

# IPACK-IMA

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## MONITOR

### FOOD - FOCUS FRESH

#### Process Technology

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JOINT VENTURE BETWEEN:



FIERA MILANO

IN COLLABORATION WITH:



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# FOOD

## Process Technologies

### Food Process Technologies

A detailed analysis of the process technologies sector for the food industry highlights a solid and steadily growing market, expected to expand consistently through 2028. The projected average annual growth rate (CAGR) between 2025 and 2028 stands at +3.3%.

**+3.3%**  
CAGR 2025 - 2028

From a geographical perspective, the sector is concentrated 32.7% in Asia-Pacific, 27.0% in North America, and 22.9% in Europe. Together, these three macro-regions account for over 80% of the total market. The remainder is distributed with 11.6% in Central and South America, and 5.8% across the Middle East and Africa.

**32.7%**  
2024  
Asia & Pacific share

Development forecasts for the coming years confirm the leadership of the Asia-Pacific region, with a growth rate of +3.8% over four years, surpassing the global average. North America follows, with an estimated annual growth of +3.2% (slightly below the sector's average), while Europe is projected to grow at +3.1% per year. Central and South America, along with the Middle East and Africa, are expected to see more modest but still positive growth rates, at +2.9% and +2.7% per year, respectively.

### Process Technologies

Expected annual growth rate by region in 2024

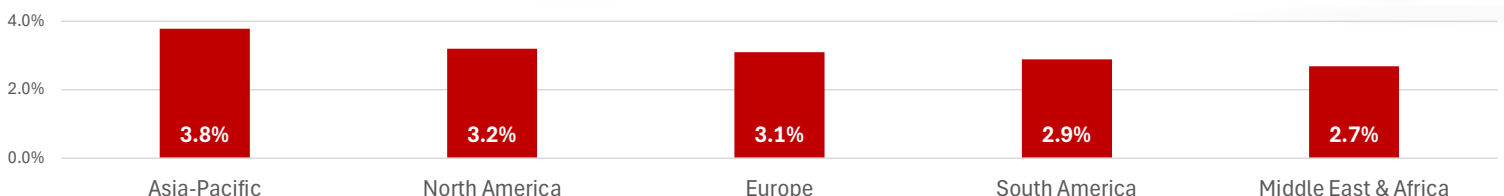
Asia &  
Pacific

North  
America

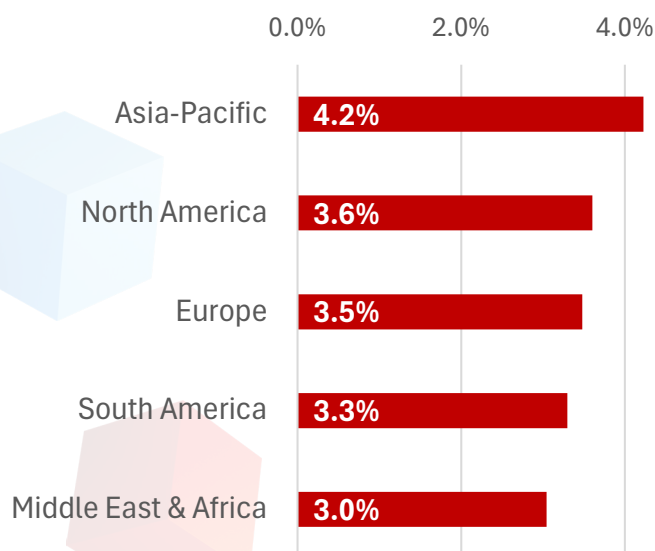
Europe

Latin  
America

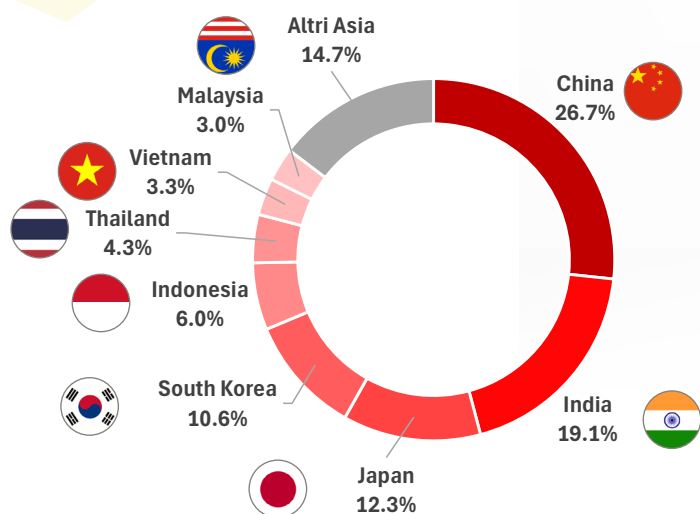
Middle East  
& Africa



### Fresh Food Process CAGR 2025 - 2028 by region



### Fresh Food Process 2024 share - TOP asian countries



A detailed analysis of the Fresh Food segment within Process Technologies once again confirms the central role of the Asia-Pacific region: the expected growth in this area exceeds the global average for the Fresh Food sector, with a forecast of +4.2% compared to the global average of +3.7%. North America also shows positive prospects, although slightly below the global average. Europe and Central-South America follow, with estimated growth rates of +3.5% and +3.3%, respectively. The Middle East and Africa close the ranking with an expected average annual increase of +3.0% over the next four years.

#### *Fresh Food – Asia-Pacific*

The leadership of Asia in the Fresh Food Process Technologies sector is mainly driven by China, which alone accounts for 26.7% of the total. India also plays a key role, holding a 19.1% share. Japan and South Korea follow with shares of 12.3% and 10.6%, respectively. Indonesia ranks fifth with a 6% share, while Thailand is sixth, contributing 4.3%. The remaining 21% is divided among other countries in the Asia-Pacific region.

The picture changes slightly when considering the projected average annual growth rates (CAGR 2025–2028): India surpasses China with an estimated annual growth of +5.0%, higher than the regional average of +4.2%. China thus moves to second place with an expected growth rate of +4.8%. Japan and South Korea follow, with forecasted growth of +4.1% and +4.0%, respectively. Indonesia remains in fifth place with an expected annual growth rate of +3.6%, while Thailand closes the ranking with a forecasted +3.3% annual growth.

### Fresh Food

#### Process and Automation Technologies Forecasts 2025 - 2028



**+3.6%**

Automatic Technologies



**+3.0%**

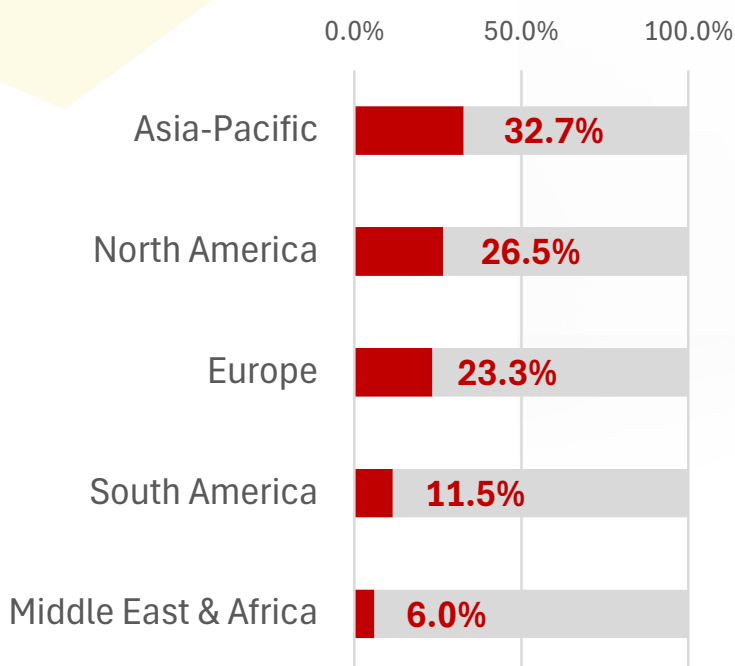
Semi-automatic Technologies



**+2.7%**

Manual equipment

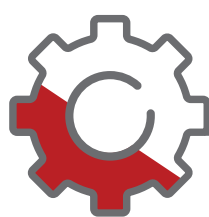
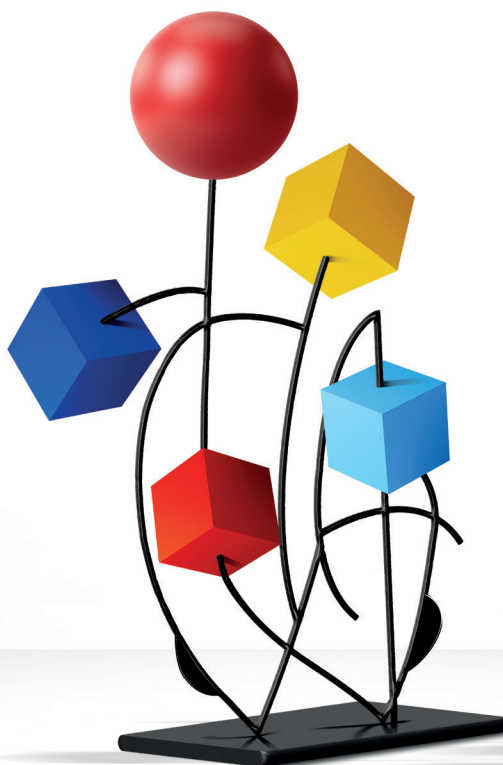
#### Automatic Machines - Fresh Food 2024 value share by region



The automation of production processes in the Fresh Food sector shows a positive trend through 2028. In particular, fully automated process technologies — which today represent over half of the total, with a share of 56.7% — are recording an average annual growth rate of +3.6%, higher than the overall sector average. Semi-automatic machines, covering 28.1% of the sector, are expected to grow by +3.0% annually, a rate lower than the sector average but still positive. Even manual equipment, though accounting for only a residual share (15.3%), continues to play an essential role in specific processes; its estimated annual growth through 2028 stands at +2.7%, lower than that of more automated technologies but still positive.

#### Automatic Machines

A detailed analysis of the automatic machines segment shows a strong concentration in the Asia-Pacific region, which accounts for 32.7% of the sector. For this region, forecasts indicate an average annual growth rate of +4.1% through 2028. North America ranks second, with 26.5% of the global market share for automatic machines used in Fresh Food processing; here, growth estimates remain positive at +3.5% per year, although slightly below the sector average. Europe holds third place with a 23.3% share and projected annual growth of +3.4%. Central and South America follow in the penultimate position, accounting for 11.5% of the total and showing modest but favorable development, with an expected annual growth of +3.2%. The Middle East and Africa close the ranking, representing just 6% of the market, with a projected average annual growth rate of +3.1% (CAGR).



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ipackima.com



#ipackima

+39 023191091

sales@ipackima.it