

## **Cosmetic Packaging Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 110 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Cosmetic Packaging Machinery Market Analysis

The cosmetic packaging machinery market size in 2026 is estimated at USD 3.41 billion, growing from 2025 value of USD 3.27 billion with 2031 projections showing USD 4.21 billion, growing at 4.29% CAGR over 2026-2031. Steady growth mirrors rising demand for automated, sustainability-ready lines that support a widening mix of packaging materials and product formats. E-commerce pressure for lightweight, shipment-friendly packs, coupled with stricter recyclability targets, compels manufacturers to install equipment that can switch rapidly between flexible films, refillable jars, and premium glass. Investments concentrate on AI-enabled inspection and electric servo drives that lift uptime, curb labor dependence, and reduce energy use. Competitive activity centers on acquisitions that extend filling, sealing, and vision capabilities, while component price volatility and export controls create cost and lead-time risk.

Global Cosmetic Packaging Machinery Market Trends and Insights

Growing Demand for Personal Care and Beauty Products

Fragrance, skincare, and premium color lines recorded double-digit sales in 2024-2025, pushing producers to widen bottle shapes, caps, and decoration effects. New launches such as Lumson's 1,500 design combinations require machinery capable of water-based lacquering, hologram application, and ergonomic refillable features. Estee Lauder's 2024 switch to bio-based polymers illustrates the need for precise form/fill/seal and labeling units that protect product integrity while handling

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

non-traditional resins. Equipment suppliers increasingly package turnkey modules so that beauty houses can synchronize filling, capping, and inspection across wider viscosity ranges. Continuous premiumization keeps demand high for versatile lines that can flex between luxury glass and lightweight pouches.

### Increasing Industrial Automation and Smart Packaging Lines

With 85% of automation employers reporting technician shortages, beauty manufacturers accelerate full-line automation. Syntegon's SPC 1000 reduced manual interventions by 80% and freed 300 production hours annually, while electric linear actuators lowered energy use and installation space. Case implementations such as Mary Kay's 2024 mascara line show how integrated robots, decentralized drives, and digital twins shorten format changeovers and raise OEE. Growing preference for plug-and-play modules means medium-sized firms adopt collaborative robots for inspection, palletizing, and wash-down cleaning, making automated capacity accessible without prohibitive retraining.

### High Upfront Capital Expenditure

Complete high-speed lines cost USD 500,000-2 million, forcing many small producers to stagger purchases or lease. While PMMI projects strong order books through 2027, higher interest rates lengthen payback periods to 3-5 years. Summit Packaging's 2024 survey showed that firms now favor phased automation where labeling and case-packing receive priority before vision inspection. Equipment developers respond with entry-level thermoformers and shared-risk service contracts to lower barriers.

Other drivers and restraints analyzed in the detailed report include:

E-commerce Shift Toward Smaller SKUs and Flexible Formats  
Sustainability Regulations Pressuring Eco-friendly Packaging  
Volatile Prices of Precision Components and Steel

For complete list of drivers and restraints, kindly check the Table Of Contents.

### Segment Analysis

Form/fill/seal equipment accounted for 28.03% of cosmetic packaging machinery market share in 2025, supported by demand for integrated dosing, sealing, and pouch forming across creams, serums, and wipes. IMA's sachet line reaches 80 cycles per minute on 16 lanes, illustrating throughput that skincare and fragrance fillers require. Wrapping and bundling units post the highest 6.56% CAGR because e-commerce channels need protective multi-packs that withstand shipping shocks. Inspection modules equipped with AI now pair with every filler to guarantee luxury finish. Capping, cartoning, and case packing maintain stable uptake as refillable formats enter the mainstream.

Continuous investment in flexible films means machine builders refine temperature control and seal-bar profiles for bio-based laminates. Advance in laser-score technology eases openability without sacrificing barrier. As rigid-to-flexible conversions accelerate, the cosmetic packaging machinery market benefits from lines that handle both 3-side sachets and stand-up pouches on a single frame. Vision inspection cameras mounted after each module feed analytics dashboards that guide real-time speed balancing.

Fully automatic lines held 64.87% revenue in 2025 and will keep the lead with a 5.58% CAGR. Integrated robots pick, orient, and cap at rates that preserve retail aesthetics and hygiene. Syntegon's RMA machine covers regulated microlot runs, linking manual feeders with robotic assembly so producers transition to full automation in stages. Predictive maintenance based on vibration sensors trims unplanned downtime and extends part life.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Semi-automatic platforms still matter for artisan and seasonal products but growth plateaus as user-friendly programming lowers the skill barrier for full lines. Association for Advancing Automation programs help operators move from bolt-on fillers to fully networked cells that share production data upstream. Cloud dashboards alert supervisors to jam risk, ensuring smaller brands can reach mass-retail quality without high headcount.

Cosmetic Packaging Machinery Market is Segmented by Machine Type (Form/Fill/Seal Machinery, Labeling Machinery, and More), Automation Level (Fully-Automatic Systems, Semi-Automatic Systems), Packaging Type (Rigid Containers and Jars, Tubes, Sachets and Pouches, and More), Cosmetic Product (Skin-Care Products, Hair-Care Products, and More), and by Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

Asia-Pacific holds 38.05% of 2025 revenue and records the fastest 7.03% CAGR. Regional producers integrate Industry 4.0 retrofits to comply with global brand audits while maintaining cost leadership. Strong domestic demand in China, South Korea, and India fuels factory expansions that source both Western and local machinery. Government incentives for intelligent manufacturing further accelerate adoption of AI inspection and energy-efficient drives.

North America remains a premium equipment buyer. Indie labels crowd the market and encourage short-run presses, modular fillers, and vision systems that maintain artisanal creativity at industrial speed. Regulations on recycled content push both multinationals and contract packers to upgrade lines for PCR resins and monomaterial laminates. Domestic reshoring of component production partially offsets tariff-related cost spikes.

Europe enforces the strictest sustainability rules. The continent's brands replace PFAS barriers and add digital passports for pack traceability, requiring printers, fillers, and sealers to integrate data carriers at high speed. OEMs here pioneer servo-electric actuation and closed-loop CIP that lower water and chemical use. Southern and Eastern Europe see green-field cosmetic plants that combine tax incentives with proximity to EU markets.

The Middle East and Africa register rising installations as local cosmetic brands expand beyond premium fragrances into skincare. Turnkey lines optimized for hot climate stability gain traction. In South America, Brazil leads demand for low-maintenance flexo labelers and pouch formers that thrive despite episodic power outages. Exchange-rate volatility makes remote diagnostic and local spares hubs critical to adoption.

### List of Companies Covered in this Report:

Syntegon Technology GmbH IMA Industria Macchine Automatiche SpA Marchesini Group SpA Coesia S.p.A (PackSys Global etc.) ProMach Inc. Accutek Packaging Equipment Co. Krones AG Sidel Group Optima Packaging Group GmbH Norden Machinery AB Barry-Wehmiller (Pneumatic Scale Angelus) Uhlmann Packaging Systems ProSys Innovative Packaging Equipment TurboFil Packaging Machines LLC Vetraco Group Zhejiang Rigao Machinery Corp. Wimco Ltd Liquid Packaging Solutions Inc. APACKS Shemesh Automation

### Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format  
3 months of analyst support </ul>

### Table of Contents:

1 INTRODUCTION

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Growing demand for personal care and beauty products

4.2.2 Increasing industrial automation and smart packaging lines

4.2.3 E-commerce shift toward smaller SKUs and flexible formats

4.2.4 Sustainability regulations pressuring eco-friendly packaging

4.2.5 AI-enabled vision inspection boosts throughput

4.2.6 Indie cosmetic brands need agile short-run equipment

4.3 Market Restraints

4.3.1 High upfront capital expenditure

4.3.2 Volatile prices of precision components and steel

4.3.3 Shortage of skilled mechatronics technicians

4.3.4 Export controls on advanced servo drives and sensors

4.4 Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces Analysis

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

4.7.3 Threat of New Entrants

4.7.4 Intensity of Competitive Rivalry

4.7.5 Threat of Substitutes

4.8 Impact of Key Macroeconomic Trends

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Machine Type

5.1.1 Form/Fill/Seal Machinery

5.1.2 Labelling Machinery

5.1.3 Capping Machinery

5.1.4 Wrapping and Bundling Machinery

5.1.5 Cartoning and Case-Packing Machinery

5.1.6 Inspection and Vision Systems

5.1.7 Other Machine Types

5.2 By Automation Level

5.2.1 Fully-Automatic Systems

5.2.2 Semi-Automatic Systems

5.3 By Packaging Type

5.3.1 Rigid Containers and Jars

5.3.2 Tubes, Sachets and Pouches

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

5.3.3 Bottles, Pumps and Dispensers

5.3.4 Flexible Films and Wraps

5.4 By Cosmetic Product

5.4.1 Skin-care Products

5.4.2 Hair-care Products

5.4.3 Make-up and Color Cosmetics

5.4.4 Fragrances and Deodorants

5.4.5 Other Personal-care Products

5.5 By Geography

5.5.1 North America

5.5.1.1 United States

5.5.1.2 Canada

5.5.1.3 Mexico

5.5.2 Europe

5.5.2.1 Germany

5.5.2.2 France

5.5.2.3 United Kingdom

5.5.2.4 Italy

5.5.2.5 Russia

5.5.2.6 Rest of Europe

5.5.3 Asia-Pacific

5.5.3.1 China

5.5.3.2 Japan

5.5.3.3 South Korea

5.5.3.4 India

5.5.3.5 Rest of Asia-Pacific

5.5.4 Middle East and Africa

5.5.4.1 Middle East

5.5.4.1.1 Saudi Arabia

5.5.4.1.2 UAE

5.5.4.1.3 Rest of Middle East

5.5.4.2 Africa

5.5.4.2.1 South Africa

5.5.4.2.2 Kenya

5.5.4.2.3 Rest of Africa

5.5.5 South America

5.5.5.1 Brazil

5.5.5.2 Argentina

5.5.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Syntegon Technology GmbH

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.2 IMA Industria Macchine Automatiche SpA
- 6.4.3 Marchesini Group SpA
- 6.4.4 Coesia S.p.A (PackSys Global etc.)
- 6.4.5 ProMach Inc.
- 6.4.6 Accutek Packaging Equipment Co.
- 6.4.7 Krones AG
- 6.4.8 Sidel Group
- 6.4.9 Optima Packaging Group GmbH
- 6.4.10 Norden Machinery AB
- 6.4.11 Barry-Wehmiller (Pneumatic Scale Angelus)
- 6.4.12 Uhlmann Packaging Systems
- 6.4.13 ProSys Innovative Packaging Equipment
- 6.4.14 TurboFil Packaging Machines LLC
- 6.4.15 Vetraco Group
- 6.4.16 Zhejiang Rigao Machinery Corp.
- 6.4.17 Wimco Ltd
- 6.4.18 Liquid Packaging Solutions Inc.
- 6.4.19 APACKS
- 6.4.20 Shemesh Automation

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

### 7.1 White-space and Unmet-need Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Cosmetic Packaging Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)