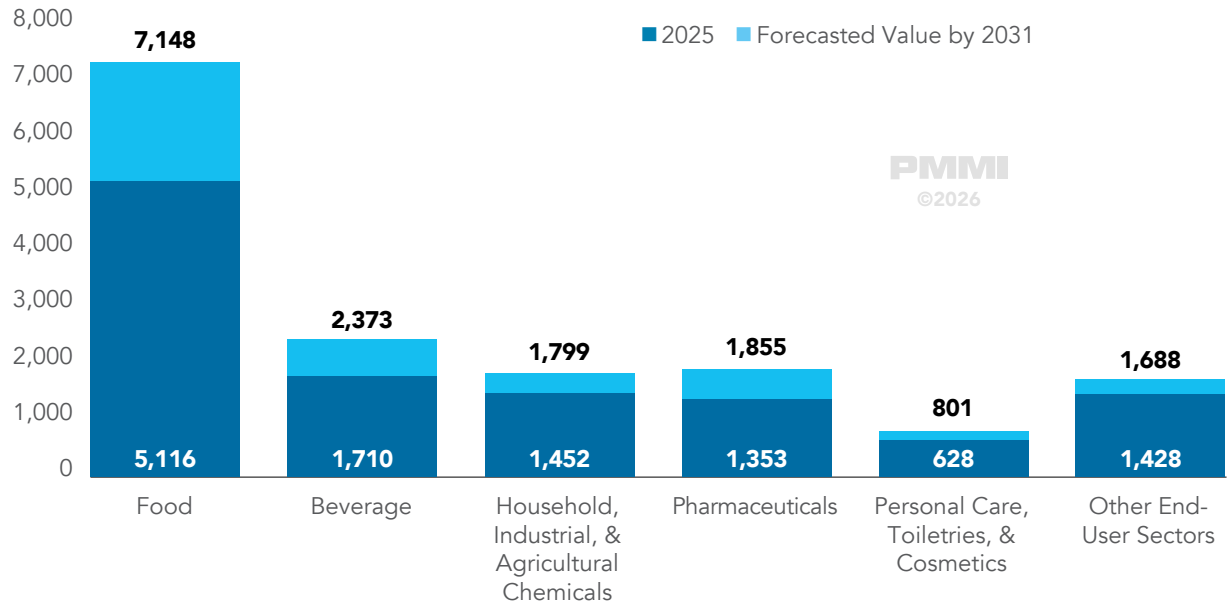
Personal care, toiletries, and cosmetics represented the smallest end-market at approximately 5.4% of total US shipment value in 2025, an estimated $628 million. The segment was expected to reach roughly $801 million by 2031, adding about $173 million at a CAGR of 4.1% for 2025–2031. Demand was affected by social-media-driven virality and rapid demand shifts that required greater line flexibility and adaptability, alongside persistent price sensitivity.

Other End-User Sectors

Other end-user sectors collectively accounted for approximately 12.2% of total US shipment value in 2025, estimated at $1.4 billion. Shipment value was projected to reach roughly $1.7 billion by 2031, an increase of about $260 million and a CAGR of 2.8% for 2025–2031, the slowest pace in the set. Growth was tempered by uncertainty and slowing investment in automotive, with niche opportunities emerging in government and defense, and ongoing consolidation across the cannabis market.

MARKET SECTOR OVERVIEW – INDUSTRY FORECAST

Fig. 4 US Packaging Machinery - Industry Forecast



PMMI members can visit https://www.pmmi.org/content/soti-dashboard to explore interactive forecast data by machine type, subcategory, industry, and more

US SECTOR FORECAST

Table 1 - US Total Packaging Machinery Value by End-user Sector - USD M

	2024	2025	2026	2027	2028	2029	2030	2031	CAGR ('25-'31')
Food	**$4,961**	**$5,116**	**$5,402**	**$5,800**	**$6,093**	**$6,331**	**$6,720**	**$7,148**	5.7%
		3.1%	5.6%	7.4%	5.0%	3.9%	6.2%	6.4%	
Beverages	**$1,688**	**$1,710**	**$1,782**	**$1,917**	**$2,008**	**$2,100**	**$2,234**	**2,373**	5.6%
		1.3%	4.3%	7.6%	4.7%	4.6%	6.4%	6.2%	
Household, Industrial & Agricultural Chemicals	**$1,438**	**$1,452**	**$1,467**	**$1,551**	**$1,609**	**$1,665**	**$1,723**	**$1,799**	3.6%
		1.0%	1.1%	5.7%	3.8%	3.5%	3.4%	4.4%	
Pharmaceuticals	**$1,305**	**$1,353**	**$1,419**	**$1,516**	**$1,595**	**$1,686**	**$1,772**	**$1,855**	5.4%
		3.7%	4.9%	6.8%	5.3%	5.7%	5.1%	4.7%	
Personal Care, Toiletries & Cosmetics	**$611**	**$628**	**$659**	**$702**	**$725**	**$746**	**$769**	**$801**	4.1%
		2.8%	4.9%	6.6%	3.3%	2.9%	3.1%	4.1%	
Other End-User Sectors	**$1,418**	**$1,428**	**$1,480**	**$1,550**	**$1,566**	**$1,587**	**$1,632**	**$1,688**	2.8%
		0.7%	3.6%	4.8%	1.0%	1.3%	2.9%	3.5%	
Grand total	**$11,420**	**$11,686**	**$12,210**	**$13,035**	**$13,596**	**$14,114**	**$14,850**	**$15,664**	5.0%
		2.3%	4.5%	6.8%	4.3%	3.8%	5.2%	5.5%	

Source: Interact Analysis

PACKAGING MACHINERY OVERVIEW

US machinery breakdown



Conveying, Feeding, & Handling Equipment

Conveyors, accumulators, and feeding and pick-and-place systems; moderate growth at a 5.0% CAGR for 2025–2031, reaching nearly $3.4 billion by 2031 as line automation and labor savings drive demand.



Cartoning, Multipacking, & Case-packing Machinery

Cartoners, case erectors, loaders and sealers, and multipackers; solid growth at a 6.0% CAGR for 2025–2031, reaching nearly $2.9 billion by 2031 as machines consolidate into integrated end-of-line systems and SKU complexity rises.



Bagging, Pouching & Wrapping

Form/fill/seal machines, pre-made bag fillers, and shrink and flow wrappers; moderate growth at a 4.9% CAGR for 2025–2031, reaching nearly $2.3 billion by 2031, led by flexible-format demand and material-reduction trends in food.



Filling, Capping & Closing

Liquid and dry fillers, cappers, and container-closing equipment; moderate growth at a 4.3% CAGR for 2025–2031, reaching nearly $1.7 billion by 2031 on steady replacement demand across food, beverage, and chemicals.



Palletizing & Load Stabilization

Palletizers, stretch wrappers, depalletizers, and pallet conveyors; strong growth at a 6.7% CAGR for 2025–2031, reaching roughly $1.5 billion by 2031, driven by robotic adoption, labor shortages, and tighter load-security requirements.



Inspection & Testing Equipment

Metal detectors, fill-level and package-integrity inspection, and QA lab equipment; the fastest-growing category at a 5.9% CAGR for 2025–2031, reaching nearly $1.4 billion by 2031 on stricter food-safety and quality requirements.



Coding, Labeling, Printing & Reading

Inkjet and laser coders, labelers, and printers; modest growth at a 3.1% CAGR for 2025–2031, reaching roughly $1.1 billion by 2031, supported by serialization, traceability, and SKU proliferation.



Specialty Equipment

Specialized and niche packaging equipment outside the core categories; the slowest-growing segment at a 1.7% CAGR for 2025–2031, reaching roughly $690 million by 2031 as limited automation tailwinds keep gains marginal.



Tray, Clamshell & Blister

Thermoform/fill/seal lines, pre-made tray and cup fillers, and blister and clamshell equipment; moderate growth at a 4.7% CAGR for 2025–2031, reaching roughly $690 million by 2031 on retail-ready packaging and pharmaceutical blister demand.

Forecasted machinery growth

Fig. 5 US Packaging Machinery - Machinery Forecast

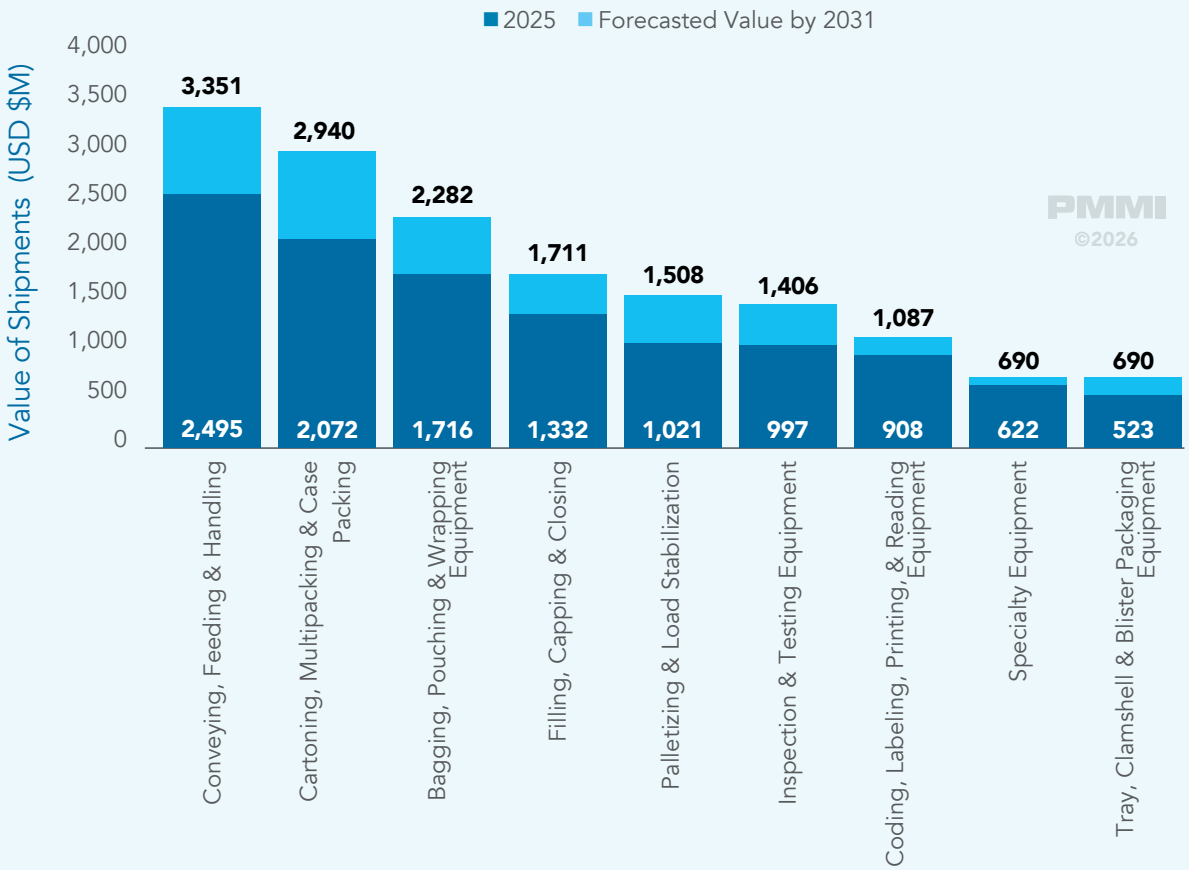


Table 2: US Total Packaging Machinery Value by Machine Category - USD M

	2024	2025	2026	2027	2028	2029	2030	2031	CAGR ('25-'31)
Conveying, Feeding & Handling	**$2,431**	**$2,495**	**$2,619**	**$2,792**	**$2,916**	**$3,030**	**$3,183**	**$3,351**	5.0%
		2.6%	5.0%	6.6%	4.5%	3.9%	5.0%	5.3%	
Cartoning, Multipacking & Case Packing	**$2,033**	**$2,072**	**$2,184**	**$2,356**	**$2,479**	**$2,596**	**$2,760**	**$2,940**	6.0%
		1.9%	5.4%	7.9%	5.2%	4.7%	6.3%	6.5%	
Bagging, Pouching & Wrapping Equipment	**$1,722**	**$1,716**	**$1,790**	**$1,910**	**$1,989**	**$2,058**	**$2,165**	**$2,282**	4.9%
		-0.4%	4.3%	6.7%	4.1%	3.5%	5.2%	5.4%	
Filling, Capping & Closing	**$1,307**	**$1,332**	**$1,371**	**$1,458**	**$1,509**	**$1,557**	**$1,630**	**$1,711**	4.3%
		1.9%	2.9%	6.3%	3.5%	3.2%	4.7%	5.0%	
Palletizing & Load Stabilization	**$1,007**	**$1,021**	**$1,084**	**$1,177**	**$1,248**	**$1,316**	**$1,407**	**$1,508**	6.7%
		1.4%	6.2%	8.6%	6.0%	5.5%	6.9%	7.2%	
Inspection & Testing Equipment	**$932**	**$997**	**$1,056**	**$1,135**	**$1,195**	**$1,251**	**$1,325**	**$1,406**	5.9%
		6.9%	5.9%	7.5%	5.3%	4.7%	5.9%	6.1%	
Coding, Labeling, Printing, & Reading Equipment	**$872**	**$908**	**$936**	**$979**	**$1,004**	**$1,023**	**$1,054**	**$1,087**	3.1%
		4.2%	3.1%	4.6%	2.5%	2.0%	3.0%	3.2%	
Specialty Equipment	**$614**	**$622**	**$623**	**$647**	**$653**	**$657**	**$672**	**$690**	1.7%
		1.3%	0.2%	3.9%	0.9%	0.6%	2.3%	2.6%	
Tray, Clamshell & Blister Packaging Equipment	**$502**	**$523**	**$546**	**$582**	**$605**	**$625**	**$656**	**$690**	4.7%
		4.1%	4.5%	6.4%	4.0%	3.4%	4.9%	5.2%	
Grand total	**$11,420**	**$11,686**	**$12,210**	**$13,035**	**$13,596**	**$14,114**	**$14,850**	**$15,664**	5.0%
		2.3%	4.5%	6.8%	4.3%	3.8%	5.2%	5.5%	

SUMMARY OF THE CANADIAN PACKAGING MACHINERY INDUSTRY

In 2027, Canada Packaging Machinery sales to reach

$1.4bn

Fig. 6 Canada Packaging Machinery Value by Industry - 2025 ($1.2B)

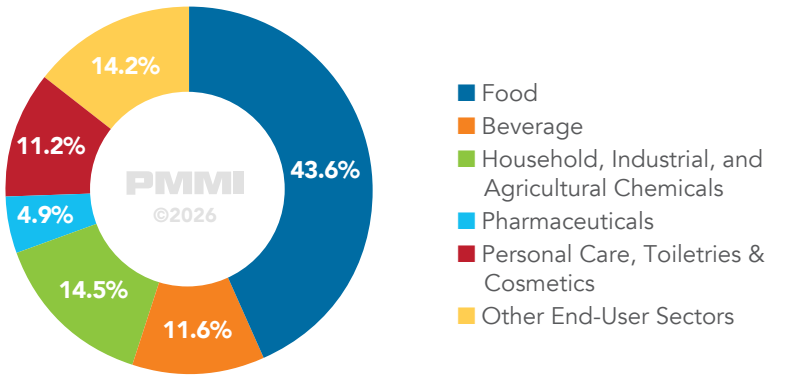
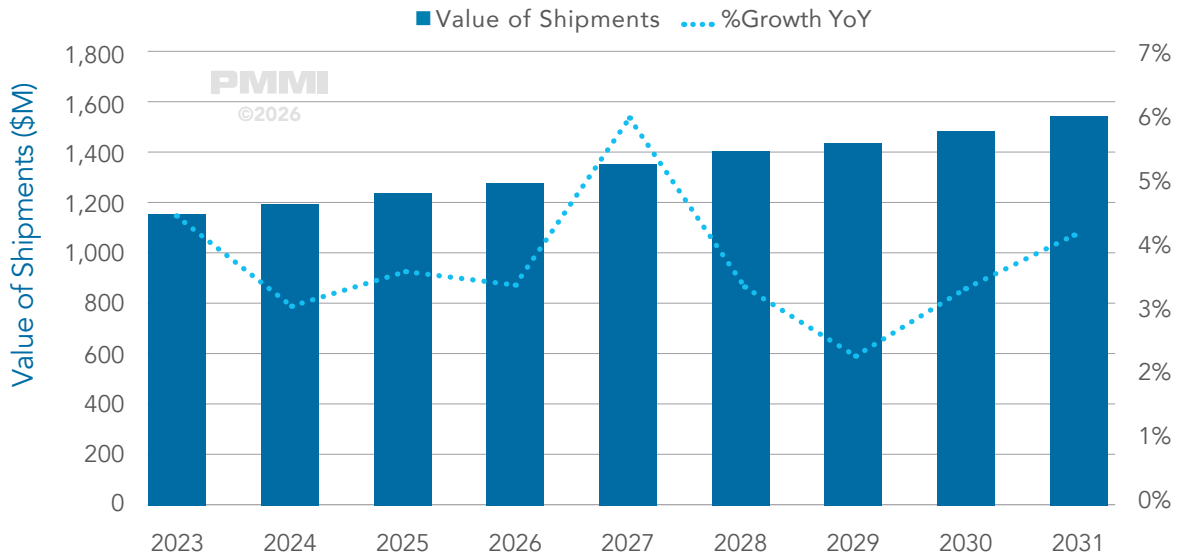


Fig. 7 Canada Packaging Machinery Forecast



PMMI members can visit https://www.pmmi.org/content/soti-dashboard to explore interactive forecast data by machine type, subcategory, industry, and more

The value of packaging machinery sold in Canada is expected to reach nearly $1.3 billion in 2026. Overall, Canada has performed steadily compared with the US, with some companies describing their Canadian business as stable and even more predictable in terms of growth when supported by local manufacturing and supply capabilities.

Tariff volatility between the US and its trading partners caused significant disruption to cross-border equipment flows, particularly in 2025, as customers delayed large capital purchases amid pricing uncertainty. However, these same dynamics also benefited Canada in several ways. Interviewees noted a shift toward domestically sourced equipment, with buyers increasingly favoring Canadian-made solutions to avoid tariff risk and stabilize pricing. In addition, Canada was, in some cases, better positioned to trade with other regions, including Europe, without facing the same tariff burdens as the US, creating a relative advantage for companies sourcing or supplying internationally. As a result, 2025 represented growth of 3.6% over 2024, supported by this shift toward local production and diversified trade relationships.

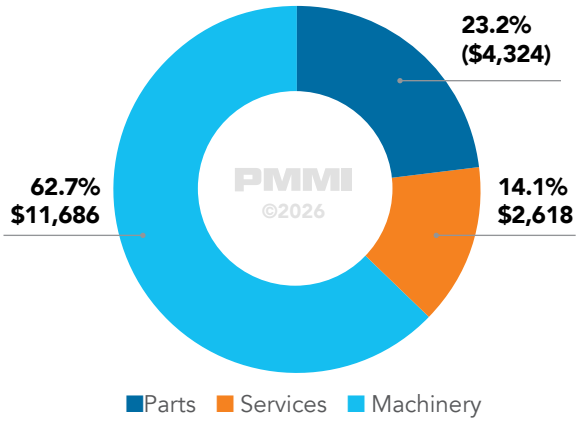
Looking ahead, delayed spending is expected to translate into stronger near-term growth, with 2027 anticipated to mark a peak as companies move forward with projects deferred in 2025 and 2026. This rebound reflects underlying demand that has been postponed rather than eliminated, as businesses continue to evaluate timing and capital allocation. At the same time, Canada faces many of the same structural pressures as the US, particularly ongoing labor shortages, which are reinforcing the need for automation and contributing to more cautious, phased investment decisions.

PARTS & SERVICES - OVERVIEW

Parts

In 2025, the market for parts for packaging machinery in the US is measured to be at $4.3 billion. By 2031, the market is projected to reach $6.2 billion, reflecting a CAGR of 6.2% for 2025–2031. Parts revenue remained stable to moderately strong across interviewees, with most reporting steady year-over-year growth. In several cases, demand was driven by customers delaying new equipment purchases and instead investing in spare parts, retrofits, and retooling of existing machines to extend asset life.

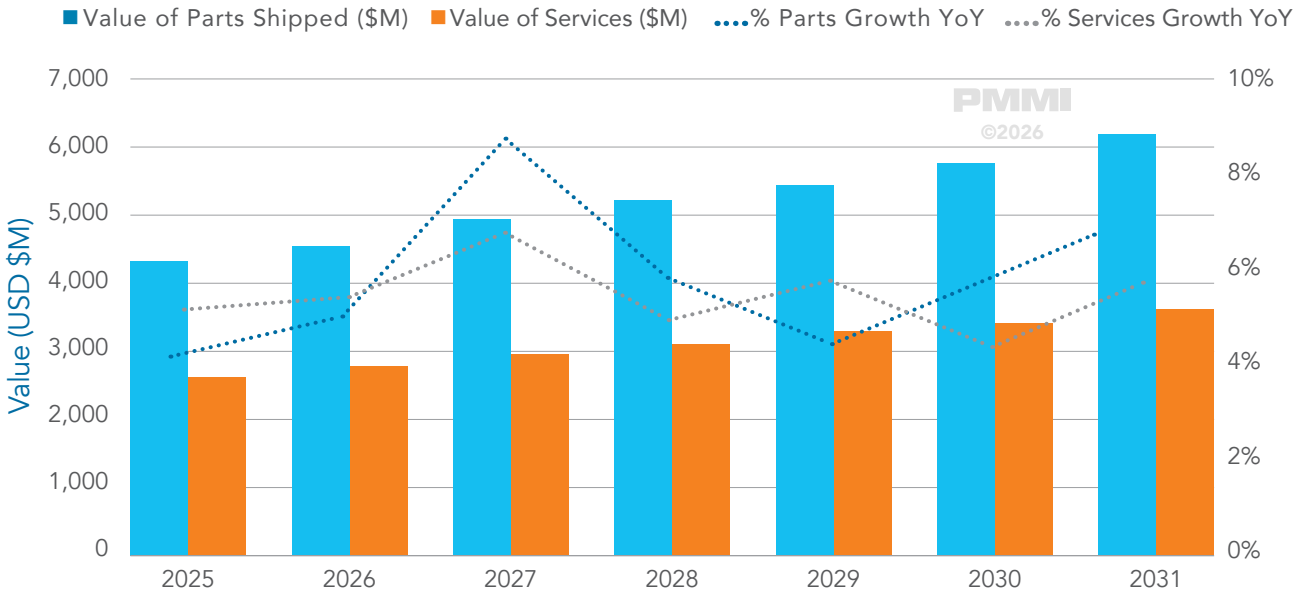
Fig. 8 US Machinery, Parts, & Services 2025 ($18.6B)



Service

In 2025, the market for services for packaging machinery in the US is measured to be nearly $2.8 billion. By 2031, the market is projected to reach $3.6 billion, reflecting a CAGR of 5.5% for 2025–2031. Service activity saw stronger growth relative to parts, with multiple interviewees highlighting increased demand for installation, maintenance, and troubleshooting support. This trend is largely tied to labor shortages and declining in-house technical expertise, leading customers to rely more heavily on OEMs for ongoing operational support. There is also a notable shift toward more proactive and structured service models, including preventative maintenance programs and service agreements, as companies seek to improve uptime and reduce unplanned downtime.

Fig. 9 US Packaging Parts & Services Forecast



PARTS & SERVICES - FORECAST

Table 3 - Parts, Services, & Machinery Forecasts for Packaging Machinery Market – USD M

United States	2025	2026	2027	2028	2029	2030	2031	'25-'31 CAGR
Parts	**$4,324**	**$4,542**	**$4,941**	**$5,230**	**$5,459**	**$5,774**	**$6,193**	**6.2%**
Annual Growth Rate		5.0%	8.8%	5.8%	4.4%	5.8%	7.3%	
Services	**$2,618**	**$2,759**	**$2,946**	**$3,091**	**$3,269**	**$3,412**	**$3,609**	**5.5%**
Annual Growth Rate		5.4%	6.8%	4.9%	5.7%	4.4%	5.8%	
Parts, Services, & Machinery	**$18,628**	**$19,511**	**$20,923**	**$21,918**	**$22,842**	**$24,037**	**$25,466**	**5.3%**
Annual Growth Rate		4.7%	7.2%	4.8%	4.2%	5.2%	5.9%	

Canada	2025	2026	2027	2028	2029	2030	2031	'25-'31 CAGR
Parts	**$452**	**$471**	**$493**	**$511**	**$524**	**$541**	**$564**	**3.7%**
Annual Growth Rate		4.1%	4.7%	3.7%	2.4%	3.3%	4.2%	
Services	**$278**	**$290**	**$308**	**$321**	**$336**	**$347**	**$365**	**4.7%**
Annual Growth Rate		4.3%	6.2%	4.3%	4.6%	3.4%	5.1%	
Parts, Services, & Machinery	**$1,970**	**$2,043**	**$2,159**	**$2,236**	**$2,296**	**$2,373**	**$2,477**	**3.9%**
Annual Growth Rate		3.7%	5.7%	3.6%	2.7%	3.4%	4.4%	

Source: Interact Analysis

US IMPORTS & EXPORTS

A snapshot of 2025

Fig. 10 US Packaging Machinery Imports by Country - 2025 ($3.8B)

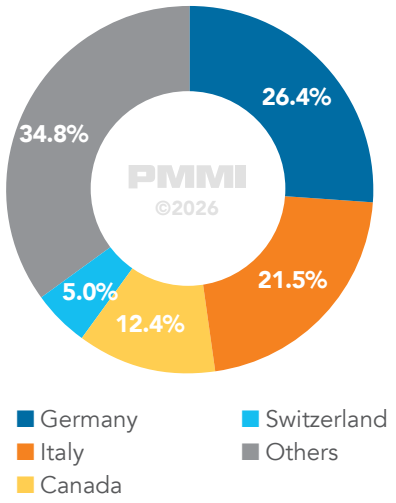
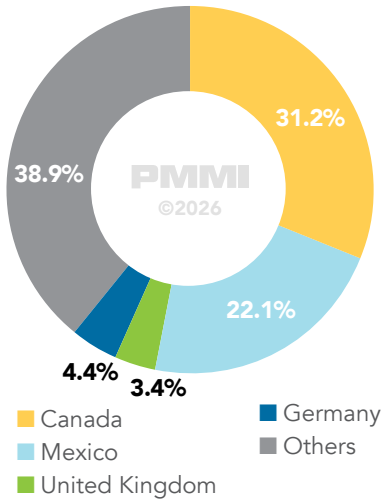


Fig. 11 US Packaging Machinery Exports by Country - 2025 ($688M)

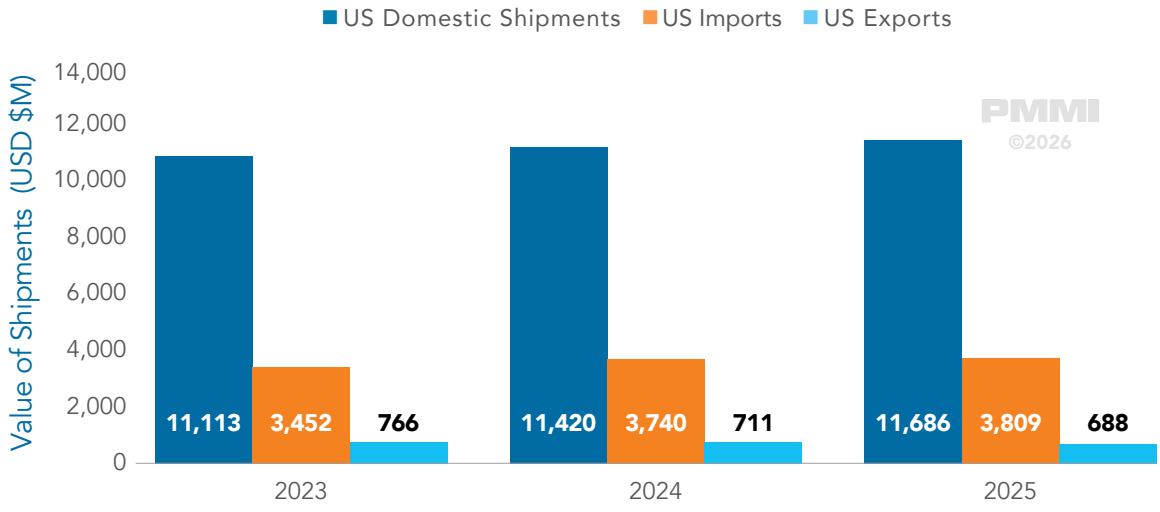


In 2025, US domestic shipments of packaging machinery were valued at $11.7 billion, with imports totaling $3.8 billion and exports at just under $688 million. Combined, domestic shipments and imports amounted to an estimated $16.2 billion of packaging machinery sold into the US market in 2025, with imports accounting for about 23% of the total.

The largest share of US packaging machinery imports in 2025 came from Germany, totaling $1.0 billion (26%), followed by Italy at $819 million (22%), Canada at $472 million (12%), and Switzerland at $189 million (5%). The remaining $1.3 billion (35%) came from other countries.

On the export side, the US shipped approximately $688 million in packaging machinery abroad in 2025. The two largest destinations were Canada, $215 million (31%), and Mexico, $152 million (22%), together accounting for just over half of total US exports.

Fig. 12 US Packaging Machinery Values: Domestic, Imports, Exports



Tariffs reshape trade and investment behavior

In 2025, tariffs emerged as a dominant factor shaping import and export strategies for machine builders. A surge in tariff-related announcements throughout early 2025 introduced a high degree of uncertainty, with many companies indicating that they lacked clarity on how rates would ultimately be applied across different regions and components.

This uncertainty created hesitation across the market. Many machine builders reported that customers delayed or paused projects, particularly those involving international sourcing decisions, as they worked to better understand potential cost impacts. The lack of predictability also made it difficult to maintain margins and plan capital expenditures, especially for companies reliant on globally sourced components.

Impact on Trade Flows and Competitive Dynamics

Tariffs influenced both trade flows and the competitive balance between domestic and imported equipment. In markets where imports had previously held a significant price advantage, tariff-related cost increases reduced that gap, shifting purchasing dynamics. At the same time, the impact was uneven, with differences in tariff application across regions and materials creating variability in how companies were affected.

Trade relationships between key markets were also affected. Some suppliers indicated that customers became less willing to source equipment across borders due to increased costs and uncertainty, while others adjusted by shifting production or assembly locations to mitigate tariff exposure. In these cases, regional manufacturing strategies helped reduce pricing uncertainty and supported project execution.

Tariff volatility

Market Adaptation and Emerging Stability

One year later, tariffs remain a central theme, but the industry's response has evolved. Rather than reacting to each individual policy change, many companies now operate under the assumption that tariffs will remain a persistent feature of the business environment. As a result, tariffs are increasingly incorporated into pricing strategies, supply chain decisions, and investment planning.

There are also signs that the market has begun to stabilize. While uncertainty has not fully disappeared, companies now report having a clearer understanding of the likely range of tariff impacts, enabling more informed decision-making and the progression of previously delayed projects. This shift has been supported in part by pent-up demand following the earlier slowdown.

As shown in Figure 13, tariff-related activity has remained elevated into 2026, indicating that ongoing policy changes have not slowed market engagement. Instead, companies are increasingly moving forward with projects despite continued volatility, reflecting a broader transition from caution to adaptation.

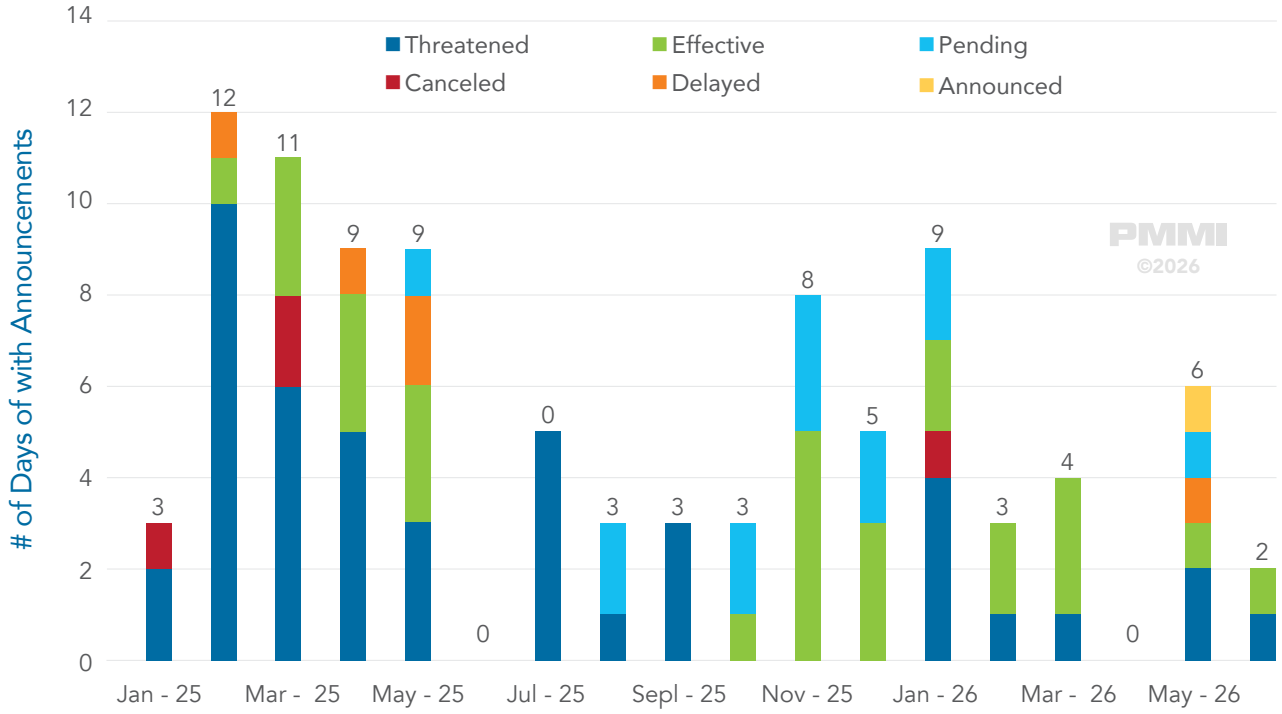
These tariff policies have had a notable and uneven effect on trade in packaging machinery, with some regions benefiting from shifting demand patterns while others have faced reduced competitiveness in export markets.

Stay Current with PMMI Business Intelligence

Continue tracking the packaging and processing industry throughout the year with PMMI's **How's Business**, **Tariffs Quickie Survey**, and **Economic Outlook** reports.



Fig. 13 Days with US Tariff Announcemnets by Month



Source: Atlantic Council, Trump Tariff Tracker

Note: Multiple tariff actions may have occurred on a single date. This Figure tracks the count of individual days with announcements categorized by status (e.g., Effective, Pending, Canceled)

Trade diversification reshapes US machinery imports

Growth in India, South Korea, and Vietnam offset declines from China and other suppliers.

Fig. 14 US Packaging Machinery Import Shifts by Country (2025 vs. 2024)

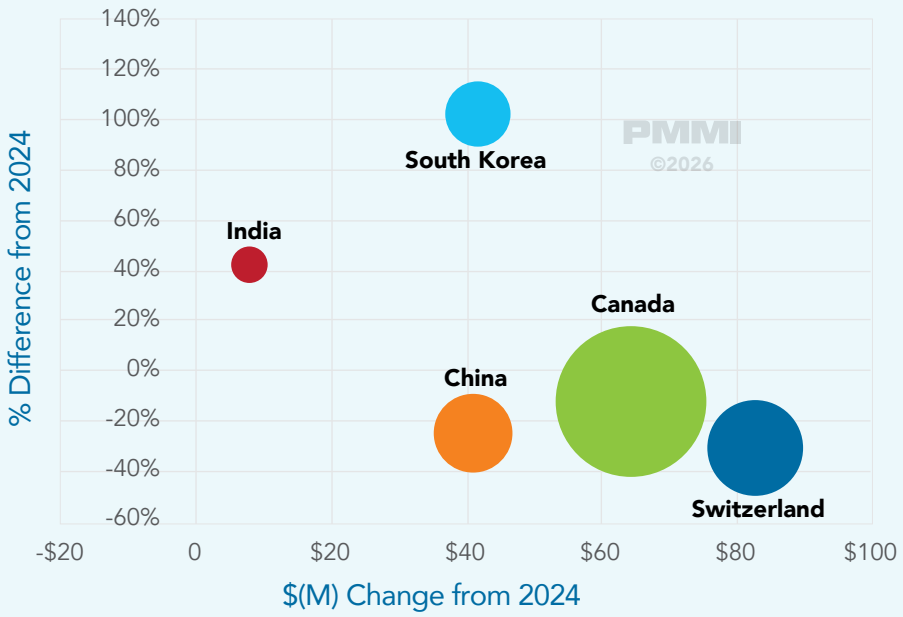


Figure 14 highlights the largest shifts in US packaging machinery imports during 2025. Several countries emerged as beneficiaries of changing sourcing strategies, while others experienced notable declines as buyers adjusted to an increasingly uncertain trade environment.

Among major suppliers, South Korea and India recorded some of the strongest growth rates, with imports increasing approximately 100% and 40%, respectively, compared to 2024. Vietnam also posted significant gains, albeit from a smaller base, with import value increasing from less than

$0.5 million in 2024 to over $7 million in 2025. This outsized growth is not shown in Figure 14, as it would distort the chart scale. These increases coincided with escalating tariffs on Chinese imports, which raised costs for US buyers and encouraged many companies to diversify their supplier networks. Interviews conducted for this study suggest that equipment purchasers became increasingly willing to evaluate alternative sourcing options, particularly for price-sensitive machinery segments.

China experienced one of the most significant declines among major trading partners, with import value falling roughly 24% year-over-year. While China remains an important supplier of packaging machinery to the US market, higher tariff exposure and ongoing trade uncertainty appear to have reduced its competitiveness relative to alternative sourcing locations across Asia.

Outside of Asia, Canada and Switzerland also recorded declines in import value during 2025. Canadian imports fell approximately 12%, reflecting broader trade friction and shifting procurement strategies. Switzerland likewise experienced a decline, suggesting that sourcing changes extended beyond China alone as buyers reassessed supplier relationships and equipment costs.

CANADA IMPORTS & EXPORTS

A snapshot of 2025

Fig. 15 Canadian Packaging Machinery Imports by Country - 2025 ($504M)

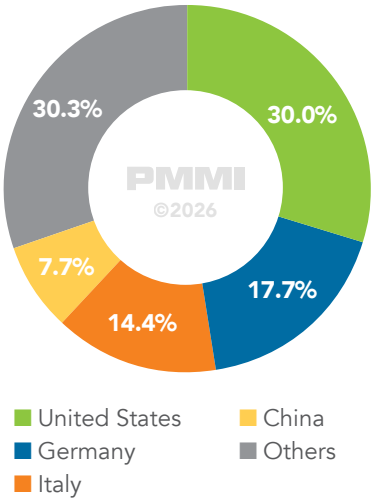
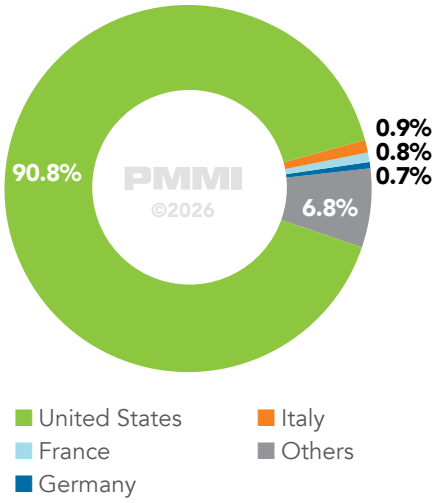


Fig. 16 Canadian Packaging Machinery Exports by Country - 2025 ($550M)

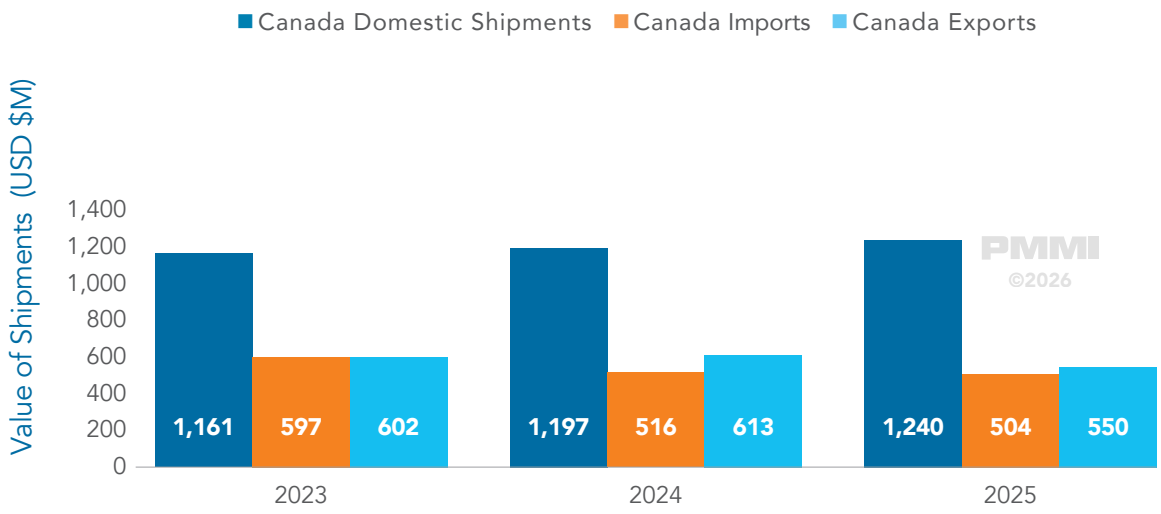


In 2025, Canada's domestic shipments of packaging machinery were valued at $1.2 billion, with imports totaling $504 million and exports at $550 million. Combined, domestic shipments and imports amounted to an estimated $2.3 billion of packaging machinery sold into the Canadian market in 2025, with imports accounting for about 29% of the total.

The largest share of Canadian packaging machinery imports in 2025 came from the United States, totaling $151 million (30%), followed by Germany at $89 million (18%), Italy at $72 million (14%), and China at $39 million (8%). The remaining $153 million (30%) came from other countries.

On the export side, Canada shipped approximately $550 million in packaging machinery abroad in 2025. The largest destination by far was the United States $499 million (91%), accounting for the vast majority of total Canadian exports.

Fig. 17 Canada Packaging Machinery Values: Domestic, Imports, Exports



Canada reshapes its packaging machinery import mix

Gains across European and APAC suppliers offset a pullback from the US amid tariff pressures

Fig. 18 Canada Packaging Machinery Import Shifts by Country (2025 vs. 2024)

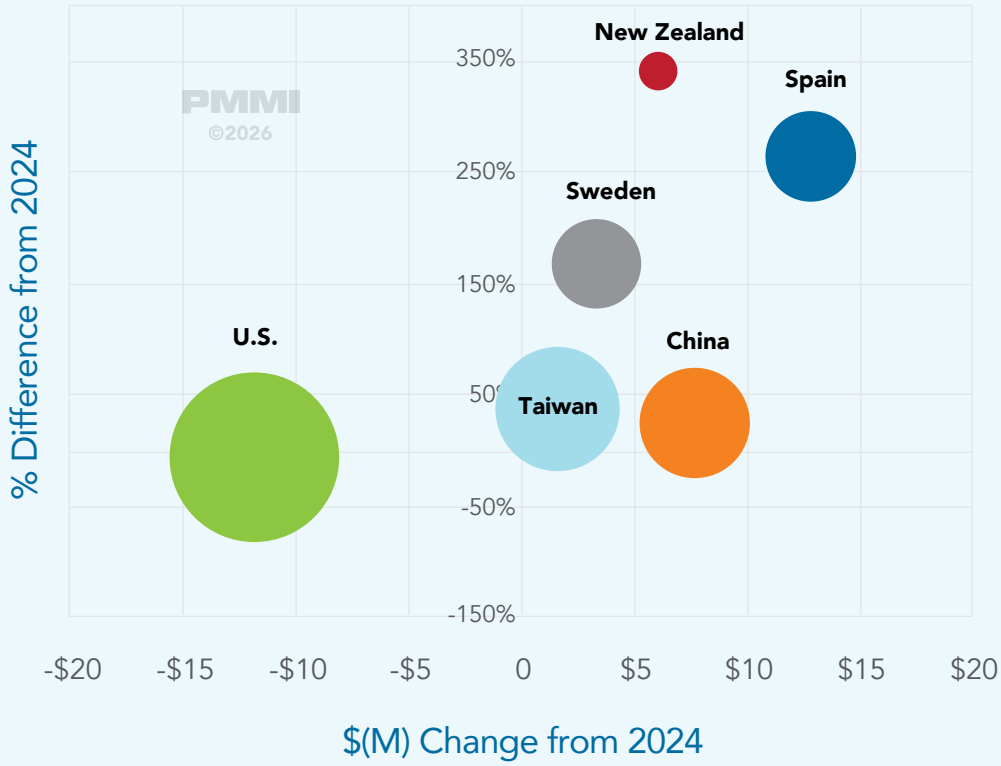


Figure 18 highlights the largest shifts in Canada's packaging machinery imports in 2025, revealing a mix of supplier diversification and early signs of trade rebalancing in response to tariff pressures.

Several smaller European and APAC suppliers recorded outsized growth. Spain and New Zealand saw the most dramatic increases, with imports rising, while Sweden also posted strong gains. Although these increases came from relatively smaller bases, they point to a clear broadening of Canada's supplier mix as buyers explored alternative sourcing options.

China showed growth, with imports increasing roughly 25% over 2024. This trend contrasts with the US market, where Chinese imports declined, suggesting that Canada may be absorbing a greater share of Chinese exports as trade flows adjust across North America.

Among larger trading partners, the United States saw a decline, with import value falling approximately 7%. Given the scale of US–Canada trade, this pullback is particularly significant and may reflect effects of tariff retaliation or shifting procurement strategies as Canadian buyers reassess cross-border sourcing costs.

Overall, these shifts suggest that Canada's import landscape is undergoing a transition, expanding into other supplier markets while simultaneously adjusting relationships with traditional partners.

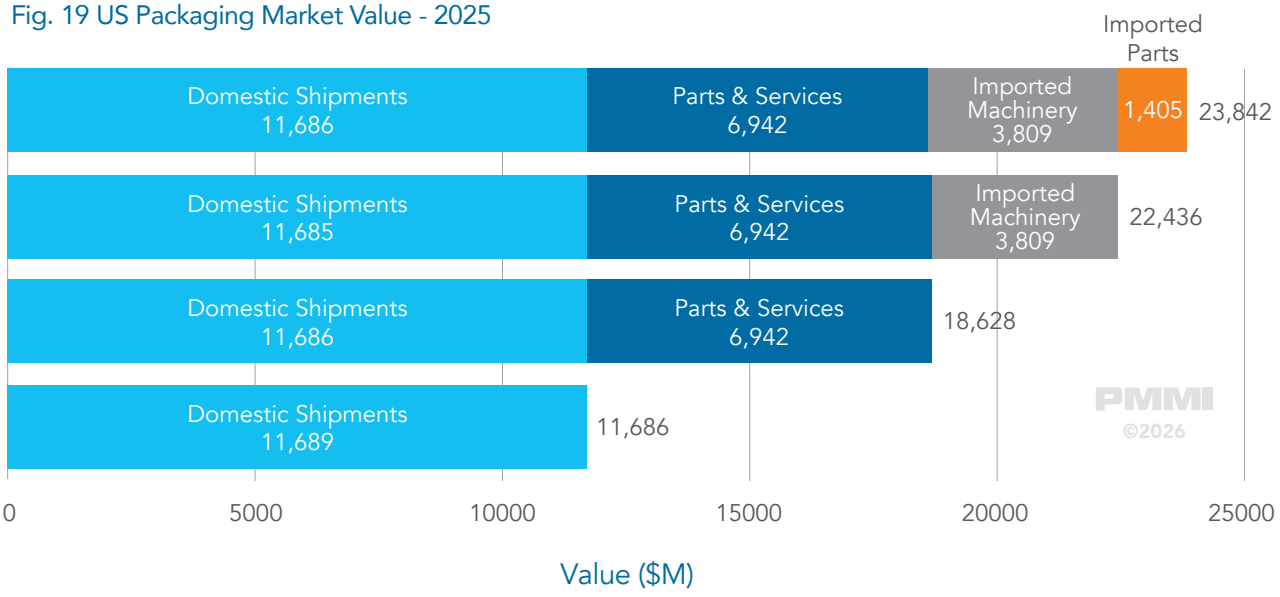


TOTAL US MARKET

Domestic, parts & services, and imports

The total US market nearly doubles, building from ~$11.7B in domestic shipments to ~$23.8B as parts, services, and imports are added.

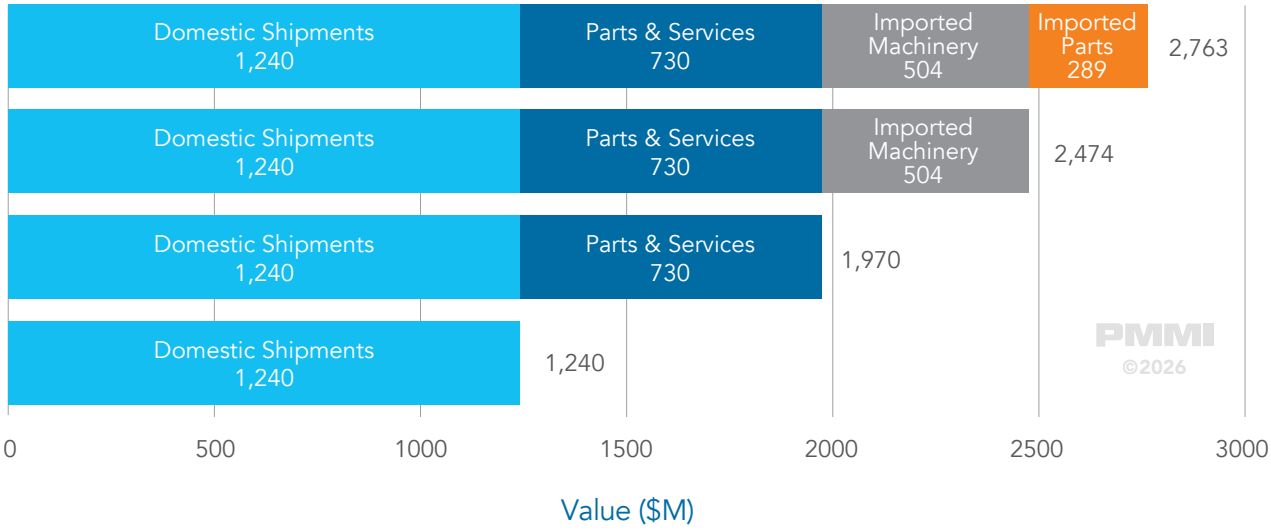
Fig. 19 US Packaging Market Value - 2025



TOTAL CANADA MARKET

Domestic, parts & services, and imports

Fig. 20 Canada Packaging Market Value - 2025



DISTRIBUTION CHANNELS

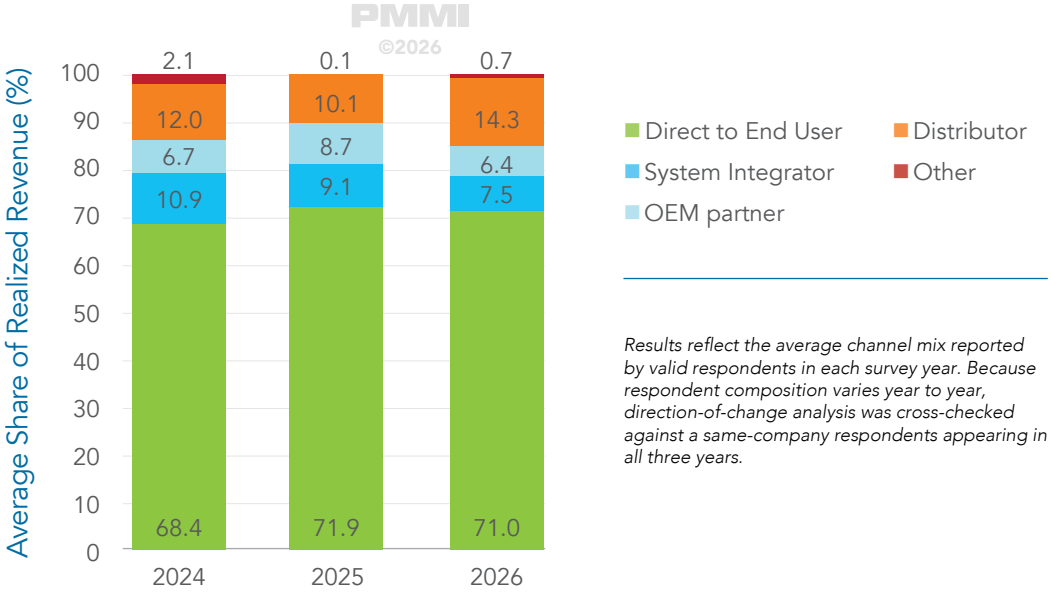
Direct to end user remains preference

When investigating distribution channels used by packaging machinery OEMs, it becomes clear that direct-to-end-user sales remain both the most common and the most preferred route to market. As can be seen in Figure 21, survey data over the past three years indicates that there has been little structural change in this channel mix, with direct sales consistently accounting for the majority of revenue across respondents. This stability is reinforced by what we are hearing qualitatively, where companies repeatedly describe direct engagement as the foundation of their commercial strategy and the primary way they interact with customers.

In interviews, OEMs emphasized the advantages of selling direct, particularly around control and clarity. Several companies described intentionally moving away from third-party representatives and toward internal sales teams, citing issues with capability, alignment, and consistency in external channels. One interviewee noted a shift over the past decade toward a more direct model after finding that manufacturers' representatives were no longer effective, ultimately replacing them with a dedicated field sales team that could better manage relationships and drive opportunities. Others highlighted that direct engagement allows for tighter control over pricing, messaging, and solution development, reducing the risk of miscommunication or losing influence during the sales process.

Outside of direct sales, system integrators and other indirect channels continue to play a role, though typically in a more situational capacity. Integrators are often involved in larger or more complex projects where full-line solutions are required, and in some cases they maintain preferred vendor relationships that influence equipment selection. However, OEMs expressed mixed sentiment toward these partnerships, noting that integrators can introduce pricing pressure through markups or by presenting multiple competing suppliers to the end customer. Distributor channels show even more variability and, in some cases, decline, with companies reporting reduced reliance or weaker performance through traditional partners. Where they do remain, these channels are often specialized or embedded in specific arrangements, such as material suppliers bundling equipment into broader solutions. Overall, while indirect channels persist, they are most often used to complement direct sales rather than replace them.

Fig. 21 Revenue by Sales Channel, 2024–2026



Results reflect the average channel mix reported by valid respondents in each survey year. Because respondent composition varies year to year, direction-of-change analysis was cross-checked against a same-company respondents appearing in all three years.

TREND OVERVIEW

Table 4 - Key trends shaping the packaging machinery market

Trend	Summary	Impact through 2031
Shifting Buyer Behavior	Faster expectations, less hands-on engagement, group decision-making, and price sensitivity are lengthening and complicating sales cycles.	Medium
Product Virality	Social-media-driven demand spikes accelerate SKU and variety-pack growth, raising the need for fast changeovers and flexible lines.	Medium
Big Data & AI	Early use cases span knowledge capture, specification development, troubleshooting, and content generation, augmenting rather than replacing expertise.	High
Used Machinery & Asset Preservation	A limited secondary market keeps focus on retrofits, preventative maintenance, and lifecycle extension to preserve capital amid uncertainty.	Low
OBBB: Accelerated Depreciation	The One Big Beautiful Bill has allowed for some suppliers to use as a selling lever as machinery can be depreciated 100% in the first year.	Low
Carbon Emission Goals by Major Players	Major consumer-goods firms' public commitments are reshaping packaging formats and material choices, even as economics increasingly drive decisions.	Low
US Regulatory Landscape	Extended Producer Responsibility (EPR), single-use plastic bans, and recycled-content rules concentrated in a few states set a *de facto* national standard, fueling demand for flexible, modular machinery.	High
Rising Cost of Gas	Rising petroleum-based input costs are driving a "use less" strategy, optimizing film, strapping, and corrugate across primary, secondary, and tertiary packaging.	Medium

Source: Interact Analysis

7

Appendix

RISKS ASSOCIATED WITH FORECAST

While the underlying fundamentals of the packaging market remain relatively stable, the outlook is increasingly shaped by external factors, particularly around policy direction and the broader macroeconomic environment. Over the past two years, industry participants have repeatedly highlighted that it is not just economic conditions themselves that influence investment decisions, but the speed and unpredictability with which they can change.

One of the most frequently cited risks is the evolving US policy landscape. Trade policy has become a key source of disruption. Interviewees described an environment where tariffs and regulatory decisions can be introduced or adjusted rapidly, often with little advance notice. This has made it difficult for companies to plan long-term investments, especially those with global supply chains. In several cases, businesses noted that policy changes were implemented quickly enough to force immediate reassessment of cost structures and sourcing strategies, creating a "pause and reassess" dynamic across the market.

This unpredictability is especially important for capital equipment demand. Even when underlying demand remains intact, sudden policy shifts can delay project timelines as companies wait for clarity. As a result, the risk is less about a permanent reduction in demand and more about timing disruptions, where orders are pushed out rather than cancelled entirely. However, if uncertainty persists, these delays can accumulate and weigh on short-term growth.

In parallel, monetary policy presents an additional layer of risk. While expectations had previously pointed toward easing financial conditions, uncertainty around the future direction of interest rates has increased. Changes in Federal Reserve leadership and evolving inflation dynamics have introduced new questions about whether rates could remain elevated or begin rising again. For equipment buyers, borrowing costs are a critical factor in investment decisions. Higher or more volatile interest rates can reduce the attractiveness of large capital expenditures, particularly for small and mid-sized firms.

Taken together, these factors create an environment where confidence becomes as important as fundamentals. The past several years have demonstrated that even in relatively stable demand conditions, uncertainty alone can slow decision-making. As a result, the primary risk to the forecast is not necessarily a sharp downturn, but rather a more cautious investment environment where projects are delayed, scaled back, or staged over longer timelines.

RESEARCH METHODOLOGY

Sources utilized in state of the industry report

Our research relies heavily on primary sources of information. For this report, these sources were as follows:



PMMI Membership Supplier Survey



20+ Interviews With Packaging Machinery Suppliers



Attending Industry Tradeshows

These sources were used to achieve the following:

1. Determine market size for 2025 through a bottom up counting of revenues
2. Uncover sentiment relating to growth during 2025/2026
3. Understand challenges and opportunities facing packaging machinery suppliers
4. Determine relative share of machine types by industry
5. Understand long term drivers of growth

Secondary Data Sets Used in Modelling Process:

US Census

The US Census provides robust data on the performance of manufacturing by various industry sectors. This data was relied upon heavily to determine the relative size of end-verticals. It was also used to provide historic perspective for how packaging machinery production has performed, and its relationship with machinery production.

Federal Reserve Economic Database (FRED)

Our macroeconomic commentary relies heavily on information provided by the federal reserve. The FRED provides information relating to inflation, interest rates, supply chain pressures, amongst much more. We've utilized these historic datasets to help determine the impact macroeconomic movement has on the sale of packaging machinery.

US Bureau of Labor Statistics

We relied on the US Bureau of Labor Statistics for information relating to employment of service technicians and utilized it to provide context for the workforce shortage discussion.

Processing Machinery Supplier Websites

Websites from public packaging machine suppliers are utilized to gain historic perspective of growth and to better understand the drivers of growth. Investor relation reports are utilized heavily for this purpose.

The Manufacturing Industry Output Tracker

An internal dataset managed by Interact Analysis, the manufacturing industry output tracker looks at growth of manufacturing and machinery production to aid in forecasting the market by industry and machine type.

Sources utilized in state of the industry report

Our methodology follows a multi-phase approach, with a strong emphasis on bottom-up market sizing. The foundation of this approach is the use of reported data rather than purely modeled estimates, with the goal of grounding market sizing in actual supplier inputs wherever possible. As the research evolves, we continue to expand and refine the data collected to strengthen this approach.

Market size estimates at the total market and industry levels are supported by consistent reporting across the supplier base. At the individual machine-type level, survey results have remained stable over recent editions and cover each major machine category. These results are further validated through supplier interviews to confirm alignment and support targeted refinements where needed.

We expect the level of detail and accuracy at the machine-type level to continue improving as additional historical data is collected and reporting consistency increases across the supplier base. Feedback remains an important component of this process, and insights gathered through each edition are incorporated to refine subsequent analyses.

Issue Survey & Analyze Results	For this edition, the annual survey continued to capture revenue from machinery and parts, with refinements to how individual machine-type revenue is collected to improve accuracy at a more granular level. Upon receiving survey responses, results were reviewed and analyzed to assess differences across editions and identify any material changes in reporting. Reported values were validated through discussions with suppliers and cross-checked against industry knowledge, with adjustments made where necessary to correct for misclassification or inconsistencies in machine-type reporting.
Interviews + Desk Research	In conjunction with the survey data, interviews were conducted with suppliers to better understand the factors influencing reported figures and broader market dynamics. These discussions focused on key trends impacting packaging machinery and the drivers underlying growth patterns. Additional desk research was conducted to further evaluate and contextualize the trends identified through both survey responses and interviews.
Create Base Year Model	A market size database is developed using supplier reporting, supplemented by estimates derived from secondary research where required. The market is then segmented by industry and machine type using a combination of survey data, interview insights, and prior research.
Build Forecast & Final Output	A forecast is derived from underlying manufacturing growth of key sectors. This growth is leveraged up or down to account for packaging machine usage by machine type. This forecast is iterated upon in collaboration with interviewees and other analysts within Interact Analysis. A final output is created based on interview notes, secondary data, and the dataset produced through primary sources.

Segmentation for Processing Market Size and Forecasts

Level 1

BY COUNTRY – United States, Canada

Level 2

BY MACHINE TYPE

- Bagging, Pouching & Wrapping Equipment
- Cartoning, Multipacking & Case Packing
- Coding, Labeling, Printing, & Reading Equipment
- Conveying, Feeding & Handling
- Filling, Capping & Closing
- Inspection & Testing Equipment
- Palletizing & Load Stabilization
- Specialty Equipment
- Tray, Clamshell & Blister Packaging Equipment

BY INDUSTRY

- Food
- Beverage
- Pharmaceuticals
- Personal Care, Toiletries, Cosmetics
- Household, Industrial, Agricultural Chemicals
- Other

Data was collected and presented in terms of total shipments for the calendar year 2025, represented in terms of US dollars. A forecast for the years 2026 through 2031 is also presented.

All data is presented in terms of US Dollars

Segmentation for Processing Market Size and Forecasts

Level 3

Bagging, Pouching & Wrapping Equipment

- Form/Fill/Seal, Horizontal
- Form/Fill/Seal, Vertical
- Form/Fill/Seal, Other
- Pre-made Bag Loading & Sealing
- Wrapping Equipment

Cartoning, Multipacking & Case Packing

- Cartoning Equipment
- Multipacking Equipment
- Case or Tray Erect/Load/Seal (Integrated)
- Case or Tray Erectors & Formers
- Case or Tray Loaders
- Case Sealers
- Case Packing Equipment, Other

Coding, Labeling, Printing, & Reading Equipment

- Coding & Marking, Ink Jet
- Coding & Marking, Laser
- Coding & Marking, Other
- Labeling Machines
- Standalone Printers

Conveying, Feeding & Handling

- Accumulators
- Conveyors, Infeed & Discharge
- Conveyors, Modular
- Conveyors, Roller
- Conveyors, Tabletop
- Conveyors, Other
- Product & Package Handling
- Feeding & Inserting Equipment

Filling, Capping & Closing

- Liquid Fillers, Piston Fillers
- Liquid Fillers, Gravity Fillers
- Liquid Fillers, Pressure Fillers
- Liquid Fillers, Net Weight Fillers
- Liquid Fillers, Others
- Dry Fillers, Net Weight Fillers
- Dry Fillers, Others
- Cappers
- Rigid container closing equipment

Inspection & Testing Equipment

- Package & Material Testing Equipment
- Packaging Inspection Equipment
- Process Inspection Equipment
- QA Lab

Palletizing & Load Stabilization

- Palletizing, Pallet Conveying, Dispensers & Slip Sheets
- Load Stabilization
- Depalletizing

Specialty Equipment

- Specialty Equipment

Tray, Clamshell & Blister Packaging Equipment

- Thermoform/Fill/Seal Equipment
- Pre-made Tray/Cup/Bowl Packaging Equipment
- Blister & Clamshell Packaging Equipment

Market figures and forecasts are presented by industry in the full dataset. An interactive **dashboard** of the full dataset is included separately from the written report to provide PMMI members the ability to interrogate the data based on their specific needs.

DEFINITIONS OF MACHINERY CATEGORIES

Machine Types Included in Scope

Bagging, Pouching & Wrapping Equipment:

Liquid and dry fillers that deposit product into flexible bags and pouches, including form/fill/seal machines and equipment for filling premade bags. Also includes wrapping equipment for individual products, such as shrink wrappers and flow wrappers.

Wrapping Equipment: Machinery that envelops a product and sometimes a primary package with a thin plastic or paper layer.

Flow Wrappers
Flow wrappers are a specialized type of horizontal form/fill/seal (hf/f/s) machine that features a film reel mounted above the operating level, whereby the product is loaded horizontally and a longitudinal seal is formed below the pack. Typical applications include wrapping individual candy or granola bars.

Overwrappers
Machinery that applies a layer of paper or plastic wrapping over a primary package or another form of packaging, often for cylindrical or cubical products, such as an overwrap for a sealed carton of perfume.

Shrink Wrappers & Heat Tunnels – Single Item
Equipment that shrinks thermoplastic film tightly around the surface of an individual product or group of products, where the shrink is activated by heat.

Twist Wrappers
Also known as bunch wrappers, twist wrappers cut and wrap pieces of film via a twisting mechanism, usually around small, individual products such as candies.

Cartoning, Multipacking & Case Packing:

Machines that erect, form, load and close paperboard cartons as well as those who make case erectors, packers and sealers, as well as equipment that packs primary containers into corrugated trays. Also in this category is a wide range of multipacking equipment from shrink bundlers and carrier equipment, sleevers and banders and related machines that package individual items together.

Cartoning Equipment: Cartoning equipment is defined as machinery that forms cartons as primary packages from flat blanks, including several related functions including erecting, folding, closing, side seaming and sealing of cartons.

Carton Erectors/Formers
Equipment that forms cartons by erecting and forming flat blanks into a primary package.

Carton Sealers
Equipment that closes and seals carton flaps into a finished primary package after the carton has been loaded with product.

Carton Erect/Load/Seal (Integrated)
Machines that perform the cartoning functions of erecting, closing, folding, side seaming, and sealing, on a single machine.

Gabletop Cartoning Equipment
Any cartoning machine that performs a variety of functions specific to gabletop cartons, including forming, folding, and sealing.

Carton Loaders
Equipment that places product into cartons.

Sleevers
A wide variety of machines that apply a sleeve, typically made of paperboard or corrugated or other materials, around a single item or package.

Cartoning, Multipacking & Case Packing

Multipacking Equipment: A wide range of equipment that consolidates multiple items for single sale (such as cans of soup on a shrink-wrapped tray) or groups separate packages sold together as a single stock keeping unit (two water bottles shrink bundled together.)

Sleevers – Multiple Items
A wide variety of machines that apply a sleeve, typically made of paperboard or corrugated or other materials, around multiple products or packages.

Tray Formers
Equipment that forms (but does not load products onto) durable, corrugated trays used to ship multiple items from a packaging operation, such as machines that form trays used to ship 20 cans of soup.

Handle/Carrier Applicators
Machinery that erects any type of packaging carrier apparatus, such as equipment that applies plastic carriers onto six-packs of beer cans or machines that erect paperboard flats into six-pack carrying cases for glass bottles of soda.

Banders, Strapping and Tying Equipment
Equipment that applies a plastic or paper-based strip around a product.

Shrink Wrappers & Heat Tunnels – Multiple Items
Equipment, also known shrink bundlers, that wraps two or more single packages in film that is then passed through a shrink tunnel to form a tightly bound single unit for sale.

Custom Engineered Multipacking Equipment
Any custom engineered equipment, built per specification for specialized applications and not part of a supplier's standard product line, that is designed to consolidate multiple items or group separate packages together for single sale.

Cartoning, Multipacking & Case Packing

Case or Tray Erect/Load/Seal (Integrated): Machines that form, fill or load, and seal a case or tray on a single machine in a continuous operation.

Case or Tray Erectors & Formers: Equipment that assembles and readies paper-based cases and trays on a packaging line for later product filling or loading processes.

Case or Tray Loaders: Equipment that places primary packages into shipping trays.

Case Sealers: Machinery that closes flaps of a case before sealing it using tape or other adhesives.

Case Packing Equipment, Other: This does not include cartoning equipment, multipacking equipment, case or tray erectors & formers, case or tray loaders, and case sealers. This would include polybag case liner equipment and pad/partition inserters/dispensers.

Coding, Labeling, Printing, & Reading Equipment:

Equipment for printing, stamping, and marking packages with graphics and codes and for applying labels, from ink jet coders and tabletop printers to pressure-sensitive labelers.

Coding & Marking, Ink Jet: Coders that use liquid ink and spray it onto a package or product in a controlled pattern to create/add text and/or graphics.

Coding & Marking, Laser: Machines that emit laser beams to produce codes text, and/or graphics in a controlled pattern directly onto a container.

Coding & Marking, Other: This does not include ink jet and laser coding & marking types. This includes thermal transfer coders and stamping machines (hot or cold).

Labeling Machines: Labeling machines apply preprinted or blank labels, stickers to packages, as well as perform shrink sleeve labeling. Also includes specialty labeling equipment like RFID applicators or electronic article surveillance (EAS) technology applicators.as candies.

Printer/Applicators
Printer/applicators, also known as print-and-apply labeling systems, combine the functions of label printing and dispensing into a single machine and can be used in a wide variety of applications, from barcode label printing to stickers and warning labels.

Pressure-Sensitive Label Applicators
Labeling machines that apply light pressure to labels coated with an adhesive backing on one side to separate the label from the face stock before adhering it to the package.

Roll-fed Labelers
Machines that remove a continuous roll of labels and separates and applies labels onto a container or package that is rotated while going through the label application head.

Pre-Cut Label Applicators
Also known as cut-and-stack labelers, these machines run stacks of labels that have been die cut with incisions, separate the labels from the stack and apply them to containers or packages.

Standalone Printers
Dedicated printers for a wide variety of applications, such as machines that print peel-off barcode or shipping labels or direct coding of shipping cases in an offline application, as opposed to printing codes on containers on the packaging line.

Filling, Capping & Closing:

ipment that fills liquid and dry product into containers such as bottles, cans, and other rigid plastic containers, as well as flexible packaging. The category also covers a range of equipment that seals or closes the package.

Liquid Fillers, Piston Fillers: Volumetric fillers that dispense products of various viscosities with a piston that draws liquid from a hopper and pushes it through a nozzle to fill a container.

Liquid Fillers, Gravity Fillers: Also called gravimetric fillers, these liquid filling machines dispense typically water-thin or low viscosity liquids from an upper chamber by dropping the product into a container, such as a bottle.

Liquid Fillers, Pressure Fillers: These liquid filling machines, also known as pressure gravity fillers, dispense higher viscosity liquids by placing pressure on the liquid through displacement pumps.

Liquid Fillers, Net Weight Fillers: Also called net weighers, these fillers use load cells beneath each filling station to dispense liquid products by exact tare weight in liquid filling operations.

Liquid Fillers, Others: This would not include piston fillers, gravity fillers, pressure fillers, or net weight fillers. For example, vacuum fillers, flow meter fillers, and aerosol & dispensing filling systems.

Vacuum Fillers
Used in applications for filling highly viscous and pasty products such as cream cheese or yogurt, these liquid filling machines use a rotary valve pump that creates a vacuum to suck product down into a chamber above the container.

Flow Meter Fillers
Flow meter filling machines dispense liquid products at rates determined by the product's flow characteristics through a valve above a container.

Aerosol & Dispensing Filling System
Machines that fill liquid substances into a container so that the substance can be released as a spray using an actuator that is mechanically primed or uses compressed gas as the propellant.heat seal pre-made, rigid blister packs for retail, such as equipment that seals blister packs of batteries with a hang hole.

Dry Fillers, Net Weight Fillers: This dry filling equipment, also called net weighers, loads cells beneath each filling station to dispense dry products by exact tare weight.

Dry Fillers, Others: This would not include net weight fillers. For example, auger fillers, piece counters, tablet counters, combination scales, vibratory fillers, pocket fillers, and loss-in-weight fillers.

Auger Fillers – Auger fillers employ a rotating screw to dispense product through a tube for even, volumetric distribution, such as powdered milk or granulated sugar.

Piece Counters – Machinery that dispenses parts or pieces to precise specifications, such as a 50-count screw bag or box.

Tablet Counters – Often used in pharmaceutical and nutraceutical packaging operations, these counters dispense a set quantity of tablets into a container. Slat counters are part of this family of products.

Combination Scales – Also known as combination weighers and weigh scalers, this equipment uses multiple weighing heads that, during simultaneous filling, combine the total product weight in each head to determine that a specified weight has been reached before discharging to a container, such as on a potato chip bag line.

Vibratory Fillers – Equipment that vibrates to dispense small, dry or granular items whereby multiple lanes distribute products from a bulk hopper to a container to reach a specific weight or count, such as in peanut packaging applications.

Pocket Fillers – Volumetric fillers that are also known as cup fillers. This packaging machine dispenses dryproducts such as cat treats or nuts by moving products from a hopper to a defined-size chamber that drops products during filling.

Loss-In-Weight Fillers – Systems that measure how much product has been dispensed by detecting the reduction in weight of a scale-mounted hopper as product exits the hopper.

Cappers: Packaging equipment that feeds and applies caps or other closures to plastic or glass bottles on liquid filling lines.

Crown Cappers – Machines that crimp and apply metal crown seals (also known as crown corks) over the tops of bottles, such as in beer bottle capping.

Roll-on Cappers – Machinery that applies aluminum roll-on pilfer proof (ROPP) caps, such as aluminum caps for non-alcoholic sparkling grape juice, as a tamper-evident sealing feature.

Press-on Cappers – Specialized cappers that apply caps or closures that snap onto the mouth of a container, such as child-proof aspirin bottles. Also called push-on or snap-on capping machines.

Screw Cappers – Used to apply threaded plastic caps that are twisted down over the mouth of a container to a set torque, such as plastic capping for most soda bottles.

Overcappers – Packaging machinery that applies an outside cap over a container with a plug, pump, or other type of seal, such as a protective cap applied to a pump hairspray product.

Retorquers – Machines that tighten lug or screw cap closures into the body of a product after the closure has been placed over the open mouth, such as applications tightening a nozzle closure into the bottle of a plastic bottle of household cleaner.

Rigid container closing equipment: Equipment used to seal, lid, or otherwise close highly rigid containers for solids or liquids including processes such as crimping aerosol cans, applying pumps to plastic bottles, and sealing pails of paint.

Can Seaming Equipment – Machines that close a filled aluminum or other metal can by folding and pressing another metal piece over the opening thereby forming a leak-proof seal, such as seaming beer or cat food cans.

Corking Machines – Closing equipment used to seal glass bottles by inserting a cork into the top of the bottle in applications such as wine bottles.

Crimper – Used for applications such as perfume spray bottles, crimping machines apply caps or buttons that are joined to the main metal seal to add the functionality of releasing liquid products from the package when depressed.

Plug & Fitment Applicators – Packaging machinery that applies plugs and fitments to a container, such as vial plug in a liquid pharmaceutical operation.

Pump Applicators – Also known as pump placers, these closing machines place a dispensing pump or spout onto the mouth of a rigid container, such as in window cleaner bottles. Pump sorters are also included here.

Induction Sealers – Using an electromagnetic field, these rigid container sealers heat to apply inner foil seals, often as a tamper-evident feature for glass or plastic bottles before they are overcapped.

Inspection & Testing Equipment

Package integrity testing equipment used for quality and safety applications (metal detectors, fill level inspectors) as well as other equipment to analyze materials, test product attributes and log data.

Package & Material Testing Equipment: Any equipment or device that tests the quality, integrity and performance of a packaging container or material.

Analyzers – Devices and equipment that measure attributes of packaging materials to optimize shelf life performance, such as the permeability of oxygen and carbon dioxide gasses and moisture. Includes modified atmosphere packaging (MAP) headspace gas analyzers, permeation analyzers, hydrocarbon analyzers, moisture analyzers and related products.

Packaging Material Testing – A broad range of equipment that focuses on analyzing packaging material substrates, especially paper and film, for attributes such as color, opacity, material strength, heat-seal quality and performance.

Coatings and Thickness Testing – Any specialized testing and analytical equipment or device used to measure micro-level material thickness and coatings on packaging or substrates.

Packaging Inspection Equipment: A wide range of equipment to measure packages, detect anomalies in package integrity as part of a quality control or safety process, or otherwise test machinery on a packaging line.

Checkweighers – Machines that weigh the amount of a package to verify its weight is within designated limits, such as a checkweigher for cases.

Metal Detectors – Machines that inspect packaging for metallic foreign matter.

X-Ray Systems – Machines that emit x-rays in a variety of applications to detect the presence of a foreign substance or object.

Vision Inspection Systems – Also known as machine vision (MV), vision inspection systems use cameras and other imaging technologies to detect defects.

Thermal Scanners – Infrared and other thermal scanners that measure heat emitted from an area of a package, often used to detect seal integrity of heat-sealed packages and containers.

Package Integrity Testing – A wide range of equipment and systems used to test packaging integrity properties including test compression, seal integrity, and leaks.

Fill Level Inspection – Quality control systems that use cameras and other devices to detect uniform fill level.

Cap Torque Testing – Inspection equipment used on bottling lines to test the torque of a screw cap to define machine tolerances so the capping equipment can be properly calibrated to avoid destruction of bottles during the operation.

Process Inspection Equipment: Testing and analytical equipment used specifically for food, beverage and other processing operations for product (as opposed to package) quality and safety.

Process Analyzers – Devices and equipment that measure and analyze product attributes or the chemical composition of products, such as the presence of fat, sugar, and proteins in a food, beverage or other processed product. Includes inline and lab devices such as densitometers, viscometers, colorimeters, product moisture analyzers, spectrometers, sulfur analyzers, pH analyzers, sodium detection systems, water treatment analyzers, chloride detectors, chlorine analyzers, and related flow, density and level instruments.

Data Loggers – Devices that store data on a processing line, tracking process data, environmental factors such as humidity or other data on processing operation.

QA Lab: Companies that sell equipment or consumables related to quality assurance (QA) and packaging integrity testing.

Lab Infrastructure – Labs that offer services related to establishing, managing or maintaining controls, predictive analysis practices, processes and procedures that help ensure product quality and safety.

Lab Equipment – Highly specialized nonindustrial lab equipment used by quality assurance (QA) labs for testing of seal integrity, coatings, air and gas presence, temperature, permeation, and other packaging or product attributes.

Lab Services – Third-party labs that offer testing and quality assurance to consumer-packaged goods companies and other packagers.

Lab Consumables – Any lab accessory or consumable product used by quality assurance (QA) and other labs for testing of products and packages, such as, test tubes or chemicals used during testing.

Palletizing & Load Stabilization

Mechanical or robotic systems that loads and unloads pallets or stabilizes them from stretch wrappers and palletizers to pallet conveyors and depalletizing systems. Also included here are related supplies, such as pallets and slip sheets.

Pallet Conveying, Dispensers & Slip Sheets: Tools, accessories and systems for augmenting pallets with extra stability or for moving pallets around a facility after the pallet has been loaded and stabilized.

Pallets & Slip Sheets

Pallets are flat structures that support bulk products, shipping cases, and other bulk goods that come in plastic, wood, stainless steel, aluminum, and other varieties. Slip sheets are flexible thin sheets made of fiber, plastic or corrugated material that support finished products such as shipping cases or multipacks that are collected by forklifts with push/pull mechanisms, as an alternative to pallets.

Pallet Conveyors & Turntables

Pallet conveyors are specialized conveyors designed to transfer empty or finished pallets from a palletizing station to another station within a facility, such as a dock station or warehouse rack. Included here are related items for moving pallets such as skid carousel turntables that orient pallets into the desired direction on a conveyor.

Slip Sheet/ Top Sheet Handling

Equipment that helps load or otherwise handle slip sheets and top sheets such as push/pull mechanisms for slip sheets that are configured onto forklifts.

Pallet Inverters/Pallet Load Transfer Systems

Pallet inverters are designed to turn an entire pallet load in various directions (upside down, sideways, etc.), enabling a damaged case at the bottom or side of the pallet to be easily removed without having to unstack a pallet manually. Pallet elevators are used to lift or lower pallets, often within a warehouse of a facility.

Pallet Dispensers & Elevators

Machines that raise or lower pallets from a stack to ready them for a manual or automatic palletizing operation.

Load Stabilization: Any machinery, systems, or accessories used to secure and stabilize a pallet while it is being loaded, or in later distribution or storage.

Stretch Wrappers

Semi-automatic and automatic machines that wrap highly elastic plastic film around finished pallet loads to protect

and contain them during shipping and warehousing; includes rotary towers, turntable systems, orbital wrappers and other types of stretch wrapping systems.

Stretch Hooders
Machinery that vertically covers a pallet load from top to bottom with a hood of stretch film.

Load Stabilization Adhesive Systems
Systems that apply non-destructive adhesives to individual cases or bags as they are loaded onto a pallet so that they grip the next layer above or below. Can be used as an alternative to stretch wrapping.

Strapping – Transport Packaging
Any machine or manual tool that wraps and seals one or more plastic or metal straps around a load pallet to secure and stabilize it, ranging from manual strapping tensioners to automatic machines.

Corner Post & Edge Applicators
Corner posts, corner boards, edge protectors and related protective material and systems that provide corner protection and load stabilization to pallet loads during shipment and storage.

Depalletizing: Equipment that unloads empty containers such as glass or plastic bottles to be filled from a pallet onto a packaging line.

Depalletizers (Mechanical) – Mechanical or conventional depalletizing systems unload containers from a pallet onto a conveyor that feeds a packaging line without the use of robotics.

Depalletizers (Robotic) – Robotic depalletizers unload containers from a pallet onto a conveyor using robotic arms.

Depalletizers (Magnetic) – Depalletizing systems designed for unloading metal cans from a pallet onto a conveyor using a magnetic lift and release system.

Tray, Clamshell & Blister Packaging Equipment

Equipment that thermoforms, fills and seals rigid and semi-rigid blisters, premade bowls and trays, as well as machines that load and seal packages like trays, cups and clamshells.

Thermoform/Fill/Seal Equipment: Thermoform/fill/seal (TF/F/S) machines use heat and vacuum or pressure applied to continuous rolls of film to form rigid or semi-rigid containers of various shapes and sizes prior to filling, hermetically sealing and cutting them into individual units.

TF/F/S for Flexible and Semi-Rigid Film – Machines that heat and apply vacuum or pressure to continuous rolls of thermoformable film to form packages such as trays, cups, portion packs, and often their lids prior to filling, hermetically sealing and cutting the package.

TF/F/S for Tablet/Capsule Blister Packs – Machines that heat and apply vacuum or pressure to continuous rolls of nonrigid thermoformable film prior to filling and hermetically sealing small blister packs, such as in pharmaceutical or nutraceutical capsule applications.

Pre-made Tray/Cup/Bowl Packaging Equipment: Machines that handle, load, fill, and seal containers such as trays, blister packs, cups and bowls that have been manufactured offline on a separate operation.

Product Loading into Trays, Cups & Bowls – Machines dedicated to depositing products, often dry foods such as cookies, into individual, pre-made trays that have been formed in a separate operation.

Tray, Cup & Bowl Sealing – Equipment that takes a pre-made rigid container including a tray, cup, or bowl and seals the container using paper, plastic lid stock, foil, or other material, such as sealing of cups of ramen.

Denest/Fill/Seal (Integrated) – A monobloc machine that performs three main functions for rigid trays, cups, and bowls in a single, continuous operation: denesting or separating pre-made containers and dropping them as individual units onto a conveying device, filling the containers, and then sealing the containers.

Blister & Clamshell Packaging Equipment: Machines that load products into pre-made, highly rigid containers as individual packages and then seal the container.

Clamshell Closing & Welding Equipment – Machines that seal or close pre-made clamshell packages by pressing the lid down onto the bottom of the clamshell or using heat sealing technology to seal the lid onto the bottom of the clamshell, such as closing an individual portion pack of salad.

Blister Sealing Equipment (Retail Packs) – Machines that heat seal pre-made, rigid blister packs for retail, such as equipment that seals blister packs of batteries with a hang hole.

Clamshell & Blister Loading Equipment – Machinery dedicated solely to depositing or placing of wet or dry products into a pre-made clamshell or blister package.

Skin Packaging Equipment – Skin Packaging Equipment: A specialized type of vacuum packaging machine for non-food applications that draws air out of a plastic sheet to form a tight mold around the product, often with a retail card backing such as skin packaging for a hand tool for retail.

Custom Engineered Blister & Clamshell Packaging Equipment – Any custom engineered equipment, built per specification for specialized applications and not part of a supplier's standard product line, that is designed to load and seal pre-made blister and clamshell packages.

Conveying, Feeding & Handling

Machinery and accessories for moving products and packages through a line, from conveyors, accumulators and lane dividers to vibratory feeders, unscrambling equipment and pick-and-place equipment.

Accumulators: Devices that are used to buffer, accumulate and offload containers, package components and packages between machines or stages in a production operation.

Accumulation Tables – Devices that accumulate and offload containers and packages on a single, often horizontal level, such as a bi-directional accumulation table for aluminum cans.

Rotary Accumulators – Also known as turntable accumulators, these buffering machines store containers or packages on a flat rotating disk, for example, filled pharmaceutical vials.

Spiral/Helical Accumulators – Buffering system that accumulates and conveys containers or packages by elevating them in a spiral or helical formation above the line, as an example, buffering containers on high-volume bottle filling line.

Vertical Accumulators – A buffering system that aligns horizontal rows of containers or packages through indexing and then elevates the indexed rows in a vertical fashion as a stack, often used for high-volume lines.

Conveyors, Infeed & Discharge: Infeed and discharge conveyors move containers and packages into or out of a packaging machine. Often specific timing or back-pressure considerations apply to these conveyors.

Conveyors, Modular: Modular conveyors, also known as modular belt conveyors, consist of attachable modules, often of plastic, that can be quickly linked together via joint rods and pins for quick reconfiguration on a conveying line as needed.

Conveyors, Roller: Lineshaft or roller conveyors feature cylindrical rollers that move primary cartons or secondary packaging such as cases, through a production line.

Conveyors, Tabletop: Any flat conveyor system in a variety of formats and sizes that runs products horizontally, usually on a belt or belted system.

Conveyors, Other: This does not include accumulators, infeed & discharge, modular, roller, and tabletop conveyors. This includes, bucket, incline, cable, flighted, magnetic, screw, vibratory, and air/vacuum tabletop style conveyors, conveyor components and accessories, and guides, rails & adjustment systems.

Product & Package Handling: Systems related to handling products as well as empty or filled primary containers; often combined with conveyors or feeding equipment for specific handling functions.

Lane Dividers, Merge & Transfers – Also known as lane combiners and laners, these systems that sort, separate, merge or relocate outfed packages or containers, such as finished cases, often integrated into conveying operations.

Diverters & Rejects – Devices integrated with conveyors to remove, divert and stage for collection packages or containers considered rejects, such as unlabeled or otherwise defective items, or to otherwise separate products from a packaging line, such as in quality checks.

Elevators & Lowerators – Product and package handling equipment that raises or lowers containers or product from one elevation to another before feeding them into the next operation, such as elevators used for palletizing and depalletizing bottles.

Puck/Carrier Systems – Any equipment or packages or containers associated with the molded plastic or food grade stainless steel components that hold containers such as bottles, cans, and tube during conveyance through a line, including puckers, depuckers and the pucks themselves.

Timing Screws – Screws that help regulate the infeed of packages so they align with a later process, such as timing the infeed of a package into a packaging machine.

Denesters – Machines that unhinge and separate a stack of **–** containers, such as tray, clamshell and blister denesters, before placing them onto a conveyor, one by one, for a separate operation such as filling.

Stacking Machines – Machines that collect and stack products such as flat products and place them onto a pallet.

Tray/Crate Handling Machines – Any machinery associated with moving trays or crates, such as tray stackers.

Case Unloaders – Also known as decasers, this machinery is specifically dedicated to automatically unloading containers such as glass or plastic bottles from a reshipping case so that they are single file and upright for a later process.

Air/Vacuum Transport – Systems that use air or vacuum pressure to move and control empty containers that are suspended by their necks toward the neck of the container or bottle.

Dumpers & Bulk Unloading – Dumpers, tilts and other bulk unloaders used to discharge the contents of a material handling operation into another.

Tilters & Shakers – Also includes product settling conveyors, this equipment is used to vibrate the container so that the product inside settles or is more evenly distributed, such as shaking sticky ingredient powder in a bag.

Custom Engineered Product & Package Handling – Any custom engineered equipment, built per specification for specialized applications and not part of a supplier's standard product line, that is designed to handle empty or filled primary containers in conjunction with conveying and feeding equipment.

Feeding & Inserting Equipment: Packaging systems that sort, organize and insert packages or containers, usually associated with a filling operation.

Pick-and-Place – Automated systems that use robots that pick objects or products as part of a product or package handling operation.

Orienting/Unscrambling Machines – Machines that take containers and sometimes products and correctly orient or organize them prior to packaging, such as unscrambling and orienting empty plastic bottles into a single-file, mouth-up position before filling.

Placement/Feeder Systems – Placement or inserter machines and friction feeders that deposit items, such as product literature or desiccant sacks, into a package.

Hanger/Display Tab Applicators – Any machinery that applies a type of hanger to assist consumers in carrying a package, such as machines that attach a carry case plastic hanger for a two-gallon multipack of joined water jugs. Also, machines that apply hanger or display tab systems onto a package for retail display.

Protective Packaging Feeders – Systems for inserting protective packaging such as paper cushioning, rolls of corrugated wrap, or cellulose wadding into a package such as a shipping case.

Vibratory Feeders (Circular) – A feeding system usually for small or lightweight products such as screws that gently shakes and rotates materials or products inside a bowl to move them onto a narrow track to be counted and fed into a package, single-file.

Specialty Equipment

Suppliers of equipment and accessories for a highly specialized set of products, from air drying equipment, static eliminators and adhesive applicators to suppliers of machine replacement parts.

Adhesive Applicators – Equipment designed specifically to apply an adhesive during packaging formation and sealing of cartons, cases and related material, or adheres paper labels to cans, and related applications.

Static Eliminators – Ionizers that remove buildup of static electricity from webs and roll film during winding and related operations so that contaminants do not adhere to the film during the operation.

Corona Treaters – Machines that apply an electrical charge, typically to plastic film and cast extrusion lines during converting, to raise surface tension of the plastic substrate to prepare it for later processes such as printing and adhesive coating.

Air Drying Systems – Also known as air knives, these air-drying systems use high pressure to wick or remove moisture from containers, labels or other packaging components, such as after a container is rinsed, cleaned, or filled.

Container Cleaning & Sanitizing Machines – Machinery that removes or aids in removing foreign objects and contaminants from rigid and semi-rigid containers, usually immediately before or after a filling operation.

Assembly Machines – Machines that are engineered to assemble different packaging components together, such as fitment assembly machines for containers.

Third-Party Replacement Parts – Seal jaws, auger replacements, forming collars, knives for cutting film, capping chucks, web and rollstock cores, finwheels, change parts and more.

Product/Package Recovery Machines – Machines and systems that can extract defective, mispackaged or otherwise unsellable finished product prior to end-of-line operations.

Industrial Recycling Equipment – Covers a range of machines that prepare industrial waste within a plant for later use, such as balers, or machines that take spent materials and generate them into fuel within the plant, such as incinerators that use spent coffee grounds for energy.

Tape Dispensers – Devices or machines that dispense adhesive tape.

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