

Filling Equipment Market Report by Sales Type (New Machinery, Spare Parts), Process Type (Manual, Semi-Automatic, Automatic), Product Type (Solid, Semi-Solid, Liquid), End Use Industry (Food and Beverages, Pharmaceutical, Personal Care, Chemical, and Others), and Region 2023-2028

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Abstracts

The global filling equipment market size reached US\$ 18.7 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 22.6 Billion by 2028, exhibiting a growth rate (CAGR) of 3.2% during 2022-2028. The growing automation and integration with Industry 4.0 principles, rising demand for customization and flexibility, and continuous investments in research and development (R&D) activities to enhance machine efficiency and minimize energy consumption are some of the major factors propelling the market growth.

Filling equipment accurately dispenses substances, such as liquids, powders, or granules, into containers, ensuring precise and consistent filling. It is available in several forms, including gravity fillers, piston fillers, and volumetric fillers. It contributes to sustainability efforts by minimizing product wastage through precise filling, reducing the need for excess packaging materials, and optimizing production efficiency. It is widely used in the food and beverage (F&B) industry for packaging of beverages like juice and soft drinks, sauces, condiments, and dairy products.

Rapid globalization and a continuous rise of international trade is driving the demand for filling equipment as companies worldwide are expanding their production capabilities to reach broader markets. Additionally, an increasing reliance on e-commerce is fueling the need for efficient packaging and filling solutions to meet online consumer demands. Along with this, the growing sustainability concerns are encouraging manufacturers to adopt eco-friendly filling equipment, reducing waste and environmental impact. Apart

from this, various filling equipment manufacturers are also investing in research and development (R&D) activities to enhance machine efficiency and minimize energy consumption, addressing the need for energy-efficient solutions. Moreover, the increasing availability of government incentives and subsidies for adopting advanced technology in manufacturing is propelling companies to invest in state-of-the-art filling equipment.

Filling Equipment Market Trends/Drivers:

Automation and Industry 4.0 integration

The rising adoption of automation and integration with Industry 4.0 principles represents one of the primary factors contributing to the market growth. Integration with Industry 4.0 allows filling equipment to collect real-time data on production processes.

Manufacturers can use this data to monitor equipment performance, detect issues early, and optimize production lines for better resource allocation. Additionally, leading market players are increasingly relying on automated filling equipment to streamline their production processes, improve efficiency, and reduce labor costs. Apart from this, the increasing utilization of automated filling equipment in the pharmaceutical industry for ensuring accurate dosing of medications and chemicals is strengthening the growth of the market.

Rising demand for customization and flexibility

The escalating demand for customization and flexibility is another significant factor contributing to the market growth. Filling equipment that can handle different product viscosities, sizes, and packaging materials allows manufacturers to produce a broader product portfolio without significant retooling. In addition, the development of filling equipment with quick-changeover features is enabling manufacturers to switch between product lines efficiently, reducing downtime and increasing overall productivity. Apart from this, various leading filling equipment manufacturers are focusing on innovating with modular designs, adaptive controls, and tool-less changeover systems. These advancements empower manufacturers to configure their filling equipment for specific production requirements and gain a competitive advantage in the market.

Stringent quality and hygiene standards

The regulatory authorities across various industries, especially in pharmaceuticals, F&B, and cosmetics are following stringent quality and hygiene standards, which is influencing the market positively. In addition, the rising need for precision filling to ensure product consistency and consumer satisfaction in cosmetics and personal care product manufacturing is strengthening the growth of the market. Furthermore, various leading manufacturers are designing machines with enhanced hygienic features, such as easy-to-clean surfaces, sanitary fittings, and compliance with Current Good Manufacturing Practices (cGMP) guidelines. Additionally, advanced quality control systems, including vision inspection and reject mechanisms, are integrated into filling

equipment to ensure that only products meeting quality standards reach the market.

Filling Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional, and country levels from 2023-2028.

Our report has categorized the market based on sales type, process type, product type and end use industry.

Breakup by Sales Type:

New Machinery

Spare Parts

New machinery dominates the market

The report has provided a detailed breakup and analysis of the market based on the sales type. This includes new machinery and spare parts. According to the report, new machinery represented the largest segment as it incorporates the latest technological innovations, making them more efficient, precise, and adaptable. Additionally, manufacturers continuously invest in research and development (R&D) to stay at the forefront of technological advancements, enabling them to offer state-of-the-art filling equipment that outperforms older models. Besides this, new machinery is installed with advanced quality control systems, such as vision inspection and reject mechanisms. These features ensure that only products meeting stringent quality criteria are packaged, which aids in reducing waste and enhancing the overall product quality. Moreover, various new machines are equipped with the Internet of Things (IoT) connectivity, allowing for remote monitoring and predictive maintenance.

Breakup by Process Type:

Manual

Semi-Automatic

Automatic

Automatic holds the largest market share

A detailed breakup and analysis of the market based on the process type has also been provided in the report. This includes manual, semi-automatic, and automatic. According to the report, automatic accounted for the largest market share. Automatic filling machines offer optimal efficiency and speed and can handle high production volumes, significantly increasing output compared to manual or semi-automatic methods. Additionally, they enable businesses to reduce their reliance on manual labor and minimize the risk of human error, improving overall production efficiency. Apart from this, many automatic filling machines are versatile and can be adjusted to accommodate a wide range of products, container sizes, and packaging formats. This flexibility allows manufacturers to quickly respond to changing market demands and produce various products on the same machine. Furthermore, modern automatic filling machines are equipped with advanced quality control systems, including vision inspection and reject

mechanisms.

Breakup by Product Type:

Solid

Semi-Solid

Liquid

Liquid accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product type. This includes solid, semi-solid, and liquid. According to the report, liquid represented the largest segment as it is ubiquitous across industries, including food and beverage, pharmaceuticals, cosmetics, chemicals, and automotive. These industries rely heavily on liquid filling equipment to package a wide array of products, such as beverages, sauces, pharmaceutical solutions, lotions, lubricants, and automotive fluids. Besides this, individuals find liquids more convenient for consumption or application, leading to a high demand for liquid-filled products, which, in turn, drives the need for efficient liquid-filling equipment. Furthermore, liquid pharmaceuticals, including oral medications, injectables, and syrups, require precise filling to ensure accurate dosing and patient safety. Moreover, liquid filling equipment offers customization and versatility. It can handle a wide range of viscosities and container sizes, making it suitable for large-scale production and niche, specialized applications.

Breakup by End Use Industry:

Food and Beverages

Pharmaceutical

Personal Care

Chemical

Others

Food and beverages represent the largest market segment

A detailed breakup and analysis of the market based on the end use industry has also been provided in the report. This includes food and beverages, pharmaceutical, personal care, chemical, and others. According to the report, food and beverages accounted for the largest market share. The food and beverage (F&B) industry encompasses an extensive range of products, from beverages like soft drinks and juices to sauces, dairy products, and condiments. This diversity creates a substantial demand for various types of filling equipment, including liquid fillers, volumetric fillers, and auger fillers, tailored to different product viscosities and packaging requirements. Apart from this, F&B production operates on a global scale to meet the demands of a growing population. This massive production volume necessitates high-speed and high-capacity filling equipment that can pack millions of units daily. As a result, the industry drives the development and adoption of advanced filling machinery.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest filling equipment market share. The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share since the region hosts a vast array of industries, including food and beverage, pharmaceuticals, chemicals, and cosmetics. These industries require a substantial amount of filling equipment to meet both domestic and international demands. In addition, the rapid economic growth and urbanization in many Asian countries are leading to increased consumption of packaged goods. Apart from this, the lower labor and production costs in Asia Pacific make it an attractive destination for filling equipment manufacturers. This allows them to produce equipment competitively and pass on cost savings to consumers. Moreover, Asia Pacific is home to some of the leading technology and engineering firms in the world. These companies

are at the forefront of developing innovative filling equipment, incorporating state-of-the-art automation, smart manufacturing, and digitalization into their products.

Competitive Landscape:

Companies are continuously investing in research and development (R&D) activities to introduce cutting-edge technologies. This includes the incorporation of Industry 4.0 principles, IoT connectivity, and AI-driven automation to enhance efficiency, reliability, and data-driven decision-making in their machines. Additionally, they are designing filling equipment with modular components and quick-changeover features. This enables customers to customize machines for various product types, container sizes, and production volumes, reducing downtime during transitions. Apart from this, they are creating equipment with easy-to-clean surfaces, sanitary materials, and compliance with stringent regulatory standards to ensure product safety and quality. Moreover, various manufacturers are developing machines that minimize material waste, reduce energy consumption, and optimize resource utilization, aligning with global sustainability goals. The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Accutek Packaging Companies

Coesia S.p.A

GEA Group Aktiengesellschaft

JBT Corporation

KHS GmbH (Salzgitter AG)

Krones AG

Ronchi Mario S.p.A.

Scholle IPN

Syntegon Technology GmbH

Tetra Laval International S.A.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In April 2022, KHS GmbH (Salzgitter AG) developed a modular PET filler platform. With this innovative PET filler platform, users can modify, alter, and expand their requirements at any time.

In March 2021, Scholle IPN, a leading global supplier of flexible packaging solutions, announced that they completed the purchase of Bossar, a global supplier of flexible horizontal form-fill-seal packaging equipment.

In May 2023, Coesia S.p.A finalized agreement with Oji Holdings Corporation, a leader in the pulp and paper industry in Japan, for the sale of IPI Srl, a leading supplier of aseptic carton packaging for the beverage and liquid food industry.

Key Questions Answered in This Report

1. What was the size of the global filling equipment market in 2022?
2. What is the expected growth rate of the global filling equipment market during 2023-2028?
3. What are the key factors driving the global filling equipment market?
4. What has been the impact of COVID-19 on the global filling equipment market?
5. What is the breakup of the global filling equipment market based on the sales type?
6. What is the breakup of the global filling equipment market based on the process type?
7. What is the breakup of the global filling equipment market based on the product type?
8. What is the breakup of the global filling equipment market based on the end use industry?
9. What are the key regions in the global filling equipment market?
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