

# **Brewer's Yeast Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Dry, Fresh, Instant Dry, Liquid), By Form (Powder, Tablet), By Application (Food, Feed), By Distribution Channel (Online, Offline), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Brewer's Yeast Market is projected to expand from USD 6.51 Billion in 2025 to USD 10.15 Billion by 2031, registering a CAGR of 7.68%. Brewer's yeast, technically known as inactivated *Saccharomyces cerevisiae*, is a byproduct of beer fermentation widely recognized for its rich profile of proteins, minerals, and B-vitamins. Market expansion is primarily fueled by the agricultural sector's urgent need for antibiotic-free growth promoters and the growing industrial appetite for alternative protein sources within human nutrition. Additionally, the increasing incorporation of yeast derivatives into pharmaceutical products aimed at gut health supports ongoing volume growth. Data from the American Feed Industry Association indicates that in 2024, U.S. animal food export volumes rose by 8% to reach 21.4 million metric tons, underscoring the strong commercial momentum within this crucial end-use sector.

However, the market confronts substantial hurdles related to raw material volatility, as the supply of brewer's yeast is intrinsically tied to the production levels of the global brewing industry. Any stagnation or reduction in beer output directly limits the availability of this biomass, resulting in supply chain bottlenecks and increased procurement costs. Consequently, manufacturers are forced to manage these upstream dependency risks, which can undermine market stability and hinder their capacity to reliably satisfy the growing demands of end-users.

## Market Driver

A primary catalyst for the global brewer's yeast market is the escalating demand for high-quality, antibiotic-free animal feed additives. As regulatory bodies increasingly prohibit antibiotic growth promoters, livestock producers are shifting toward yeast-based alternatives containing mannan-oligosaccharides and beta-glucans to support animal gut health and immune systems. This structural transition is boosting the volume of inactivated yeast needed to maintain agricultural output levels. According to Alltech's '2025 Agri-Food Outlook', global animal feed production recovered in 2024, rising by 1.2% to 1.396 billion metric tons, highlighting the growing market for these nutritional additives. Leading manufacturers are capitalizing on this trend, as seen in Angel Yeast's '2024 Annual Report', which announced total revenue of 15.197 billion yuan, largely driven by the continued adoption of yeast derivatives in animal nutrition and related applications.

A second significant driver is the growing use of yeast proteins in plant-based meat alternatives, elevating brewer's yeast from a simple byproduct to a high-value functional ingredient. In meat analogue formulations, yeast extracts are increasingly employed to mask vegetable protein off-notes and add essential umami flavors, while the protein content helps achieve an amino acid profile comparable to animal meat. This application has drawn considerable investment into fermentation innovations aimed at optimizing yeast strains for human consumption. The Good Food Institute's '2024 State of the Industry Report: Fermentation' notes that companies focused on fermentation-enabled alternative proteins secured USD 651 million in 2024, indicating sustained funding for technologies that integrate yeast biomass into sustainable food products.

## Market Challenge

Raw material volatility creates a fundamental obstacle to market stability, as the availability of brewer's yeast is wholly dependent on the operational output of the brewing sector. Since manufacturers cannot generate this biomass autonomously, they must rely on fermentation byproducts as their primary input. As a result, supply levels are determined by beverage consumption trends rather than the growing demand for yeast derivatives in animal feed or human nutrition. This strict upstream reliance means that any decrease in beer production volumes leads to immediate scarcity, driving up procurement costs and limiting the inventory available for processing.

This constraint becomes especially critical when brewing activity stagnates, leaving processors with supply deficits that cannot be remedied through alternative sourcing.

The inability to separate yeast production from brewing cycles subjects the market to severe volume fluctuations that can disrupt long-term supply contracts. For instance, the Brewers Association reported that independent craft beer production volume in the United States fell by 2 percent in the first half of 2024. Such declines in brewing output directly reduce the recoverable tonnage of yeast, making it difficult for manufacturers to consistently meet the rising needs of end-users and thereby impeding overall market growth.

## **Market Trends**

The sustainable upcycling of brewery waste for the circular economy is significantly reshaping supply chain dynamics by transforming spent yeast from disposable refuse into a strategic asset. Manufacturers are increasingly adopting advanced fractionation technologies to recover high-value beta-glucans and proteins from residual yeast biomass, opening new revenue streams while reducing environmental footprints. This strategy supports broader corporate sustainability objectives to close production loops and minimize landfill usage, effectively turning a potential volatility liability into a reliable material resource. Reflecting the scale of this trend, Heineken N.V. stated in its 'Annual Report 2023' that 99.4% of its residual products, including brewer's grains and yeast, were recycled or reused for animal feed and material loops.

Concurrently, the push into functional and premium pet nutrition is creating specialized demand for brewer's yeast outside of traditional livestock markets. As pet owners continue to humanize their companions, there is a growing preference for natural ingredients that provide tangible health advantages, such as enhanced digestion, immune support, and better palatability. Yeast derivatives are aggressively marketed in this sector for their abundant B-vitamin complex and savory umami flavor, acting as a clean-label appetite stimulant for cats and dogs. The American Pet Products Association's 'State of the Industry Report' revealed that total U.S. pet industry spending hit USD 147 billion in 2023, indicating a massive and high-value market opportunity for functional yeast additives in the companion animal space.

## **Key Market Players**

Associated British Food plc

Lesaffre Group

Alltech

Leiber GmbH

Angel Yeast Co., Ltd.

Lallemand, Inc.

F.L. Emmert

Nutreco N.V.

Biomin

Shandong Bio Sunkeen Co., Ltd.

## Report Scope

In this report, the Global Brewer's Yeast Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Brewer's Yeast Market, By Product

Dry

Fresh

Instant Dry

Liquid

### Brewer's Yeast Market, By Form

Powder

Tablet

### Brewer's Yeast Market, By Application

Food

Feed

### Brewer's Yeast Market, By Distribution Channel

Online

Offline

### Brewer's Yeast Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Brewer's Yeast Market.

## **Available Customizations:**

Global Brewer's Yeast Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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