Automated Cartoning Machines Market Forecasts to 2032 – Global Analysis By Machine Type (Horizontal End-Load Cartoners, Vertical End-Load Cartoners, Top-Load Cartoners, Wrap-Around Cartoners, Tray/Carton Erectors & Closers and Other Machine Types), Motion Type (Continuous Motion and Intermittent Motion), Carton Type, Process Type, Capacity, Application, End User and By Geography

https://marketpublishers.com/r/AC1A4E88B672EN.html
Date: July 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: AC1A4E88B672EN

Abstracts

According to Stratistics MRC, the Global Automated Cartoning Machines Market is accounted for $5.2 billion in 2025 and is expected to reach $7.5 billion by 2032 growing at a CAGR of 5.2% during the forecast period. Automated cartoning machines are advanced packaging systems engineered to erect, load, and seal cartons with minimal human intervention. These machines handle various product types rigid, flexible, or loose by integrating robotic arms, conveyors, and programmable logic controls. They enhance operational efficiency, ensure consistent packaging quality, and support high-speed throughput across industries such as pharmaceuticals, food, and consumer goods. Automated cartoners reduce labor costs, minimize errors, and accommodate diverse carton sizes, making them essential for scalable, precision-driven packaging environments.

Market Dynamics:

Driver:

Increased demand for packaging automation

Industries such as pharmaceuticals, food & beverage, and personal care are increasingly shifting toward automation to meet stringent hygiene and safety standards. Moreover, the integration of robotics and vision systems into cartoning lines is enabling faster changeovers and improved product handling. These systems streamline packaging workflows, minimize human error, and enhance throughput, making them indispensable in high-volume production environments. This surge in automation is driven by the need for consistent quality, reduced labor dependency, and scalable packaging solutions.

Restraint:

Integration challenges with legacy systems

Older systems often lack compatibility with modern software protocols, requiring costly upgrades or custom interfaces. This complexity can lead to extended downtime during implementation and increased maintenance overhead. Additionally, workforce training becomes essential to manage hybrid environments where manual and automated systems coexist. The lack of standardized integration frameworks across industries further complicates deployment, especially for small and mid-sized enterprises operating on limited budgets.

Opportunity:

Integration of industry 4.0 technologies

Smart cartoners equipped with predictive maintenance capabilities, real-time performance analytics, and remote diagnostics are redefining production intelligence. These technologies enable dynamic adjustments based on product specifications, reducing waste and optimizing resource utilization. Furthermore, cloud-based monitoring and digital twins are enhancing traceability and compliance across supply chains. As Industry 4.0 gains traction, manufacturers are investing in modular and scalable cartoning systems that align with future-ready production models.

Threat:

Strict regulatory compliance and evolving standards

Automated cartoning systems must adhere to a complex web of regional and international packaging regulations, which are frequently updated to address safety, sustainability, and labeling requirements. Non-compliance can result in product recalls, legal penalties, and reputational damage. Additionally, evolving standards around tamper-evidence, serialization, and eco-friendly packaging materials demand continuous machine upgrades and validation which can strain R&D and operational budgets.

Covid-19 Impact:

The COVID-19 pandemic accelerated the shift toward automation in packaging, as manufacturers sought to reduce human contact and maintain continuity amid labor shortages. Demand for cartoning machines surged in sectors like pharmaceuticals and e-commerce, where packaging speed and hygiene became critical. However, supply chain disruptions, including delays in component sourcing and logistics bottlenecks, temporarily hindered machine deliveries and installations. Overall, the pandemic underscored the strategic importance of automation in ensuring business continuity and scalability.

The vertical end-load cartoners segment is expected to be the largest during the forecast period

The vertical end-load cartoners segment is expected to account for the largest market share during the forecast period due to their versatility in handling a wide range of product shapes and sizes. These machines are particularly favored in the food and pharmaceutical industries for their compact footprint and efficient loading mechanisms. Their ability to accommodate both rigid and flexible packaging formats makes them ideal for high-speed operations. Additionally, advancements in servo-driven technology and ergonomic design are enhancing performance and reducing operator fatigue.

The intermittent motion segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the intermittent motion segment is predicted to witness the highest growth rate driven by their suitability for small-batch and variable-speed production environments. Their modular architecture allows easy customization, while integrated inspection systems ensure packaging integrity. As manufacturers seek flexible solutions to meet fluctuating consumer demand, intermittent motion cartoners are gaining traction across nutraceuticals, cosmetics, and specialty food segments.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share attributed to robust industrial automation infrastructure and high adoption of advanced packaging technologies. The region’s strong presence of pharmaceutical and processed food manufacturers drives consistent demand for high-speed cartoning solutions. Regulatory emphasis on product safety and traceability further encourages investment in automated systems. Additionally, the presence of key market players and ongoing innovation in packaging machinery contribute to North America's dominant market position.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR reflecting its continued investment in smart manufacturing and digital transformation. The region’s focus on sustainability, coupled with rising labor costs, is prompting companies to automate secondary packaging processes. Government incentives supporting industrial modernization and the proliferation of e-commerce are further accelerating market growth. As manufacturers prioritize agility and compliance, North America remains a hotspot for next-generation cartoning technologies.

Key players in the market

Some of the key players in Automated Cartoning Machines Market include Marchesini Group S.p.A., Syntegon Technology GmbH, IMA Group, K?rber Medipak Systems GmbH, Cama Group S.p.A., Omori Machinery Co., Ltd., Romaco Group, Mpac Group plc, PMI KYOTO Packaging Systems, Optima Packaging Group GmbH, Econocorp Inc., ADCO Manufacturing, Triangle Package Machinery Co., Coesia Group, Jacob White Packaging Ltd., Rovema GmbH, Bradman Lake Group Ltd., Tetra Pak International S.A., Krones AG, and Massman Automation Designs, LLC.

Key Developments:

In July 2025, Omori showcased its latest packaging systems at JAPAN PACK 2025, emphasizing productivity enhancement and digital transformation. The company demonstrated new cartoning technologies tailored for food and pharmaceutical sectors. This aligns with its commitment to innovation and market leadership.

In July 2025, Romaco introduced the Noack N 760 machine at PACK EXPO Las Vegas

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and PPMA Birmingham, featuring PET mono-material blister packs. The PVC-free design reduces carbon footprint and supports sustainability goals. The launch highlights Romaco's push toward eco-conscious pharmaceutical packaging.

In March 2025, Massman acquired ADCO Manufacturing, expanding its portfolio with horizontal cartoners for frozen foods, ready meals, and flow-wrapped products. The deal strengthens Massman's end-of-line automation capabilities. ADCO's legacy in cartoning complements Massman's strategic growth.

Machine Types Covered:

- Horizontal End-Load Cartoners
- Vertical End-Load Cartoners
- Top-Load Cartoners
- Wrap-Around Cartoners
- Tray/Carton Erectors & Closers
- Other Machine Types

Motion Types Covered:

- Continuous Motion
- Intermittent Motion

Carton Types Covered:

- Stand-Up Straight
- Folded
- Closed

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Bag-In-Box

Side-Seamed

Custom Formats

Other Carton Types

Process Types Covered:

Online Cartoning Machines

Offline Cartoning Machines

Capacities Covered:

Low Speed (120 cartons/min)

Applications Covered:

Bakery & Confectionery

Dairy Products

Snacks & Cereals

Blister Packs

Vials, Ampoules, and Syringes

Sachets & Pouches

Cleaning Agents & Laundry Products

Other Applications

End Users Covered:

- Food & Beverage
- Healthcare & Pharmaceuticals
- Personal Care & Cosmetics
- Consumer Goods
- Chemical & Industrial
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe

- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

- Company Profiling
  - Comprehensive profiling of additional market players (up to 3)
  - SWOT Analysis of key players (up to 3)
- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)
- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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14.15 Coesia Group
14.15 Jacob White Packaging Ltd.
14.16 Rovema GmbH
14.17 Bradman Lake Group Ltd.
14.18 Tetra Pak International S.A.
14.19 Krones AG
14.20 Massman Automation Designs, LLC

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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