

High-Pressure Processing Equipment Market: A Global and Regional Analysis, 2023-2033

<https://marketpublishers.com/r/HD554CDC6D8FEN.html>

Date: April 2024

Pages: 145

Price: US\$ 4,950.00 (Single User License)

ID: HD554CDC6D8FEN

Abstracts

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Introduction to the Global High-Pressure Processing Equipment Market

The global high-pressure processing equipment market has experienced remarkable growth, with North America taking the lead in adopting and advancing the high-pressure processing equipment technology. The global shift toward sustainability is a key driver in the global high-pressure processing equipment market, driving both innovation and investment in high-pressure processing equipment solutions. The market for high-pressure processing equipment has been witnessing significant growth due to rising consumer demand for minimally processed foods with extended shelf life without the use of chemical preservatives. Additionally, stringent food safety regulations are driving the adoption of high-pressure processing technology among food manufacturers. High-pressure processing technology is primarily utilized in the processing of meat, poultry, seafood, fruits, vegetables, juices, dairy products, and ready-to-eat meals. It helps in extending the shelf life of these products while maintaining freshness and nutritional value. As food supply chains become more globalized, there's a greater emphasis on maintaining food quality and safety throughout transportation and distribution. High-pressure processing helps in extending the shelf life of perishable products, thereby reducing food waste and ensuring product integrity during transit.

The global high-pressure processing equipment market is estimated to reach \$1,442.1 million by 2033 from \$662.4 million in 2023, growing at a CAGR of 8.09% during the forecast period 2023-2033.

Industrial Impact

HIPERBARIC, thyssenkrupp AG, and JBT are some of the leading players globally in the high-pressure processing equipment Market. EXDIN Solutions and American Pasteurization are some of the emerging private companies that have remained in the limelight for the last few years in the high-pressure processing equipment market.

Some of the strategies adopted by high-pressure processing equipment manufacturers are new product launches, business expansions, mergers and acquisitions, partnerships, and collaborations. Mergers and acquisitions, partnerships, and collaborations have been the most preferred strategies in the market.

Market Segmentation:

Segmentation 1: by Application

Fruit and Vegetable Products

Juices and Other Beverages

Dairy Products

Meat Products

Seafood

Others

Meat Products to Dominate the Global High-Pressure Processing Equipment Market (by Application)

High-pressure processing (HPP) in meat products has gained significant traction in the food industry due to its ability to extend shelf life, improve safety, and maintain the quality of meat products. One of the primary benefits of high-pressure processing (HPP) in meat products is its ability to effectively reduce pathogenic bacteria such as Salmonella, Escherichia coli (E. coli), and Listeria monocytogenes. High pressure disrupts the cellular structure of these microorganisms, rendering them inactive without affecting the sensory attributes of the meat. High-pressure processing helps in extending the shelf life of meat products by inhibiting spoilage microorganisms and

enzymes responsible for deterioration. This enables manufacturers to produce meat products with longer refrigerated shelf life without the need for additional preservatives or additives. High-pressure processing is utilized across a wide range of meat products, including raw meats such as beef, pork, and poultry, processed meats such as sausages, deli meats, and ready-to-eat products including cooked ham and roast beef.

Segmentation 2: by Vessel Volume Type

Less than 100 L

100-300 L

Above 300 L

100-300 L to Dominate the Global High-Pressure Processing Equipment Market (by Vessel Volume Type)

High-pressure processing equipment systems with vessel volumes ranging from 100 to 300 liters are often considered medium-scale high-pressure processing equipment. These equipment are suitable for mid-sized food manufacturers and processors, allowing for the processing of moderate batch sizes. They are versatile and can handle a variety of food products, including juices, meats, and prepared meals. High-pressure processing (HPP) equipment with vessel volumes ranging from 100 to 300 liters is typically utilized by medium to large-scale food processing facilities to treat a considerable quantity of food products in each processing batch. The initial investment in high-pressure processing equipment may be significant. Many food processors consider it a worthwhile investment in midsize high-pressure processing equipment due to the increasing demand for food products with extended shelf life, improved food safety, and preserved product quality.

Segmentation 3: by Orientation Type

Horizontal

Vertical

Horizontal to Dominate the Global High-Pressure Processing Equipment Market (by

Orientation Type)

In horizontal high-pressure processing systems, the pressure vessel is positioned horizontally. Food products are typically loaded onto trays or shelves and stacked horizontally within the vessel. Products are loaded horizontally onto trays or shelves, which are then pushed into the pressure vessel. Loading and unloading are typically done manually or with the assistance of automated systems. Horizontal systems typically have a higher processing capacity compared to vertical systems. They can accommodate a larger volume of products per batch due to the horizontal stacking of trays or shelves. Horizontal systems are more suitable for products that are sensitive to compression or require careful handling during processing. The horizontal orientation allows for the gentle treatment of delicate items. Horizontal systems may be easier to maintain and clean due to their accessible design. Trays or shelves can be removed for thorough cleaning, and maintenance tasks are relatively straightforward.

Segmentation 4: by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Spain, Italy, and Rest-of-Europe

Asia-Pacific - Japan, China, Australia and New Zealand, South Korea, and Rest-of-Asia-Pacific

Rest-of-the-World

The high-pressure processing equipment market in North America is poised for continued growth, driven by increasing consumer awareness regarding food safety and quality, technological advancements, and regulatory support for high-pressure processing technology. The increasing consumer demand for clean-label and minimally processed foods, coupled with growing concerns about foodborne illnesses and food safety, is driving the adoption of high-pressure processing technology among food processors in North America. Additionally, the ability of high-pressure processing to extend the shelf life of perishable products and maintain their sensory attributes is attracting manufacturers across various segments. The North American food processing market is one of the largest in the world, driven by factors such as population growth, urbanization, changing dietary preferences, and technological advancements. The market continues to grow steadily, with a focus on efficiency, sustainability, and

innovation. Regulatory bodies such as the Food and Drug Administration (FDA) in the United States and Health Canada play a significant role in shaping the regulatory landscape for high-pressure processing equipment. Compliance with food safety regulations and guidelines is crucial for manufacturers and operators of high-pressure processing systems.

Recent Developments in the Global High-Pressure Processing Equipment Market

In March 2023, the Canadian Food Inspection Agency (CFIA) developed and published a document as guidance to assist food businesses in achieving compliance with the Safe Food for Canadians Regulations. Health Canada determined that high-pressure processing (HPP) treatment up to a maximum pressure of 87,000 pounds per square inch (600 megapascals) for a duration of less than 27 minutes does not adversely affect the nutritional quality or chemical safety of a food product compared to its untreated counterpart.

In September 2023, HIPERBARIC, one of the global leaders in high-pressure processing technologies, in collaboration with the Commonwealth Scientific and Industrial Research Organisation (CSIRO), Australia's national science agency, introduced an innovative solution such as high-pressure thermal processing (HPTP). This groundbreaking system combines the microbial lethality of heat with the rapid speed of high pressure, revolutionizing food processing and preservation. CSIRO has developed a patented canister that is integrated into existing HIPERBARIC high-pressure processing machines as the core of HPTP.

In March 2021, thyssenkrupp AG inaugurated Germany's largest high-pressure processing (HPP) center in Quakenbrück, which is capable of processing up to 26 tons of foodstuffs daily. Situated within the Business and Innovation Park Quakenbrück (BIQ), the 630 m² facility strategically collaborates with the DIL German Institute for Food Technology for research and development endeavors. This initiative marks a significant step forward in the field of food processing, emphasizing thyssenkrupp AG's commitment to innovation and advancing technology in the food industry.

Demand - Drivers, Challenges, and Opportunities

Market Demand Drivers: Increasing Demand for Processed Food Products with Preserved Nutritional Value

The increasing demand for processed foods that prioritize nutritional preservation is a powerful force driving the high-pressure processing (HPP) equipment market. Consumers today seek the convenience of processed foods but insist on healthier, more natural options. HPP uniquely delivers on this by inactivating harmful microbes while maintaining a food product's fresh taste, nutritional content, and sensory qualities, something traditional heat-based pasteurization often compromises.

This surge in demand for minimally processed, nutritionally dense foods is bolstering the HPP market. Growing focus on clean-label foods and a heightened aversion to artificial preservatives are further fueling HPP adoption. Its usage expands across beverages, meat, seafood, plant-based products, and more, offering a way to deliver convenience without compromising quality.

Market Challenges: High Initial Cost of the HPP Equipment

Demand for foods preserved through high-pressure processing (HPP) is poised to grow at a significant growth rate, yet the steep upfront costs for the requisite equipment present a formidable challenge. HPP technology demands a significant capital investment from food manufacturers, attributed to the specialized technology and sturdy construction needed to endure extreme pressures, which elevates the cost. This high barrier to entry significantly slows the broader and quicker adoption of HPP across the food industry. Smaller entities and newcomers to HPP often find it challenging to justify the hefty initial investment, leading them to continue with more conventional, cost-effective preservation methods despite potential misalignments with clean-label trends.

Furthermore, the elevated expenses create obstacles for businesses aiming to enhance their HPP capabilities or explore new product innovations. The perceived financial risk may contribute to a potential slowdown in the expansion pace of the HPP equipment market.

Market Opportunities: Expansion of Product Portfolio Specific to Application

The diversification of product lines to meet the varying demands of different applications presents a crucial opportunity to drive growth in the high-pressure processing (HPP) equipment market. With HPP's advantages spanning numerous food categories, there's a recognized demand for equipment tailored to the distinct requirements of various sectors. For instance, the equipment needed for processing meat and seafood under HPP differs from those for handling plant-based items or ready-to-eat meals.

By crafting HPP systems specialized for specific uses, manufacturers can boost processing efficiency, elevate product quality, and enhance consumer attraction. This specialized approach underscores dedication to innovation and establishes manufacturers as frontrunners in particular market niches. The emergence of application-specific HPP equipment is poised to draw new entrants to the market, intensifying competition and spurring additional innovation.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different applications of the high-pressure processing equipment products available in the market, which is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of sustainable high-pressure processing equipment solutions. Therefore, the high-pressure processing equipment business is a high-investment and high-revenue generating model.

Growth/Marketing Strategy: The global high-pressure processing equipment market has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include partnerships and collaborations.

Competitive Strategy: The key players in the high-pressure processing equipment market analyzed and profiled in the study include high-pressure processing equipment manufacturers. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

Research Methodology

Factors for Data Prediction and Modeling

The scope of this report has been focused on high-pressure processing equipment only.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations,

considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to December 2023 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was unavailable, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global high-pressure processing equipment market.

The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the high-pressure processing

equipment market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of reports segmentation and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for market type
- percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as GFI and Delft University of Technology.

Secondary research was done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares
- data for market value
- key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and high-pressure processing (HPP) equipment market penetration.

Some of the prominent names in the global high-pressure processing equipment market are:

HIPERBARIC

JBT

thyssenkrupp AG

EXDIN Solutions

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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