

Barley Flour Market Forecasts to 2030 – Global Analysis By Barley Type (Hulled Barley, Hulless Barley, Pearled Barley and Other Products), Processing Technique, Distribution Channel, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Barley Flour Market is accounted for \$1.62 billion in 2024 and is expected to reach \$2.58 billion by 2030 growing at a CAGR of 7.5% during the forecast period. Barley flour is a fine powder made by grinding whole barley grains. It is a nutritious, versatile ingredient known for its mild nutty flavor and slightly coarse texture. Rich in dietary fiber, vitamins, and minerals, barley flour contains beta-glucans, which are beneficial for heart health and blood sugar regulation. It is often used in baking bread, muffins, and pancakes or as a thickening agent in soups and sauces. It also adds a wholesome texture and nutritional boost to recipes.

According to a survey released by National Agricultural Statistics Service (NASS), the Canadian government allocated USD 5.2 million for research to help barley producers adopt climate-resilient crops.

Market Dynamics:

Driver:

Increased demand for plant-based diets

As consumers shift toward vegan and plant-based lifestyles, there is a growing preference for natural, nutrient-dense ingredients like barley flour, which is rich in fiber, vitamins, and minerals. Barley flour, being versatile and gluten-reduced, is used in a

wide range of plant-based products such as bread, pasta, and snacks. Its appeal lies in its ability to provide a healthy, sustainable alternative to traditional wheat flour. This trend is boosting barley flour adoption in both retail and foodservice sectors, contributing to market growth.

Restraint:

Low gluten content

Barley flour has low gluten content because barley contains less gluten-forming protein compared to wheat. While this makes it suitable for those seeking gluten-reduced diets, it limits its effectiveness in recipes requiring dough elasticity and structure, such as bread and pizza crusts. Consequently, its appeal is primarily limited to niche markets focused on gluten-free or health-conscious alternatives, reducing its broader market potential.

Opportunity:

Rising popularity of ancient grains

Barley, considered an ancient grain, is prized for its high fiber content, essential vitamins, and antioxidants. As part of the broader trend toward healthy eating, barley flour is gaining attention for its nutritional benefits, such as supporting digestive health and reducing cholesterol. This shift in consumer preferences toward wholesome, time-honoured grains has expanded barley flour's presence in various food products, including bread, snacks, and cereals, driving demand across global markets.

Threat:

Allergen concerns

Allergen concerns in barley flour arise from its gluten content, which can trigger adverse reactions in individuals with celiac disease or gluten intolerance. Although barley contains less gluten than wheat, even small traces can cause severe health issues for sensitive consumers. This has led to limited adoption of barley flour in gluten-free products, hampering market growth, especially in regions with high awareness of gluten-related disorders.

Covid-19 Impact

The covid-19 pandemic significantly influenced the barley flour market, driving demand as consumers turned to home baking and cooking during lockdowns. Increased health awareness further boosted interest in barley flour for its nutritional benefits, such as high fiber and immunity-boosting properties. However, disruptions in supply chains, labor shortages, and transportation delays impacted the availability of raw materials and production. Post-pandemic, the market witnessed steady growth due to sustained interest in healthy and home-prepared foods.

The dry milling segment is expected to be the largest during the forecast period

The dry milling segment is predicted to secure the largest market share throughout the forecast period. Dry milling is a processing technique used to produce barley flour by grinding the whole barley grain without the addition of water. The barley is first cleaned, dehulled, and then ground into a fine powder. This method preserves the grain's nutrients, including fiber, vitamins, and minerals, while maintaining the characteristic flavor and texture.

The food & beverages segment is expected to have the highest CAGR during the forecast period

The food & beverages segment is anticipated to witness the highest CAGR during the forecast period due to its nutritional benefits and versatile applications. It is commonly used in baking for products like bread, muffins, and cookies, providing a rich source of fiber and essential vitamins. Barley flour is also used in the production of breakfast cereals, energy bars, and snacks, offering a wholesome, natural alternative to wheat flour. Additionally, it serves as a thickening agent in soups, sauces, and beverages, enhancing texture and nutritional value.

Region with largest share:

Asia Pacific is expected to register the largest market share during the forecast period driven by increasing health consciousness, rising demand for functional foods, and the growing popularity of plant-based diets. Traditional use of barley in cuisines across countries like India, China, and Japan further boosts its demand. Key players in the region include Bob's Red Mill, Arrowhead Mills, and local producers catering to regional preferences. With a growing urban population and rising disposable incomes, the Asia-Pacific barley flour market is poised for robust growth in the coming years.

Region with highest CAGR:

North America is expected to witness the highest CAGR over the forecast period fuelled by the popularity of clean-label and plant-based foods. The region's baking industry extensively uses barley flour for bread, muffins, and snacks. Key players include Bob's Red Mill, King Arthur Baking Company, and Ardent Mills, alongside smaller organic brands. The growing trend of functional foods and home baking further supports market expansion. North America's barley flour market is expected to witness steady growth, driven by evolving dietary trends and consumer preferences for healthy alternatives.

Key players in the market

Some of the key players profiled in the Barley Flour Market include Archer Daniels Midland Company, Cargill Inc., Salalah Mills Co SAOG, King Arthur Flour, Manildra Group, Agrana Group, The Quaker Oats Company, Ardent Mills, General Mills, The Bunge Group, Marubeni Corporation, United Grain Growers, The K.C. Milling Company, Blue Ribbon Mills, Nature's Path Foods, Bob's Red Mill Natural Foods Inc., Western States Barley Growers and Beneo.

Key Developments:

In July 2023, Beneo launched Orafiti β -fit, a barley flour with an impressive 20% beta-glucan content. This product is a significant advancement in the food industry, particularly for those interested in health-focused ingredients. Beta-glucan is a soluble fiber that has been widely recognized for its numerous health benefits, especially in supporting cardiovascular health and blood sugar management.

In November 2022, Salalah Mills Company launched the new barley flour product. This product is part of the company's expansion into offering a diverse range of high-quality flour products to cater to the growing demand in the regional market. This new product was positioned to appeal to health-conscious consumers, those with gluten sensitivities, and those looking for high-protein options.

Barley Types Covered:

Hulled Barley

Hulless Barley

Pearled Barley

Other Products

Processing Technique:

Dry Milling

Wet Milling

Stone Milling

Roller Milling

Heat-Treated Milling

Enzymatic Processing

Other Processing Techniques

Distribution Channels Covered:

Supermarkets/Hypermarkets

Specialty Stores

Convenience Stores

Other Distribution Channels

Applications Covered:

Food & Beverages

Animal Feed

Pharmaceuticals & Nutraceuticals

Biofuel Production

Cosmetics & Personal Care

Other Applications

End Users Covered:

Commercial Sector

Household Consumers

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & 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 2022, 2023, 2024, 2026, and 2030
- 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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