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Global Packaging Machinery (End-of-Line Packaging Machinery) Market Growth 2026-2032

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Abstracts

The global Packaging Machinery (End-of-Line Packaging Machinery) market size is predicted to grow from US$ 10295 million in 2025 to US$ 15280 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 2032.

Packaging Machinery (End-of-Line Packaging Machinery) refers to machinery and automation systems used after primary packaging to perform secondary packaging, grouped packaging, transport packaging, order consolidation, palletizing, and outbound loading or unloading operations. Conventional end-of-line packaging equipment typically includes case erecting, case packing, case sealing, shrink wrapping, strapping, palletizing, and pallet load securing equipment. This report applies an expanded end-of-line definition and additionally includes Parcel Packaging Machinery, Put Wall Systems, and Robotic Loading and Unloading Systems serving e-commerce and logistics fulfillment, thereby covering key automation equipment from the completion of primary packaging through the formation of storage-, distribution-, or transportation-ready units. Primary packaging machinery that directly contacts the product or creates the immediate package, such as dosing, filling, bag forming, sealing, blister packaging, and thermoforming equipment, is generally excluded from the core scope.

In 2025, global Packaging Machinery (End-of-Line Packaging Machinery) production reached approximately 113 K Units with an average global market price of around US$ 93 K per unit.

The upstream supply chain includes structural metals, mechanical transmission and motion-control components, electrical automation products, industrial robots, pneumatic systems, sensors, conveying components, and control software. Carbon steel, stainless steel, aluminum alloys and engineering plastics are widely used in machine structures,

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while food, beverage and pharmaceutical applications generally place greater emphasis on stainless steel, surface treatment and hygienic design. Representative upstream suppliers include China Baowu, Outokumpu, Siemens, Rockwell Automation, etc..

Downstream demand spans E-commerce and Logistics, Food and Beverage, Home and Personal Care, Pharmaceuticals and Healthcare, Representative customers include Coca-Cola, Walmart, Wehkamp, JD, etc.

The gross margin is approximately 24%–50%.

By product type, the market covered in this report consists of Case and Carton Packaging Machinery, Shrink Wrapping Machinery, Parcel Packaging Machinery, Palletizing Machinery, Put Wall Systems, Robotic Loading and Unloading Systems, and Others. Case and Carton Packaging Machinery performs case erecting, case packing and case sealing and remains one of the most established end-of-line equipment categories across food, beverage, personal care, pharmaceuticals and industrial manufacturing. Shrink Wrapping Machinery creates grouped packages with shrink film and is extensively used in beverage, food and consumer-goods production. Parcel Packaging Machinery automates bagging, sealing, labeling and shipment preparation for individual and multi-item orders and is an important growth area in e-commerce fulfillment. Palletizing Machinery arranges cases, bags and other packaged units into predefined pallet patterns, with robotic systems increasingly replacing manual and conventional mechanical processes in many applications. Put Wall Systems perform order sorting, consolidation and verification and are particularly valuable in high-SKU, small-batch and high-frequency fulfillment environments. Robotic Loading and Unloading Systems extend automation from the packaging and warehouse floor to trailer or vehicle loading, unloading and material transfer. Others mainly include strapping machines, stretch wrappers, depalletizing equipment, checkweighers, scan-and-label systems, vision inspection equipment, and short-distance conveying and controls directly integrated with end-of-line workstations. Increasing integration among these categories reflects the industry's shift from isolated end-of-line machinery toward connected fulfillment and logistics automation systems.

By application, the market includes E-commerce and Logistics, Food and Beverage, Home and Personal Care, Pharmaceuticals and Healthcare, Industrial Manufacturing and Automotive Components, and Others. E-commerce and Logistics accounts for approximately 37% of global revenue and has developed into the largest downstream application market, driven by rising online order volumes, fragmented order profiles,

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next-day and rapid-delivery expectations, and increasing automation of picking, consolidation, packing and dispatch. Food and Beverage provides a stable installed base because its high-volume continuous production requires case packing, shrink wrapping and palletizing at high throughput. Home and Personal Care benefits from the proliferation of SKUs, package formats and frequent changeovers, supporting demand for flexible packaging automation. Pharmaceuticals and Healthcare require traceability, packaging integrity and strict quality control, supporting investment in inspection, labeling and automated end-of-line systems. Industrial Manufacturing and Automotive Components demand robust case handling, palletizing and robotic material handling for heavier and more diverse loads. Asia-Pacific represented approximately 37% of global revenue in 2025 and was the world's largest consuming region, supported by manufacturing expansion, e-commerce logistics investment, and continued automation of consumer-goods, food and beverage, pharmaceutical and industrial production across China, Japan, South Korea, Southeast Asia and India.

The global competitive landscape includes diversified packaging groups, specialist end-of-line machinery companies and logistics automation integrators. Major suppliers covered by the market include ProMach, Krones, Sidel Group, Tetra Pak, Aetna Group, IMA, K?rber, Signode Industrial, KHS GmbH, KNAPP, Hangzhou Youngsun, Toyota Automated Logistics, Barry-Wehmiller, Syntegon Technology, YCTD, Gurki, Guangzhou Tech-Long, Hangzhou Zhongya Machinery, Jiangsu Newamstar, BlueSword Intelligent and Hualian Machinery. The Top 5 suppliers collectively account for approximately 28% of global revenue. This relatively moderate concentration reflects the breadth of the market definition: while global groups benefit from large installed bases, turnkey-line capabilities, international service networks and long-term customer relationships, individual segments such as case packaging, palletizing, parcel fulfillment, put-wall systems and robotic loading continue to support numerous regional and specialized suppliers.

Market growth is supported by multiple structural drivers. Continued expansion of e-commerce and omnichannel retail is generating more high-frequency, small-batch and multi-SKU orders and therefore increasing demand for parcel packaging, order consolidation and automated dispatch systems; food, beverage, personal care and pharmaceutical manufacturers are continuing to replace manual processes with highly automated production lines; rising labor costs and shortages of warehouse and manufacturing labor are improving the investment case for robotic palletizing, automated case packing and robotic loading and unloading; greater demand for smaller batches and faster format changeovers is accelerating the adoption of flexible automation, machine vision and programmable motion control; advances in robotics,

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artificial intelligence, industrial vision, digital twins and software are improving throughput, flexibility and predictive maintenance; sustainability initiatives are encouraging manufacturers to reduce film, corrugated material and energy consumption through more efficient packaging equipment; and continued expansion of manufacturing and logistics infrastructure in Asia-Pacific is creating additional demand for both new production lines and fulfillment centers. Krones' strong 2025 order intake and its assessment of the resilience of the filling and packaging technology market also provide evidence of continued customer willingness to invest in packaging automation.

The market nevertheless faces meaningful restraints. Complete end-of-line lines, robotic palletizing cells, Put Wall Systems and automated loading solutions can require substantial upfront capital expenditure, which can delay purchasing decisions among smaller customers; differences in product dimensions, packaging materials, throughput, plant layouts and information systems lead to extensive customization, installation, commissioning and acceptance requirements, increasing project-execution risk; fluctuations in steel, aluminum, motors, gearboxes, servo systems, industrial robots and electronic components can affect equipment costs and delivery schedules; stringent hygiene, safety, validation and traceability requirements in food, beverage and pharmaceutical applications increase engineering and compliance costs; e-commerce and logistics demand can be highly seasonal and investment in major automation projects may be postponed during weak macroeconomic conditions; increasing automation requires stronger software integration, data connectivity, cybersecurity and aftermarket support capabilities, which increases manufacturers' research, engineering and service expenses; and changes in tariffs, trade policy, currency movements and regional supply-chain strategies can raise the cost of cross-border machinery projects and encourage more complex localization strategies.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Packaging Machinery (End-of-Line Packaging Machinery) Industry Forecast” looks at past sales and reviews total world Packaging Machinery (End-of-Line Packaging Machinery) sales in 2025, providing a comprehensive analysis by region and market sector of projected Packaging Machinery (End-of-Line Packaging Machinery) sales for 2026 through 2032. With Packaging Machinery (End-of-Line Packaging Machinery) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Packaging Machinery (End-of-Line Packaging Machinery) industry.

This Insight Report provides a comprehensive analysis of the global Packaging

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Machinery (End-of-Line Packaging Machinery) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Packaging Machinery (End-of-Line Packaging Machinery) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Packaging Machinery (End-of-Line Packaging Machinery) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Packaging Machinery (End-of-Line Packaging Machinery) and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Packaging Machinery (End-of-Line Packaging Machinery).

This report presents a comprehensive overview, market shares, and growth opportunities of Packaging Machinery (End-of-Line Packaging Machinery) market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Case and Carton Packaging Machinery

Shrink Wrapping Machinery

Parcel Packaging Machinery

Palletizing Machinery

Put Wall Systems

Robotic Loading and Unloading Systems

Others

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Segmentation by Automatic Level:

Semi-Automatic End-of-Line Packaging Equipment

Fully Automatic End-of-Line Packaging Equipment

Robotic and Intelligent End-of-Line Packaging Systems

Segmentation by Packaging Capacity:

Low-Throughput Equipment

Medium-Throughput Equipment

High-Throughput Equipment

Segmentation by Application:

E-commerce and Logistics

Food and Beverage

Home and Personal Care

Pharmaceuticals and Healthcare

Industrial Manufacturing and Automotive Components

Others

This report also splits the market by region:

Americas

United States

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- Canada
- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa

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Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ProMach

Krones

Sidel Group

Tetra Pak

Aetna Group

IMA

K?rber

Signode Industrial

KHS GmbH

KNAPP

Hangzhou Youngsun

Toyota Automated Logistics

Barry-Wehmiller

Syntegon Technology

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YCTD

Gurki

Guangzhou Tech-Long

Hangzhou Zhongya Machinery

Jiangsu Newamstar

BlueSword Intelligent

Hualian Machinery

Key Questions Addressed in this Report

What is the 10-year outlook for the global Packaging Machinery (End-of-Line Packaging Machinery) market?

What factors are driving Packaging Machinery (End-of-Line Packaging Machinery) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Packaging Machinery (End-of-Line Packaging Machinery) market opportunities vary by end market size?

How does Packaging Machinery (End-of-Line Packaging Machinery) break out by Type, by Application?

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