

# **Automated Brewing Market Forecasts to 2034 – Global Analysis By Automation Level (Fully Automated Brewing Systems, Semi-Automated Brewing Systems, and Manual-to-Automated Retrofit Systems), Equipment Type, Brewing Capacity, Brewery Type, Technology, End User, and By Geography**

<https://marketpublishers.com/r/A4E9D87E44A7EN.html>

Date: March 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: A4E9D87E44A7EN

## **Abstracts**

According to Statistics MRC, the Global Automated Brewing Market is accounted for \$0.92 billion in 2026 and is expected to reach \$2.16 billion by 2034 growing at a CAGR of 11.2% during the forecast period. Automated brewing systems integrate advanced technologies including IoT sensors, AI optimization, and robotics to streamline beer production processes while ensuring consistency, quality, and operational efficiency. These solutions enable brewers to monitor fermentation remotely, automate recipe execution, and reduce human error across production scales. The market serves diverse brewery types seeking to balance traditional craftsmanship with modern efficiency demands in an increasingly competitive beverage landscape.

### **Market Dynamics:**

Driver:

Rising craft beer demand and production complexity

Consumer preference for diverse, high-quality beer styles continues driving brewery expansion while increasing production complexity. Craft brewers face challenges maintaining consistency across small batches while experimenting with innovative ingredients and recipes. Automated systems provide precise control over temperature,

pressure, and timing variables critical for replicating complex flavor profiles batch after batch. This technological enablement allows breweries to scale production without sacrificing quality, meeting growing consumer expectations while managing operational costs effectively through reduced waste and optimized resource utilization.

#### Restraint:

##### High initial capital investment

Substantial upfront costs associated with automated brewing systems present significant barriers for small and medium-sized breweries operating with limited capital resources. Comprehensive automation solutions require investment in sensors, control systems, software platforms, and sometimes complete facility retrofitting. This financial hurdle proves particularly challenging for microbreweries and brewpubs where margins remain tight despite growing consumer interest. The extended return on investment timelines create hesitation among brewery owners, potentially slowing automation adoption across the smaller operators that constitute the majority of industry participants.

#### Opportunity:

##### Integration of AI for recipe development

Artificial intelligence applications in brewing optimization create unprecedented opportunities for innovation and efficiency gains. Machine learning algorithms analyze historical production data, ingredient characteristics, and consumer preference patterns to suggest novel recipe combinations with predicted success rates. These systems continuously learn from each batch outcome, refining recommendations and identifying optimal fermentation parameters for specific flavor profiles. Breweries leveraging AI capabilities reduce experimentation costs and time-to-market for new offerings while maintaining quality standards. This technology democratizes recipe innovation, enabling smaller brewers to compete effectively with larger competitors.

#### Threat:

##### Supply chain vulnerabilities for critical components

Global semiconductor shortages and specialized sensor supply constraints threaten automated brewing system availability and maintenance capabilities. Advanced brewing

automation relies on consistent access to electronic components that face increasing demand across multiple industries. Geopolitical tensions and logistics disruptions further compound these vulnerabilities, potentially delaying new installations and compromising existing system repairs. Breweries dependent on automated operations face significant downtime risks when replacement components prove unavailable, highlighting the fragility inherent in technology-dependent production environments.

### **Covid-19 Impact:**

The COVID-19 pandemic accelerated automation adoption across brewing as social distancing requirements and labor shortages disrupted traditional operations. Breweries faced reduced on-site staffing capacity while managing shifting demand patterns between on-premise and off-premise channels. Automated systems enabled continued production with minimal human intervention, proving essential for business continuity. The pandemic also intensified direct-to-consumer models, requiring breweries to increase production flexibility. These operational pressures permanently shifted industry perspectives on automation value, establishing technology investment as strategic priority rather than optional upgrade.

The Macro Breweries segment is expected to be the largest during the forecast period

The Macro Breweries segment is expected to account for the largest market share during the forecast period, driven by massive production volumes requiring comprehensive automation across entire facilities. These large-scale operations prioritize efficiency, consistency, and cost control through fully integrated brewing systems managing everything from ingredient handling to packaging. Macro breweries possess capital resources enabling continuous technology upgrades and early adoption of emerging automation solutions. Their global distribution networks demand standardized product quality across multiple facilities, making automation essential for brand consistency and operational scalability across international markets.

The AI & Machine Learning Brewing Optimization segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the AI & Machine Learning Brewing Optimization segment is predicted to witness the highest growth rate, reflecting breweries' increasing focus on data-driven decision-making and predictive operations. These intelligent systems analyze vast datasets from sensors, historical batches, and market trends to optimize fermentation parameters, predict maintenance needs, and recommend recipe

adjustments. Early adopters report significant improvements in yield, quality consistency, and innovation speed. As computational costs decrease and AI tools become more accessible to smaller breweries, adoption accelerates across all brewery types seeking competitive advantages through operational intelligence.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, supported by the world's most developed craft brewing culture and early automation technology adoption. The region's thousands of breweries range from microbreweries to massive production facilities, creating diverse automation demand across scales. Strong venture capital investment in brewing technology startups drives continuous innovation. Established automation providers maintain close relationships with major brewery groups, facilitating technology upgrades and new installations. Consumer demand for consistent, high-quality beer further pressures breweries to invest in precision control systems.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapidly expanding beer consumption and modernization of brewing facilities across developing economies. China's position as the world's largest beer market, combined with increasing premiumization trends, creates substantial automation opportunities. Rising disposable incomes throughout Southeast Asia fuel demand for quality beers, prompting brewery expansions incorporating latest automation technologies. Government support for food and beverage manufacturing modernization accelerates adoption. International brewery groups investing in regional production facilities transfer automation standards from mature markets, establishing advanced capabilities throughout the region.

### **Key players in the market**

Some of the key players in Automated Brewing Market include Anheuser-Busch InBev, Heineken N.V., Carlsberg A/S, Kronen AG, GEA Group Aktiengesellschaft, Böhler Holding AG, Alfa Laval AB, Paul Mueller Company, Pentair plc, Brewie, Picobrew Inc., iGulu, Speidel Tank- @und Beh?lterbau GmbH, Ziemann Holvrieka GmbH, and Brewtech.

### **Key Developments:**

In February 2026, Carlsberg launched its "Tradition Meets Tech" campaign, featuring AI-crafted packaging and digital-first branding for the Lunar New Year across China, Malaysia, and Vietnam.

In September 2025, At drinktec 2025, Ziemann Holvrieka debuted "BubbleBoil," an automated, energy-efficient wort boiling system, and the "T-Rex WET mill" with automatic gap adjustment.

#### Automation Levels Covered:

Fully Automated Brewing Systems

Semi-Automated Brewing Systems

Manual-to-Automated Retrofit Systems

#### Equipment Types Covered:

Brewhouse Automation Systems

Fermentation Automation

Filtration & Clarification Automation

Packaging & Filling Automation

Cleaning & Sanitation Automation (CIP Systems)

Process Control Software & SCADA

#### Brewing Capacities Covered:

Small-Scale Brewing Systems (Below 5,000 Liters/Batch)

Mid-Scale Brewing Systems (5,000–10,000 Liters/Batch)

## Large-Scale Brewing Systems (Above 10,000 Liters/Batch)

### Brewery Types Covered:

Microbreweries

Craft Breweries

Macro Breweries

Contract Brewing Facilities

Brewpubs

### Technologies Covered:

Industrial IoT-Based Brewing

AI & Machine Learning Brewing Optimization

Digital Twin Brewing Systems

Robotics in Brewing Operations

Smart Sensors & Real-Time Monitoring

### End Users Covered:

Commercial Breweries

Independent Craft Brewers

Large Beverage Corporations

Hospitality & Brewpub Chains

## Research & Pilot Breweries

### Regions Covered:

#### North America

United States

Canada

Mexico

#### Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

#### Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

### **What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

## Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

## Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

## Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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