

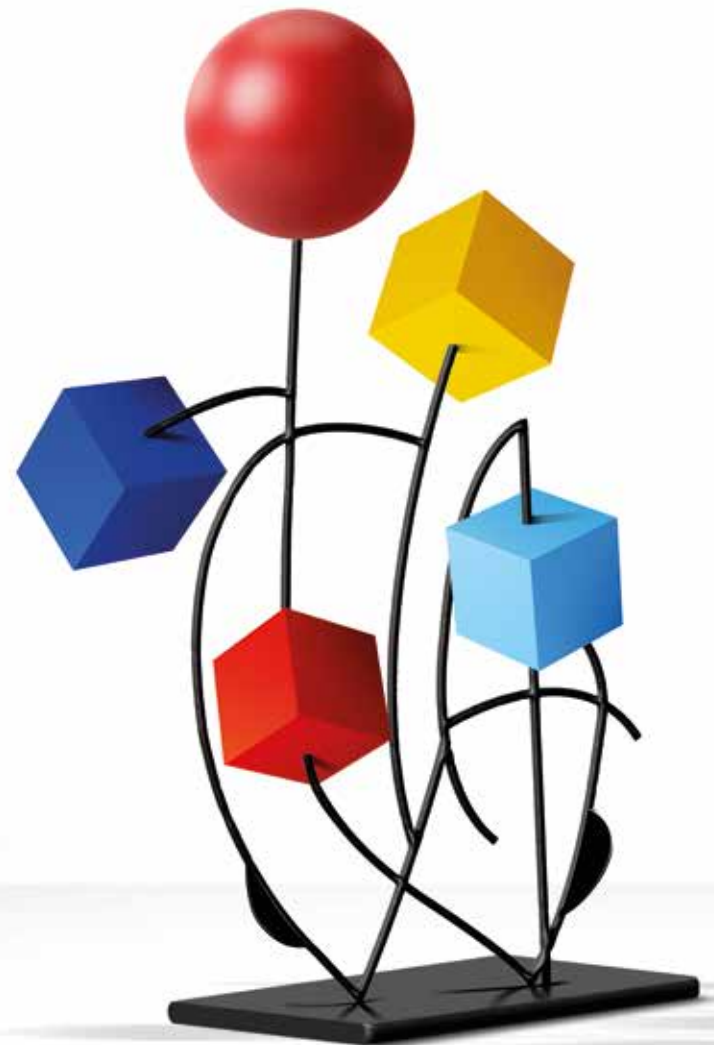
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Packaging Machinery Production and Market

December 2024



JOINT VENTURE BETWEEN:



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End of Line Packaging Machinery Market



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Market values in 2023 and 2027

4.9 bln. €

Market value in 2023

5.6 bln. €

Market value in 2027

The **End of Line Packaging Technologies** sector is experiencing significant growth between 2023 and 2027, reaching a total value of **€ 4.9 billion in 2023**. The outlook indicates an **average annual growth of +3.2%** (CAGR 2023-2027), a rate that exceeds the global growth of Packaging Machinery, estimated at +3.0%. This positive trend will bring the industry to a **value of € 5.6 billion by 2027**.

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Average annual growth rate 2023-2027

+700 mln. €

Added value

+3.2%

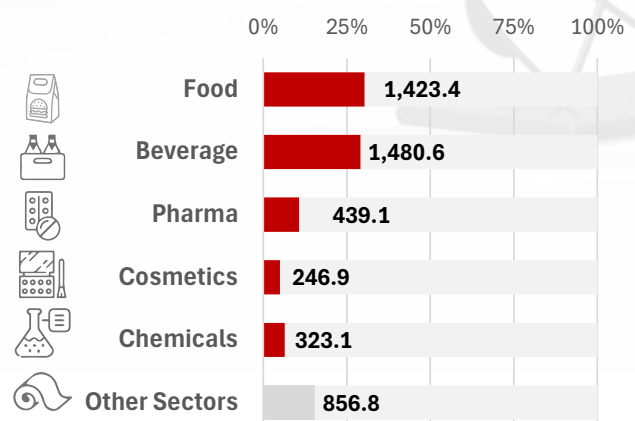
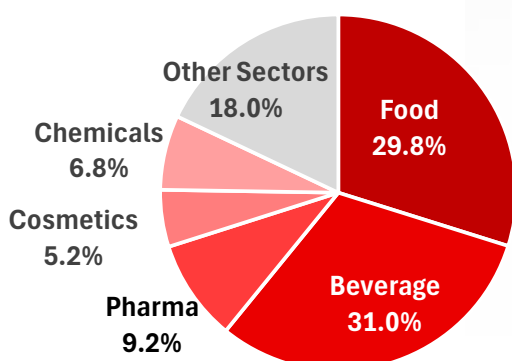
CAGR 2023 - 2027

End of Line Technologies account for **9.3%** of the **global Packaging Machinery market**. The share distribution shows a **strong concentration** in the **Beverage** and **Food sectors**, which together make up **60.9%** of the total. **Beverage** remains the leading sector with a **31%** share and a **value of 1,524 million euros in 2023**. **Food** follows, accounting for **28.9%** of the total, with a **value of 1,469 million euros**. The **Other Sectors** (Tobacco, Tissue, etc.), hold **18%** of the shares, with a total value of **892 million euros**. The **Pharmaceutical** sector accounts for **9.2%** of the total, or **451 million euros**, while the **Chemical** and **Cosmetic** sectors stand at **6.8%** (**331 million euros**) and **5.2%** (**256 million euros**), respectively.

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Market share by customer client sector and market values 2023

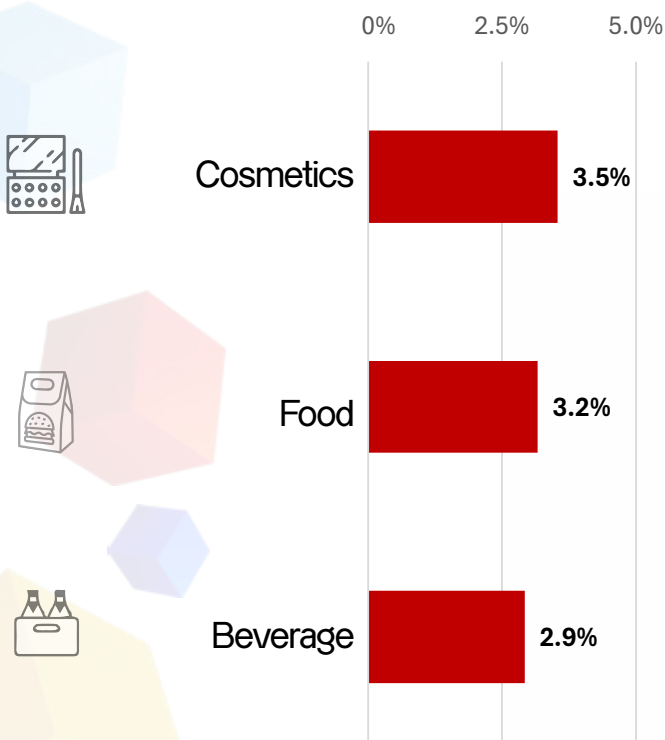
(data in % e million of euros)



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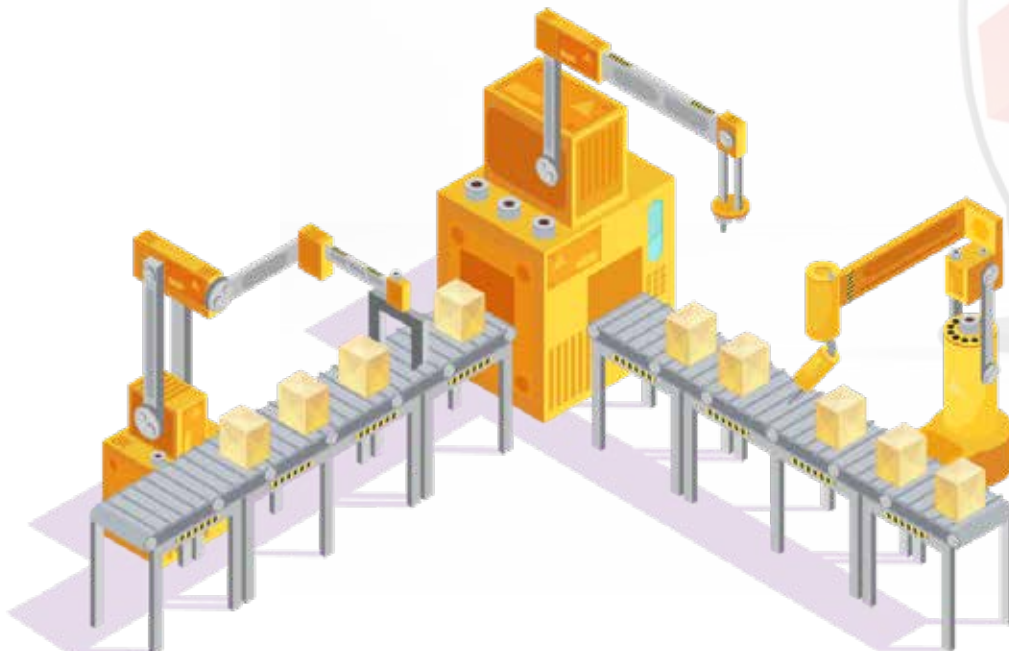
End of Line Packaging Machinery Market

End of Line
CAGR 23-27 of
Packaging Machinery by Client Sector



Analyzing the **growth prospects** for the period 2023-2027, interesting dynamics emerge that reverse the ranking of the leading sectors. The **Other Sectors** (Tobacco, Tissue, etc.), show an average annual increase of **+4.1%**, outpacing the overall average for the End of Line sector. The **Cosmetic** sector also shows significant development, with an expected growth of **+3.5%** per year. The **Food sector** remains in line with the industry average, with a rate of **+3.2%** per year. **Beverage**, while remaining central, is expected to grow at a slightly lower rate of **+2.9%** per year. The **Pharmaceutical** and **Chemical** sectors close the rankings, both with a **CAGR of +2.6%**.

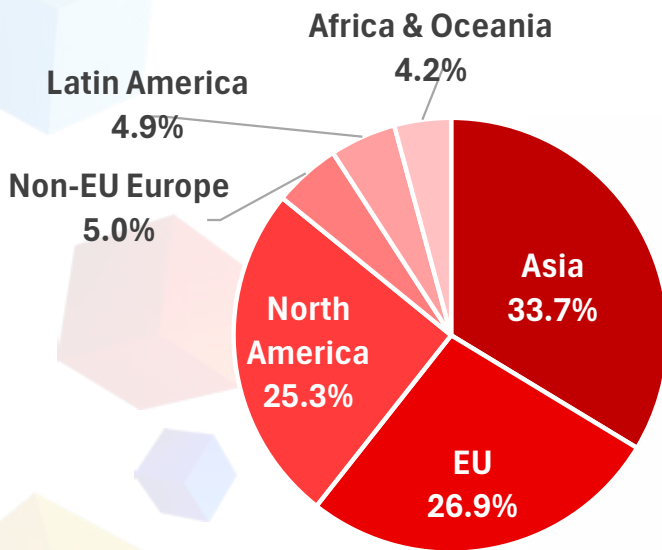
The End of Line Packaging Technologies sector thus confirms a steady evolution, driven by innovation and growing demand in traditional sectors, with significant momentum coming from emerging markets. The outlook indicates strategic opportunities not only in the more established sectors, but also in the less traditional ones, offering new challenges for the entire industrial chain.



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End of Line Packaging Machinery Market

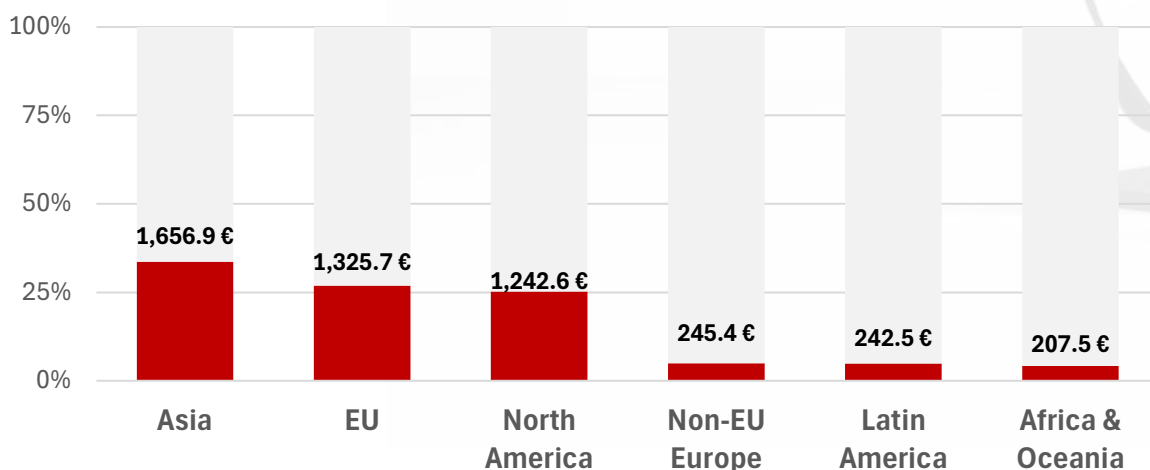
End of Line Value Distribution by macro region



The **End of Line Packaging Machinery** market shows a clear geographic concentration, with **Asia**, the **European Union** and **North America** together accounting for nearly **86%** of the entire value of use. **Asia** is the undisputed leader, accounting for **33.7%** of the technologies used, with a total value of **1,656.9 million euros**. This is followed by the **European Union**, which absorbs **26.9%** of the market (**1,325.7 million euros**), and **North America**, in third place with a **25.3%** share and a value of **1,242.6 million euros**. The remaining regions share the residual slice of 14.1%. These include **Non-EU Europe**, which ranks fourth with **5%** of the total and a value of **245.4 million euros**. Not far behind is **Latin America**, which accounts for **4.9%** of the market (**242.5 million euros**). Close behind are **Africa & Oceania**, which together cover just **4.2%** of the total value, or **207.5 million euros**.

This is a clear snapshot of a sector in which the weight of the large economies remains predominant, but which also offers growth opportunities for less represented areas.

End of Line Machinery market value by macro region



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End of Line Packaging Machinery Production

En of Line Production 2023

1,310 mln. €

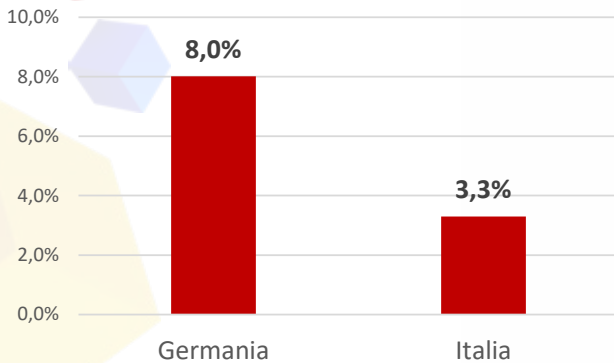
Italian turnover

812 mln. €

Germany turnover

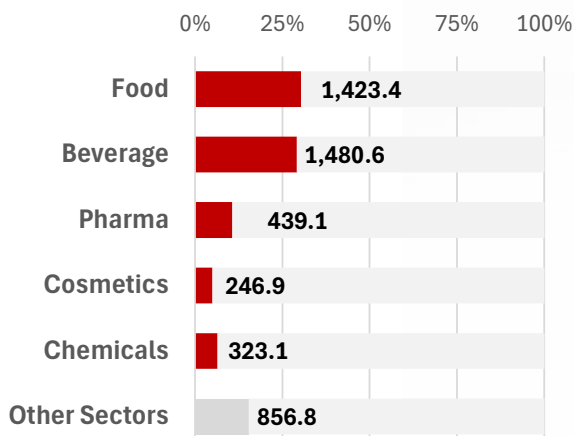
In 2023, Italian turnover related to the production of End of Line Packaging Technologies reached a value of **1,310.1 million euros**, registering a growth of **+3.3%** over 2022. In the same period, Germany produced a value of **812.4 million euros**, an increase of **8.0%** over the previous year. Although Italy surpasses Germany in total production value, the latter shows a stronger growth performance compared to the previous year.

End of Line Turnover Var. % 2023/2022

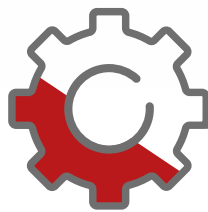
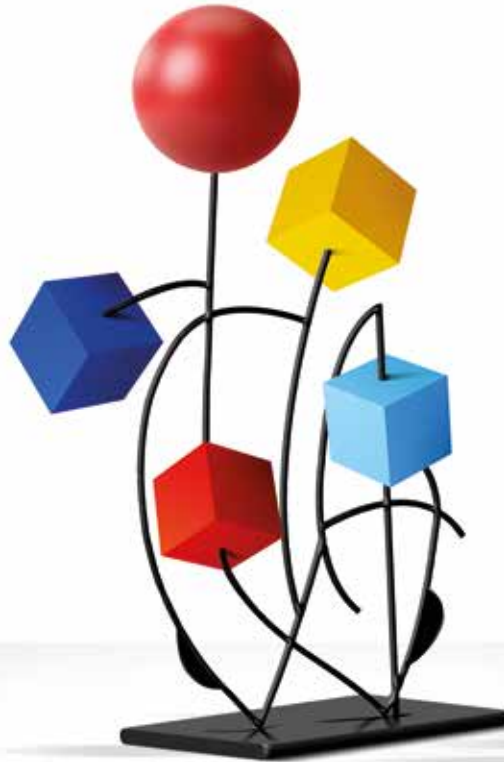


Looking at the composition of Italian production, it emerges that the **Beverage segment** contributes the most to turnover with a **34.8% share**, amounting to **455.3 million euros** in 2023. This is followed by the **Other Sectors** (Tobacco, Tissue, etc.), which account for **24%** of the total, with a value of **314.8 million euros**. The **Food Sector** ranks third, with a **23%** share and sales of **302.0 million euros**. Overall, **Food and Beverage** accounts for **57.8%** of total production, generating a combined value of **757.3 million euros in 2023**, more than half of the sector.

End of Line Italian turnover in 2023 Value share by client sector



The **Chemicals sector** ranks fourth with an **8.2%** share and a value of **107.6 million euros**. **Pharma technologies**, in fifth place, account for **5.4%** of the total, with a turnover of **70.3 million euros**. Closing the ranking is the **Cosmetics sector**, which contributed a **4.6%** share of **60.1 million euros in 2023**.



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