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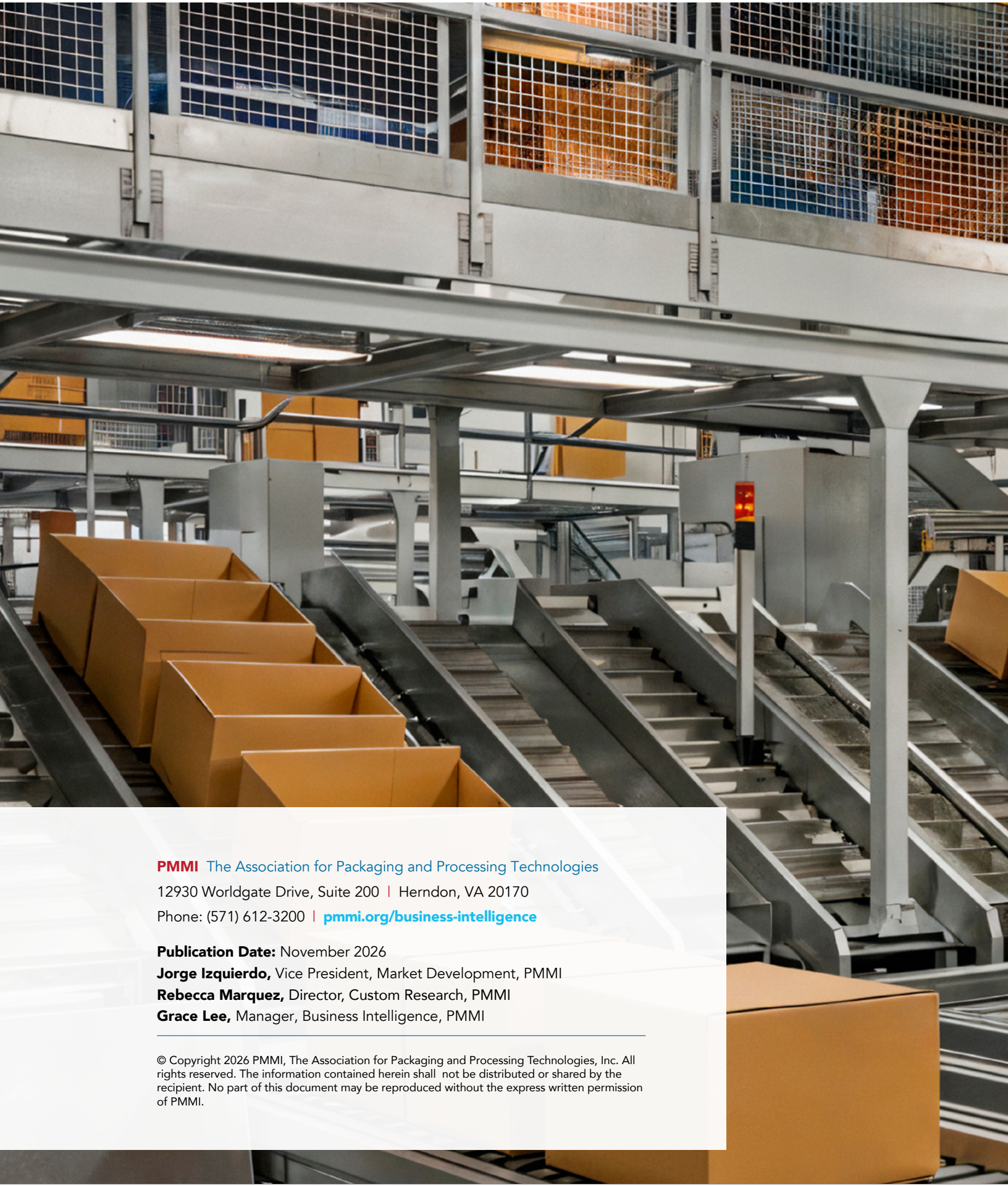
Beyond the Packaging Line: Trends in End-of-Line Automation and Equipment



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About This Report

This publication is adapted from PMMI Business Intelligence's 2026 State of the Industry: Packaging Machinery report, developed in collaboration with Interact Analysis. It presents selected findings from industry research, including interviews with packaging machinery suppliers, to provide insights into trends and developments shaping the packaging machinery market.

Figure and table numbering has been retained from the original report for consistency. The full report, 2026 State of the Industry: Packaging Machinery report, including additional findings and market forecasts, is available through PMMI Business Intelligence.

END-OF-LINE PACKAGING MACHINERY

End-of-Line Packaging Machinert: Market Trends and Developments

End-of-line packaging operations are evolving as manufacturers seek greater flexibility, improved efficiency, and more integrated automation solutions. Growing SKU complexity, changing order profiles, and ongoing workforce challenges are influencing equipment requirements and investment priorities across case packing, palletizing, load stabilization, and related operations.

At the same time, advances in robotics, mobile automation, and warehouse technologies are creating new opportunities to connect packaging operations with downstream material handling and distribution processes.

This report examines the market and operational factors shaping end-of-line packaging machinery, including emerging technologies, equipment trends, and considerations influencing adoption and investment.

End-of-line machinery covered in this report includes the following equipment categories:

Table 9 - End of Line Machinery

Machine	Sub-machine
Cartoning, Multipacking & Case Packing	Case or Tray Erect/Load/Seal (Integrated) Case or Tray Erectors & Formers Case or Tray Loaders Case Sealers Case Packing Equipment, Other
Palletizing & Load Stabilization	Palletizing, Pallet Conveying, Dispensers & Slip Sheets Load Stabilization Depalletizing

Source: Interact Analysis

Overview of trends

Warehouse Automation Convergence

End-of-line packaging is becoming increasingly integrated with warehouse automation, with right-fit packaging integrated earlier into system design. As core warehouse functions mature, automation attention is shifting downstream to packing and pallet handling.

Beyond the Line: AMRs & AGVs

Suppliers are extending automation into material movement, where mobile robot revenue is set to grow, and AGV forklifts are emerging as a high-value segment by 2030. Labor shortages and safety concerns are accelerating adoption, with forklift AGVs commanding outsized revenue relative to their unit share.

Case Packing Integration

Case erecting, packing, and sealing are converging into unified end-of-line systems rather than standalone machines. Buyers increasingly favor integrated erect-load-seal configurations that cut footprint, handoffs, and operator touchpoints.

Flexibility & Changeover Efficiency

Demand is shifting from dedicated lines toward flexible systems that handle multiple SKUs and frequent changeovers, narrowing the gap between rated and real changeover times. Shorter runs and variety packs are pushing suppliers toward digital feedback and reduced operator intervention to speed ramp-up.

Robotic Palletizing

Robotic palletizers are gaining share for high SKU variability and changing pallet patterns, though cost and integration keep adoption selective. They excel in applications where case sizes and pallet configurations change frequently, conditions that fixed mechanical systems often struggle to accommodate.

Load Stability & Regulation

EU Directive 2014/47 and the EUMOS 40509 test protocol are shifting load-security liability and raising the bar for pallet containment. With responsibility extending beyond the carrier, shippers face stronger pressure to validate wrapping and containment performance.

Retail-Ready & Mixed Pallets

Growth in mixed-case, shelf-ready pallets and stretch wrapping is reshaping palletizing as SKU variety rises and order sizes shrink. Grocery and discount retailers' planogram and display standards are raising precision requirements across the supply chain.

END-OF-LINE PACKAGING IN WAREHOUSE AUTOMATION

Warehouse automation overview

For suppliers active in end-of-line machinery, warehouse automation represents an adjacent area of investment and growth.

What Is Warehouse Automation?

Warehouse automation refers to the use of technology to improve the efficiency, speed, and accuracy of operations within distribution and fulfillment environments. This includes a wide range of systems, from storage and retrieval and material transport to picking, sortation, and packaging.

Historically, investment has been concentrated in workflows such as picking, storage, and sortation, where labor demands and operational costs are highest.



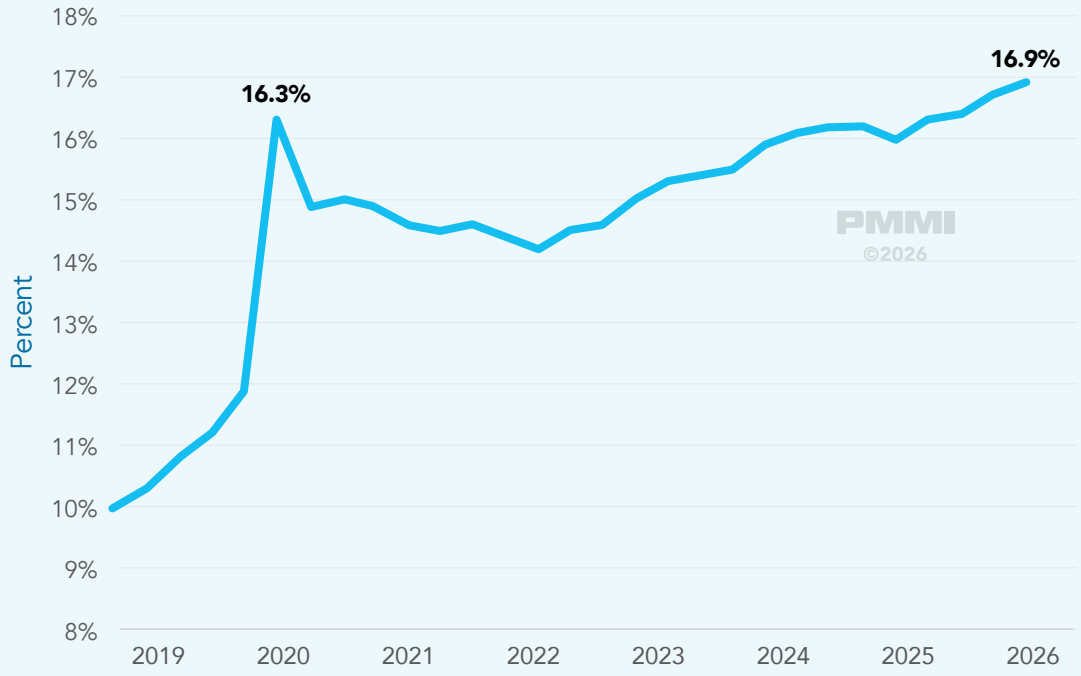
Key Drivers of Warehouse Automation

Several structural factors continue to drive investment in warehouse automation.

The growth of e-commerce has significantly increased order volumes while shifting order profiles toward smaller, more fragmented shipments. This has increased operational complexity and placed greater pressure on fulfillment centers to process orders quickly and efficiently. As shown in Figure 30, E-commerce retail sales have surpassed the pandemic peak and continue to increase.

Compounding this, persistent labor challenges, including rising wages and difficulty recruiting workers for physically demanding roles, have reinforced the business case for automation across a range of workflows.

Fig. 30 US E-Commerce Retail Sales as a Percent of Total Sales



Source: US Census Bureau, E-Commerce Retail Sales [ECOMPCTSA], retrieved from FRED, Federal Reserve Bank of St. Louis; https://fred.stlouisfed.org/series/ECOMSA, June 11, 2026.

Spending looks at the downstream processes

Shift Toward Downstream Processes

As automation in core warehouse functions has matured, attention is shifting toward areas that have historically received less investment. As shown in Figure 31, depalletizing, palletizing, and packing represented lower spend in 2025. These downstream packaging and pallet-handling workflows are now emerging as priority targets for automation, driven by their continued reliance on manual labor and their growing share of overall operational costs.

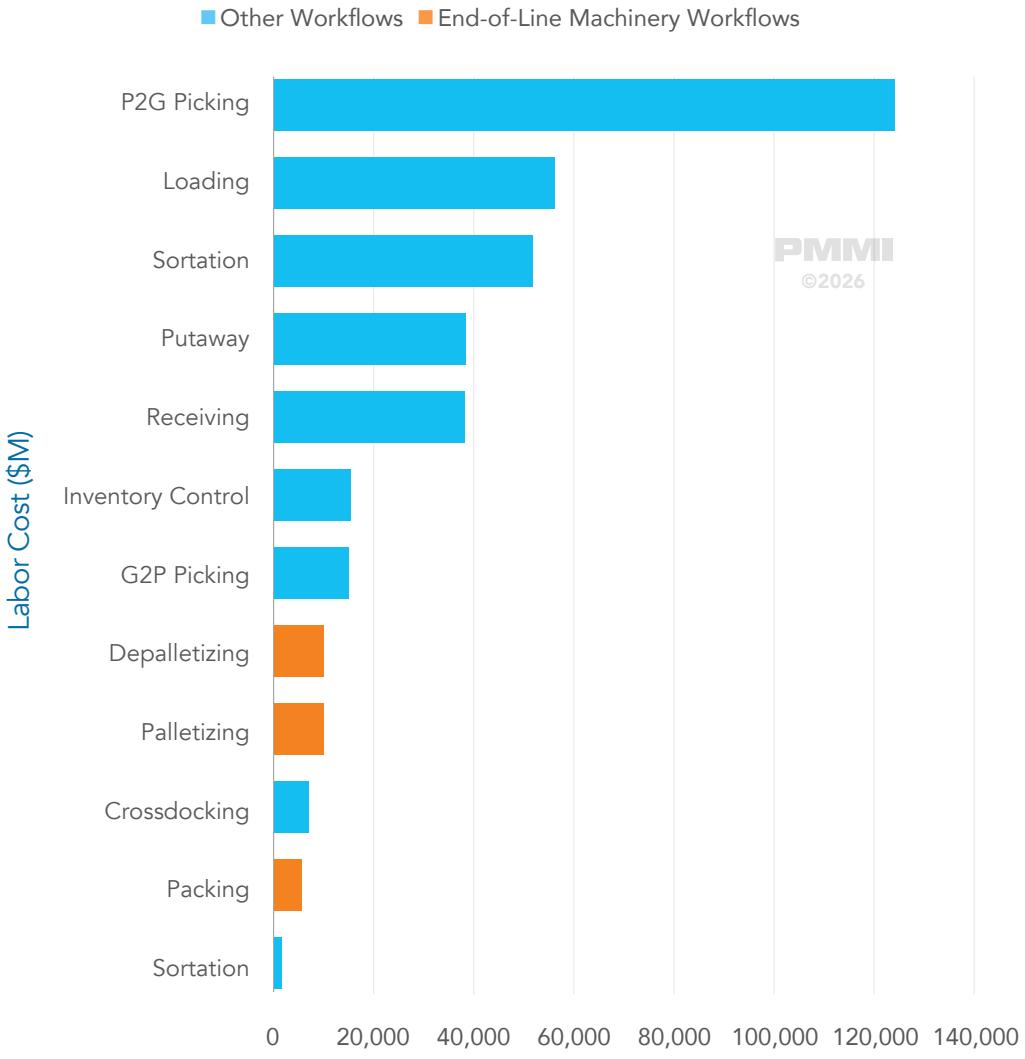
The Role of End-of-Line Machinery

Within this context, end-of-line machinery plays a key role in enabling automation at the final stages of warehouse operations.

- Packing equipment (case erecting, loading, sealing) supports order preparation, particularly in e-commerce environments
- Palletizing and depalletizing systems enable efficient movement of goods, especially in mixed-SKU environments
- Equipment for load stabilization and unitizing ensures that products are securely prepared for transport

These systems are becoming increasingly important as warehouses look to improve throughput, reduce labor dependency, and manage more complex order profiles.

Fig. 31 2025 Global Labor Spend by Workflow in Warehousing



Source: Interact Analysis' Warehouse Building Stock Database Q1 2026, quarterly updated and available by country, verticals, and state.

RIGHT FIT PACKAGING

An emerging market

One area of innovation within end-of-line packaging is the development of right-fit packaging solutions, which are increasingly being deployed in warehouse environments.

What Is Right-Fit Packaging?

Right-fit packaging refers to automated systems that create or adjust packaging to closely match the dimensions of the product being shipped. These solutions measure, cut, and form packaging in real time, producing a "right-sized" box or bag with minimal excess space.

This approach differs from traditional packaging systems, which rely on a limited set of predefined box sizes. Instead, right-fit solutions enable greater flexibility by adapting packaging dimensions to the specific requirements of each order.

Why Right-Fit Packaging Is Gaining Importance

Right-fit packaging is emerging as a key area of innovation within warehouse automation, particularly in e-commerce and fulfillment environments.

One of the primary drivers is the shift toward smaller, more fragmented orders. Fulfillment centers handling individual items require packaging systems that can accommodate a high degree of variability in product size and shape. Right-fit solutions are well-suited to these environments, as they can dynamically adjust packaging dimensions without relying on standardized formats.

In addition to operational flexibility, these systems address several cost and efficiency challenges. By reducing excess packaging material and minimizing void space, right-fit solutions can improve shipping efficiency and increase parcel density, enabling better utilization of transport capacity.

Role Within Warehouse Automation

As warehouse automation strategies evolve, right-fit packaging is becoming more closely integrated into broader system design. Historically treated as a downstream or standalone process, packaging is now being incorporated earlier in automation planning, aligning more closely with upstream workflows such as picking and order sequencing.

This shift reflects a broader move toward end-to-end automation, where packaging is optimized alongside other processes to improve overall system performance. In this context, right-fit solutions represent a more advanced form of end-of-line automation, enabling greater responsiveness to changing order profiles and operational requirements.

Key Drivers of Adoption

Several factors are contributing to the growing adoption of right-fit packaging:



E-commerce growth: Increasing volumes of small, individualized orders require more flexible packaging solution



Material efficiency: Reducing packaging waste and excess void fill is becoming a greater priority



Shipping optimization: Improved parcel density reduces transportation costs while enhancing logistics efficiency



Regulatory pressure: Legislation focused on packaging waste, such as state-level EPRs and the EU's PPWR, is encouraging the adoption of right-sized packaging systems

EXPANDING BEYOND THE END OF THE LINE

AMRs and AGVs are creating new opportunities for suppliers

Historically, end-of-line automation has focused on packaging functions such as case packing, palletizing, and load stabilization. Increasingly, however, suppliers are extending automation beyond the packaging line and into material movement. Automated Guided Vehicles (AGVs) and Autonomous Mobile Robots (AMRs) are becoming a natural extension of end-of-line systems as manufacturers look to automate the transportation of finished pallets between production, staging, and warehouse areas.

Drivers Behind Automation Adoption

Several factors are driving this shift. Labor shortages continue to affect manufacturing and distribution operations, while improving workplace safety remains a priority in environments where employees regularly move heavy palletized loads. Pallet transportation is often viewed as a necessary but relatively low-value activity, making it an attractive target for automation. By automating these repetitive tasks, companies can reallocate labor to higher-value activities while reducing operator exposure to potentially hazardous material handling processes.

Integration of Mobile Robotics in Material Flow

The adoption of mobile robotics also reflects a broader evolution in how companies approach automation investments. Rather than deploying isolated technologies to address individual bottlenecks, end users increasingly seek solutions that connect multiple stages of production and logistics. Mobile robots serve as a bridge between packaging operations and downstream warehouse activities, enabling automated pallet transport, staging, and warehouse transfers without requiring manual forklift intervention. As a result, automation is expanding beyond individual machines toward more integrated material flow systems.

Opportunities for Equipment Suppliers

For end-of-line equipment suppliers, this trend presents an opportunity to expand their role within customer facilities. Suppliers that historically focused on packaging and palletizing equipment are increasingly exploring mobile robotics as a way to automate a broader portion of the production workflow. By incorporating pallet movement into their offerings, suppliers can extend automation beyond the packaging line, expand project scope, and provide more comprehensive solutions. This aligns with growing customer interest in working with fewer suppliers capable of delivering larger, more integrated automation systems.

Market growth makes pallet movement the next logical step

Fig. 32 Global Units Shipped for Mobile Robots

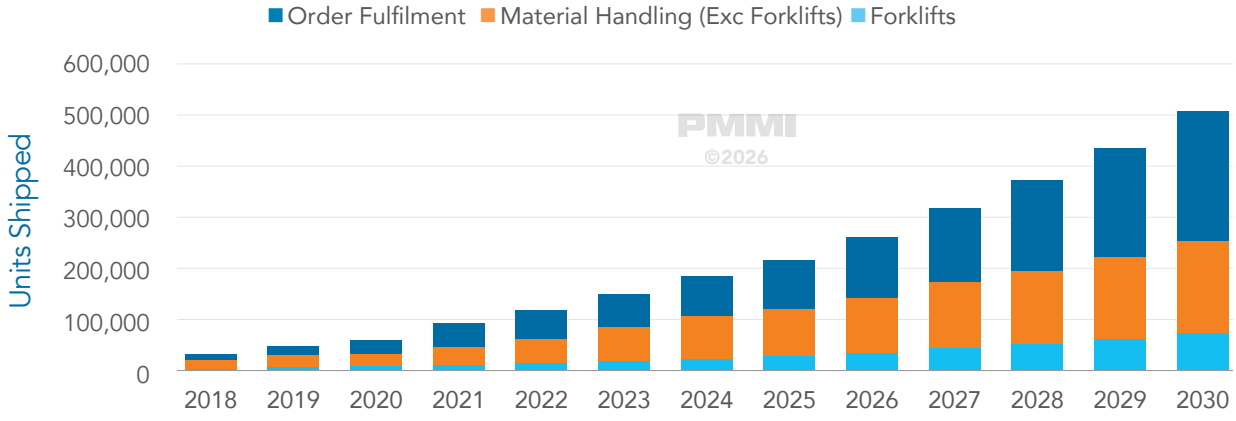
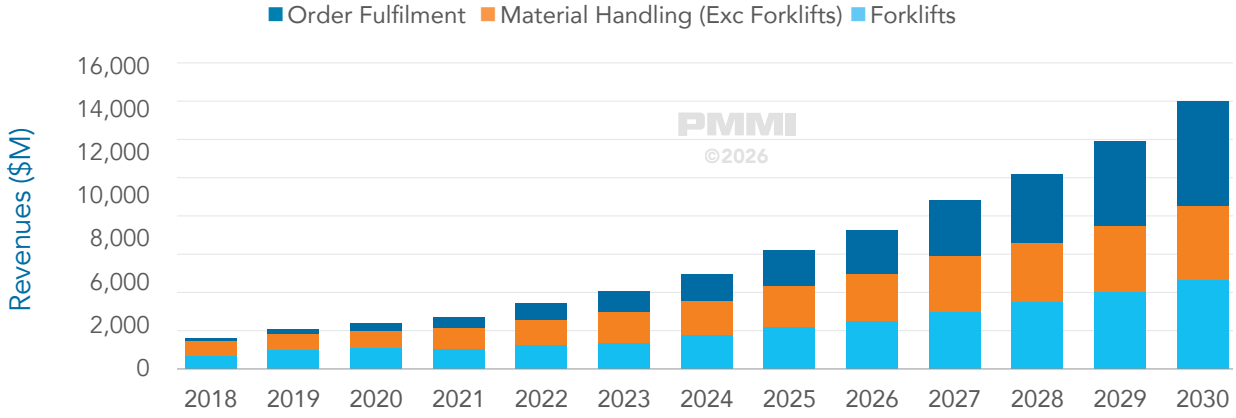


Fig. 33 Global Revenues for Mobile Robots



Source: Interact Analysis' Mobile Robots 2025, annually updated and available by robot type, industry, and facility type.

Market Outlook and Revenue Potential

The market outlook further reinforces the attractiveness of this opportunity. Global mobile robot revenue is expected to grow significantly over the coming years, reflecting increasing investment across manufacturing, warehousing, and logistics applications. While order-fulfillment robots are projected to account for the largest share of unit shipments, as can be seen in Figure 32, forklift AGVs represent a particularly attractive segment for packaging automation suppliers. By 2030, AGV forklifts are expected to account for roughly one-third of mobile robot revenue (see Figure 33) while representing a much smaller share of total shipments. This disproportionate revenue contribution highlights the higher value associated with forklift automation and helps explain the growing industry interest in these solutions.

Pallet Movement: A Next Step

As mobile robotics adoption continues to expand, pallet movement is emerging as one of the most logical adjacent opportunities for end-of-line automation. What was once considered a separate material handling function is increasingly becoming part of a broader automation strategy that connects packaging operations with warehouse execution. For equipment suppliers, this creates an opportunity to capture additional value while strengthening their position as providers of integrated automation solutions rather than standalone machines.

A case study on robotic arms

One supplier highlighted a case where an existing customer interaction led to the identification of a new automation opportunity outside of the supplier's core machine offering. During a site visit for installed equipment, the supplier observed a labor-intensive process in which workers were manually stacking layered building materials. The task involved repetitive handling of heavy components and presented both operational inefficiencies and ergonomic risks.

Recognizing this, the supplier proposed the integration of robotic arms to automate the stacking process. The solution allowed the customer to improve consistency and throughput while reducing reliance on manual labor for a physically demanding task. Rather than requiring a full overhaul of the production line, the robotics were introduced as a targeted enhancement to an existing process.

This example illustrates how suppliers can expand beyond traditional equipment offerings by identifying adjacent automation opportunities during customer engagements. For suppliers with robotics capabilities, these incremental applications can provide an additional revenue stream while strengthening customer relationships through practical, problem-specific solutions.



CARTONING, MULTIPACKING & CASE PACKING

Case packing preferences

The following section examines how the end-of-line is evolving across two closely linked areas: cartoning, multipacking, and case packing, followed by palletizing and load stabilization. For case packing, three themes stand out: a shift toward integrated end-of-line systems, a growing emphasis on flexibility and faster changeovers to handle greater SKU variability, and mounting bottlenecks that are pushing companies to automate more proactively. Palletizing remains a stable, baseline function, but it is seeing similar momentum toward flexible and robotic systems, including collaborative robots, as companies weigh ongoing tradeoffs between the simplicity of traditional equipment and the flexibility of newer automation.

Shift Toward Integrated Case Packing Systems

Case or Tray Erect/Load/Seal (Integrated) systems are gaining traction compared with standalone case-erecting, loading, and sealing equipment (see Figure 34). Rather than purchasing and integrating separate case erectors, case packers, and case sealers, buyers are increasingly favoring integrated systems that can consolidate these functions within a single machine.

Interviewees pointed to wraparound case packers as a common example of this trend, as these systems can consolidate erecting, loading, and sealing into one machine while reducing footprint, handoffs, and integration complexity. In some cases, participants also noted that portions of the packing process had previously been performed manually, making integrated systems an attractive way to simplify line design while increasing automation levels.

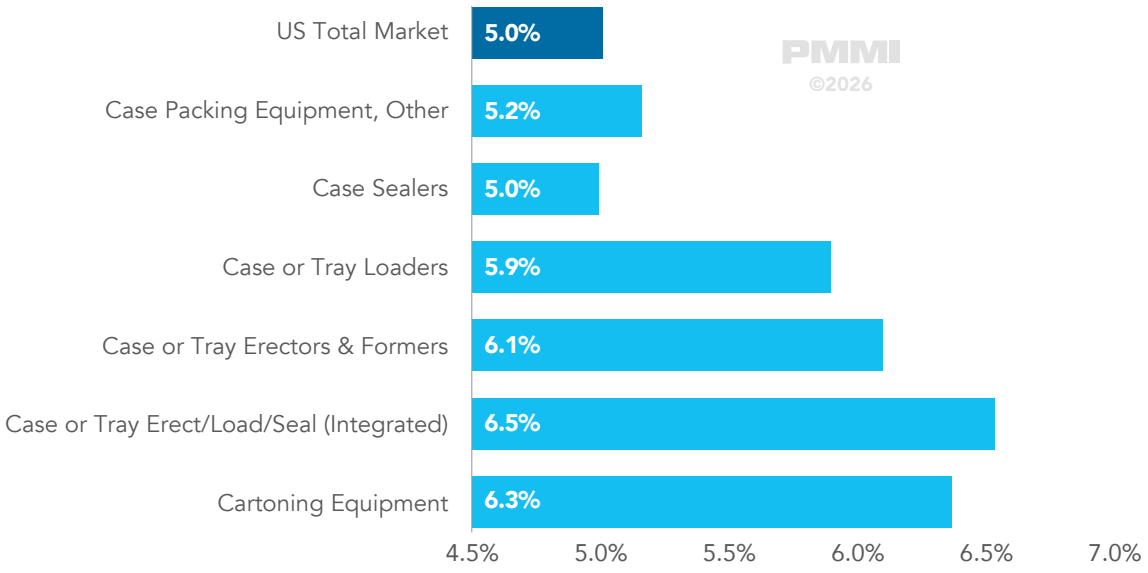
Case Packing Selection Driven by Speed, Format, and SKU Complexity

The selection of case packing technology continues to be highly application-specific. Interviewees consistently pointed to speed requirements, product format, and SKU complexity as the primary drivers of machine selection.

In more standardized environments, such as beverage applications, top-load and drop packing methods remain prevalent due to their reliability and alignment with existing packaging formats. In contrast, wraparound and side-load solutions are increasingly used in applications where automation efficiency or material optimization is prioritized.

The growing role of robotics also reflects this shift. Robotic systems are being introduced to improve flexibility and manage greater SKU variability, although this typically involves higher initial costs and greater system complexity.

Fig. 34 US EOL Packaging Machinery - Cartoning, Multipacking & Case Packing CAGRs '25-'31



Flexibility, automation tradeoffs, and material variability effects on machines

Growing Emphasis on Flexibility and Changeover Efficiency

A major shift in customer expectations is the move away from dedicated, single-product lines toward more flexible systems capable of handling multiple SKUs and frequent changeovers. Interviewees noted that this change is being driven by increasing product variety, shorter production runs, and the rise of variety packs.

While many machines are designed with quick changeovers in mind, there remains a gap between theoretical changeover time and actual operational performance. The time required to stabilize production after a change, including setup validation and ramp-up, continues to be a challenge in practice.

As a result, there is growing emphasis on simplifying adjustments, introducing digital feedback mechanisms, and reducing reliance on operator intervention. These improvements are seen as critical to maintaining efficiency in high-mix production environments.

Operational Tradeoffs Between Automation and Resilience

Interviews highlighted a consistent tradeoff between increasing automation and maintaining operational resilience. Highly automated systems, such as wraparound case packers, deliver clear benefits in terms of speed, efficiency, and material reduction. However, they also reduce the ability to fall back on manual processes when issues arise.

In contrast, more traditional case formats allow for manual intervention if a machine goes down, enabling production to continue in a degraded but functional state.

This dynamic not only shapes end-user decision-making but also introduces new requirements for equipment suppliers. As automation levels increase, machine performance and reliability become more critical, particularly in environments where downtime has a direct impact on production continuity. The ability to ensure uptime, simplify troubleshooting, and provide responsive service may become increasingly important differentiators for suppliers.

Material and Process Variability as Persistent Challenges

Material variability remains an ongoing source of complexity in case packing and sealing operations. Interviewees pointed to factors such as corrugate quality, board weight, and environmental conditions, including humidity, as influencing machine performance.

In some cases, these variations require adjustments during operation, which are often made manually by operators. However, these adjustments can introduce inconsistency, particularly when different operators modify machine settings based on individual judgment rather than standardized processes.

Interviewees emphasized that a significant portion of service calls are not caused by machine failures, but rather by deviations in setup or operating parameters. This highlights the importance of standardization, training, and system safeguards to maintain consistent performance.

Bottlenecks and shrinking cases

End-of-Line Bottlenecks Driving Adoption

Interviewees also noted that case packing and sealing are often addressed reactively rather than proactively. As upstream processes become more automated and higher throughput is achieved, bottlenecks frequently shift downstream to the end-of-line.

This creates situations where companies are forced to invest in case packing solutions after constraints emerge, rather than incorporating them into initial system design. Interviewees noted that improvements in primary packaging often expose inefficiencies in downstream operations, accelerating demand for automation in case packing and sealing.

As a result, many implementations occur in brownfield environments, with companies seeking solutions that can be integrated into existing lines with minimal disruption.

Evolving Role of Case Sealing Within Integrated Systems

While case sealing was discussed less frequently as a standalone category, its role is evolving as part of more integrated system architectures. Increasingly, sealing is incorporated directly into case packing solutions, particularly

in wraparound systems where forming, loading, and closing are handled within a single process.

Even so, tape-based sealing remains common where format flexibility is needed, while glue-based sealing, typical of wraparound formats, suits higher-automation lines.

This evolution suggests that case sealing is becoming less of an independent purchasing decision and more of a functional component within broader end-of-line system design.

Case Sizes Shrinking

At the same time, manufacturers are facing shifting requirements for case sizes. Both retail and e-commerce dynamics are contributing to the trend toward smaller cases. On the retail side, competition for shelf space has intensified, driving companies to offer greater SKU variety in smaller volumes. Instead of sending a full pallet of a single product, manufacturers may now be asked to send a few cases of multiple variants, each in different quantities. On the e-commerce side, customer orders are smaller and more fragmented, which can consist of two items ordered online instead of a full case bought in-store, driving the need for packaging flexibility.

These changes introduce added complexity. As case sizes shrink, more cycles are required to keep pace with the same level of throughput. Smaller cases may need to be packed and sealed more frequently, placing additional strain on end-of-line equipment.

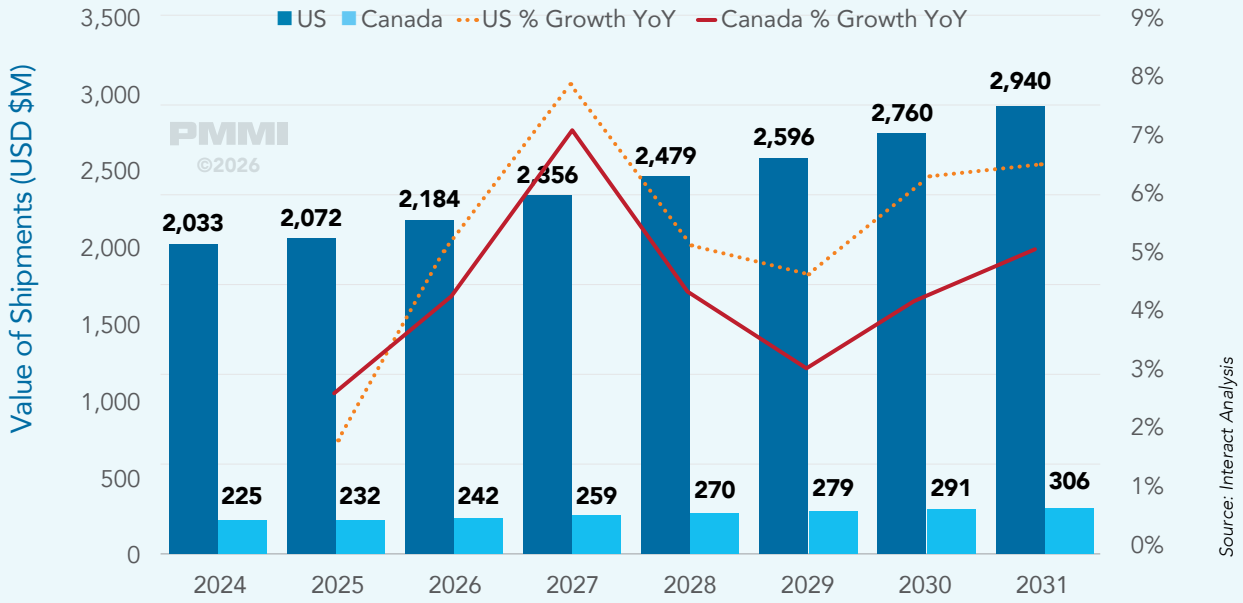
Machine sector overview

In 2025, the total estimated value of shipments within the cartoning, multipacking, and case packing equipment sector in the US was $2.1 billion. The food sector remained the largest end market, accounting for roughly 45% of US shipments in 2025, followed by beverage (17%) and other end-user sectors (12%).

This machinery is forecast to grow by about 5.4% in 2026 in the US. By 2031, we expect the value of shipments to reach nearly $2.9 billion, reflecting an overall CAGR of about 6.0% from 2025 to 2031.

In Canada, the cartoning, multipacking, and case packing equipment market totaled $232 million in 2025. Food again led the end-market mix at 44%, followed by other end-user sectors (15%) and beverage (13%). Shipments are forecast to grow by about 4.5% in 2026 and reach roughly $306 million by 2031, an overall CAGR of about 4.8% from 2025 to 2031.

Fig. 35 Packaging Machinery Forecast - Cartoning, Multipacking & Case Packing



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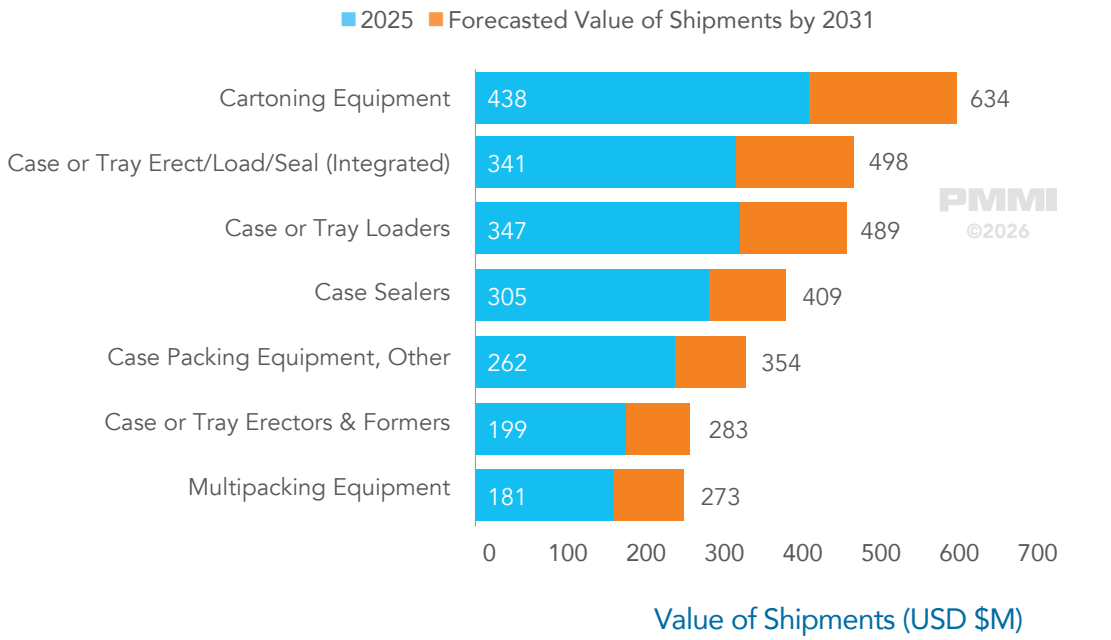
Table 10 - Cartoning, Multipacking & Case Packing

Industry	USA		Canada	
	2025 Value of Shipments ($M)	Share %	2025 Value of Shipments ($M)	Share %
Food	$931	45%	$102	44%
Beverage	$347	17%	$30	13%
Household, Industrial, & Agricultural Chemicals	$193	9%	$27	12%
Pharmaceuticals	$230	11%	$11	5%
Personal Care, Toiletries, & Cosmetics	$115	6%	$27	12%
Other End-User Sectors	$256	12%	$34	15%
Total	**$2,072**		**$232**	

Source: Interact Analysis

US sub machines

Fig. 36 US Packaging Sub-Machinery Forecast - Cartoning, Multipacking & Case Packing



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PALLETIZING & LOAD STABILIZATION

Steady demand, labor-driven automation

This section explores the evolving role of palletizing within end-of-line packaging operations. Drawing on insights from industry interviews, it examines the key trends, challenges, and technology shifts shaping this area. Topics covered include the demand for palletizers, the drivers of automation, the rise of robotic and collaborative systems, and the operational tradeoffs faced by manufacturers as they adapt to a changing labor and production landscape.

Core End-of-Line Function with Consistent Demand

Palletizing remains one of the most stable and essential components of the end-of-line. Across interviews, it was consistently described as a baseline requirement for nearly all production environments, regardless of product type or packaging format.

Alongside case packers and stretch wrappers, palletizers are considered foundational equipment needed to complete the packaging process. As a result, demand tends to remain steady even during periods of broader market volatility.

However, while the function itself has not changed significantly, the way it is being executed is evolving rapidly, particularly as companies reconsider how labor and automation are deployed at the end-of-line packaging operations.

Labor and Ergonomics as Primary Drivers of Automation

More than any other end-of-line function, palletizing is being reshaped by labor constraints and ergonomic considerations. Interviews repeatedly highlighted that palletizing tasks are physically demanding, repetitive, and difficult to staff, making them one of the first areas targeted for automation.

Companies are increasingly replacing manual palletizing operations not only to reduce headcount, but also to improve safety by removing workers from heavy lifting and repetitive motions. This is particularly important in applications involving large or heavy cases, where manual handling introduces both injury risk and inconsistency in stacking quality.

Since COVID, labor shortages have accelerated this shift. Many companies that previously relied on manual processes are now prioritizing palletizing automation as a way to stabilize operations and ensure consistent throughput.

Robotic systems and cobots

Shift Toward Flexible and Robotic Palletizing Systems

The transition toward robotic palletizing is a notable change in this segment. While traditional palletizers remain widely used, robotic systems are gaining traction due to their flexibility and adaptability.

Interviewees noted that robotic palletizers are particularly well suited for environments with:



Multiple SKUs



Varying Case Sizes



Frequently Changing Pallet Configurations

In these settings, robots offer a level of flexibility that fixed mechanical systems cannot easily match. Adjustments to pallet patterns, product mix, or case dimensions can be made with less physical reconfiguration, aligning with the broader industry shift toward greater SKU variability.

That said, adoption remains selective. Some companies continue to weigh the higher upfront costs and integration complexity associated with robotics, particularly in facilities without existing experience managing automated systems. In certain cases, growth in robotic palletizing has been uneven as companies balance flexibility needs against capital constraints.

Role of Cobots in Palletizing

In addition to traditional mechanical and robotic palletizing systems, interviewees also highlighted emerging interest in collaborative robots (cobots) as an incremental step toward automation. Cobots are often positioned as a more accessible entry point, offering lower upfront investment, simplified setup, and a smaller footprint compared to conventional robotic systems. These attributes make them particularly attractive for facilities with limited automation experience or space constraints.

Cobot adoption is most prevalent in lower-speed, entry-level palletizing applications, where throughput requirements are modest and operational flexibility remains important. In these environments, cobots can effectively handle repetitive tasks while reducing ergonomic strain on workers and lowering barriers to automation adoption.

However, interview feedback consistently emphasized that cobots are not universally applicable. Their performance is typically constrained by lower speeds and payload limitations, making them less suitable for high-volume or more complex palletizing operations. In these cases, traditional industrial robots or mechanical systems remain more effective. Several interviewees noted that cobots are sometimes over-requested by customers who view them as a simple solution, despite not always being the best fit for the application.

Additionally, collaborative systems often operate at reduced speeds to meet safety requirements when working alongside human operators, which can further limit throughput. Their perceived cost advantage may also be less pronounced than expected, as added sensing and safety features can offset some of the initial savings.

Despite these limitations, cobots continue to gain traction in targeted use cases, particularly where modularity, ease of deployment, or the ability to serve multiple lines is valued. For certain operations, they provide a practical way to introduce automation without the complexity of fully engineered robotic cells, contributing to a broader spectrum of palletizing solutions available to end users.

Simplicity vs flexibility tradeoffs

Operational Tradeoffs: Simplicity vs Flexibility

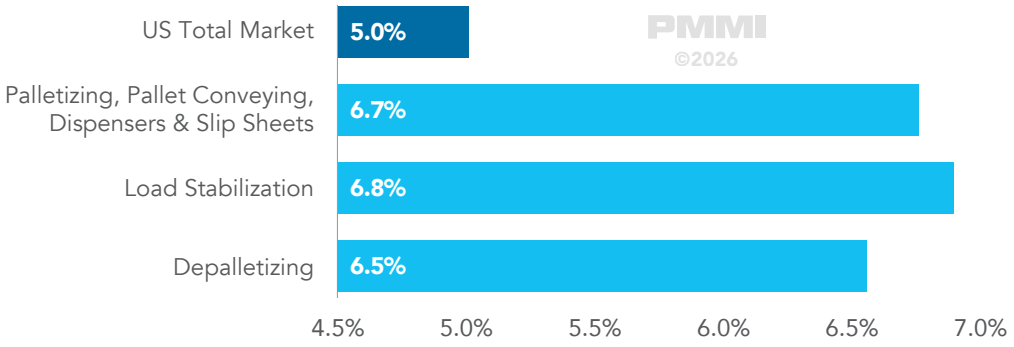
Similar to other areas of the end-of-line, palletizing involves tradeoffs between simplicity and flexibility. Traditional palletizers are often valued for their reliability and ease of operation, particularly in high-volume, low-variation environments.

In contrast, robotic systems offer greater flexibility but introduce additional complexity in programming, maintenance, and operator training. Interviewees noted that some customers remain cautious about adopting more advanced systems, particularly when internal technical expertise is limited.

This creates a spectrum of adoption, where companies select palletizing solutions based on their specific operational needs, workforce capabilities, and long-term production strategies.



Fig. 37 US EOL Packaging Machinery - Palletizing & Load Stabilization '25-'31 CAGRs



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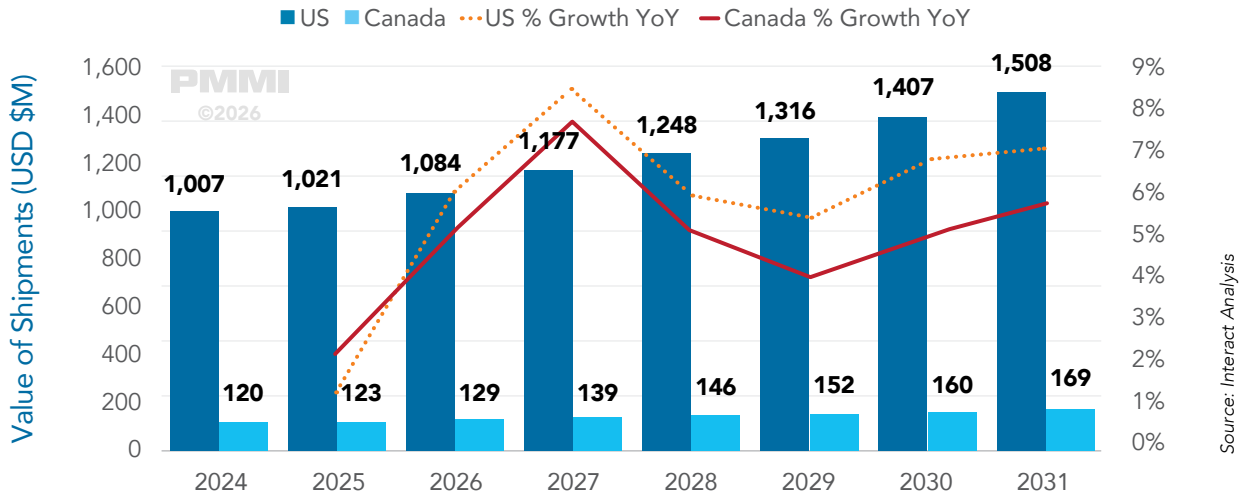
Machine sector overview

In 2025, the total estimated value of shipments within the palletizing and load stabilization equipment sector in the US was $1.0 billion. The food sector remained the largest end market, accounting for roughly 39% of US shipments in 2025, followed by beverage (18%) and household, industrial, and agricultural chemicals (17%).

This machinery is forecast to grow by about 6.2% in 2026 in the US. By 2031, we expect the value of shipments to reach $1.5 billion, reflecting an overall CAGR of about 6.7% from 2025 to 2031.

In Canada, the palletizing and load stabilization equipment market totaled $123 million in 2025. Food again led the end-market mix at 38%, followed by household, industrial, and agricultural chemicals (19%) and beverage (14%). Shipments are forecast to grow by about 5.2% in 2026 and reach roughly $169 million by 2031, an overall CAGR of about 5.5% from 2025 to 2031.

Fig. 38 Packaging Machinery Forecast - Palletizing & Load Stabilization



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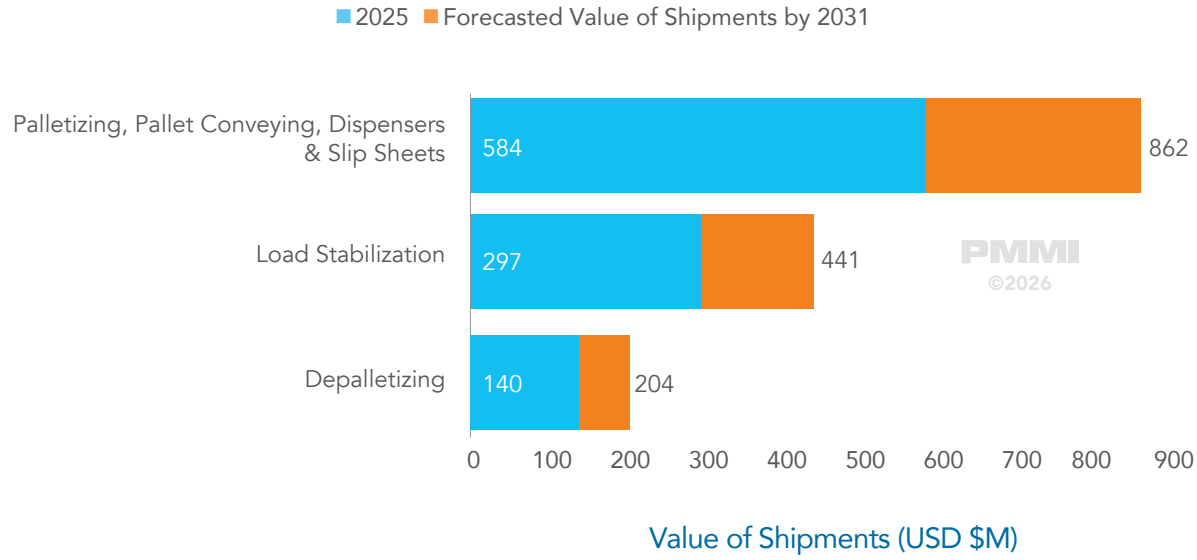
Table 11 - Palletizing & Load Stabilization

Industry	USA		Canada	
	2025 Value of Shipments ($M)	Share %	2025 Value of Shipments ($M)	Share %
Food	$400	39%	$47	38%
Beverage	$187	18%	$18	14%
Household, Industrial, & Agricultural Chemicals	$172	17%	$23	19%
Pharmaceuticals	$89	9%	$5	4%
Personal Care, Toiletries, & Cosmetics	$49	5%	$12	10%
Other End-User Sectors	$124	12%	$18	14%
Total	**$1,021**		**$123**	

Source: Interact Analysis

US sub machines

Fig. 37 US Packaging Sub-Machinery Forecast - Palletizing & Load Stabilization



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