

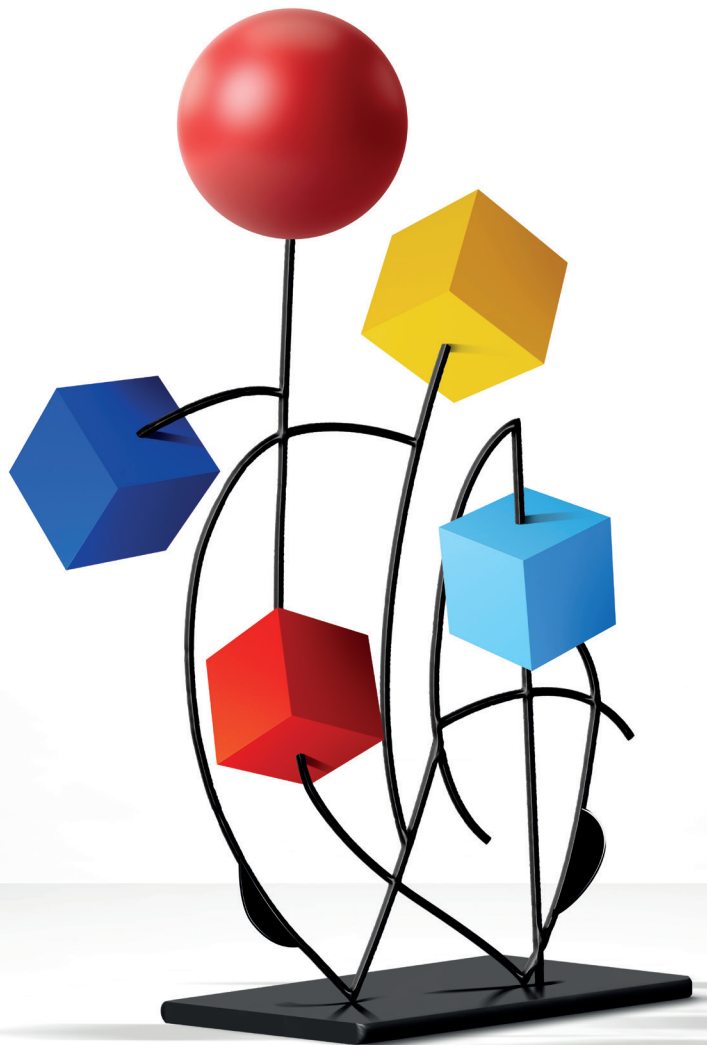
IPACK-IMA

MONITOR

LIQUID FOOD & BEVERAGE

Technologies and materials

March 2025



JOINT VENTURE BETWEEN:



FIERA MILANO

IN COLLABORATION WITH:



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LIQUID FOOD & BEVERAGE

Packaging Materials

Packaging Materials

Liquid Food & Beverage

The **packaging materials** sector for **Liquid Food & Beverage** is projected towards sustained growth, with an average compound annual rate (**CAGR 2025-2028**) of **+4.2%** until 2028.



+4.2%

CAGR 2025 - 2028



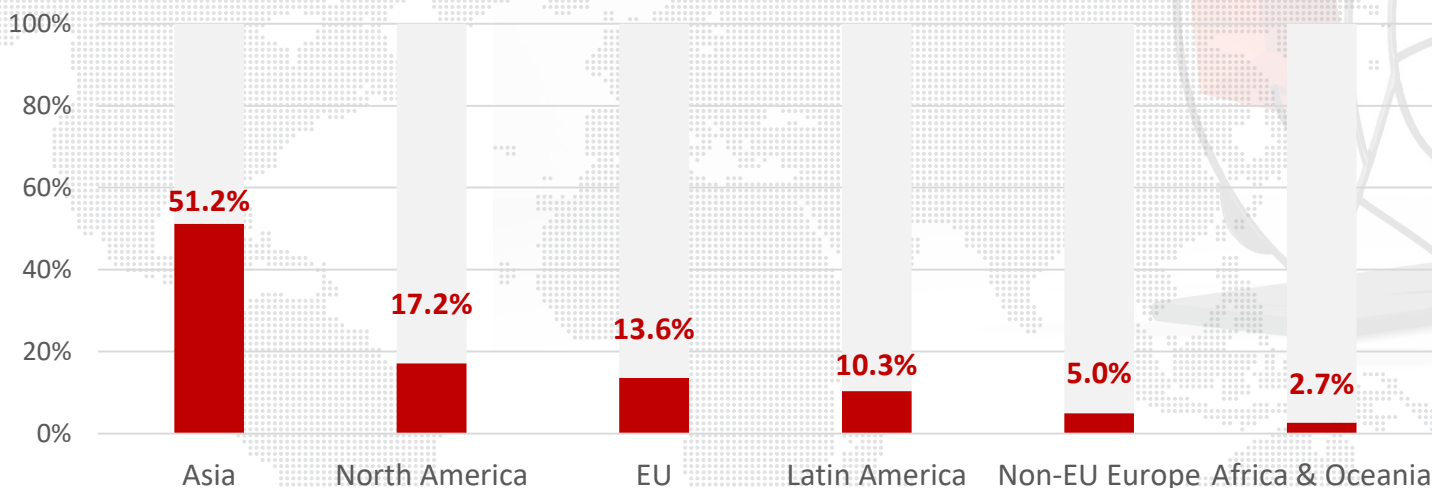
51.2%

2024: Asia share

The **geographical distribution** of the sector sees a clear prevalence of **Asian regions**, which hold **51.2%** of the overall volumes. **North America** follows, which absorbs **17.2%** of packages, while the **European Union** ranks third with a share of **13.6%**. Overall, these three areas dominate the market, accounting for over 80% of the total. At a distance, **Latin America** and **Non-EU Europe** occupy fourth and fifth position, with **10.3%** and **5.0%** of the shares respectively. **Africa and Oceania** close the ranking, with a share of **2.7%**, confirming themselves as smaller markets but with development potential.

Packaging Materials

Shares by macro region in 2024

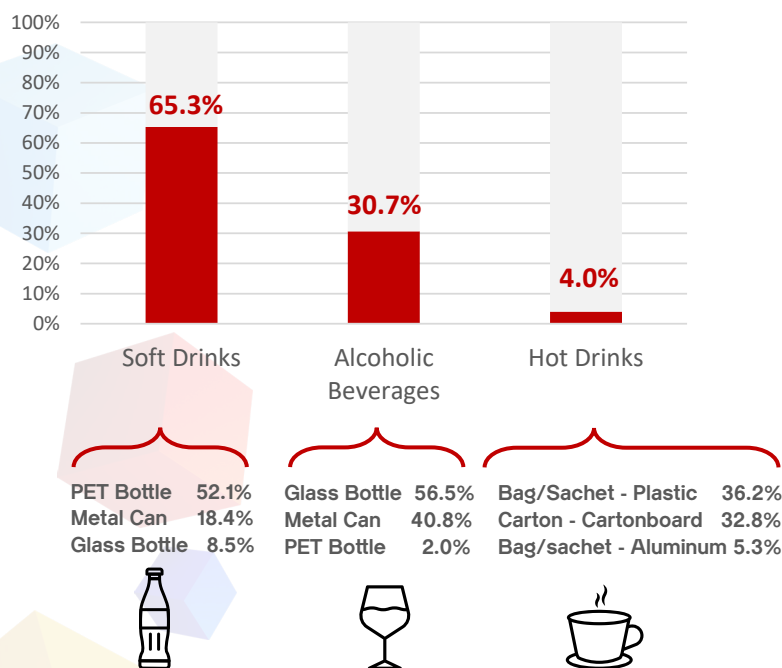


LIQUID FOOD & BEVERAGE

Packaging Materials in detail

Beverage

Packaging materials shares in 2024 by product

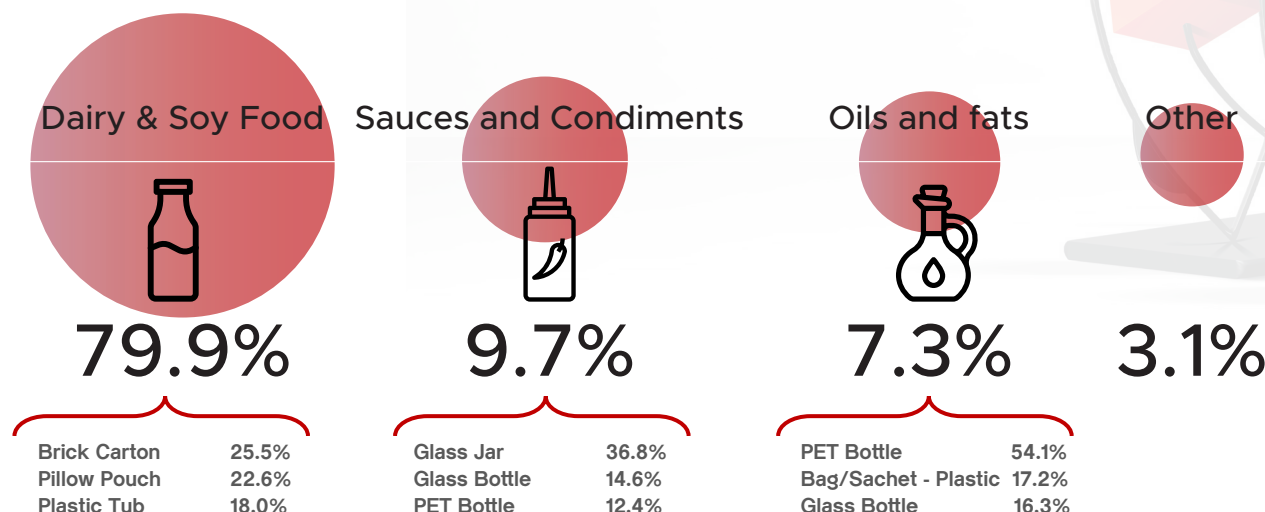


In the **Beverage sector**, the analysis of packaging volumes highlights a clear prevalence of **Soft Drinks**, which represent **65.3%** of the total (of which over 50% PET bottles, 18.4% cans and 8.5% in glass). This is followed by **alcoholic beverages**, with a share of **30.7%** (glass for 56.5%, sun loungers 4.8% and PET bottles for just 2%), while **hot drinks** cover a smaller portion of the market, equal to **4.0%** (of which the first three materials are plastic bags for 36.2%, paper, which is worth 32.8% and aluminum bags with just 5.3%).

As regards **Liquid Food**, almost 80% of the packaging is intended for **Dairy & Soy Food products** (25.5% Brick Carton, 22.6% Pillow Pouch and 18% Plastic Bottles), confirming the central role of this category. Next, **saucers and condiments** occupy **9.7%** of the total volumes (glass jars 36.8%, glass bottles 14.6% and PET bottles 12.4%), while in third place are **oils and fats** (54.1% PET bottles, 17.2% plastic bags and 16.3% glass bottles) with a share of **7.3%**, while the shares residuals, equal to 3.1%, include syrups, spreads and soups, which remain niche segments within the sector.

Liquid Food

Packaging materials shares in 2024 by product



BEVERAGE

Packaging Technologies

Beverage Packaging Technologies

16.9 bln €
Value 2028

+4.0%
CAGR 2024 - 2028

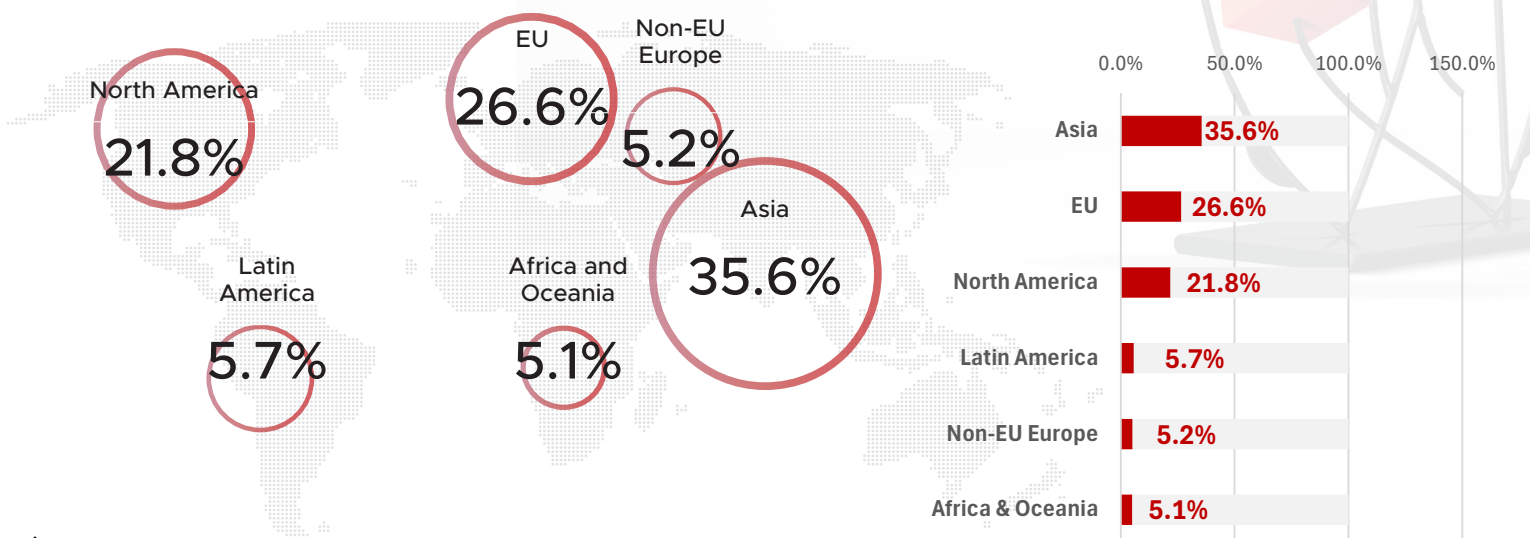
13.9 bln €
Value 2023

+3.0 bln €
Additional market

The **Beverage Packaging Technologies** sector recorded a value of **13.9 billion euros** in 2023 and is expected to increase by **+3 billion euros** by **2028**. This growth will be determined by a compound annual rate (**CAGR 2024-2028**) of **+4%** which will allow the market to reach the size of **16.9 billion** in **2028**.

At a **geographical level**, in 2023 the market was mainly concentrated in **Asia**, which represented **35.6%** of the total with a value of **4,941.9 million euros**. The **European Union** follows with **3,691 million euros**, equivalent to **26.6%** of the sector. **North America** ranks third with **3,027.3 million euros** and a share of **21.8%**. **Latin America** occupies fourth position, recording **795.3 million euros** and a share of **5.7%**. **Non-EU Europe** ranks in penultimate place with **721.6 million euros**, equal to **5.2%** of the total. **Africa and Oceania** close the ranking, with a total value of **405.1 million euros**, representing **5.1%** of the Beverage Packaging Technologies market.

Beverage Packaging technology value by macro region - 2024

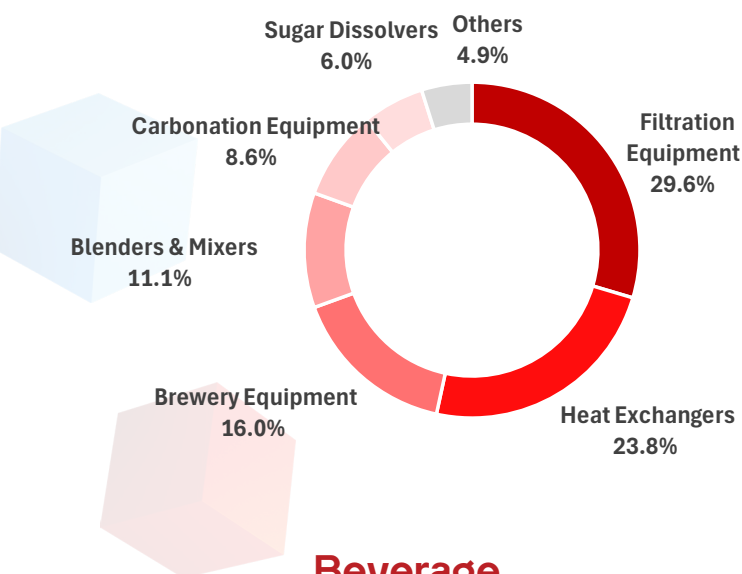


BEVERAGE

Process Technologies

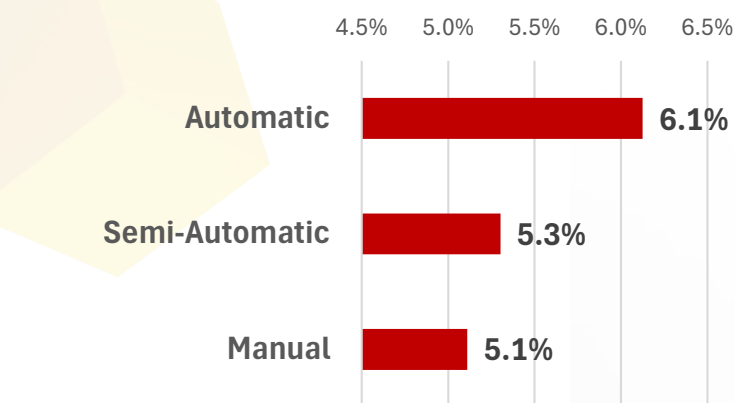
Beverage

Process Technologies - shares 2024



Beverage

Process Technologies CAGR 2024-2028



The **Beverage Process Technologies** sector is made up of machines and equipment useful for the preparation of various types of drinks. From a more careful analysis of the sector it emerges that the most used instrumentation of all is that relating to **liquid filtration machines** (**29.6% of the total in 2024**), followed in second place by **heat exchangers** which are worth **23.8%** of the total, slightly lower than the first technology. At a distance are the **Brewery Tools** with **16%** of the total. This is followed by **Mixing and Blending machines** (**11.1%** of the sector) and **Carbonation machines** which are worth **8.6%** of the overall value. Closing the ranking are **Sugar dissolvers** and **Other machines** which are worth **6%** and **4.9%** of the total respectively.

Observing the **Beverage Process Technologies** sector based on the **target sector**, a balanced distribution emerges between **Alcoholic and Non-Alcoholic Beverages**, with shares of **48.3%** and **51.7%** respectively. The two categories show different evolution: Process Technologies for **Alcoholic Beverages** will grow at an annual rate of **+5.4%**, slightly lower than the sector average (**+5.7%**). On the contrary, Processing Machines for **Non-Alcoholic Beverages** will record an increase of **+6.0%** per year, exceeding the sector average.

Beverage

Process Technologies - shares by client sector

48.3%

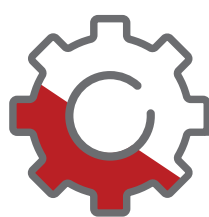
Alcoholic Drinks



51.7%

Non Alcoholic Drinks





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