# IPACK-IMA

## MONITOR

## LIQUID FOOD & BEVERAGE
### Process Technologies

November 2024
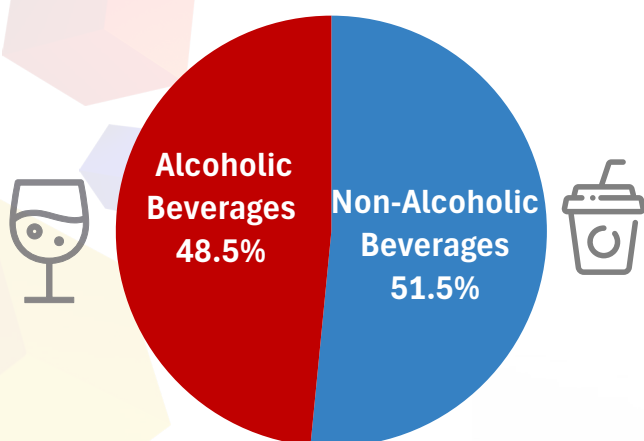
# LIQUID FOOD & BEVERAGE
## Industry Overview

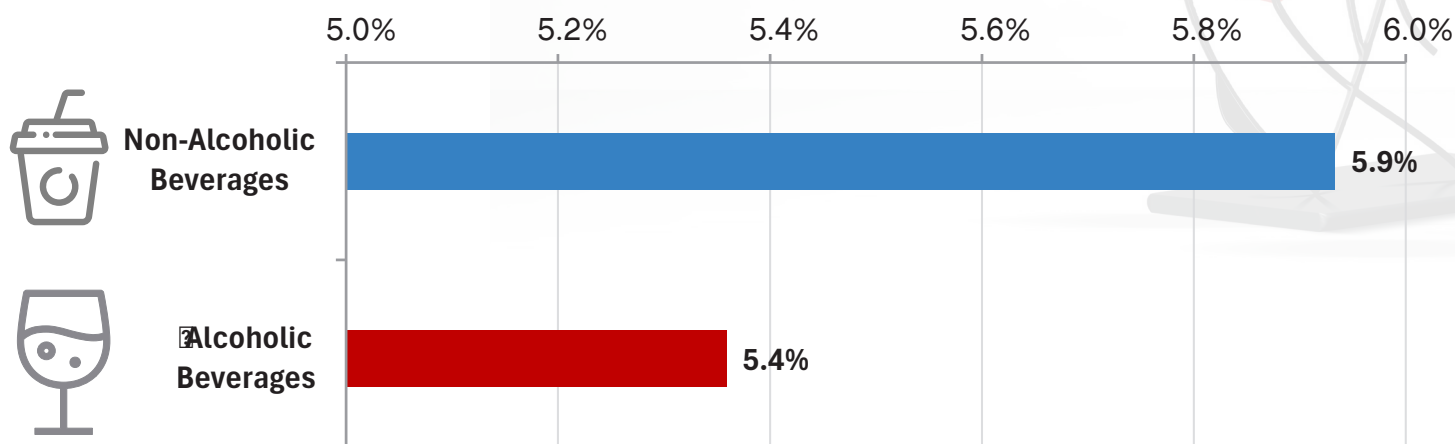### Liquid Food & Beverage
CAGR 2023 - 2027

**+6.7%**

The Liquid Food & Beverage sector is showing robust growth within the industrial process machinery industry, highlighting relevant performances and an expansion trajectory that foresees an average annual increase of +6.7% until 2027. In this sector, drinks represent the largest share and promise growth of 5.7% per year, made up of both alcoholic and non-alcoholic drinks.

In detail, alcoholic beverages, which constitute approximately 48.5% of the industrial process technologies market, will record an estimated annual growth of 5.4%, a slightly lower rate than the average for the general sector. Non-alcoholic beverages, which represent 51.5% of the sector, show a more marked acceleration, with an average annual growth rate (CAGR 2023 - 2027) estimated at +5.9% per year. This distinction between the two sub-sectors reflects the different consumption dynamics and demands of the market, which sees livelier growth for non-alcoholic beverages, driven by a growing demand for healthy and trendy products.

### Non-Alcoholic vs Alcoholic
Shares on totale value

Alcoholic Beverages
48.5%

Non-Alcoholic Beverages
51.5%

### Non Alcoholic vs Alcoholic
CAGR 2023 - 2027

| | 5.0% | 5.2% | 5.4% | 5.6% | 5.8% | 6.0% |
|---|---|---|---|---|---|---|

Non-Alcoholic Beverages — 5.9%

Alcoholic Beverages — 5.4%

## Process Technologies - Automatic and Semi-Automatic machines

### Shares % on the Beverage sector



# 82.4%

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## Automatic, Semi-Automatic and Manual machines

### Shares % on the Beverage sector



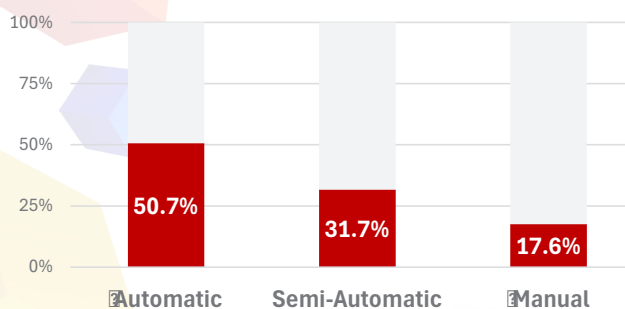| | | |
|---|---|---|
| Automatic | Semi-Automatic | Manual |
| 50.7% | 31.7% | 17.6% |

A fundamental aspect for the entire Beverage sector is represented by process automation. Automatic and semi-automatic machines make up a total of 82.4% of the technologies used in the sector.

Automatic machines, in particular, represent more than half of the technological solutions used, and an annual growth of +6.1% is expected for them, higher than the overall average for the sector. Semi-automatic technologies, although showing more limited growth, still recorded a significant increase, with an average annual rate of +5.3%.
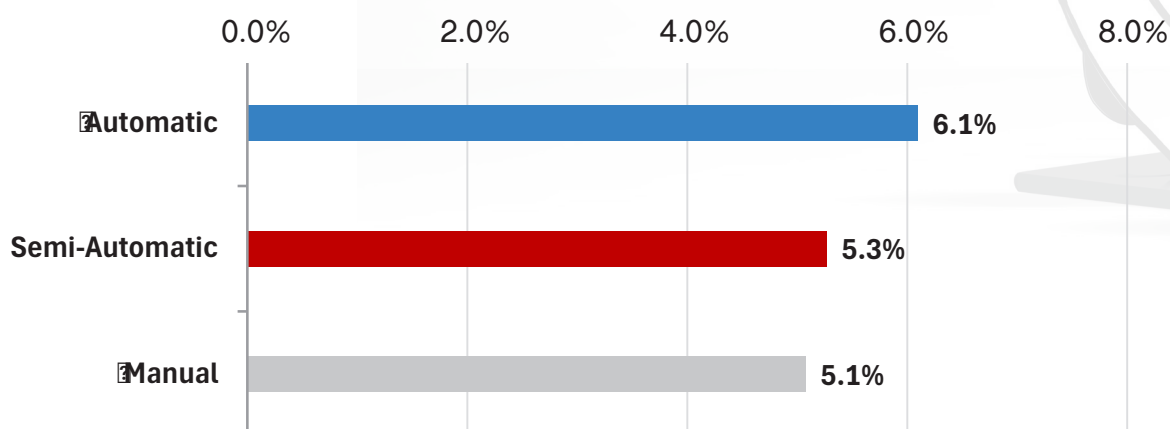
Finally, a residual portion of the market is occupied by manual technologies, which represent 17.6% of the total. Despite being used to a lesser extent and in specific contexts, these machines remain indispensable for some processes. An annual growth of +5.1% is also expected for these technologies.

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## Automatic, Semi-Automatic and Manual machines
### CAGR 2023 - 2027



| | |
|---|---|
| Automatic | 6.1% |
| Semi-Automatic | 5.3% |
| Manual | 5.1% |

In the global beverage processing technology market, filtration euipment rank first, occupying a significant share of 29.4% of the industry in 2023. This success is attributable to the crucial importance of filtration in beverage production.

Next, there are heat exchangers, which represent 23.8% of the process technologies. These devices are essential for temperature control and energy efficiency, playing a critical role in many manufacturing applications.

In third place in the ranking are technologies for breweries, a segment that reflects the heterogeneity and tradition of a constantly evolving sector. Blenders and mixers, fundamental tools in the preparation of mixtures and in the creation of innovative drinks, follow in fourth position, contributing with an important share of 11.1% of the market. Carbonation equipment and sugar dissolution technologies close the ranking, with respective shares of 8.7% and 4.9%. In addition, other technologies of lesser importance account for a further 4.9% of the industry, underlining the variety of solutions available for different production needs.
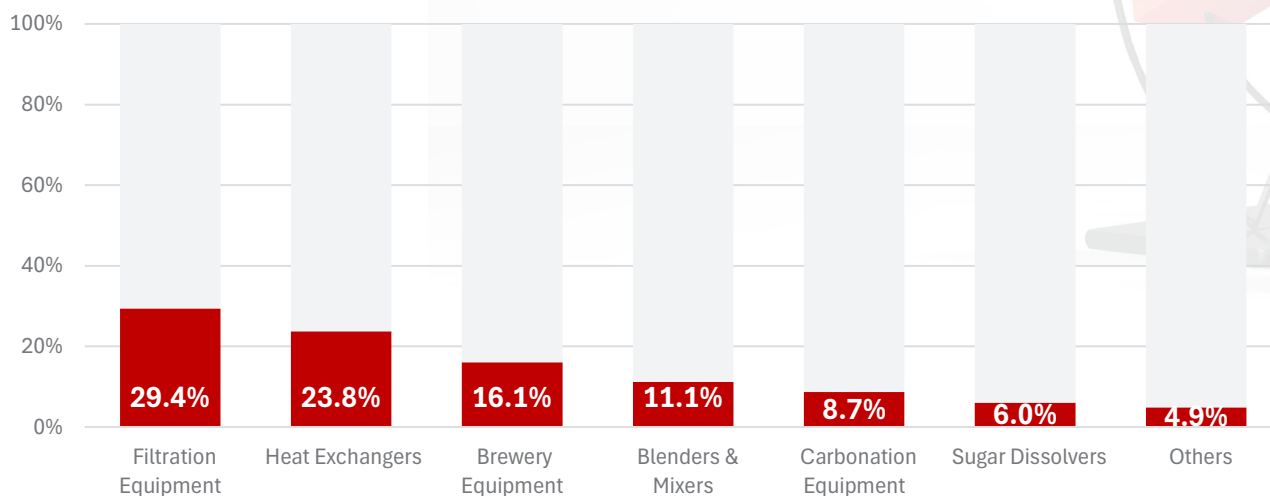
## Beverage Process
### Filtration Equipment share

# 29.4%

## Beverage Process
### Heat Exchangers share

# 23.8%

## Beverage Process
### Shares by technology

| Technology | Share |
|---|---|
| Filtration Equipment | 29.4% |
| Heat Exchangers | 23.8% |
| Brewery Equipment | 16.1% |
| Blenders & Mixers | 11.1% |
| Carbonation Equipment | 8.7% |
| Sugar Dissolvers | 6.0% |
| Others | 4.9% |

# LIQUID FOOD & BEVERAGE
## Focus on beverage process machines

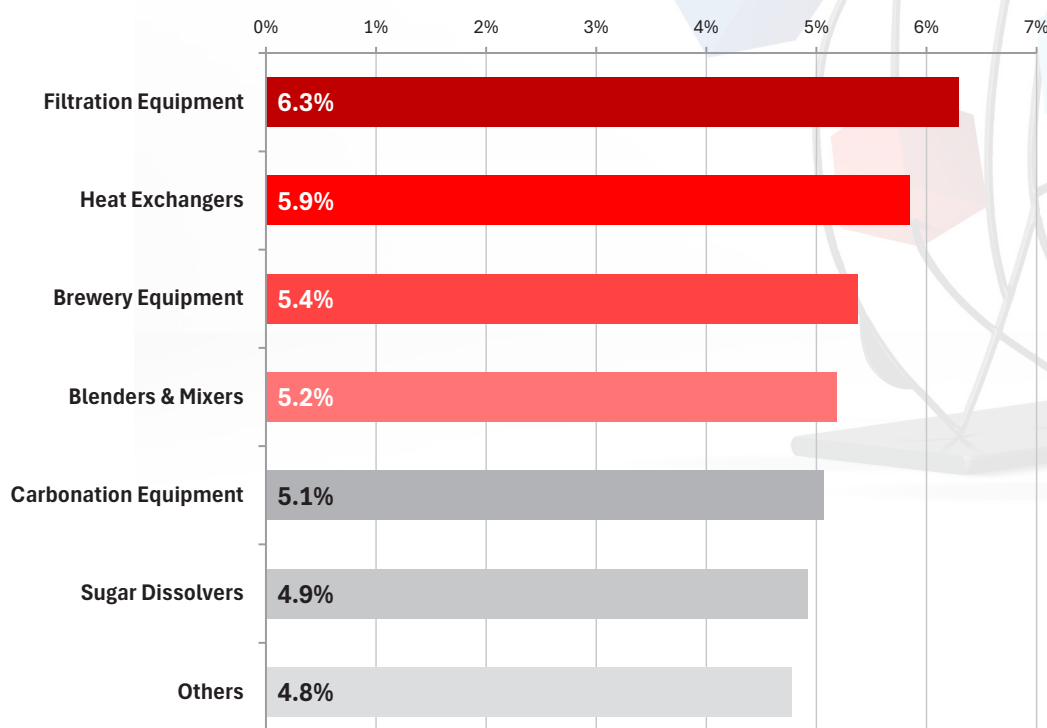Looking at the growth forecasts up to 2027, filtration equipments continue to maintain their primacy, with an expected average annual growth of +6.3%. Heat exchangers follow with an expected increase of +5.9% per year, reflecting the importance of energy efficiency in beverage production. Brewery equipment rank in third place, with an average annual growth of +5.3%.

Blenders and mixers show an increase of +5.2%, continuing to satisfy the demand for personalized and innovative products. The growth of carbonation equipment is more limited, expected at +5.1% per year, while sugar dissolvers stand at an increase of +4.9% per year. These projections highlight an evolving sector, in which technological innovation and sustainability are key factors for the future.
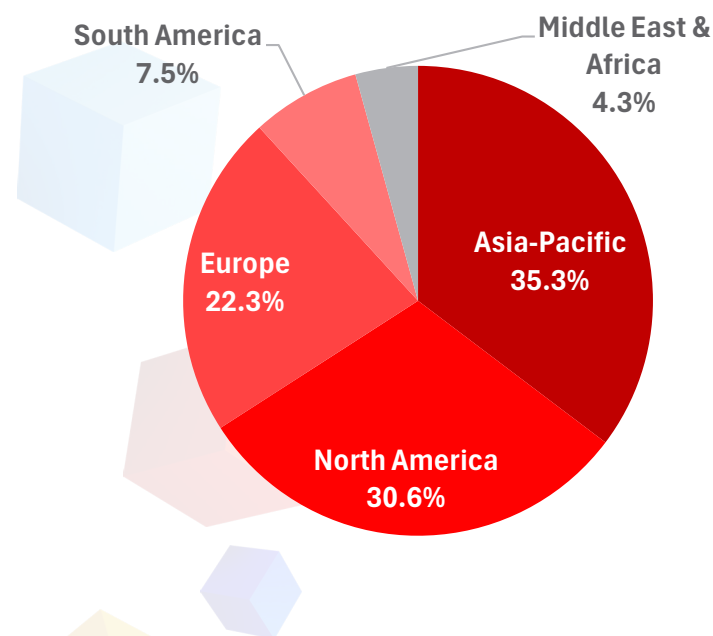
## Beverage Process
CAGR 2023 - 2027

# +5.7%

## Beverage Process
CAGR 2023 - 2027 by technology

| Technology | CAGR |
|---|---|
| Filtration Equipment | 6.3% |
| Heat Exchangers | 5.9% |
| Brewery Equipment | 5.4% |
| Blenders & Mixers | 5.2% |
| Carbonation Equipment | 5.1% |
| Sugar Dissolvers | 4.9% |
| Others | 4.8% |

# LIQUID FOOD & BEVERAGE
## Beverage process: macro-regions

### Beverage Process
#### Duistribution by macro-region

South America
7.5%

Middle East & Africa
4.3%

Europe
22.3%

Asia-Pacific
35.3%

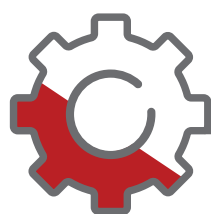North America
30.6%

The analysis of the geographical distribution in the Beverage Process Technologies sector reveals that production is highly concentrated in the Far East, North America and Europe, together responsible for 88.2% of the total value. In first place we find the Far East, which represents 35.3% of production, followed by North America with 30.6% and Europe at 22.3%. The regions of Central-South America and Middle East-Africa, on the other hand, cover smaller shares, respectively 7.5% and 4.3% of the total.

This distribution is also reflected in the growth forecasts for the next few years: the Far East is expected to grow at an annual rate of +5.9% until 2027, followed by North America with an increase of +5.6%. In third position, Europe shows growth of +5.4% per year, while Central and South America will expand by +5.2% per year and, in the rear, the Middle East and Africa with an average rate of +5 .0% per year.

### Beverage Process
#### CAGR 2023 - 2027 by region

| Asia-Pacific | North America | Europe | South America | Middle East & Africa |
|---|---|---|---|---|
| 5.9% | 5.6% | 5.4% | 5.2% | 5.0% |

# IPACK-IMA
## M O N I T O R