

Processing Industry Material Handling Equipment Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

<https://marketpublishers.com/r/P8EB65DF9EC5EN.html>

Date: July 2025

Pages: 210

Price: US\$ 4,850.00 (Single User License)

ID: P8EB65DF9EC5EN

Abstracts

The Global Processing Industry Material Handling Equipment Market was valued at USD 152.9 billion in 2024 and is estimated to grow at a CAGR of 6.1% to reach USD 262.5 billion by 2034. This steady rise is primarily attributed to the growing demand for advanced, automated solutions across processing sectors. The industry is increasingly embracing digital transformation, driven by the integration of intelligent technologies that are reshaping how materials are moved, stored, and managed. Automation is no longer a future trend - it has become an essential element of operational efficiency, cost reduction, and workforce safety.

Companies across processing industries are leveraging innovations such as robotics, AI, and IoT to streamline workflows, enhance real-time visibility, and gain a competitive edge through better process control. These digital systems not only improve production output but also support lean manufacturing by reducing reliance on manual labor, minimizing operational errors, and increasing uptime.

As businesses face heightened pressure to boost productivity and maintain agility in rapidly evolving markets, the shift toward modern material handling equipment continues to accelerate. The adoption of smart handling solutions has enabled companies to respond faster to dynamic production needs, while also supporting sustainability goals through energy-efficient operations and minimizing material waste. Furthermore, these automated systems can be tailored for various industrial requirements, making them ideal for processing applications where precision, consistency, and adaptability are critical.

From food and beverage processing to chemicals and electronics, enterprises are

investing in equipment that enhances flow, reduces bottlenecks, and ensures seamless intra-facility movement. This push toward modernization is not only transforming large manufacturing operations but is also proving beneficial for mid-sized facilities aiming to stay competitive without investing heavily in fully autonomous systems. The cumulative effect of these shifts is a robust demand trajectory for material handling equipment tailored specifically to processing environments.

In terms of operation mode, the market is categorized into manual systems, semi-automated systems, fully automated systems, and IoT-enabled smart handling systems. Among these, the semi-automated segment emerged as the market leader in 2024, capturing around 34.4% of the overall revenue. This segment is forecasted to grow at a CAGR of over 4.4% through the forecast period. Semi-automated equipment offers an optimal blend of automation benefits and operator control, which is particularly appealing to businesses that require both flexibility and precision. These systems are especially suitable for facilities with varying workflows, enabling operators to manage customized tasks efficiently while mechanizing repetitive activities. Their affordability, ease of integration, and lower maintenance requirements make them a practical choice for many processing firms aiming to scale without transitioning fully to autonomous operations.

On the basis of application, the market is segmented into conveyors, cranes and hoists, forklifts and industrial trucks, automated guided vehicles (AGVs), storage and retrieval systems, robotic material handling systems, bulk material handling equipment, and others. The conveyors segment led the market in 2024 with a revenue share of 25.2%, and it is anticipated to register a CAGR of over 5.5% from 2025 to 2034. The widespread deployment of conveyor systems is due to their ability to transport materials seamlessly across different points within processing plants. Their design versatility supports the movement of a wide range of goods, from lightweight items to bulk loads, thereby improving throughput and minimizing handling times. These systems contribute significantly to process optimization by ensuring uninterrupted material flow, which is essential for industries that operate on continuous production cycles.

The market, based on distribution channel, is divided into direct and indirect channels. In 2024, the direct sales segment held the dominant position with a revenue share of 72.7% and is projected to grow at a CAGR of over 4.7% throughout the forecast period. Direct channels offer buyers better access to tailored solutions and technical support, creating strong value propositions. However, the indirect segment continues to play a critical role in market expansion. It enables broader customer reach and provides additional services such as customization, post-sale assistance, and flexible financing

options, which are especially appealing to small and mid-sized enterprises. This dual-channel approach helps manufacturers maintain a balance between personalized service and wide-scale accessibility.

Regionally, China emerged as the front-runner in the Asia-Pacific processing industry material handling equipment market in 2024, securing approximately 35.5% of the regional share. The country's market is projected to exceed USD 2 billion by 2034. This dominance is fueled by rapid industrial development, a robust manufacturing infrastructure, and strong governmental initiatives aimed at boosting automation and smart manufacturing. Continued urbanization and regional industrialization efforts further drive the demand for advanced handling systems, making China a key contributor to the sector's growth across APAC.

Prominent players shaping the global landscape of the processing industry material handling equipment market include Daifuku, Crown Equipment Corporation, Dematic Group, GEA, Fives Group, Hyster-Yale Materials Handling, JBT Corporation, Intelligrated, Jungheinrich, Linde Material Handling, KION Group, Mitsubishi Logisnext, Tetra Pak, SSI Schaefer Group, and Toyota Industries Corporation. These companies are investing heavily in R&D, partnerships, and global expansions to strengthen their competitive positions and cater to the increasing need for intelligent and integrated material handling solutions.

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