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Global Coffee Grinder Burrs Market Growth 2026-2032

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Abstracts

The global Coffee Grinder Burrs market size is predicted to grow from US$ 220 million in 2025 to US$ 343 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

Coffee Grinder Burrs are precision grinding components used to crush and shear roasted coffee beans into controlled particle-size distributions through the relative movement of two matched grinding surfaces. The market primarily covers flat burrs and conical burrs manufactured from steel, engineering ceramics, and other wear-resistant materials, with products ranging from compact burr sets for manual and household grinders to large-diameter burrs for commercial and industrial grinding equipment. Key manufacturing processes include precision CNC machining, heat treatment, grinding, ceramic forming and sintering, and functional surface coating. Product performance is determined by burr geometry, tooth profile, dimensional tolerance, material hardness, wear resistance, heat generation, throughput, and consistency of particle distribution. Coffee Grinder Burrs are used in commercial on-demand espresso grinders, shop and roastery bulk grinders, industrial high-volume grinders, household electric grinders, manual grinders, fully automatic coffee machines, and coffee vending systems. The market covers both original equipment installation and replacement or performance-upgrade demand.

Key Findings

Global Coffee Grinder Burrs sales volume was estimated at approximately 35.0 million sets in 2025

Global sales volume is estimated to reach approximately 37.1 million sets in 2026

Average manufacturer realized price is estimated at about US$6.43 per set in 2025 and

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US$6.47 in 2026

Flat and conical burrs are the two standardized product architectures while steel and ceramic remain the mainstream material systems

The validated core competitive set contains 24 manufacturers across Europe East Asia and North America

Market Trends

The Coffee Grinder Burrs industry is moving from relatively standardized grinding components toward higher-precision, application-specific designs. In professional and premium household grinders, manufacturers are increasingly optimizing cutting geometry, particle-size distribution, burr alignment and machining tolerances rather than relying only on larger burr diameter as the primary performance indicator. Precision CNC machining, tighter dimensional control, refined heat-treatment processes and coated steel burrs are gaining importance in premium segments, while ceramic injection molding and sintering remain attractive for high-volume applications requiring wear resistance and competitive manufacturing cost. Replacement and upgrade demand is also becoming more sophisticated as specialty-coffee users select burr profiles according to espresso, filter and multipurpose grinding requirements. At the equipment level, the development of grind-by-weight, automated adjustment and connected grinding systems is increasing the importance of stable burr performance because software-based control cannot compensate for inconsistent geometry or progressive mechanical wear. Major manufacturers therefore increasingly integrate burr design with grinder motor characteristics, rotational speed, grinding chamber geometry and target extraction profiles.

Market Dynamics

Drivers

Growth in Coffee Grinder Burrs is supported by the expanding installed base of burr-based coffee grinders, premiumization of home coffee preparation, continued development of specialty coffee shops, and increasing adoption of bean-to-cup and fully automatic coffee machines. Burrs are critical wear components whose geometry directly influences particle distribution and extraction consistency, creating recurring replacement demand in commercial environments with high coffee throughput. Professional burr service life varies materially by size, material and coating, with

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conventional commercial steel burrs typically requiring replacement after processing hundreds to more than one thousand kilograms of coffee, while selected coated products provide substantially longer operating life. This creates a recurring aftermarket in addition to original-equipment demand. Expansion of automatic coffee equipment also supports demand for built-in grinding components supplied directly to machine manufacturers.

Restraints

The principal restraint is the relatively long replacement cycle of well-designed burrs, particularly in household grinders and coated professional products, which limits recurring unit demand compared with consumable coffee-machine components. Increasing vertical integration among grinder manufacturers can also reduce the addressable merchant market because several major equipment OEMs design and manufacture burrs internally. Production economics vary significantly between low-cost mass-produced ceramic burrs and precision-machined premium steel burrs, creating persistent pricing pressure in standard specifications. Compatibility is another constraint: differences in burr diameter, mounting dimensions, screw patterns, rotation direction, geometry and grinder chamber design prevent the market from developing into a fully standardized interchangeable component industry. Consequently, supplier qualification can be lengthy and switching costs are higher for OEM programs than they appear from the component value alone.

Opportunities

The strongest value-creation opportunities are concentrated in premium coated burrs, application-specific grinding profiles, high-precision replacement sets and OEM component programs for fully automatic coffee machines. Specialty-coffee users increasingly differentiate grinders by particle uniformity, clarity, sweetness, throughput and espresso performance, supporting higher-value burr geometries rather than purely commodity replacement parts. Larger professional formats such as 64 mm, 83 mm and 98 mm remain important platforms for aftermarket innovation because installed grinder bases can support alternative burr profiles without requiring complete equipment replacement. At the same time, Asian precision-machining and advanced-ceramic manufacturers are expanding their ability to supply OEM and ODM programs, creating opportunities to serve global grinder brands with customized metal and ceramic burrs. The continued development of integrated grinders for automatic coffee machines and vending systems provides an additional volume opportunity where long-term component supply relationships and manufacturing repeatability are more important than consumer-facing branding.

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Challenges

Coffee Grinder Burrs remain technically demanding despite their relatively small share of total grinder value. Small deviations in tooth geometry, concentricity, flatness, hardness or surface finish can materially affect grinding speed, particle distribution, noise and product life, making manufacturing consistency a key barrier to entry. Suppliers must also balance cutting performance against wear resistance, heat generation, food-contact requirements and manufacturability. High-end products face intellectual-property and differentiation challenges because burr geometry is increasingly treated as proprietary grinder technology, while OEM suppliers must protect customer-specific designs and maintain strict dimensional repeatability across production batches. The market also lacks a universal specification system beyond basic characteristics such as diameter and flat or conical architecture, creating fragmented SKU structures and limiting economies of scale. Capacity investment in advanced CNC equipment, heat treatment, coating and inspection therefore requires sufficient long-term OEM volumes to generate attractive utilization.

Industry Chain Analysis

The upstream industry for Coffee Grinder Burrs includes specialty and stainless steels, tool steels, alumina and zirconia ceramic materials, coating materials, CNC cutting tools, heat-treatment services and precision manufacturing equipment. Steel burr manufacturing typically progresses through material preparation, annealing or conditioning, precision machining of the grinding geometry, hardening, surface finishing and inspection, while ceramic products rely more heavily on powder preparation, forming, injection molding or pressing, sintering and precision finishing. Functional coatings add another process layer for premium steel products. Hemro, for example, describes a production sequence covering steel preparation, annealing, machining, hardening and finishing, while CoorsTek uses ceramic injection molding for high-volume alumina coffee burr production.

The midstream comprises independent burr specialists, advanced-ceramic manufacturers and vertically integrated grinder OEMs. Value creation is concentrated in grinding geometry development, machining precision, material and heat-treatment selection, coating technology, repeatability and OEM qualification rather than raw material cost alone. Downstream demand originates from commercial grinder manufacturers, household grinder brands, manual grinder suppliers, fully automatic coffee-machine manufacturers, vending-equipment companies, coffee shops, roasters and aftermarket replacement channels. The value chain therefore has two distinct

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commercial paths: merchant suppliers selling burr sets or customized components to equipment manufacturers and aftermarket customers, and captive manufacturers producing burrs primarily for their own grinder platforms.

Segment Insights

By product type, flat burrs and conical burrs constitute the most stable and mutually exclusive market segmentation. Flat burrs are widely used in professional espresso, shop, filter and industrial grinding platforms, where precise adjustment, relatively compact grinding chambers and scalable diameters support a broad range of throughput requirements. Conical burrs are prominent in manual grinders, household grinders, fully automatic machines and selected high-productivity commercial grinders, where lower rotational speed and favorable throughput characteristics can be advantageous. The market should not treat espresso burrs, filter burrs or multipurpose burrs as equivalent top-level product categories because these describe application-oriented tooth profiles rather than fundamental burr architecture.

> By material, steel burrs remain central to professional and premium grinding applications because machining, heat treatment and coating allow manufacturers to tailor cutting geometry and wear characteristics. Ceramic burrs maintain an important position in household, automatic and high-volume OEM programs, supported by hardness, corrosion resistance and scalable forming processes. Surface treatment creates an additional value layer within steel products: coated burrs generally target longer operating life and premium performance, while uncoated burrs remain the mainstream solution for many conventional grinders. Specialized tungsten-carbide and other uncommon material systems remain niche products and are appropriately grouped into Other rather than treated as independent mainstream segments.

Downstream Market Opportunities

Commercial on-demand espresso grinders remain an important value pool because cafes and hospitality operators require high grind consistency and periodically replace worn burrs. Shop and roastery bulk grinders create demand for larger and more durable burrs capable of processing packaged coffee in repeated batches, while industrial high-volume grinders extend the market into significantly larger diameters and higher throughput requirements. Household electric and manual grinders provide broader unit-volume opportunities, especially as consumers move from blade grinders toward burr-

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based preparation. Fully automatic coffee machines represent a strategically important OEM opportunity because the grinding mechanism is integrated into the brewing system and component suppliers can secure multi-year platform programs. Coffee vending machines create a similar embedded application where reliability, service interval and cost per cup are critical. These applications collectively support a market structure in which high-volume OEM demand and higher-value commercial replacement demand coexist.

Regional Insights

Europe remains the principal technology and specialist-manufacturing cluster for Coffee Grinder Burrs, particularly across Italy, Spain, Germany, Switzerland, Liechtenstein and France. The region combines established commercial grinder manufacturing with independent burr specialists and vertically integrated equipment manufacturers, supporting strong capabilities in precision steel machining, heat treatment and professional grinding technology. Italy has particularly deep supplier concentration across both independent burr manufacturers and grinder OEMs with internal burr production, while Germany and Switzerland-linked suppliers maintain strong positions in commercial grinding components and built-in grinding systems.
East Asia has become increasingly important across both precision metal burrs and ceramic grinding components. China combines CNC machining, advanced ceramics, OEM manufacturing and expanding premium domestic grinder brands; Japan retains specialized ceramic and manual-grinder capabilities; South Korea is established in high-performance aftermarket burrs; and Taiwan participates through precision component manufacturing. North America has a more limited base of dedicated coffee-burr manufacturers but retains important capabilities in advanced technical ceramics and a sizable premium replacement market. Southeast Asia and India are relevant downstream and equipment-assembly markets, but the currently validated manufacturing base for specialized Coffee Grinder Burrs remains smaller than in Europe and East Asia.

Competitive Landscape Analysis

The validated Coffee Grinder Burrs competitive landscape contains 24 core manufacturers and is characterized by the coexistence of independent component suppliers and vertically integrated grinder producers. Independent specialists such as Macine Keber, ITALMILL, Hemro, Etzinger and Sung Sim Precision compete primarily through OEM relationships, grinding geometry expertise, machining capability and compatibility with multiple grinder platforms, while CoorsTek and specialized Asian

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manufacturers extend competition into high-volume technical ceramics and contract manufacturing. Vertically integrated companies including Mazzer, Fiorenzato, Ceado, Compak, Santos and TIMEMORE use internal burr development to differentiate complete grinder systems and retain tighter control over performance, quality and product development. Chinese suppliers increasingly participate through precision machining, ceramic manufacturing and customized OEM production, creating additional cost and capacity competition. Competitive advantage therefore depends less on scale alone than on repeatable manufacturing tolerances, proprietary grinding profiles, material and coating know-how, customer qualification, delivery reliability and the ability to support both original equipment and replacement demand.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Coffee Grinder Burrs Industry Forecast” looks at past sales and reviews total world Coffee Grinder Burrs sales in 2025, providing a comprehensive analysis by region and market sector of projected Coffee Grinder Burrs sales for 2026 through 2032. With Coffee Grinder Burrs sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Coffee Grinder Burrs industry.
This Insight Report provides a comprehensive analysis of the global Coffee Grinder Burrs landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Coffee Grinder Burrs portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Coffee Grinder Burrs market.
This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Coffee Grinder Burrs and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Coffee Grinder Burrs.
This report presents a comprehensive overview, market shares, and growth opportunities of Coffee Grinder Burrs market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

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Flat Burrs

Conical Burrs

Other

Segmentation by Material:

Steel Burrs

Ceramic Burrs

Other

Segmentation by Application:

Commercial On-Demand Espresso Grinders

Shop and Roastery Bulk Grinders

Industrial High-Volume Coffee Grinders

Household Electric Coffee Grinders

Manual Coffee Grinders

Fully Automatic Coffee Machines

Coffee Vending Machines

Other

This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Macine Keber S.r.l.

ITALMILL GRINDING TECHNOLOGY S.R.L.

Mazzer Luigi S.p.A.

Fiorenzato M.C. s.r.l.

Ceado S.r.l.

FACEM S.p.A.

Macap S.r.l.

COMPAK COFFEE GRINDERS, S.A.

MOLCUNILL S.L.

Hemro International AG

Etzinger AG

BB Coffee Company GmbH

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SANTOS S.A.S.

CoorsTek, Inc.

Sung Sim Precision

JAPAN PORLEX Co., Ltd.

KAWASAKI PLASTICS CO., LTD.

Shanghai Timemore Coffee Equipment Co., Ltd.

Shenzhen Yingde Precision Manufacturing Co., Ltd.

Yongzhou Mingrui Ceramic Technology Co., Ltd.

Xiamen Innovacera Advanced Materials Co., Ltd.

Dongguan Finish Line Precision Electromechanical Co., Ltd.

AN HSIN ENTERPRISE CO., LTD

Key Questions Addressed in this Report

What is the 10-year outlook for the global Coffee Grinder Burrs market?

What factors are driving Coffee Grinder Burrs market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Coffee Grinder Burrs market opportunities vary by end market size?

How does Coffee Grinder Burrs break out by Type, by Application?

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