

# IPACK-IMA

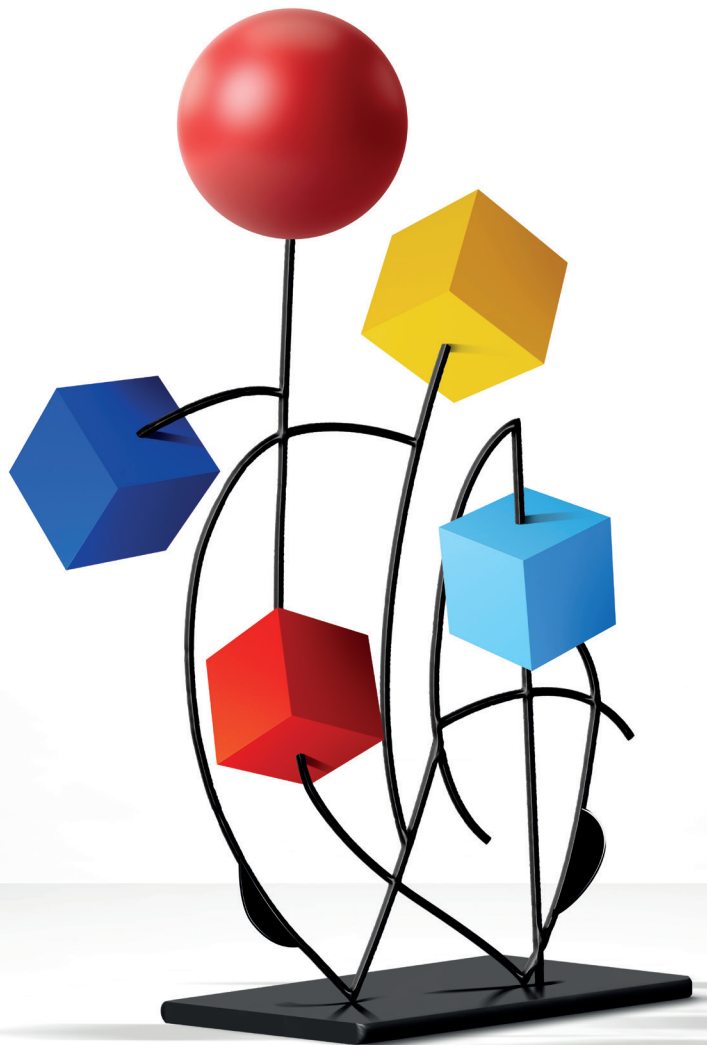
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## MONITOR

### GRAIN BASED FOOD

### Packaging and Process Technologies

September 2024



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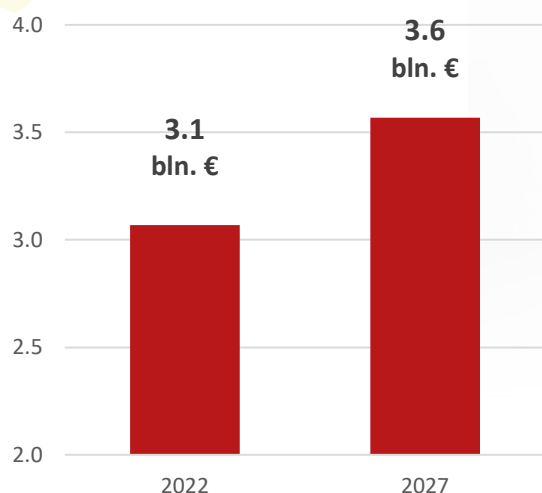
**18.0 %**

On the Food Packaging Machinery Industry

**5.8 %**

On the Total Packaging Machinery Industry

**World Packaging Machines  
Grain Based Food**  
Market value



The latest analyses related to **Packaging Technologies** show details on the structure of the downstream sectors served by the industry.

With particular reference to the **Grain Based Food sector**, resources used for the **packaging** of Grain Based Food **exceed 3 billion of euros**, a share that corresponds to **18 % of the Food macro-sector** (5.8 % of total packaging sales).

In **2027**, the **value** of the Grain Based Food packaging technology market **is expected to reach € 3.6 billion euros**, thanks to an average annual growth of **+3.1%**, growth that exceeds the expected average trend of the packaging and packaging technology sector (3.0%).

**World Packaging Machines  
Grain Based Food**  
Market expected growth



**+498.5**  
mln. €



**+3.1 %**  
CAGR 2023 - 2027

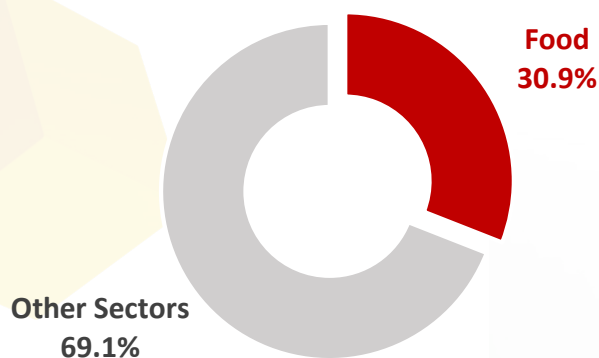
# GRAIN BASED FOOD

## Packaging Technologies - Italy

From the 12<sup>th</sup> National Statistical Survey on the **Italian Packaging Machinery Manufacturers Industry**, we can delve into the dynamics of the industry sector in the domestic market: **Food Packaging Technologies account for 30.9% of the total industry value**. The food sector occupies the largest share, followed by Beverage (26.2 % of total), Pharmaceutical (16.2 %), Cosmetic & Personal Care (4.4 % of total sales), Chemical (3.9 % of the industry) and Other sectors (18.4 % of the industry).

Analyzing the **Food Packaging industry** in further detail shows that the leading segment is **Fresh & Produce Food** with the share of **28.7 %**; followed by **Dairy** with **22.3 %** and **Bakery and Grain Based Food** in third place with the weight of **20.3 %** of the total food value. They have lesser shares **Convenience Food** (**17.3 %**) and **Confectionery** (**11.4 %**).

### Food Packaging Machines



Food  
30.9%



Fresh and Produce Food	28.7%
Dairy	22.3%
Bakery and Grain Based Food	20.3%
Convenience Food	17.3%
Confectionery	11.4%

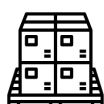
FFS  
**287.1** mln €



Cartoning  
& Case packers  
**110.1** mln €



Palletizers  
**61.1** mln €



### Value of the main Packaging Machines in the Bakery sector

value in millions of euros

Within **Bakery & Grain Based Food**, among the **technologies produced in Italy**, **FFS (Form Fill Seal)** prevails with a total value of **287.1 million euros**, followed by **Cartoning and Case Packers**, worth **110.1 million euros** and **Palletizers and Depalletizers** worth **61.1 million euros**.

# GRAIN BASED FOOD

## Process Technologies

### Process Technologies - 2023

Market value

#### Bakery



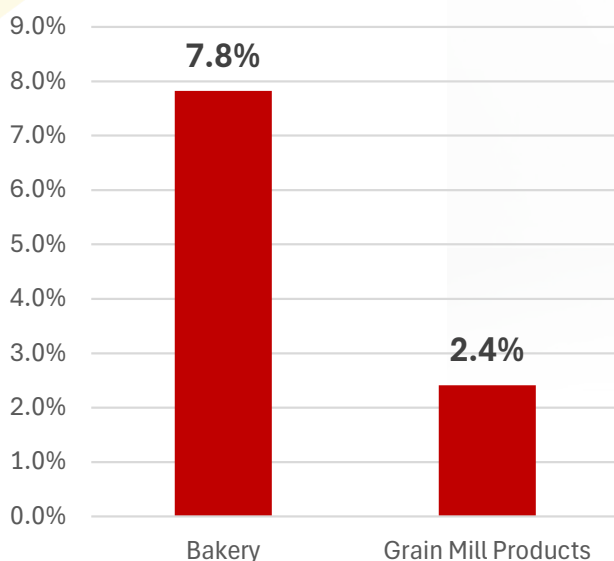
**10.7**  
bln. €

#### Milling



**2.2**  
bln. €

### Average expected growth (CAGR 2023 - 2027)



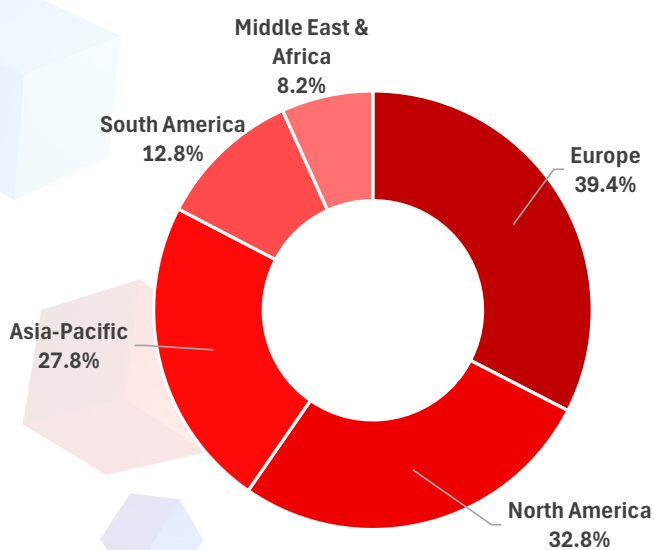
Complementary to the Packaging Industry sector is the **Process Technology** sector, which is useful for the transformation of primary goods into ready-to-eat foods.

Speaking of **Grain Based Food**, we cannot fail to mention the **Bakery** category which, **globally, has a value of 10.7 billion euros**. Analyzing the upstream processes of the supply chain, we find the **Milling sector with a value of more than 2.2 billion euros**.

Expectations for growth are positive: between now and 2027, **the value** of the market for machinery and process equipment for bakery products **is expected to grow by an average of +7.8 % per year**, while **milling** is expected to grow positively **by +2.4 % per year** until 2027.



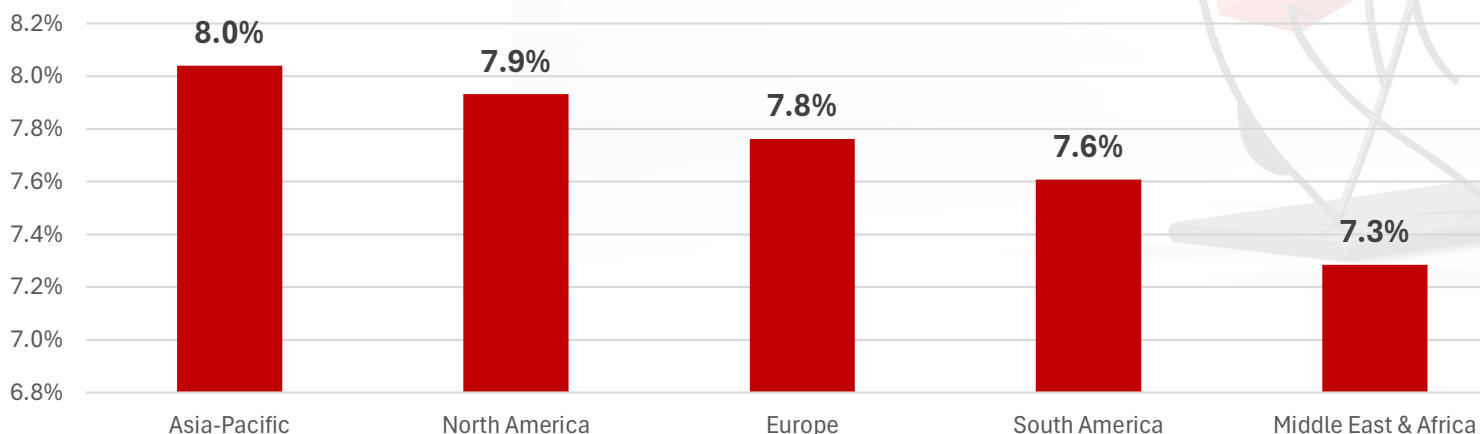
### Process Technologies Market value distribution



Within the broad sector of Grain Based Food, the **Bakery** segment is particularly interesting from the point of view of its **geographical distribution**. **Europe** competes for **32.6 %** of the Bakery Process equipment market, followed by **North America** with **27.1 %**. Next in order of magnitude come the **Asian and Pacific regions (23.0%)**, **South America (10.6%)**, and last come the **Middle East & Africa (6.8%)**.

The analysis of the sector **with reference to the growth prospects** of the regions is also interesting: Bakery Process Technologies will grow fastest in **Asia & the Pacific**, with expectations of **+8% average per year until 2027**, followed by **North America** for which a change of **+7.9%** is expected. **Europe** is expected to grow by **+7.8% by 2027**, **Central & South America** will grow by **+7.6%** while **Africa & the Middle East** will see a change of **+7.3%**.

### Process Technologies CAGR 2023 - 2027



### Packaging Materials Projected volume - 2027

#### Bakery



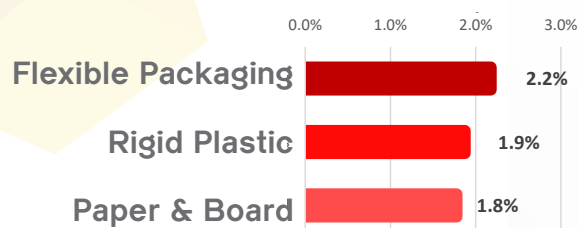
**326.2**  
bln. units

#### Pasta



**28.8**  
bln. units

### Packaging Materials Expected growth (CAGR 2023 - 2027)



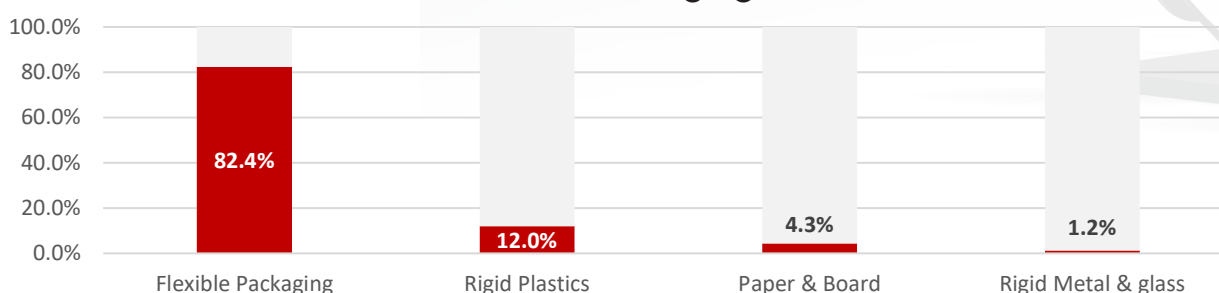
Among the downstream **client sectors** of packaging (i.e., among the user sectors of packaging technologies), food is undoubtedly among the most important not only because of the dimensional importance of the food sector and the implications of packaging on green issues, but also and especially because of the issues in terms of food safety and traceability.

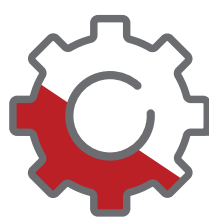
Focusing on Grain Based Food, the following dynamics of Packaging Materials use for Bakery and Pasta goods are observed: **nearly 29 billion units of Pasta packaging** are expected to be used in 2027, **over 326 billion for Bakery goods**.

A total of five **material types** are used for Grain Based food storage: **Flexible Packaging** is the predominant category (**82.4 % of the total**), **Rigid Plastic** (with **12 % of the volume**) and **Paper & Board** (worth **4.3 % of the market by quantity**). Residual shares refer to **Metal and Glass packaging**.

**Growth forecasts to 2027** see **Flexible Packaging** in first place with a projected average annual increase of **+2.2% per year**, followed by **Rigid Plastic (+1.9%)** and **Paper & Board (+1.8%)**.

### Packaging Materials % shares of Packaging Materials





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