

Malted Barley Market Outlook 2025-2034: Market Share, and Growth Analysis By Type (Basic Malt, Special Mal), By Form (Flakes, Pellets, Granular, Powder, Liquid), By Application

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Abstracts

The Malted Barley Market is valued at USD 5 billion in 2025 and is projected to grow at a CAGR of 3.8% to reach USD 7 billion by 2034. The malted barley market is centered around barley that has undergone controlled germination and drying, commonly used as a key ingredient in brewing, distilling, and food production. Malted barley is prized for its fermentable sugars, enzyme activity, and rich flavor profile, making it indispensable in beer production and whisky distillation. It is also increasingly utilized in health foods, snacks, and malt-based beverages. The market is highly responsive to trends in alcoholic beverage consumption, particularly craft brewing, and is influenced by climatic conditions affecting barley yield and quality. Demand for organic, non-GMO, and locally sourced malted barley is also rising as consumers and manufacturers prioritize sustainability and ingredient traceability. The malted barley market experienced a robust resurgence driven by recovery in global beer consumption and continued expansion of the craft and artisanal brewing segments. Microbreweries and regional distilleries prioritized unique malt profiles to create differentiated flavor notes in their products. Europe remained the largest producer and consumer of malted barley, while North America and Asia-Pacific witnessed growing demand for specialty and premium-grade malts. Simultaneously, malted barley found increased applications in energy bars and plant-based beverages as a functional grain. However, erratic weather patterns in top-producing regions like Canada and Australia created volatility in barley supply, prompting some brewers to explore alternative grains and malt blends. The malted barley market is expected to diversify as climate-smart farming practices are adopted to mitigate weather-related supply disruptions. Innovations in barley breeding will yield higher enzyme content and drought-resistant varieties, enhancing output consistency.

Sustainable sourcing certifications will play a larger role in procurement strategies for global beverage companies. Demand from the non-alcoholic malt beverage segment is forecasted to rise in Middle Eastern and African markets, where alcohol consumption is restricted but malted drinks are widely popular. Additionally, digitized supply chain platforms will enhance traceability and quality assurance for artisanal and export-oriented producers.

Key Insights Malted Barley Market

Craft and specialty brewers are increasingly sourcing custom-roasted and varietal malted barleys to deliver unique beer and whiskey profiles.

Rising popularity of non-alcoholic malted beverages in culturally restricted regions is supporting malted barley consumption in alternative drink formats.

Interest in high-protein and fiber-rich barley-based snacks and cereals is boosting demand for malted barley in functional foods.

Use of organic and locally sourced malted barley is growing in sustainable brewing initiatives across North America and Europe.

Advanced malting techniques and improved storage systems are being developed to preserve quality under extreme climate variability.

Continued expansion of the global craft beer and whiskey market is fueling sustained demand for high-quality malted barley varieties.

Rising consumer preference for natural, whole-grain ingredients in food and beverages is encouraging malted barley use beyond brewing.

Government incentives and R&D funding in barley breeding are helping stabilize supply and improve disease-resistant crop yields.

Increased investment in malting infrastructure in developing regions is enhancing domestic production capabilities and reducing import reliance.

Climate-related disruptions in top-producing nations create unstable supply conditions, impacting pricing and long-term planning for buyers.

Competition from alternative grains and pseudo-cereals in the beverage sector may reduce market share in some health-conscious consumer segments.

Malted Barley Market Segmentation

By Type

Basic Malt

Special Mal

By Form

Flakes

Pellets

Granular

Powder

Liquid

By Application

Brewing Industry

Food Industry

Pharmaceutical

Other Applications

Key Companies Analysed

Cargill Inc.

COFCO International Ltd.

Heineken N.V.

AB InBev

Avangard-Agro

Groupe Soufflet

Dohler GmbH

IREKS GmbH

GrainCorp Malt

Malteurop Group

Simpsons Malt Ltd.

Boortmalt Group

Viking Malt

Bairds Malt

Briess Malt & Ingredients Co

Rahr Corporation

United Canadian Malt Ltd.

Barmalt Malting Private Limited

Muntons Malt plc

Great Western Malting Co

Castle Malting S.A.

Malting Company of Ireland

Malt Products Corporation

Crisp Malting Group Ltd.

Bestmalz AG

Imperial Malt Ltd.

Weyermann Malz

Maltexo

Gladfield Malt

Thomas Fawcett & Sons Ltd.

The Swaen Malts

Mouterij Dingemans

Axereal

MaltEurop China

Malt Handling LLC

Shanxi Huaxiang Group Co Ltd.

Montana Specialty Mills LLC

Malted Barley Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping,

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and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Malted Barley Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Malted Barley market data and outlook to 2034

United States

Canada

Mexico

Europe — Malted Barley market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Malted Barley market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Malted Barley market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Malted Barley market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Malted Barley value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Malted Barley industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Malted Barley Market Report

Global Malted Barley market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Malted Barley trade, costs, and supply chains

Malted Barley market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Malted Barley market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Malted Barley market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and Malted Barley supply chain analysis

Malted Barley trade analysis, Malted Barley market price analysis, and Malted Barley supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Malted Barley market news and developments

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Contents

1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

2. GLOBAL MALTED BARLEY MARKET SUMMARY, 2025

- 2.1 Malted Barley Industry Overview
 - 2.1.1 Global Malted Barley Market Revenues (In US\$ billion)
- 2.2 Malted Barley Market Scope
- 2.3 Research Methodology

3. MALTED BARLEY MARKET INSIGHTS, 2024-2034

- 3.1 Malted Barley Market Drivers
- 3.2 Malted Barley Market Restraints
- 3.3 Malted Barley Market Opportunities
- 3.4 Malted Barley Market Challenges
- 3.5 Tariff Impact on Global Malted Barley Supply Chain Patterns

4. MALTED BARLEY MARKET ANALYTICS

- 4.1 Malted Barley Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 Malted Barley Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 Malted Barley Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 Malted Barley Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global Malted Barley Market
 - 4.5.1 Malted Barley Industry Attractiveness Index, 2025
 - 4.5.2 Malted Barley Supplier Intelligence
 - 4.5.3 Malted Barley Buyer Intelligence
 - 4.5.4 Malted Barley Competition Intelligence
 - 4.5.5 Malted Barley Product Alternatives and Substitutes Intelligence
 - 4.5.6 Malted Barley Market Entry Intelligence

5. GLOBAL MALTED BARLEY MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034

5.1 World Malted Barley Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)

5.1 Global Malted Barley Sales Outlook and CAGR Growth By Type, 2024- 2034 (\$ billion)

5.2 Global Malted Barley Sales Outlook and CAGR Growth By Form, 2024- 2034 (\$ billion)

5.3 Global Malted Barley Sales Outlook and CAGR Growth By Application, 2024- 2034 (\$ billion)

5.4 Global Malted Barley Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

6. ASIA PACIFIC MALTED BARLEY INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK

6.1 Asia Pacific Malted Barley Market Insights, 2025

6.2 Asia Pacific Malted Barley Market Revenue Forecast By Type, 2024- 2034 (USD billion)

6.3 Asia Pacific Malted Barley Market Revenue Forecast By Form, 2024- 2034 (USD billion)

6.4 Asia Pacific Malted Barley Market Revenue Forecast By Application, 2024- 2034 (USD billion)

6.5 Asia Pacific Malted Barley Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.5.1 China Malted Barley Market Size, Opportunities, Growth 2024- 2034

6.5.2 India Malted Barley Market Size, Opportunities, Growth 2024- 2034

6.5.3 Japan Malted Barley Market Size, Opportunities, Growth 2024- 2034

6.5.4 Australia Malted Barley Market Size, Opportunities, Growth 2024- 2034

7. EUROPE MALTED BARLEY MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034

7.1 Europe Malted Barley Market Key Findings, 2025

7.2 Europe Malted Barley Market Size and Percentage Breakdown By Type, 2024- 2034 (USD billion)

7.3 Europe Malted Barley Market Size and Percentage Breakdown By Form, 2024- 2034 (USD billion)

7.4 Europe Malted Barley Market Size and Percentage Breakdown By Application, 2024- 2034 (USD billion)

7.5 Europe Malted Barley Market Size and Percentage Breakdown by Country, 2024-

2034 (USD billion)

7.5.1 Germany Malted Barley Market Size, Trends, Growth Outlook to 2034

7.5.2 United Kingdom Malted Barley Market Size, Trends, Growth Outlook to 2034

7.5.2 France Malted Barley Market Size, Trends, Growth Outlook to 2034

7.5.2 Italy Malted Barley Market Size, Trends, Growth Outlook to 2034

7.5.2 Spain Malted Barley Market Size, Trends, Growth Outlook to 2034

8. NORTH AMERICA MALTED BARLEY MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034

8.1 North America Snapshot, 2025

8.2 North America Malted Barley Market Analysis and Outlook By Type, 2024- 2034 (\$ billion)

8.3 North America Malted Barley Market Analysis and Outlook By Form, 2024- 2034 (\$ billion)

8.4 North America Malted Barley Market Analysis and Outlook By Application, 2024- 2034 (\$ billion)

8.5 North America Malted Barley Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)

8.5.1 United States Malted Barley Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Canada Malted Barley Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Mexico Malted Barley Market Size, Share, Growth Trends and Forecast, 2024- 2034

9. SOUTH AND CENTRAL AMERICA MALTED BARLEY MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS

9.1 Latin America Malted Barley Market Data, 2025

9.2 Latin America Malted Barley Market Future By Type, 2024- 2034 (\$ billion)

9.3 Latin America Malted Barley Market Future By Form, 2024- 2034 (\$ billion)

9.4 Latin America Malted Barley Market Future By Application, 2024- 2034 (\$ billion)

9.5 Latin America Malted Barley Market Future by Country, 2024- 2034 (\$ billion)

9.5.1 Brazil Malted Barley Market Size, Share and Opportunities to 2034

9.5.2 Argentina Malted Barley Market Size, Share and Opportunities to 2034

10. MIDDLE EAST AFRICA MALTED BARLEY MARKET OUTLOOK AND GROWTH PROSPECTS

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa Malted Barley Market Statistics By Type, 2024- 2034 (USD billion)

10.3 Middle East Africa Malted Barley Market Statistics By Form, 2024- 2034 (USD billion)

10.4 Middle East Africa Malted Barley Market Statistics By Application, 2024- 2034 (USD billion)

10.5 Middle East Africa Malted Barley Market Statistics by Country, 2024- 2034 (USD billion)

10.5.1 Middle East Malted Barley Market Value, Trends, Growth Forecasts to 2034

10.5.2 Africa Malted Barley Market Value, Trends, Growth Forecasts to 2034

11. MALTED BARLEY MARKET STRUCTURE AND COMPETITIVE LANDSCAPE

11.1 Key Companies in Malted Barley Industry

11.2 Malted Barley Business Overview

11.3 Malted Barley Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

12 APPENDIX

12.1 Global Malted Barley Market Volume (Tons)

12.1 Global Malted Barley Trade and Price Analysis

12.2 Malted Barley Parent Market and Other Relevant Analysis

12.3 Publisher Expertise

12.2 Malted Barley Industry Report Sources and Methodology

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