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# State of the Industry Report

EXECUTIVE SUMMARY

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**PMMI** The Association for Packaging and Processing Technologies

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**Publication Date:** August 2025

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## How To Use This Report

This report provides a high-level view of the U.S. packaging machinery market. It is designed to help PMMI members, OEMs, and industry stakeholders understand overall market performance, key trends, and the projected outlook by industry and major machine categories.

What the Report Covers:

- Total shipment values and growth forecasts for the U.S. market
- Breakdowns by major industries (e.g., Food, Beverage, Pharmaceutical, Personal Care)
- Shipment values by primary machine categories
- Market drivers and demand signals influencing investment decisions
- High-level shipment estimates for Canada

For more granular data—including sub-machine breakouts and industry-specific filters—PMMI members can access the interactive **State of the Industry Dashboard** at: [pmmi.org/content/soti-dashboard](https://pmmi.org/content/soti-dashboard)

## 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](https://pmmi.org/content/soti-dashboard)



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# Executive Summary

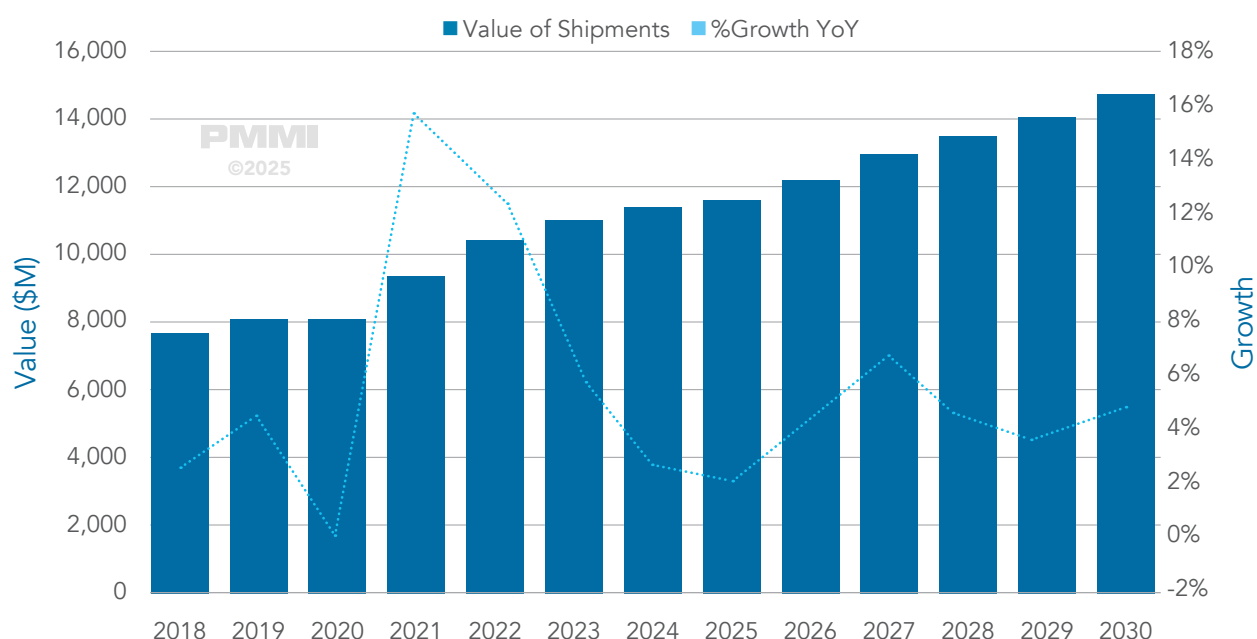
## SUMMARY OF THE US PACKAGING MACHINERY INDUSTRY



In 2024, US Packaging Machinery sales reached

**\$11.3bn**

Fig. 1 US Packaging Machinery Forecast: Value of Shipments & % Growth YoY



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

## Uncertainty Continues to Slow Growth

Growth in 2024 was slower than in previous years, largely due to persistent economic uncertainty. As interest rates remained high, many companies delayed placing orders. In the second half of the year, the Federal Reserve announced an interest rate reduction, which led to a modest uptick in activity. Additionally, as the U.S. election approached and talk of tariffs gained traction, some companies rushed to place orders ahead of potential policy changes. Still, overall uncertainty weighed on the market, resulting in a growth rate of 2.7% over 2023.

Heading into 2025, many expected the “wait and see” mentality to ease. The Fed had signaled further rate cuts, and the election outcome was expected to bring additional clarity to the macroeconomic future. However, the first half of the year brought more turbulence than anticipated. Tariff announcements were issued, withdrawn, and reinstated across multiple countries, creating policy whiplash for manufacturers. Faced with these unpredictable trade conditions, many companies chose to pause capital investments in new machinery and equipment.

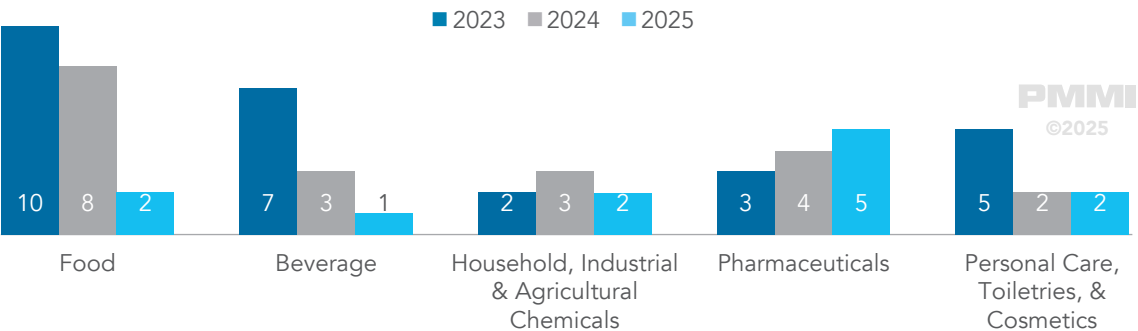
Looking to the second half of 2025, uncertainty is expected to persist. Equipment orders remain delayed or on hold as companies reassess their plans in this unstable environment. While a contraction is not expected, 2025 is projected to be a low-growth year, with a modest 2.2% increase over 2024.

## MARKET SECTOR OVERVIEW – END-USER SECTOR INVESTMENTS

### End Sector Investments Slow in 2024

Following a period of high growth in the post-pandemic era, investments in new facilities in 2024 continued but slowed compared to previous years. This slowdown is largely attributed to the sustained increase in interest rates affecting the US economy. As uncertainty persists into 2025, coupled with ongoing discussions about tariffs, we have observed a noticeable decline in major capital expenditures across various sectors. However, some key players have decided to establish new manufacturing plants in the US in response to these tariffs. We anticipate that this will lead to gradual and steady growth in the coming years as the construction of these facilities progresses towards completion.

Fig. 2 US Number of Plant Investment Announcements per End-User Sector (2023-2025)



Source: Interact Analysis. Based on publicly available plant investment announcements from major U.S. end-user companies. Selected announcements are detailed in Tables 7–11.

## MARKET SECTOR OVERVIEW – INDUSTRY BREAKDOWN



### Food

The food industry continues to be the largest sector, making up 43.5% of the value of packaging machinery shipped in 2024. Plant investment activity in the food sector moderated slightly in 2024 compared to 2023, with just under \$200 million directed toward pet food alone. Major players such as Nestlé and Campbell Soup Co. announced more than \$575 million in combined investment across six facilities, reflecting a steady, if somewhat scaled-back, pace of expansion (see Table 7).



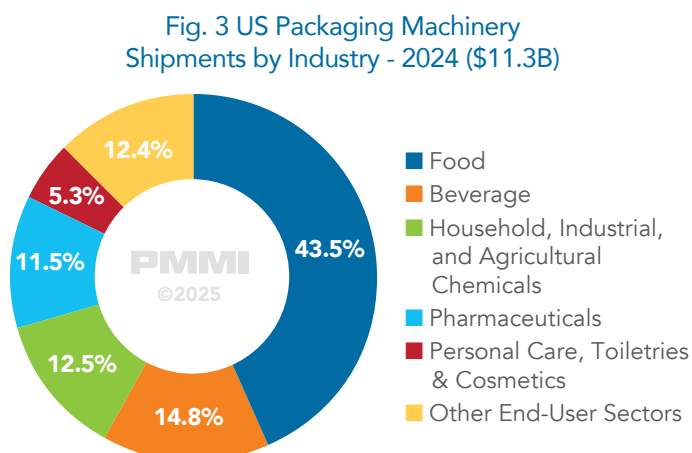
### Beverage

The second-largest end market at 15%, the beverage sector experienced a slight dip in large-scale investment activity in 2024, following a strong rebound in 2023. Construction remains underway on several multi-million-dollar facilities announced last year, and early indicators from 2025 point to renewed momentum. While investment has slowed, experimentation has not as brands continue testing new drink formats and shift away from plastic.



### Household, Industrial, & Agricultural Chemicals

The chemicals sector is expected to experience slow growth over the next couple of years, with a projected growth rate of 1.3% in the US for 2024 compared to 2023. Announcements regarding new developments remain limited in 2024, with the exception of Eastman Chemicals' \$1.3 billion expansion in Texas. We expect that the value of shipments in the US will reach \$1.7 billion by 2030.



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



# MARKET SECTOR OVERVIEW – INDUSTRY FORECAST



### Pharmaceuticals

In 2024, the pharmaceutical sector demonstrated a growth rate of 5.5%, matching the strong performance of the previous year and remaining the highest among all sectors in the U.S. There is a notable increase in plant investment announcements for 2025, with total investments exceeding \$100 billion as major companies commit to onshoring efforts in the United States likely as a result of the tariff policies.



### Personal Care

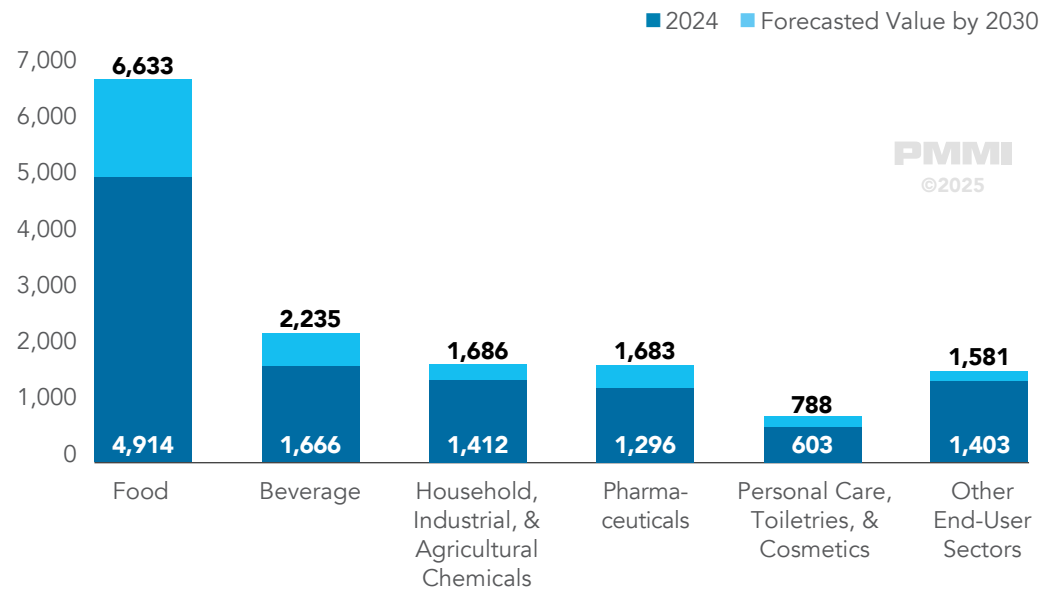
While personal care is the smallest of the end-user sectors by shipment value, it has still seen a handful of notable plant investment announcements in 2024 and 2025. One of the most significant is Johnson & Johnson’s commitment to invest \$55 billion in U.S. operations over the next four years. The total value of shipments for this sector is expected to reach \$788 million by 2030.



### Other End-User Sectors

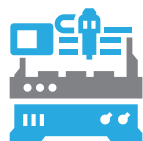
The other end-user sectors, which represent 12.4% of the market, is projected to see the slowest growth during the forecast period. This segment, which includes industries such as automotive and cannabis, is expected to reach nearly \$1.6 billion by 2030, reflecting a modest CAGR of 2.0% from 2024 to 2030.

Fig. 4 US Packaging Machinery - Value of Shipments by Industry Sectors - 2024 - 2030 (\$M)



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# SUMMARY OF THE CANADIAN PACKAGING MACHINERY INDUSTRY



In 2024, Canada  
Packaging Machinery  
sales reached

**\$1.2bn**

The value of packaging machinery sold in Canada reached an estimated \$1.2 billion in 2024, growing 3.1% despite the headwinds of persistently high interest rates, mirroring the economic challenges seen in the U.S. With financing conditions still tight and ongoing uncertainty related to U.S. tariff policy, machinery shipments are expected to remain relatively flat in 2025, with projected growth of just 0.8%.

Looking longer term, the value of machinery shipments in Canada is forecast to reach \$1.4 billion by 2030, reflecting a CAGR of 3.1% from 2023 to 2030. In 2024, Cartoning, multipacking, and case packing machines are projected to post the highest growth at 4.3%, followed closely by palletizing and load stabilization machines at 4.2%.

This growth is largely driven by demand for end-of-line automation, as Canadian manufacturers continue to grapple with the rising cost of human resources and persistent staffing shortages, trends that parallel those seen in the U.S. The push toward more sustainable packaging also plays a role: increased investment in cartoning equipment is being supported by Canada's bans on single-use plastics and new requirements around recyclability and packaging material content.

Fig. 5 Canada Packaging Machinery Shipments by Industry - 2024 (\$1.2B)

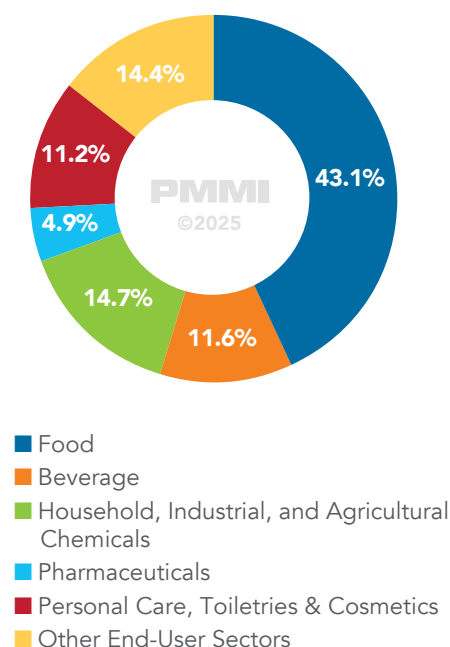
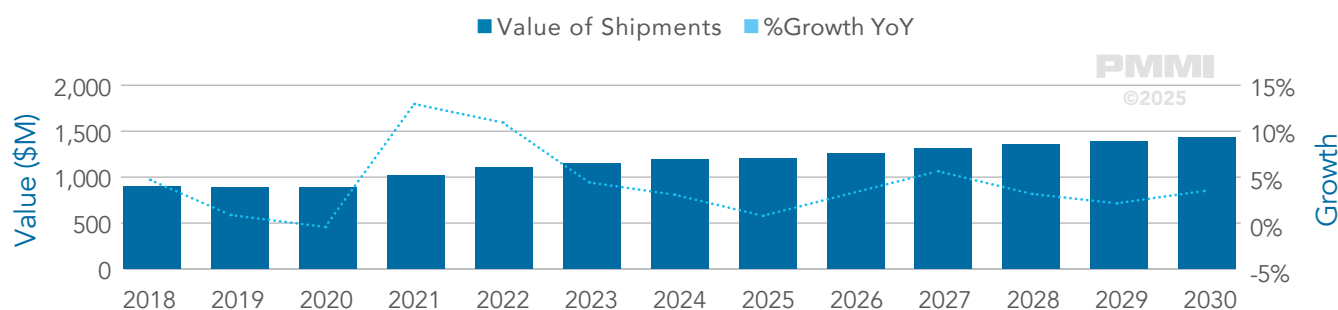


Fig. 6 Canada Packaging Machinery Forecast - Value of Shipments & % Growth YoY



PMMI members can visit <https://www.pmmi.org/content/soti-dashbaord> 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**

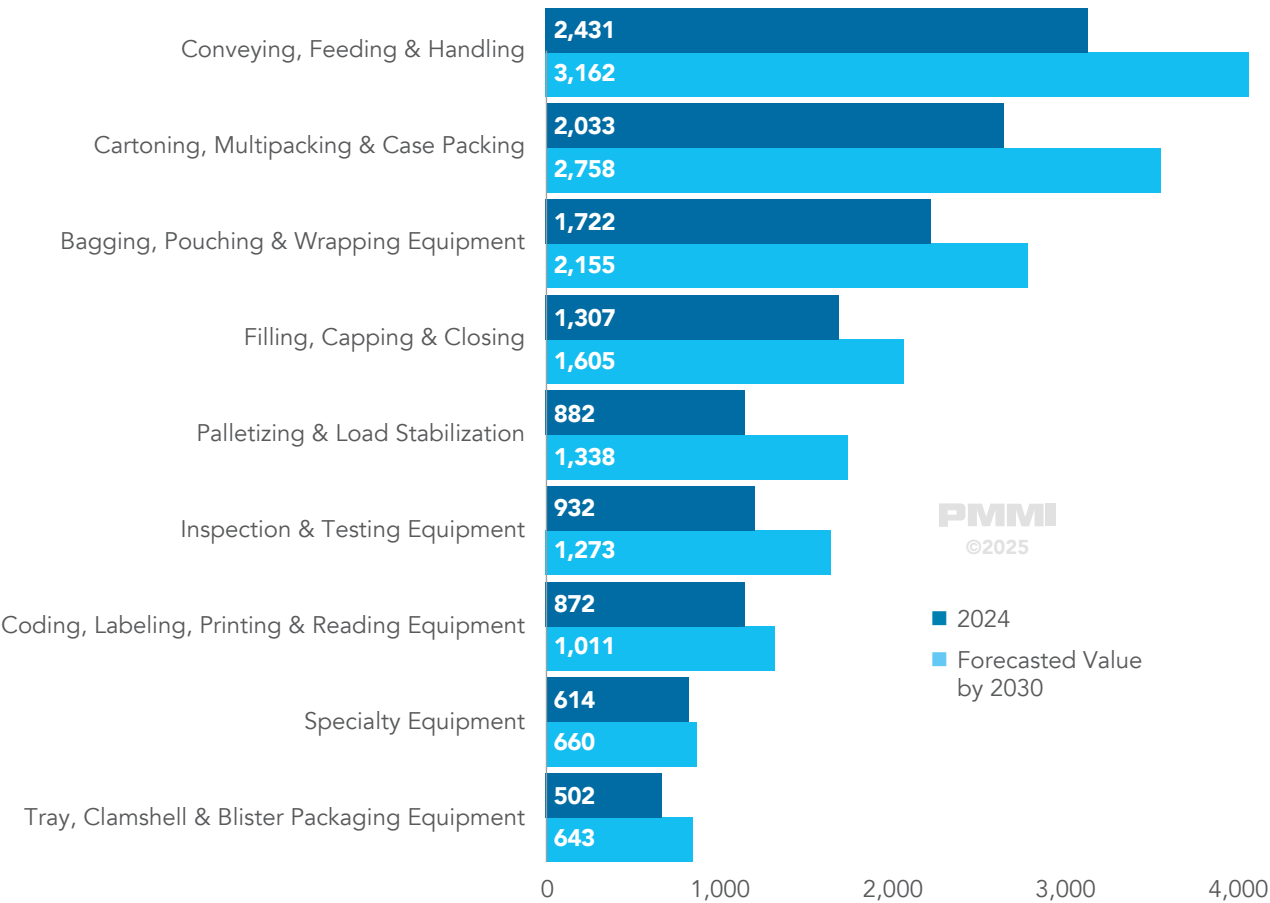
	2023	2024	2025	2026	2027	2028	2029	2030	CAGR
Food	<b>\$4,754</b>	<b>\$4,914</b>	<b>\$5,059</b>	<b>\$5,341</b>	<b>\$5,752</b>	<b>\$6,055</b>	<b>\$6,295</b>	<b>\$6,633</b>	4.9%
		3.4%	2.9%	5.6%	7.7%	5.3%	4.0%	5.4%	
Beverages	<b>\$1,627</b>	<b>\$1,666</b>	<b>\$1,714</b>	<b>\$1,806</b>	<b>\$1,937</b>	<b>\$2,030</b>	<b>\$2,111</b>	<b>\$2,235</b>	4.6%
		2.4%	2.9%	5.3%	7.3%	4.8%	4.0%	5.9%	
Household, Industrial & Agricultural Chemicals	<b>\$1,395</b>	<b>\$1,412</b>	<b>\$1,433</b>	<b>\$1,444</b>	<b>\$1,528</b>	<b>\$1,605</b>	<b>\$1,648</b>	<b>\$1,686</b>	2.7%
		1.3%	1.5%	0.8%	5.8%	5.0%	2.7%	2.3%	
Pharmaceuticals	<b>\$1,228</b>	<b>\$1,296</b>	<b>\$1,312</b>	<b>\$1,371</b>	<b>\$1,462</b>	<b>\$1,533</b>	<b>\$1,609</b>	<b>\$1,683</b>	4.6%
		5.5%	1.3%	4.5%	6.6%	4.8%	5.0%	4.6%	
Personal Care, Toiletries & Cosmetics	<b>\$584</b>	<b>\$603</b>	<b>\$608</b>	<b>\$639</b>	<b>\$689</b>	<b>\$724</b>	<b>\$749</b>	<b>\$788</b>	4.4%
		3.4%	0.8%	5.1%	7.7%	5.1%	3.5%	5.2%	
Other End-User Sectors	<b>\$1,404</b>	<b>\$1,403</b>	<b>\$1,414</b>	<b>\$1,441</b>	<b>\$1,497</b>	<b>\$1,514</b>	<b>\$1,538</b>	<b>\$1,581</b>	1.7%
		-0.1%	0.8%	1.9%	3.9%	1.1%	1.6%	2.7%	
<b>Grand total</b>	<b>\$10,993</b>	<b>\$11,294</b>	<b>\$11,540</b>	<b>12,041</b>	<b>\$12,866</b>	<b>\$13,461</b>	<b>\$13,950</b>	<b>\$14,606</b>	4.1%
		2.7%	2.2%	4.3%	6.8%	4.6%	3.6%	4.7%	

Source: Interact Analysis



# US MARKET SIZE AND FORECASTED MACHINERY GROWTH

Fig. 7 US Value of Shipments by Machine Categories - 2024 - 2030 (\$M)



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



### Conveying, Feeding, & Handling Equipment

This category represents the highest value of packaging machinery shipped in the US for 2024, with an estimated revenue of \$2.4 billion. The sector has remained robust over the years and is projected to grow to nearly \$3.2 billion by 2030. This equipment is used in all lines and continues to see high demand, especially as many facilities are now optimizing their floor plans by building vertically rather than expanding horizontally.



### Cartoning, Multipacking, & Case-packing Machinery

This category forms the second largest in terms of the value of US machinery shipped in 2024, with an estimated revenue of \$2.0 billion. Revenue from these machines is expected to experience significant growth, increasing by \$725 million from 2024 to 2030, bringing the sector's value to nearly \$2.8 billion. One main driver is the reduction of shelf space, which is pushing for smaller cartons and more diversified products.



### Palletizing & Load Stabilization Equipment

This category has the highest CAGR in the forecast for the US, at 7.2% for the 2024–2030 period. It is expected to have an anticipated value of \$1.3 billion by 2030. The growth is largely driven by the automation of end-of-line solutions, which have traditionally been slower to adopt automation compared to front-of-line packaging.

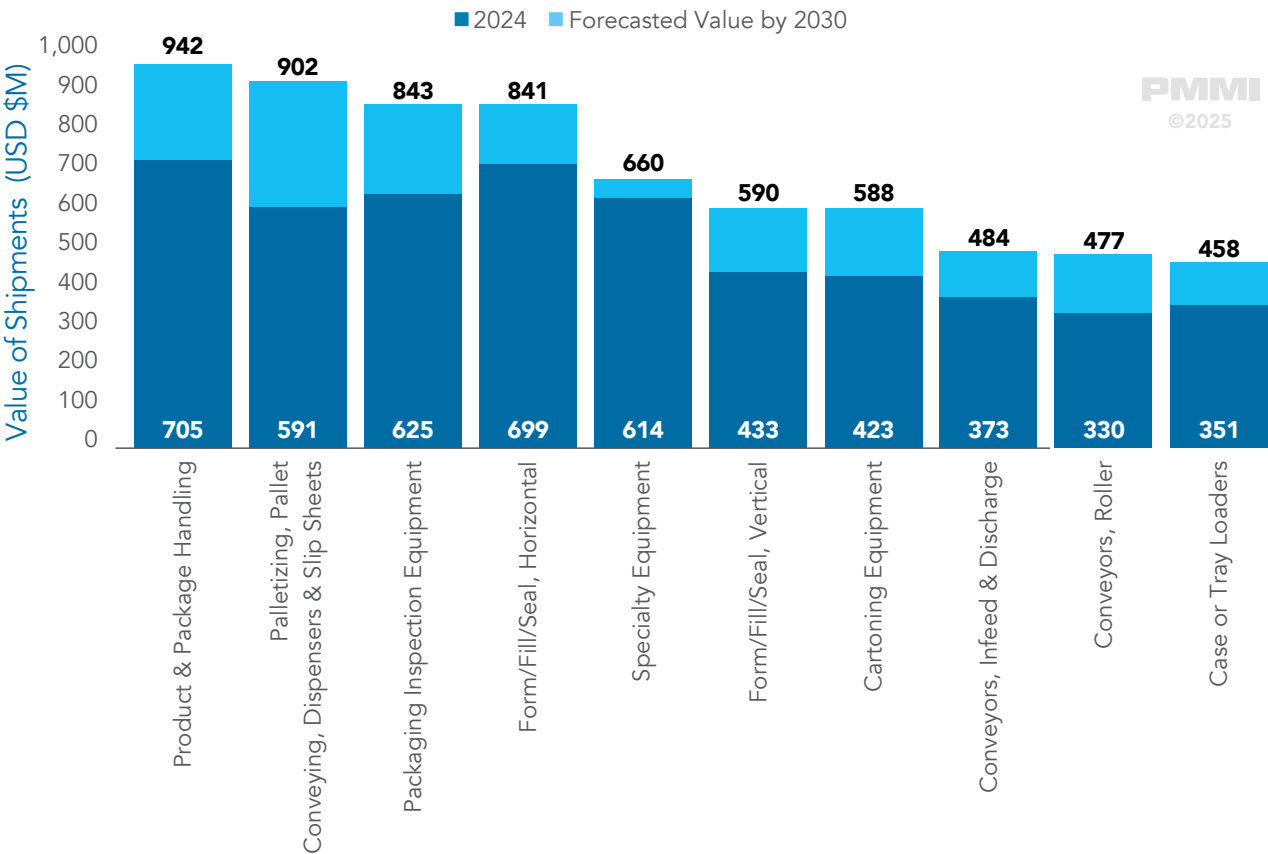


### Inspection & Testing Equipment

This category has the highest growth rate in 2024 for the US, at 4.6%. Currently estimated at \$932 million, this sector is projected to grow to nearly \$1.3 billion by 2030. One large factor is the need to reduce manual inspection, which further fuels the demand for automated inspection and testing equipment.

# FASTEST GROWING SUB-MACHINE CATEGORIES

Fig. 8 US Packaging Machinery Value of Shipments - 2024 vs 2030 - 10 Largest Sub-Machine Categories (\$M)



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



### Product & Package Handling Equipment

Expected to reach a shipment value of \$942 million by 2030, product and package handling systems are poised for significant growth. This growth is driven by the need for fewer touchpoints and the increasing complexity of production lines, which require more equipment capable of handling high throughput.



### Palletizing, Pallet Conveying, Dispensers & Slip Sheets

Projected to achieve a shipment value of \$902 million in 2030, this category is also experiencing rapid expansion. The growth is supported by the ability to eliminate labor-intensive work, making these solutions more attractive and cost-effective.



### Packaging Inspection Equipment

This sector continues to attract strong investment, supported by manufacturers' ongoing efforts to improve product quality and ensure compliance. With an estimated shipment value of \$843 million in 2030, demand is being driven by the growing complexity of packaging formats and the need for automated, inline quality checks. As production speeds increase, inspection systems are becoming essential for catching errors in real time, without slowing down operations.



### Form/Fill/Seal Horizontal Machines

Projected to reach \$841 million by 2030, horizontal form/fill/seal machines continue to gain traction due to their speed, flexibility, and wide application across the food sector. Their high throughput and role in extending product shelf life have helped make them one of the highest-value machinery categories in terms of shipment revenue.

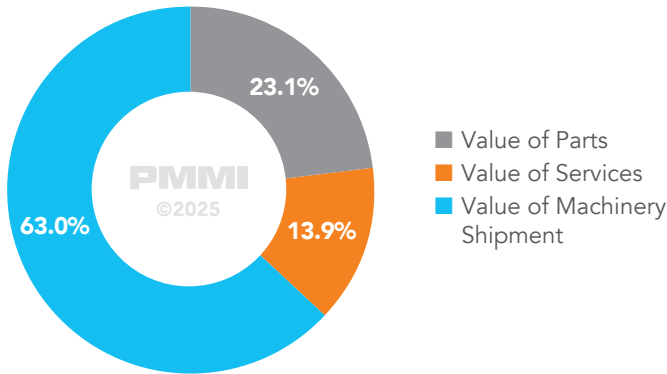
# PARTS & SERVICES - OVERVIEW

## Parts

In 2024, the market for parts for packaging machinery in the US is estimated to be at \$4.1 billion. By 2030, the market is projected to reach \$5.3 billion, reflecting a CAGR of 4.2%.

Parts sales remain a steady, high-margin business throughout all cycles, as customers prioritize keeping lines running, whether by replacing worn components during periods of high production or opting for retrofits when delaying new capital investments.

Fig. 9 US Revenue Share by Business Segment - Machinery, Parts, Services - 2024 (\$17.9B)

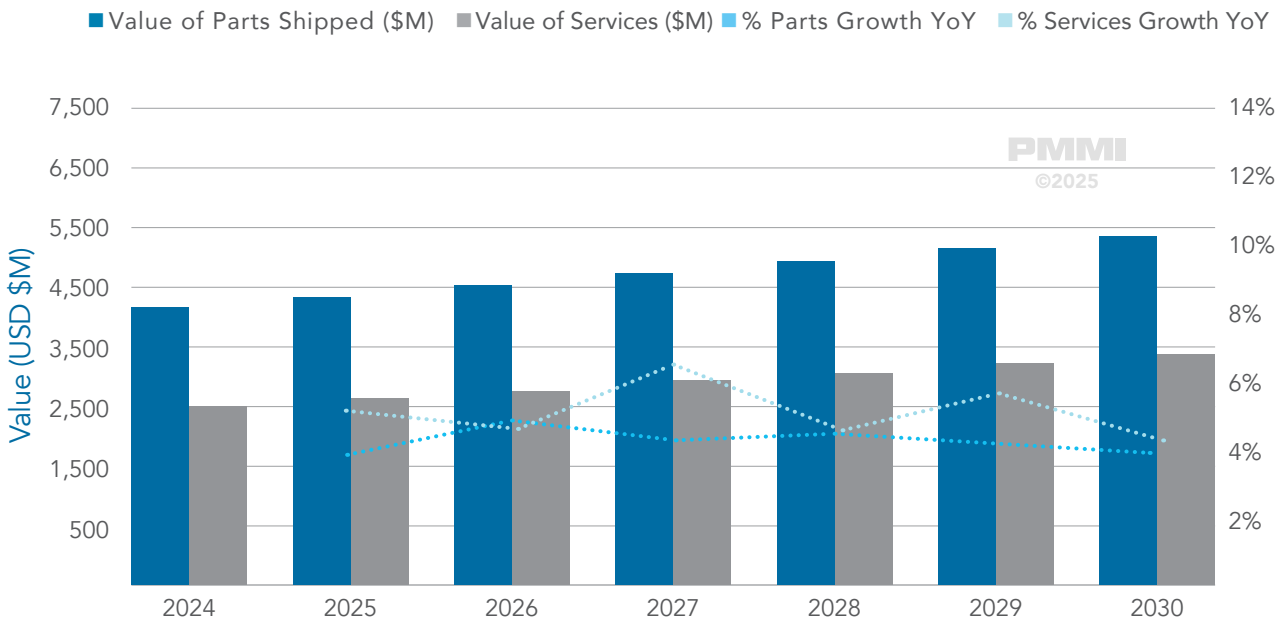


## Services

In 2024, the market for services for packaging machinery in the US is estimated to be nearly \$2.5 billion. By 2030, the market is projected to reach \$3.4 billion, reflecting a CAGR of 5.1%.

Service demand continues to grow alongside the installed base, as customers increasingly adopt structured plans, remote support, and predictive diagnostics to extend the life and performance of their equipment during capital investment slowdowns.

Fig. 10 US Packaging Parts Forecast (2024-2030) - Value of Shipments & % Growth YoY





## PARTS & SERVICES - FORECAST

**Table 2 - Parts, Services, & Machinery Forecasts for Packaging Machinery Market**

United States	2024	2025	2026	2027	2028	2029	2030	'24-'30 CAGR
Parts	\$4,147	\$4,308	\$4,517	\$4,710	\$4,919	\$5,125	\$5,322	4.2%
Annual Growth Rate		3.9%	4.8%	4.3%	4.4%	4.2%	3.8%	
Services	\$2,490	\$2,615	\$2,735	\$2,912	\$3,046	\$3,215	\$3,355	5.1%
Annual Growth Rate		5.0%	4.6%	6.5%	4.6%	5.6%	4.3%	
Machinery	\$11,294	\$11,540	\$12,041	\$12,866	\$13,461	\$13,950	\$14,606	4.1%
Annual Growth Rate		2.2%	4.3%	6.8%	4.6%	3.6%	4.7%	
Parts, Services, & Machinery	\$17,931	\$18,463	\$19,293	\$20,488	\$21,426	\$22,291	\$23,282	4.4%
Annual Growth Rate		3.0%	4.5%	6.2%	4.6%	4.0%	4.4%	

Canada	2024	2025	2026	2027	2028	2029	2030	'24-'30 CAGR
Parts	\$439	\$450	\$468	\$483	\$500	\$515	\$531	3.2%
Annual Growth Rate		2.5%	3.9%	3.3%	3.4%	3.0%	3.1%	
Services	\$264	\$275	\$287	\$304	\$316	\$332	\$344	4.5%
Annual Growth Rate		4.4%	4.2%	5.9%	4.1%	4.8%	3.7%	
Machinery	\$1,197	\$1,206	\$1,244	\$1,315	\$1,357	\$1,386	\$1,434	3.1%
Annual Growth Rate		0.8%	3.2%	5.7%	3.2%	2.2%	3.4%	
Parts, Services, & Machinery	\$1,900	\$1,931	\$1,998	\$2,102	\$2,173	\$2,233	\$2,309	3.3%
Annual Growth Rate		1.7%	3.5%	5.2%	3.4%	2.7%	3.4%	

Source: Interact Analysis

## PARTS & SERVICES - THE RELATIONSHIP OF MACHINERY, PARTS, AND SERVICES

While packaging machinery remains the primary source of revenue for most machine builders, the aftermarket for parts and services has matured into a standard portion of the business. In our survey, the split among these three segments was relatively consistent across respondents, with machinery accounting for about 63% of total revenue, parts for 23%, and services for 14% (see Figure 9).

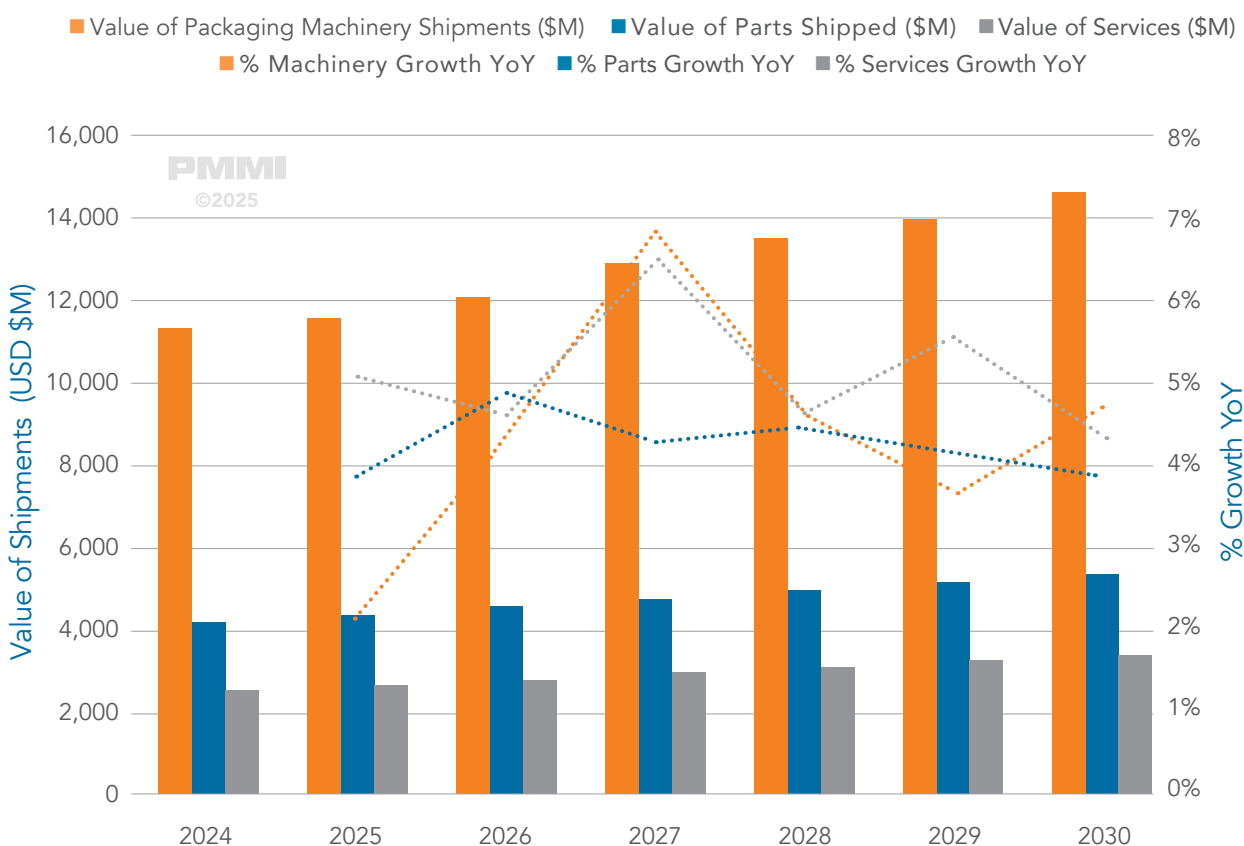
### Services: Growing with the Installed Base

As shown in Figure 11, services are expected to outpace machinery growth in 2025 and again in 2028. These inflection points align with moments of slower capital investment, when buyers pull back on new equipment and instead extend the life and output of what they already own. Several machine builders told us that services have become a key source of recurring revenue, particularly as more customers request structured service plans, remote support, or predictive diagnostics. As the installed base grows, so does the need for ongoing maintenance, troubleshooting, and operator training, further fueling demand for service offerings.

### Parts: Steady Through All Cycles

In contrast, the market for spare parts is relatively stable. Whether demand is high or low, facilities rely on parts to keep operations running. When production is strong, machines are pushed harder and wear parts out more quickly. But even when production slows, many customers delay capital expenditures and instead invest in component upgrades or retrofits. As a result, the parts segment sees less volatility but continues to offer attractive margins.

Fig. 11 US Packaging Machinery Market: % Growth Comparison by Segment (2024–2030)



# TOTAL US PACKAGING MACHINERY VALUE OF SHIPMENTS

Fig. 12 US Packaging Machinery Imports by Country - 2024 (\$3.7B)

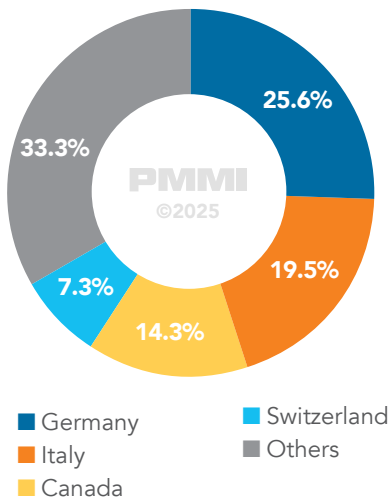
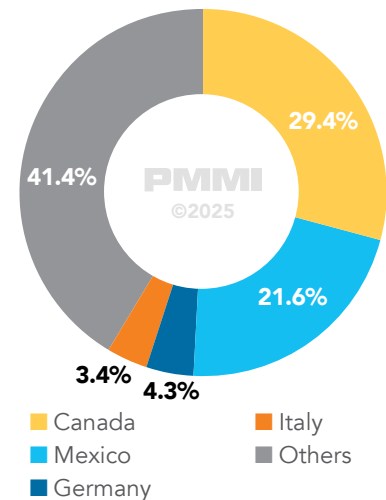


Fig. 13 US Packaging Machinery Exports by Country - 2024 (\$703M)

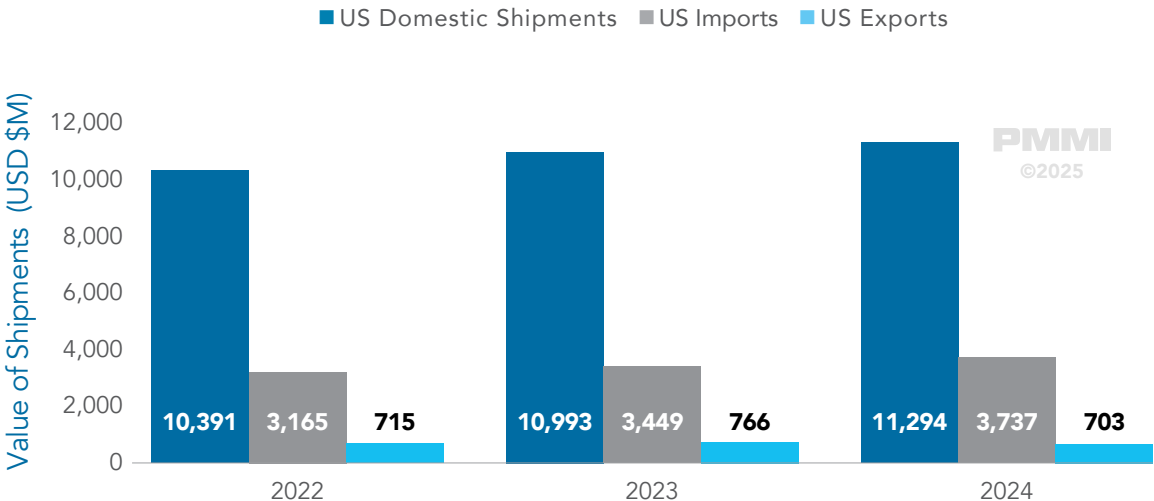


In 2024, U.S. domestic shipments of packaging machinery were valued at \$11.3 billion, with imports totaling \$3.7 billion and exports at \$703 million. Combined, domestic shipments and imports amounted to an estimated \$15 billion of packaging machinery sold into the U.S. market in 2024, with imports accounting for about 25% of the total.

The largest share of U.S. packaging machinery imports in 2024 came from Germany, totaling \$957 million (26%), followed by Italy at \$727 million (20%), Canada at \$536 million (14%), and Switzerland at \$272 million (7%). The remaining \$1.2 billion (33%) came from other countries.

On the export side, the U.S. shipped approximately \$703 million in packaging machinery abroad in 2024. The two largest destinations were Canada (\$206 million, 29%) and Mexico (\$152 million, 22%), together accounting for just over half of total U.S. exports.

Fig. 14 US Packaging Machinery Values: Domestic, Imports, Exports - 2022 - 2024

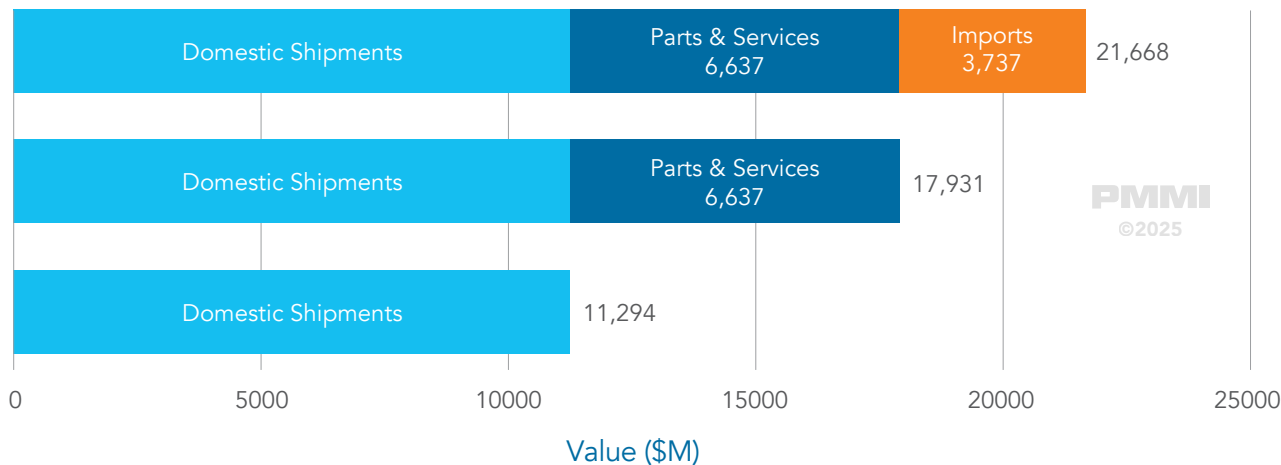




# TOTAL US MARKET – DOMESTIC, PARTS & SERVICES, AND IMPORTS

In 2024, US domestic packaging machinery shipments were valued at \$11.3 billion. Including parts and services, the market size increased to \$17.9 billion, reflecting the significant contribution of aftermarket revenue. When imported equipment is also accounted for, alongside domestic shipments, parts, and services, the total US market value reached \$21.7 billion.

Total US Market – Domestic, Parts & Services, and Imports



# TOTAL CANADIAN PACKAGING MACHINERY VALUE OF SHIPMENTS

Fig. 16 Canada Packaging Machinery Imports by Country - 2024 (\$515M)

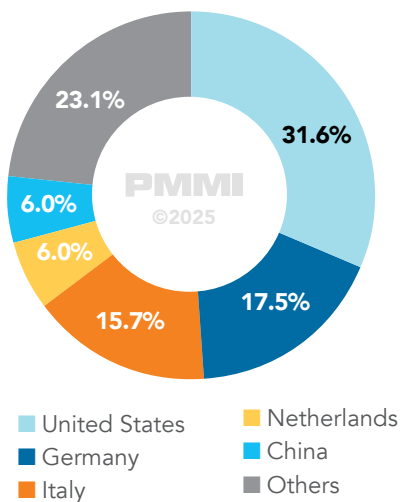
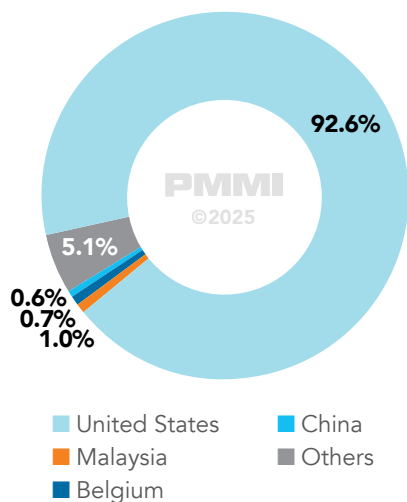


Fig. 17 Canada Packaging Machinery Exports by Country - 2024 (\$613M)

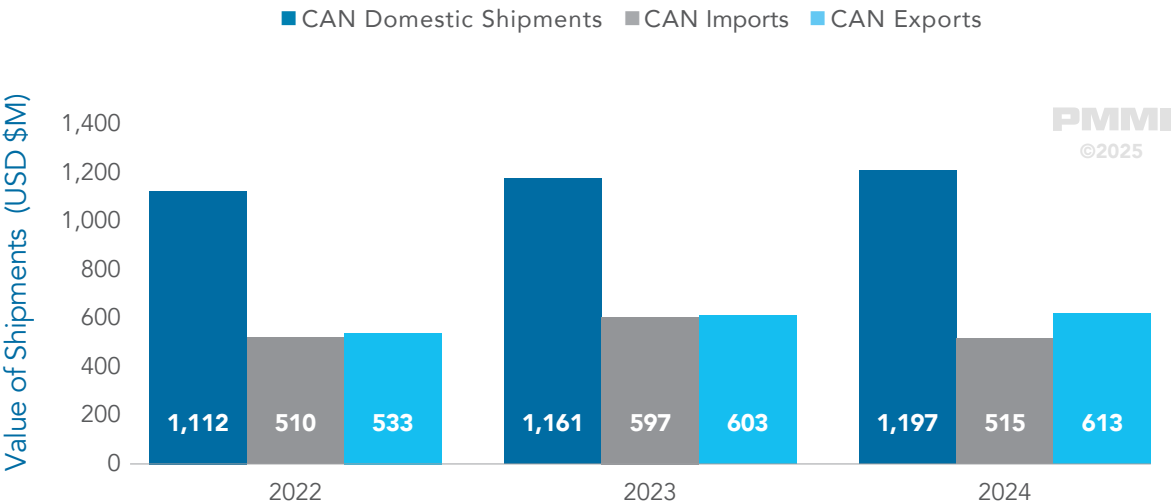


In 2024, Canada’s domestic shipments of packaging machinery were valued at approximately \$1.2 billion, with imports totaling \$515 million and exports at \$613 million. Combined, domestic shipments and imports amounted to an estimated \$1.7 billion of packaging machinery sold into the Canadian market in 2024, with imports accounting for about 30% of the total.

The largest share of Canada’s packaging machinery imports in 2024 came from the United States, totaling approximately \$165 million (32%), followed by Germany (\$88 million, 17%), Italy (\$82 million, 16%), Netherlands (\$31 million, 6%), and China (\$31 million, 6%). The remaining \$118 million (23%) came from other countries.

On the export side, Canada shipped approximately \$613 million in packaging machinery abroad in 2024. The vast majority of these exports went to the United States (\$570 million, 93%), with smaller shares to Malaysia (1%), Belgium (1%), China (0.6%), and other destinations making up the remaining 5%.

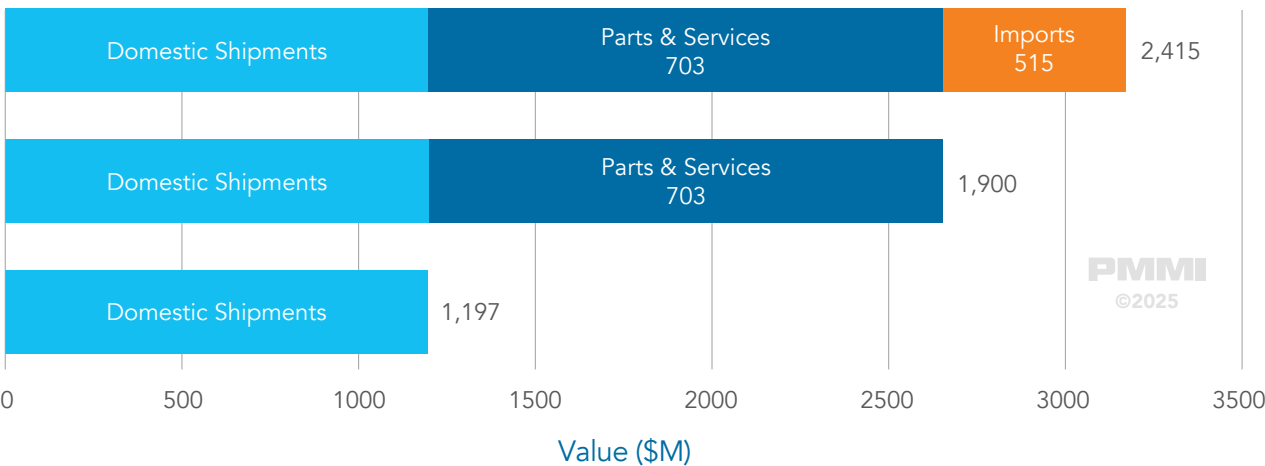
Fig. 18 Canada Packaging Machinery Value: Domestic, Imports, Exports - 2022 - 2024



## TOTAL CANADIAN MARKET – DOMESTIC, PARTS & SERVICES, AND IMPORTS

In 2024, Canada’s domestic packaging machinery shipments were valued at \$1.2 billion. Including parts and services, the market increased to \$1.9 billion, highlighting the importance of aftermarket activity. When imported equipment is also included, along with domestic shipments, parts, and services, the total Canadian market value reached nearly \$2.4 billion.

Fig. 19 Canada Packaging Machinery Market Value - Domestic, Parts & Services, and Imports (2024)



## MACRO-TREND OVERVIEW ECONOMIC EFFECTS & WORKFORCE

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### Economic Effects on Packaging Machinery

In 2024, the U.S. packaging machinery market experienced a marked slowdown, shaped by broader economic headwinds and heightened policy uncertainty. While inflation eased and interest rates began to decline late in the year, new tariff announcements in early 2025 introduced fresh uncertainty, prompting many businesses to delay capital investments. Industrial machinery production showed signs of recovery exiting 2024, but growth remains fragile as the effects of policy-driven uncertainty are expected to weigh more heavily in the second half of 2025. Packaging machinery manufacturers reported continued caution among customers, with many holding off on new equipment purchases and focusing instead on maintaining existing assets.

Despite these short-term challenges, the sector's long-term outlook remains positive. The packaging machinery market, which historically follows 3–5 year investment cycles, is expected to reach its current trough in 2025 before rebounding toward 2027. However, growth at the next peak is likely to be more modest than the double-digit gains of earlier years, as the overall size of the market now makes such high growth rates less attainable.

### Workforce

Workforce remains one of the most influential factors shaping the packaging machinery market. In 2024, hiring and retention challenges began to ease slightly, with companies reporting modest gains driven by stronger onboarding and changing economic conditions. However, long-term pressures persist, particularly the shortage of skilled tradespeople, technician burnout, and limited internal capacity to scale with demand. In response, many machine builders are investing in workforce development, including apprenticeships, internal training programs, and partnerships with local institutions.

At the same time, workforce dynamics are increasingly shaping machine design and buyer expectations. As staffing limitations persist across end-user facilities, customers are placing more value on automation, operator-free systems, and remote service capabilities. Some OEMs are even incorporating aptitude levels scales into proposals to help buyers evaluate operational readiness and unlock training budgets. While workforce challenges continue to evolve, they remain deeply embedded in both the internal operations of machine builders and the broader value proposition offered to their customers.

## MACRO-TREND OVERVIEW SUSTAINABILITY, & TARIFFS

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### Sustainability

Sustainability continues to shape decisions across the packaging machinery market, though priorities have shifted as customers balance environmental goals with cost and operational realities. While material changes, such as the transition from PVC to rPET and early experiments with compostables, remain ongoing, many end users have slowed their implementation in response to infrastructure limitations and cost pressures. Regulatory and retailer-driven initiatives are helping to maintain momentum, particularly outside the U.S., with growing demand for paper-based alternatives and commitments from major North American retailers to transition toward recyclable or reusable packaging by 2030.

Meanwhile, the rise of external sustainability certifications, such as EcoVadis, reflect how customers are increasingly evaluating suppliers' environmental and ethical performance more formally. As these trends mature, builders with flexible designs, strong collaboration capabilities, and demonstrated sustainability credentials are likely to be better positioned to meet the evolving expectations of their customers.

### Tariffs

Tariffs have become the dominant topic effecting machine builders this year. Many described the current U.S. trade policy as unpredictable, with shifting announcements making it difficult to plan. While some global OEMs said they would consider adjusting operations most have held off on major investments, viewing the current environment as too volatile to justify costly changes.



# MACRO-TREND OVERVIEW

## MACHINERY, PARTS & SERVICES, & BIG DATA

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### Machinery

Evolving packaging requirements continue to shape how machinery is designed and specified, with flexibility, efficiency, and user-friendliness emerging as central themes. Customers are interested in equipment that can handle high SKU counts and innovative formats with minimal downtime, driving demand for automated changeovers, servo-driven systems, and machines versatile enough to accommodate both legacy and novel packaging styles.

At the same time, customers remain focused on practical considerations, favoring compact machines that fit within existing brownfield sites, systems that reduce operator headcount, and designs capable of handling thinner, more delicate materials without damage. Lastly, enhanced ergonomics and intuitive HMIs have become key differentiators, as buyers seek equipment that is easy to operate and maintain, even in environments with high workforce turnover and limited technical expertise.

### Parts & Services

The aftermarket for parts and services has evolved from a secondary support role into a central part of machine builders' business strategies. Both segments have become vital to customer retention, profitability, and operational resilience, especially as workforce shortages, rising turnover, and budget-conscious customers drive demand for support beyond the initial sale.

### Big Data

Machine builders are moving past the hype of AI and big data, focusing instead on targeted, practical applications that solve real problems. Vision systems remain the most mature example, with sharper cameras and smart software enabling defect detection, promotional pack assembly, and even emergency stops when products fall out of place — features that have helped builders win orders. Newer developments, like AI-powered HMIs that translate error codes and guide operators, are gaining interest as a way to support less-experienced staff in high-turnover environments.

Predictive maintenance continues to draw interest, with adoption beginning to accelerate. While some end users remain skeptical of its cost and are hesitant to move away from established preventive maintenance routines. Builder report progress when predictive systems are integrated into the HMI with simple, actionable alerts. Meanwhile, data connectivity strategies are evolving as customers remain cautious about external links; builders are offering hybrid approaches, such as USB-based diagnostics, to improve uptime while respecting cybersecurity concerns. Together, these developments reflect an industry stepping cautiously into the big data era, prioritizing operator-friendly, high-impact features over sweeping AI overhauls.





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