

Southeast Asia Sorting and Grading Machines Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Sorting and Grading Machines are machines that use mechanical, optical, or sensor-driven technologies to sort raw or processed materials into predetermined quality grades. Their main purpose is to minimize manual intervention and errors and to increase throughput in industrial processes.

The Southeast Asia Sorting and Grading Machines market is expected to exhibit a growth rate of 5.40% during the forecast period (2025-2033F). The growing demand for processed and packaged foods, the growing agricultural exports, and the tightening of quality and safety standards contribute to the development of the market. The labor costs and wage increases are driving the shift to automated sorting. The rising development of optical sensing and AI-based inspection technologies is becoming more accurate and cost-effective, which is increasingly encouraging. The scope of sorting machines is also expanding with the growth of recycling and waste management infrastructure. For example, on July 29, 2024, BEST Inc., a leading integrated smart supply chain and logistics solutions provider in China and Southeast Asia, announced the deployment of its eleven advanced Dimensioning, Weighing, and Scanning (DWS) systems in its largest sorting center in Southeast Asia, located in U10 Shah Alam, Malaysia (KULHUB). The total investment in these systems amounts to nearly 10 million Malaysian Ringgit (~USD 2.1 million).

Based on machine type, the market is segmented into optical sorting, weight-based grading, size-based grading, and others. Among these, the optical sorting market held the largest share in 2024. This is because food processors and exporters in Southeast Asia will require greater accuracy, consistency, and adherence to international quality standards. The yield and waste are directly improved by the ability to detect color, defects, and foreign materials at high

speeds. Therefore, this drives processors to invest in high-end optical systems, which accelerates adoption in agriculture, food processing, and recycling. For example, in January 2025, B?hler launched its new SPARK Pro optical sorter, designed to improve wheat cleaning and increase yields in flour mills. The new milling machine will focus on the needs of the milling sector in Southeast Asia, where wheat quality is likely to be driven by weather variability and grain supply volatility.

Based on technology, the Southeast Asian Sorting and Grading Machines market is segmented into camera/vision-based systems, AI and machine learning, sensor-based systems, and others. Among these, the camera/vision-based systems segment held the dominant share of the Southeast Asia sorting and grading machines market in 2024. The camera/vision-based systems promote market development through cost-efficient, reliable automation that outperforms manual grading. These systems have demonstrated the capability to detect size, shape, and surface defects, thereby appealing to both large and mid-scale processors. Also, the scalability and reduced integration complexity facilitate the rapid deployment of processing facilities in Southeast Asia.

Based on end-use industry, the market is segmented into agriculture & food processing, recycling & waste management, mining & minerals, pharmaceuticals, and others. Among these, the recycling & waste management segment is expected to grow at a significant CAGR during the forecast period (2025-2033). The expansion in recycling and waste management is driven by the use of sorting machines, as governments are becoming more stringent in environmental regulations and investing in material recovery facilities. Also, the enhanced material purity and yield through automated sorting are essential to plastics, metal, and e-waste recycling. This widening range of applications spreads revenue among equipment manufacturers outside food processing.

Based on sales channel, the market is segmented into direct sales and indirect sales. Among these, the direct sales segment is expected to grow at a significant CAGR during the forecast period (2025-2033). Direct sales contribute to market growth by enabling manufacturers to work more closely with major processors and by providing specialized sorting options. OEM-based sales enhance after-sales services, system optimization, and long-term relationships, and this aspect is becoming increasingly crucial for export-based manufacturers. This channel enhances brand loyalty and accelerates repeat installations.

For a better understanding of the market adoption of the Southeast Asian Sorting and Grading Machines market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow at a significant CAGR during the forecast period (2025-2033). The market is driven by the rapid growth of export-oriented food processing and by increased foreign direct investment in manufacturing. The increased use of automation is helping processors enhance uniformity, minimize waste, and address labor shortages. Adding to this, the rising adoption of optical and AI-based systems is increasing rapidly due to the growing demand among international buyers for standardized grading. Moreover, the rising investments in recycling and environmental management expand the range of applications. The long-term demand for equipment is encouraged by the government's focus on industrial modernization. For example, on May 28, 2025, SPX Express (SPX) signed a strategic collaboration agreement with Frasers Property Vietnam to develop its newest automated sorting centre in Hung Yen province. When completed in 2027, the state-of-the-art industrial space in Frasers Property Vietnam's Industrial Centre Yen My will be SPX's largest automated sorting centre in Southeast Asia. Spanning 170,000 sqm, the sorting centre will boost operational efficiency, enhance service reliability, and support the expected demand growth of businesses and shoppers from the region.

Some major players running in the market include TOMRA Systems ASA, Böhler Group, SHIBUYA CORPORATION, Satake Corporation, Sesotec GmbH, Anhui Vsee Optoelectronic Technology Co., Ltd., Anhui Jiexun Optoelectronic Technology Co., Ltd. (ANYSORT), Duravant, and others.

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