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Brewing Ingredients Market Forecasts to 2032 – Global Analysis By Product (Malt Extract, Beer Additives, Adjuncts/Grains, Beer Yeast, Hops and Other Products), Source, Function Type, Brewery Type, Application and By Geography

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Abstracts

According to Stratistics MRC, the Global Brewing Ingredients Market is accounted for $45.8 billion in 2025 and is expected to reach $82.7 billion by 2032 growing at a CAGR of 8.8% during the forecast period. Brewing ingredients refer to the essential components used in the production of beer, each contributing distinct characteristics to the final product. The four primary ingredients are water, which forms the bulk of the brew and influences flavor; malted grains (typically barley), which provide fermentable sugars and body; hops, which add bitterness, aroma, and act as natural preservatives; and yeast, which ferments the sugars into alcohol and carbon dioxide. Additional adjuncts like corn, rice, oats, fruits, and spices may be used to enhance flavor, texture, or reduce costs.

According to the Brewers Association, beer production in the U.S. in 2020 declined nearly 13% from 2019. As a result, the global brewing ingredients market share contracted during the COVID-19 era.

Market Dynamics:

Driver:

Rising Global Consumption of Beer

The rising global consumption of beer is fueling robust growth in the brewing ingredients

market. Increased demand for craft and premium beers is driving innovation in malt, hops, and yeast formulations. Emerging trends like organic and low-alcohol beers are expanding ingredient diversity, while the surge in microbreweries boosts regional sourcing and specialty inputs. This consumption boom is encouraging sustainable practices and technological advancements, positioning brewing ingredients as a dynamic segment within the food and beverage industry.

Restraint:

Stringent Regulations on Alcohol Production

Stringent regulations on alcohol production significantly hinder the brewing ingredients market. Complex licensing, labeling, and compliance requirements increase operational costs and slow time-to-market. Smaller breweries often struggle with evolving legal standards, reducing their ability to innovate or experiment with specialty ingredients. These regulatory burdens can limit market entry, discourage investment in new ingredient technologies, and stifle product diversity—ultimately constraining demand growth and limiting the overall expansion of the brewing ingredients sector.

Opportunity:

Innovation in Flavors and Ingredients

Innovation in flavors and ingredients of beer is positively driving the brewing ingredients market by catering to evolving consumer preferences for unique, artisanal, and experimental brews. Breweries are increasingly incorporating exotic hops, fruits, spices, and botanicals to differentiate their products, which boosts demand for diverse and premium ingredients. This trend is especially strong among craft brewers and younger demographics seeking novel tasting experiences, encouraging suppliers to expand their ingredient portfolios and invest in R&D, thereby fueling market growth and innovation.

Threat:

Volatility in Raw Material Prices

Volatility in raw material prices poses a significant challenge to the brewing ingredients market. Fluctuating costs of key inputs like barley, hops, and yeast disrupt budgeting and pricing strategies for breweries, particularly small and craft producers. These uncertainties can lead to reduced profit margins, inconsistent product quality, and

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hesitant investments in innovation. Such instability in the supply chain hampers market growth and weakens the overall competitiveness of brewing ingredient suppliers and manufacturers.

Covid-19 Impact

The Covid-19 pandemic had a mixed impact on the brewing ingredients market. Initially, lockdowns, supply chain disruptions, and closure of bars and restaurants led to a sharp decline in beer production and ingredient demand. However, the market gradually rebounded as home brewing and off-premise consumption increased. The crisis also accelerated digital sales channels and prompted breweries to adapt operations, which helped stabilize and reshape demand for brewing ingredients post-pandemic.

The microbrewery segment is expected to be the largest during the forecast period

The microbrewery segment is expected to account for the largest market share during the forecast period as these small-scale, craft-focused breweries prioritize quality and unique flavor profiles, leading to increased demand for premium ingredients such as specialty malts, hops, and yeast strains. As consumers increasingly seek artisanal and locally produced beers, microbreweries are fostering experimentation and diversity in beer production. This trend not only stimulates ingredient sales but also encourages the development of novel brewing components tailored to niche and evolving consumer preferences.

The proteins segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the proteins segment is predicted to witness the highest growth rate, because it enhances beer quality, stability, and nutritional value. Proteins, particularly from barley and other grains, play a vital role in foam formation, mouthfeel, and overall sensory experience, which are key attributes valued by consumers. Additionally, the rising trend of health-conscious drinking has led to increased interest in protein-enriched and functional beers. This has spurred demand for high-quality protein-rich ingredients, driving innovation and growth within the brewing ingredients market.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rising beer consumption, urbanization, and a growing middle-class population. Increasing disposable incomes and evolving consumer preferences for

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premium and craft beers are boosting demand for high-quality brewing ingredients. Additionally, expanding microbrewery culture and supportive government policies in countries like China, India, and Japan are encouraging local production. This dynamic environment is fostering innovation and investment, making Asia Pacific a key growth hub for brewing ingredients.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to strong craft beer culture and rising consumer demand for premium, diverse beer profiles. Innovation in hops, malts, and yeast strains is fueling product differentiation, while sustainability initiatives are enhancing ingredient sourcing. The region's robust infrastructure and supportive regulatory environment empower microbreweries and home brewers alike. This dynamic ecosystem fosters continuous growth, making North America a pivotal hub for brewing ingredient advancements and market expansion.

Key players in the market

Some of the key players profiled in the Brewing Ingredients Market include Cargill, Incorporated, Angel Yeast Co., Ltd., Malteurop Groupe, Boortmalt, Viking Malt, BSG (Brewers Supply Group), Lallemand Inc., Lesaffre, Kerry Group plc, Rahr Corporation, Simpsons Malt Ltd., Muntons plc, Weyermann Specialty Malts, The Swaen, Impextraco NV, Castle Malting, Dingemans, IREKS GmbH and Associated British Foods plc.

Key Developments:

In July 2024, Cargill and Ultrascale Digital Infrastructure (UDI) have teamed up to deploy a groundbreaking plant-based immersion cooling solution—NatureCool™ 2000—aimed at transforming data center operations. This biodegradable, vegetable oil derivative coolant enhances energy efficiency, reducing a data center's cooling power demand by over 50%, while simultaneously slashing water waste and eliminating toxic chemicals.

In May 2024, Boortmalt, has partnered with Soil Capital to significantly reduce Scope 3 emissions associated with its barley supply. Together, they aim to achieve a 30% reduction in emissions from two-thirds of Boortmalt's barley by 2030—equating to roughly 200,000 tonnes of CO? equivalent—by promoting regenerative agriculture practices among farmers.

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Products Covered:

- Malt Extract
- Beer Additives
- Adjuncts/Grains
- Beer Yeast
- Hops
- Other Products

Sources Covered:

- Microbial
- Plant-based
- Other Sources

Function Types Covered:

- Fragrance
- Flavors
- Preservatives
- Proteins
- Other Function Types

Brewery Types Covered:

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- Macro Brewery
- Craft Brewery
- Microbrewery
- Brewpub
- Other Brewery Types

Applications Covered:

- Lager
- Stout
- Pale Ale
- Wheat Beer
- Craft Beer
- Other Applications

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany

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- 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)

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Competitive Benchmarking

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

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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