

Carbonated Beverage Processing Equipment Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Equipment Type (Sugar Dissolvers, Filtration Equipment, Heat Exchangers, Blenders & Mixers and Others), By Beverage Type (Flavoured Drinks, Club Soda & Sparkling Water and Functional Drinks), By Region & Competition, 2021-2031F

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Abstracts

The Global Carbonated Beverage Processing Equipment Market is projected to expand from USD 8.38 Billion in 2025 to USD 11.91 Billion by 2031, registering a CAGR of 6.03%. This sector encompasses specialized industrial machinery engineered to mix, carbonate, fill, and package aerated fluids while maintaining product stability and safety standards. Key factors propelling this growth include a rising global population and higher disposable incomes, which sustain the demand for convenience beverages and soft drinks. Furthermore, rapid urbanization requires high-speed automated production capabilities to satisfy mass consumption needs, thereby encouraging manufacturers to modernize their existing infrastructure.

According to PMMI, 68% of beverage companies in 2025 expect moderate to significant increases in packaging machinery investments over the coming years to support business expansion and meet consumer demand. However, the market faces a substantial obstacle in the form of high initial capital investments required for these advanced automated systems. This financial burden restricts entry and scalability for small and medium-sized enterprises, thereby hindering broader market expansion despite the positive investment outlook.

Market Driver

The incorporation of automation and Industry 4.0 technologies serves as a major catalyst for the market, with manufacturers increasingly focusing on operational efficiency and data-centric strategies. Modern processing lines utilize smart sensors and predictive maintenance algorithms to monitor carbonation levels and filling accuracy in real-time, which significantly diminishes product waste and operational downtime. This shift is corroborated by adoption metrics; according to Rockwell Automation's March 2024 '9th Annual State of Smart Manufacturing Report', 95% of manufacturers are currently utilizing or assessing smart manufacturing technologies to enhance agility and competitiveness, prompting beverage producers to invest heavily in these digital upgrades.

Simultaneously, the surging demand for functional and low-calorie beverage options necessitates significant investment in flexible, multi-product processing lines. As consumer preferences move away from traditional high-sugar sodas, manufacturers require versatile equipment capable of managing complex ingredients and varying viscosities without cross-contamination. This trend is highlighted by financial performance; Celsius Holdings, Inc. reported in its February 2024 '2023 Annual Report' a revenue surge of 102% to \$1.3 billion, attributed entirely to the success of their functional, sugar-free energy drinks. To support such diverse portfolios, global machinery trade is growing, with VDMA reporting in 2024 that German food processing and packaging machinery exports rose by 8.6% the previous year to ?9.85 billion.

Market Challenge

The significant initial capital required for automated carbonated beverage processing equipment represents a primary barrier to market development. Manufacturers face the need to allocate substantial financial resources to acquire industrial machinery that ensures high-speed carbonation, precise filling, and safety compliance. This elevated financial threshold creates a formidable entry barrier for small and medium-sized enterprises, limiting their capacity to adopt essential automation and restricting their scalability. Consequently, these prohibitive implementation costs delay the modernization of production lines and dampen the overall adoption rate of advanced processing systems across the sector.

Economic pressures further intensify this issue, compelling beverage producers to postpone commitments to large-scale infrastructure projects. When financing costs

remain high, companies often choose to extend the operational life of legacy equipment instead of investing in new models, a practice that directly decelerates the revenue cycle for equipment suppliers. According to the VDMA (Food Processing and Packaging Machinery Association), incoming orders for the food processing and packaging machinery sector dropped by 7% in the first seven months of 2024 as companies showed reluctance toward new capital expenditures. This reduction in order intake illustrates how financial hurdles directly impede the market's expansion and technological renewal.

Market Trends

The integration of energy and water resource recovery systems is fundamentally transforming the global equipment market, as manufacturers increasingly embed closed-loop circularity into their processing lines. Modern systems now routinely capture thermal energy from pasteurization for pre-heating purposes and treat rinse water for internal reuse, directly addressing both operational costs and environmental goals. This trend toward reducing the ecological footprint of machinery is supported by recent sustainability data; according to Krones' March 2025 'Non-financial statement for 2024', the company achieved a 10% reduction in the downstream water footprint of its sold products compared to the 2022 baseline, highlighting the tangible impact of these resource-efficient technologies.

Concurrently, the adoption of aseptic filling technologies for carbonated beverages is gaining momentum as brands remove preservatives to meet clean-label consumer trends. Unlike conventional methods, these aseptic systems sterilize the packaging and liquid separately before filling takes place in a sterile environment, preserving the sensory quality of sensitive low-acid and functional drinks without inducing thermal stress. This technological shift is prompting significant investments in high-speed, contaminant-free production lines; according to a January 2025 press release from Sidel, the company installed three large-scale aseptic lines for a major bottler in 2024, confirming the growing industrial reliance on this technology to ensure product integrity.

Key Market Players

Krones AG

GEA Group AG

KHS GmbH

Tetra Laval

Goma Engineering Pvt. Ltd

Alfa Laval AB

DUE SpA

Bajaj Group

Pentair Plc

Raj Innotech Pvt. Ltd.

Report Scope

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

Carbonated Beverage Processing Equipment Market, By Equipment Type

Sugar Dissolvers

Filtration Equipment

Heat Exchangers

Blenders & Mixers and Others

Carbonated Beverage Processing Equipment Market, By Beverage Type

Flavoured Drinks

Club Soda & Sparkling Water and Functional Drinks

Carbonated Beverage Processing Equipment 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 Carbonated Beverage Processing Equipment Market.

Available Customizations:

Global Carbonated Beverage Processing Equipment 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL CARBONATED BEVERAGE PROCESSING EQUIPMENT MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Equipment Type (Sugar Dissolvers, Filtration Equipment, Heat Exchangers, Blenders & Mixers and Others)
 - 5.2.2. By Beverage Type (Flavoured Drinks, Club Soda & Sparkling Water and

Functional Drinks)

5.2.3. By Region

5.2.4. By Company (2025)

5.3. Market Map

6. NORTH AMERICA CARBONATED BEVERAGE PROCESSING EQUIPMENT MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Equipment Type

6.2.2. By Beverage Type

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States Carbonated Beverage Processing Equipment Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Equipment Type

6.3.1.2.2. By Beverage Type

6.3.2. Canada Carbonated Beverage Processing Equipment Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Equipment Type

6.3.2.2.2. By Beverage Type

6.3.3. Mexico Carbonated Beverage Processing Equipment Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Equipment Type

6.3.3.2.2. By Beverage Type

7. EUROPE CARBONATED BEVERAGE PROCESSING EQUIPMENT MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Equipment Type

7.2.2. By Beverage Type

7.2.3. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Carbonated Beverage Processing Equipment Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Equipment Type

7.3.1.2.2. By Beverage Type

7.3.2. France Carbonated Beverage Processing Equipment Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Equipment Type

7.3.2.2.2. By Beverage Type

7.3.3. United Kingdom Carbonated Beverage Processing Equipment Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Equipment Type

7.3.3.2.2. By Beverage Type

7.3.4. Italy Carbonated Beverage Processing Equipment Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Equipment Type

7.3.4.2.2. By Beverage Type

7.3.5. Spain Carbonated Beverage Processing Equipment Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Equipment Type

7.3.5.2.2. By Beverage Type

8. ASIA PACIFIC CARBONATED BEVERAGE PROCESSING EQUIPMENT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Equipment Type
 - 8.2.2. By Beverage Type
 - 8.2.3. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Carbonated Beverage Processing Equipment Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Equipment Type
 - 8.3.1.2.2. By Beverage Type
 - 8.3.2. India Carbonated Beverage Processing Equipment Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Equipment Type
 - 8.3.2.2.2. By Beverage Type
 - 8.3.3. Japan Carbonated Beverage Processing Equipment Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Equipment Type
 - 8.3.3.2.2. By Beverage Type
 - 8.3.4. South Korea Carbonated Beverage Processing Equipment Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Equipment Type
 - 8.3.4.2.2. By Beverage Type
 - 8.3.5. Australia Carbonated Beverage Processing Equipment Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Equipment Type
 - 8.3.5.2.2. By Beverage Type

9. MIDDLE EAST & AFRICA CARBONATED BEVERAGE PROCESSING

EQUIPMENT MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Equipment Type

9.2.2. By Beverage Type

9.2.3. By Country

9.3. Middle East & Africa: Country Analysis

9.3.1. Saudi Arabia Carbonated Beverage Processing Equipment Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Equipment Type

9.3.1.2.2. By Beverage Type

9.3.2. UAE Carbonated Beverage Processing Equipment Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Equipment Type

9.3.2.2.2. By Beverage Type

9.3.3. South Africa Carbonated Beverage Processing Equipment Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Equipment Type

9.3.3.2.2. By Beverage Type

10. SOUTH AMERICA CARBONATED BEVERAGE PROCESSING EQUIPMENT MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Equipment Type

10.2.2. By Beverage Type

10.2.3. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Carbonated Beverage Processing Equipment Market Outlook

- 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
- 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Equipment Type
 - 10.3.1.2.2. By Beverage Type
- 10.3.2. Colombia Carbonated Beverage Processing Equipment Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Equipment Type
 - 10.3.2.2.2. By Beverage Type
- 10.3.3. Argentina Carbonated Beverage Processing Equipment Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Equipment Type
 - 10.3.3.2.2. By Beverage Type

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. GLOBAL CARBONATED BEVERAGE PROCESSING EQUIPMENT MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. Krones AG

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

15.2. GEA Group AG

15.3. KHS GmbH

15.4. Tetra Laval

15.5. Goma Engineering Pvt. Ltd

15.6. Alfa Laval AB

15.7. DUE SpA

15.8. Bajaj Group

15.9. Pentair Plc

15.10. Raj Innotech Pvt. Ltd.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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