

Beverage Carton Packaging Machinery Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Horizontal End Side- Load Cartons, Top-Load Carton, Vertical Leaflet, Wraparound Cartons and Others), By Application (Alcoholic Beverages, Soft Drinks, Dairy Beverages), By Functional Automation (Semi-Automatic Machines and Automatic Machines), By Region & Competition, 2021-2031F

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Abstracts

The Global Beverage Carton Packaging Machinery Market is projected to expand from USD 1.87 Billion in 2025 to USD 2.53 Billion by 2031, registering a compound annual growth rate of 5.17%. This sector encompasses the capital equipment required to erect, fill, and seal paperboard-based containers for liquid products, including dairy, juices, and plant-based alternatives. The primary factors driving this growth are the escalating global demand for sustainable packaging formats that minimize plastic use and the urgent need for high-speed automation to counter labor shortages while guaranteeing product safety. Data from VDMA indicates that in 2023, the global trade volume for food processing and packaging machinery rose to exceed 52 billion euros, highlighting strong investment resilience despite economic headwinds.

Nevertheless, the market faces a significant obstacle in the form of a strict and changing regulatory landscape concerning packaging waste and recyclability standards. Adhering to complex frameworks, such as the European Union's Packaging and Packaging Waste Regulation, often demands substantial upfront capital for upgrading or replacing machinery. This financial burden can cause reluctance among manufacturers, leading

to delays in acquiring new equipment and potentially hindering rapid market expansion.

Market Driver

The transition toward sustainable and renewable packaging materials is fundamentally reshaping the machinery sector, compelling manufacturers to invest in equipment capable of handling plant-based polymers and non-foil barriers. This shift necessitates replacing legacy systems with advanced filling lines designed to process lower carbon footprint materials without sacrificing seal integrity or speed. As brands actively decarbonize their supply chains, the installation base for machinery compatible with renewable structures is growing rapidly. For instance, an article in Packaging Dive from June 2024 titled 'Tetra Pak reports plant-based plastics demand growing in North America' noted that the U.S. and Canadian markets distributed nearly 1.4 billion packs utilizing plant-based plastics in 2023, a 330% year-over-year increase that directly impacts equipment specifications.

Concurrently, the rising demand for aseptic packaging to extend product shelf life is fueling the procurement of high-speed, sterile filling technologies essential for complex global distribution networks. Producers are prioritizing machinery that ensures product safety and longevity without refrigeration, driving significant organic growth in the aseptic segment. According to SIG Group's 'Annual Report 2023' released in February 2024, the company achieved a 7.4% organic revenue growth in aseptic cartons at constant currency, underscoring the robust demand for sterile packaging solutions. This sector-wide momentum is reflected in the financial performance of major technology providers; Krones reported in their March 2024 'Annual Report 2023' that group revenue increased by 12.2% year-on-year to ?4.7 billion, driven by sustained investment in filling and packaging technology.

Market Challenge

The rigorous and evolving regulatory environment regarding packaging waste and recyclability standards acts as a major restraint on the Global Beverage Carton Packaging Machinery Market. As governments enforce strict compliance frameworks, such as the mandate for tethered caps or specific fiber-content thresholds under the European Union's Packaging and Packaging Waste Regulation, beverage manufacturers face substantial uncertainty regarding future technical requirements. This ambiguity forces companies to adopt a cautious approach, postponing capital-intensive procurement decisions to avoid investing in equipment that might fail to meet future

standards. The necessity for expensive retrofits or entirely new production lines to ensure compliance strains capital budgets, creating a financial barrier that induces hesitation and stalls rapid market expansion.

This trend of deferred investment is clearly reflected in recent industry performance metrics, where regulatory unpredictability has contributed to a contraction in new business for equipment suppliers. According to VDMA, in the first seven months of 2024, incoming orders for the food processing and packaging machinery sector declined by 7% compared to the same period in the previous year. This downturn underscores how the lack of planning security and the financial burden of meeting complex environmental mandates are directly hampering the growth and immediate order intake of the machinery market.

Market Trends

The shift toward energy-efficient and low-carbon machinery designs is accelerating as beverage producers seek to minimize operational utility consumption and align with Scope 1 and 2 decarbonization targets. Unlike the focus on sustainable packaging materials, this trend centers on the equipment itself, driving the engineering of filling lines that utilize advanced water recovery systems, energy-saving servo motors, and optimized cleaning-in-place (CIP) cycles. These technical improvements directly reduce the intake of water, steam, and electricity during high-speed production, offering a tangible return on investment through lower utility bills. According to a May 2024 article titled 'Tetra Pak introduces Factory Sustainable Solutions program to lower energy and water usage', the implementation of their new water recovery technology enabled a customer to reduce water consumption by 95%, saving approximately 22 million liters annually.

Simultaneously, the adoption of robotics and automated end-of-line solutions is surging, driven by the imperative to enhance line efficiency and mitigate the risks associated with labor volatility. Manufacturers are increasingly integrating robotic palletizers, case packers, and automated guided vehicles (AGVs) to ensure seamless material handling and high throughput consistency that manual labor cannot sustain. This automation extends beyond simple repetitive tasks to include complex pick-and-place operations that handle multiple pack formats with precision. The robust growth in this segment is evident in manufacturing output; according to a VDMA update from June 2024 titled 'Packaging machinery production reached record high in 2023', the production value of the beverage packaging machinery sector in Germany increased by 18% to ?2.8 billion, reflecting the heavy industrial investment in these automated systems.

Key Market Players

R.A.Jones

Coesia S.p.A.

Nichrome Packaging Solutions

Imanpack Packaging and Eco Solutions S.p.A.

Langley Holdings plc

Jacob White Packaging Ltd.

KHS Group

OPTIMA

Syntegon Technology GmbH

Mpac Group plc

Report Scope

In this report, the Global Beverage Carton Packaging Machinery Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Beverage Carton Packaging Machinery Market, By Type

Horizontal End Side-Load Cartons

Top-Load Carton

Vertical Leaflet

Wraparound Cartons and Others

Beverage Carton Packaging Machinery Market, By Application

Alcoholic Beverages

Soft Drinks

Dairy Beverages

Beverage Carton Packaging Machinery Market, By Functional Automation

Semi-Automatic Machines and Automatic Machines

Beverage Carton Packaging Machinery Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Beverage Carton Packaging Machinery Market.

Available Customizations:

Global Beverage Carton Packaging Machinery Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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