

# **Barley Malt Extracts Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Light Extracts, Ambe Extracts, Dark Extracts), By Application (Food, Beverages, Pharmaceuticals, Other), By Source (Conventional, Organic), By Form (Liquid, Powder), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Barley Malt Extracts Market is projected to expand from USD 537.98 Million in 2025 to USD 849.45 Million by 2031, reflecting a CAGR of 7.91%. Defined as a nutritive concentrate produced through the enzymatic conversion of malted barley into soluble sugars and amino acids, the market is largely driven by growing consumer interest in natural, clean-label sweeteners and the booming craft brewing industry, which demands high-quality fermentation substrates. This momentum is underpinned by significant processing infrastructure; according to Euromalt, the total malting capacity in the EU reached 10,237,085 tonnes in 2024.

However, the industry encounters major hurdles due to raw material cost volatility caused by climatic instability. Unpredictable weather patterns frequently degrade the quality and yield of barley harvests, resulting in supply chain interruptions that hinder production planning and force manufacturers worldwide to raise prices due to the upward pressure on costs.

## **Market Driver**

A key growth catalyst is the surging popularity of non-alcoholic malt beverages in emerging economies, where manufacturers utilize malt extracts to supply the essential

body and flavor profile missing in alcohol-free formulations. This movement is fuelled by a worldwide shift towards health-conscious habits, requiring premium malt concentrates to mimic the sensory experience of conventional beer without fermentation-derived alcohol. As evidence of this trend, Heineken N.V. reported in their '2024 Full Year Results' in February 2025 that the Heineken 0.0 brand saw a 10% global volume increase, with notable growth in markets like Brazil, highlighting the vital role of malt extracts in scalable, alcohol-free product innovation.

Concurrently, the growth of the global craft brewing and microbrewery sector drives demand for specialty malt extracts to improve fermentation efficiency and consistency across various beer styles. Independent brewers are increasingly relying on these concentrates for gravity adjustments and flavor accuracy as the industry rebounds from past economic challenges. According to the Society of Independent Brewers (SIBA) 'Independent Beer Report 2025' released in May 2025, average production volumes for independent breweries rose by 10% year-on-year; to support this, the USDA Foreign Agricultural Service estimated global barley production at 143.27 million metric tons in January 2025, ensuring a stable supply chain for these value-added applications.

## **Market Challenge**

The principal barrier to growth in the Global Barley Malt Extracts Market is the severe volatility of raw material costs stemming from climatic instability. Because barley quality and yields are deeply connected to weather patterns, events like unexpected droughts or excessive rain can drastically reduce harvest outputs. Such erratic conditions limit the supply of malting-grade barley, resulting in immediate supply chain constraints that force malt extract manufacturers to procure inputs at inflated prices, thereby squeezing profit margins and creating an uncertain financial climate that deters capacity investment.

This negative impact is confirmed by recent data showing production declines in key cultivation areas. In December 2024, COCERAL reported that barley production for the EU-27 and UK region was restricted to 57.3 million tonnes due to difficult growing conditions throughout the season. This diminished availability of crucial raw materials inevitably drives up operational costs for extract producers, potentially forcing them to raise final product prices to maintain viability, which risks eroding competitiveness and suppressing demand in price-sensitive sectors.

## **Market Trends**

A significant growth avenue is the rising inclusion of barley malt extracts in plant-based dairy alternatives, specifically within the growing oat and cereal milk categories. Manufacturers are leveraging malt concentrates to impart enzymatic sweetness and mask vegetal flavors, thereby removing the need for refined sugars or artificial modifiers in clean-label products. This trend generates a consistent demand for hydrolyzed barley proteins and sugars to emulate the sensory profile of conventional dairy; notably, SunOpta Inc. reported in their 'Third Quarter 2024 Financial Results' in November 2024 that revenue from their plant-based beverage segment rose by 15.5% to \$176.2 million, underscoring the strong industrial adoption of grain-based inputs.

At the same time, the market is observing strong utilization of malt extracts as natural texturizers and colorants in the premium bakery sector. Industrial bakers are moving away from synthetic caramel colors and dough conditioners, opting instead for the reducing sugars found in malt to expedite the Maillard reaction, which improves crust browning and moisture retention. This functional application boosts visual appeal and prolongs shelf life in artisan breads, cookies, and crackers while meeting clean-label standards; as reported by Associated British Foods plc in their 'Annual Results Announcement 2024' in November 2024, their Ingredients division saw a 2% revenue increase driven by robust bakery ingredient volumes, reflecting the growing demand for functional baking solutions.

## **Key Market Players**

Cargill Incorporated

Archer Daniels Midland Company

Malteurop

Boortmalt

Muntons plc

Malteurop Group

Soufflet

Kerry Group plc

Associated British Foods plc

Briess Malt & Ingredients Company

## Report Scope

In this report, the Global Barley Malt Extracts Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Barley Malt Extracts Market, By Type

Light Extracts

Ambe Extracts

Dark Extracts

### Barley Malt Extracts Market, By Application

Food

Beverages

Pharmaceuticals

Other

### Barley Malt Extracts Market, By Source

Conventional

Organic

### Barley Malt Extracts Market, By Form

Liquid

Powder

## Barley Malt Extracts 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 Barley Malt Extracts Market.

### **Available Customizations:**

Global Barley Malt Extracts 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).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL BARLEY MALT EXTRACTS MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Light Extracts, Ambe Extracts, Dark Extracts)
  - 5.2.2. By Application (Food, Beverages, Pharmaceuticals, Other)
  - 5.2.3. By Source (Conventional, Organic)
  - 5.2.4. By Form (Liquid, Powder)

- 5.2.5. By Region
- 5.2.6. By Company (2025)
- 5.3. Market Map

## **6. NORTH AMERICA BARLEY MALT EXTRACTS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Type
  - 6.2.2. By Application
  - 6.2.3. By Source
  - 6.2.4. By Form
  - 6.2.5. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Barley Malt Extracts Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Type
      - 6.3.1.2.2. By Application
      - 6.3.1.2.3. By Source
      - 6.3.1.2.4. By Form
  - 6.3.2. Canada Barley Malt Extracts Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Type
      - 6.3.2.2.2. By Application
      - 6.3.2.2.3. By Source
      - 6.3.2.2.4. By Form
  - 6.3.3. Mexico Barley Malt Extracts Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Type
      - 6.3.3.2.2. By Application
      - 6.3.3.2.3. By Source
      - 6.3.3.2.4. By Form

## 7. EUROPE BARLEY MALT EXTRACTS MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Application

#### 7.2.3. By Source

#### 7.2.4. By Form

#### 7.2.5. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. Germany Barley Malt Extracts Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Type

###### 7.3.1.2.2. By Application

###### 7.3.1.2.3. By Source

###### 7.3.1.2.4. By Form

#### 7.3.2. France Barley Malt Extracts Market Outlook

##### 7.3.2.1. Market Size & Forecast

###### 7.3.2.1.1. By Value

##### 7.3.2.2. Market Share & Forecast

###### 7.3.2.2.1. By Type

###### 7.3.2.2.2. By Application

###### 7.3.2.2.3. By Source

###### 7.3.2.2.4. By Form

#### 7.3.3. United Kingdom Barley Malt Extracts Market Outlook

##### 7.3.3.1. Market Size & Forecast

###### 7.3.3.1.1. By Value

##### 7.3.3.2. Market Share & Forecast

###### 7.3.3.2.1. By Type

###### 7.3.3.2.2. By Application

###### 7.3.3.2.3. By Source

###### 7.3.3.2.4. By Form

#### 7.3.4. Italy Barley Malt Extracts Market Outlook

##### 7.3.4.1. Market Size & Forecast

###### 7.3.4.1.1. By Value

#### 7.3.4.2. Market Share & Forecast

##### 7.3.4.2.1. By Type

##### 7.3.4.2.2. By Application

##### 7.3.4.2.3. By Source

##### 7.3.4.2.4. By Form

#### 7.3.5. Spain Barley Malt Extracts Market Outlook

##### 7.3.5.1. Market Size & Forecast

##### 7.3.5.1.1. By Value

##### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Type

##### 7.3.5.2.2. By Application

##### 7.3.5.2.3. By Source

##### 7.3.5.2.4. By Form

## **8. ASIA PACIFIC BARLEY MALT EXTRACTS MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Type

#### 8.2.2. By Application

#### 8.2.3. By Source

#### 8.2.4. By Form

#### 8.2.5. By Country

### 8.3. Asia Pacific: Country Analysis

#### 8.3.1. China Barley Malt Extracts Market Outlook

##### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

##### 8.3.1.2.1. By Type

##### 8.3.1.2.2. By Application

##### 8.3.1.2.3. By Source

##### 8.3.1.2.4. By Form

#### 8.3.2. India Barley Malt Extracts Market Outlook

##### 8.3.2.1. Market Size & Forecast

##### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

##### 8.3.2.2.1. By Type

##### 8.3.2.2.2. By Application

- 8.3.2.2.3. By Source
- 8.3.2.2.4. By Form
- 8.3.3. Japan Barley Malt Extracts Market Outlook
  - 8.3.3.1. Market Size & Forecast
    - 8.3.3.1.1. By Value
  - 8.3.3.2. Market Share & Forecast
    - 8.3.3.2.1. By Type
    - 8.3.3.2.2. By Application
    - 8.3.3.2.3. By Source
    - 8.3.3.2.4. By Form
- 8.3.4. South Korea Barley Malt Extracts Market Outlook
  - 8.3.4.1. Market Size & Forecast
    - 8.3.4.1.1. By Value
  - 8.3.4.2. Market Share & Forecast
    - 8.3.4.2.1. By Type
    - 8.3.4.2.2. By Application
    - 8.3.4.2.3. By Source
    - 8.3.4.2.4. By Form
- 8.3.5. Australia Barley Malt Extracts Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Type
    - 8.3.5.2.2. By Application
    - 8.3.5.2.3. By Source
    - 8.3.5.2.4. By Form

## **9. MIDDLE EAST & AFRICA BARLEY MALT EXTRACTS MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Application
  - 9.2.3. By Source
  - 9.2.4. By Form
  - 9.2.5. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Barley Malt Extracts Market Outlook

- 9.3.1.1. Market Size & Forecast
  - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
  - 9.3.1.2.1. By Type
  - 9.3.1.2.2. By Application
  - 9.3.1.2.3. By Source
  - 9.3.1.2.4. By Form
- 9.3.2. UAE Barley Malt Extracts Market Outlook
  - 9.3.2.1. Market Size & Forecast
    - 9.3.2.1.1. By Value
  - 9.3.2.2. Market Share & Forecast
    - 9.3.2.2.1. By Type
    - 9.3.2.2.2. By Application
    - 9.3.2.2.3. By Source
    - 9.3.2.2.4. By Form
- 9.3.3. South Africa Barley Malt Extracts Market Outlook
  - 9.3.3.1. Market Size & Forecast
    - 9.3.3.1.1. By Value
  - 9.3.3.2. Market Share & Forecast
    - 9.3.3.2.1. By Type
    - 9.3.3.2.2. By Application
    - 9.3.3.2.3. By Source
    - 9.3.3.2.4. By Form

## **10. SOUTH AMERICA BARLEY MALT EXTRACTS MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application
  - 10.2.3. By Source
  - 10.2.4. By Form
  - 10.2.5. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Barley Malt Extracts Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast

- 10.3.1.2.1. By Type
- 10.3.1.2.2. By Application
- 10.3.1.2.3. By Source
- 10.3.1.2.4. By Form
- 10.3.2. Colombia Barley Malt Extracts Market Outlook
  - 10.3.2.1. Market Size & Forecast
    - 10.3.2.1.1. By Value
  - 10.3.2.2. Market Share & Forecast
    - 10.3.2.2.1. By Type
    - 10.3.2.2.2. By Application
    - 10.3.2.2.3. By Source
    - 10.3.2.2.4. By Form
- 10.3.3. Argentina Barley Malt Extracts Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Type
    - 10.3.3.2.2. By Application
    - 10.3.3.2.3. By Source
    - 10.3.3.2.4. By Form

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. GLOBAL BARLEY MALT EXTRACTS MARKET: SWOT ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers

- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Cargill Incorporated
  - 15.1.1. Business Overview
  - 15.1.2. Products & Services
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel
  - 15.1.5. SWOT Analysis
- 15.2. Archer Daniels Midland Company
- 15.3. Malteurop
- 15.4. Boortmalt
- 15.5. Muntons plc
- 15.6. Malteurop Group
- 15.7. Soufflet
- 15.8. Kerry Group plc
- 15.9. Associated British Foods plc
- 15.10. Briess Malt & Ingredients Company

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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