



Global Malt Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 24.9 bn
Forecast (2031)	USD 32.8 bn
CAGR (2021-2031)	4.7%
Study period	2021-2031
Largest region	Europe · 35.8%
Fastest-growing region	Asia-Pacific · 5.8%
Market concentration	Moderate
Licence	Individual / Company

The global malt market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Brewing remains the anchor application, while premium whisky, alcohol-free beer, specialty malt and clean-label food ingredients generate the strongest incremental value. Europe leads with XX% of global revenue, supported by more than XXX tonnes of EU malting capacity, while Asia-Pacific is the fastest-growing regional market. Consolidation among multinational maltsters is increasing procurement scale, but differentiated specialty-malt suppliers continue to command attractive margins.

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Executive summary

The global malt market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Brewing remains the anchor application, while premium whisky, alcohol-free beer, specialty malt and clean-label food ingredients generate the strongest incremental value. Europe leads with XX% of global revenue, supported by more than XXX tonnes of EU malting capacity, while Asia-Pacific is the fastest-growing regional market. Consolidation among multinational maltsters is increasing procurement scale, but differentiated specialty-malt suppliers continue to command attractive margins.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global malt revenue reached USD XXX billion in 2025 and will rise to USD XXX billion by 2031.
- The market will generate a XX% CAGR between 2025 and 2031, adding USD XXX billion in annual revenue.
- Europe accounted for XX% of 2025 market value and remains the largest producing and exporting region.
- EUROMALT reported XXX tonnes of EU malting capacity in 2024, up from XXX tonnes in 2020.
- Barley malt represented XX% of 2025 market value, reflecting its technical dominance in brewing and malt-whisky production.
- Brewing absorbed XX% of malt-market value in 2025; distilling is the fastest-growing major application at a XX% CAGR.
- USDA forecast global barley production at approximately XXX tonnes for 2026/27, strengthening raw-material availability after tighter recent harvests.
- Soufflet Malt operates 41 malt plants across 20 countries with XXX tonnes of annual capacity following the United Malt integration.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Malt Market Trends and Growth Drivers

The malt market sits between a weather-sensitive grain system and concentrated beverage customers, making procurement quality and plant efficiency as important as headline consumption. Barley typically represents the largest variable cost, but malting-grade premiums depend on germination, protein, moisture, varietal purity and kernel size rather than feed-grain availability alone.

Demand is becoming more valuable even where beer volumes are mature. Distilling capacity, specialty beer recipes, alcohol-free beer and clean-label food ingredients require differentiated malt specifications, allowing technical performance and traceability to carry greater pricing weight than undifferentiated tonnes.

Decarbonisation is reshaping both agriculture and processing. Maltsters are financing regenerative practices, measuring field emissions and replacing fossil heat in kilns, while buyers increasingly incorporate verified Scope 3 reductions into contracts and supplier scorecards.

Growth drivers

Premium whisky capacity accelerates distilling-malt demand

New distilleries and capacity additions require malt supply years before mature whisky reaches the market, creating forward demand visibility for maltsters. Scottish expansions remain important, while American single malt, Indian single malt and Japanese-style whisky broaden the geographic opportunity for high-extract and specification-controlled malt.

Specialty beer shifts value toward higher-margin malt

Craft brewers and premium brand owners use larger and more varied malt bills to differentiate colour, aroma, body and provenance. Even where mature beer volumes are soft, migration toward caramel, roasted, wheat and heritage malts raises malt value per hectolitre.

Alcohol-free beer expands technically demanding malt use

Alcohol-free beer has become the fastest-growing beer category in several developed markets and requires careful control of fermentability, flavour and mouthfeel. Maltsters benefit through tailored low-fermentability products, speciality grains and application support that help brewers retain body after alcohol reduction.

Clean-label foods broaden the addressable market

Liquid and dry malt extracts supply natural sweetness, browning, colour and flavour in bakery, confectionery, cereals, beverages and savoury foods. Reformulation away from artificial colours and heavily refined sweeteners supports malt-derived ingredients with recognisable labels and multifunctional performance.

Asian brewing and distilling localise supply

Brewer investment in India and Southeast Asia and premium-spirit growth across India, China and East Asia are increasing demand for reliable regional malt supply. Local plants reduce freight exposure and enable closer alignment between barley specifications, recipes and brewery production schedules.

Low-carbon malt becomes a procurement differentiator

Brewers and distillers are targeting agricultural and thermal-energy emissions embedded in purchased malt. Regenerative-barley contracts, heat recovery, renewable kilning and verified carbon accounting allow maltsters to secure strategic contracts and defend price premiums.

Restraints

Climate volatility reduces malting-grade barley availability

Drought, heat during grain filling and excessive harvest rainfall can reduce germination capacity, kernel plumpness and acceptable protein consistency. Maltsters must widen origination, increase screening and carry additional inventory when a smaller share of the barley crop meets malting specifications.

Mature-market beer contraction limits base-malt volume

Beer production and consumption remain under pressure in parts of Europe as consumers moderate alcohol intake and reduce hospitality spending. Premiumisation offsets part of the loss in value, but standard lager malt remains exposed to lower brewery utilisation.

Energy and water intensity constrain margins

Steeping, germination and kilning require substantial water, heat and electricity, making malt conversion margins sensitive to utility prices. Decarbonisation also requires capital for heat pumps, biomass, waste-heat networks and process controls before savings fully materialise.

Large-brewer purchasing power pressures pricing

Global brewers procure substantial volumes through multi-year contracts and competitive tenders, transferring commodity-price and service expectations to malt suppliers. Consolidation strengthens the position of scaled maltsters, but undifferentiated regional capacity faces persistent margin pressure.

Malt Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium whisky capacity accelerates distilling-malt demand	XXX	XXX	XXX
Specialty beer shifts value toward higher-margin malt	XXX	XXX	XXX
Alcohol-free beer expands technically demanding malt use	XXX	XXX	XXX
Clean-label foods broaden the addressable market	XXX	XXX	XXX
Asian brewing and distilling localise supply	XXX	XXX	XXX
Low-carbon malt becomes a procurement differentiator	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate volatility reduces malting-grade barley availability	XXX	XXX	XXX
Mature-market beer contraction limits base-malt volume	XXX	XXX	XXX
Energy and water intensity constrain margins	XXX	XXX	XXX
Large-brewer purchasing power pressures pricing	XXX	XXX	XXX

Source: XXX

Malt Market Segmentation by Grain, Product, Form and Application

By Grain Source

Barley dominates because its husk, enzyme package, starch structure and established varieties make it the preferred brewing and whisky substrate. Wheat malt grows faster in wheat beer, bakery and flavour applications, while rye and other grains benefit from craft recipes, heritage positioning and differentiated food formulations.

Value by grain Source, USD bn

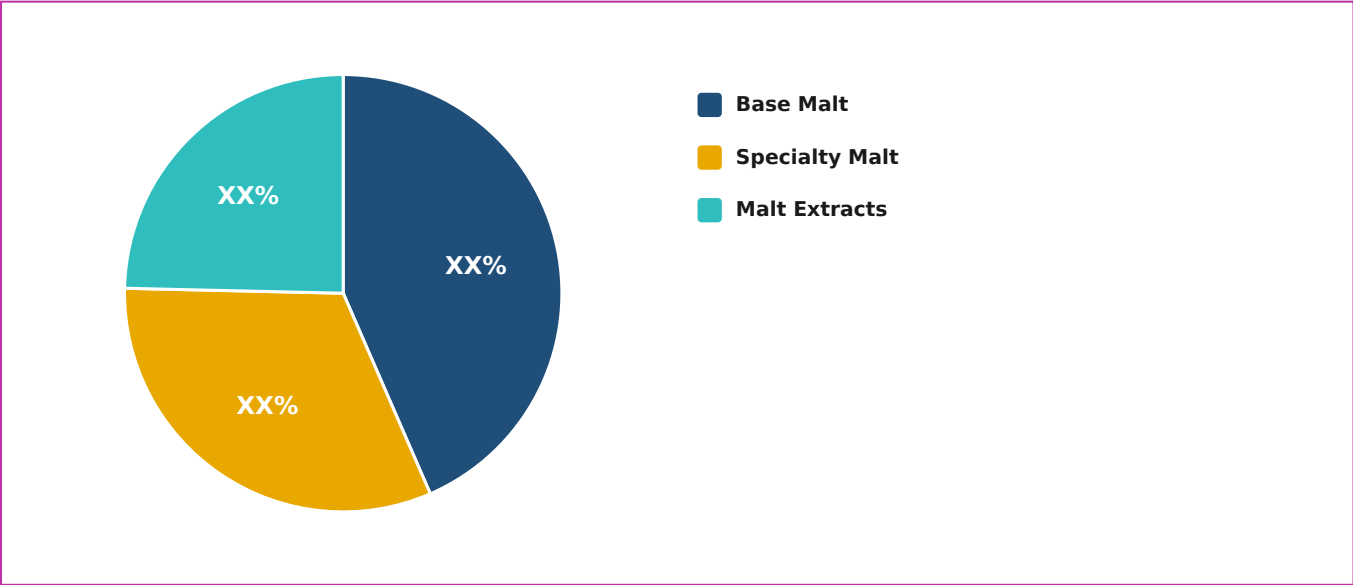
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Barley	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wheat	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rye	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Grains	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Category

Base malt supplies the fermentable foundation for mainstream beer and grain spirits and therefore retains the largest share. Specialty malt gains value through caramelisation, roasting, smoking, colour development and varietal differentiation. Malt extracts expand through food, beverage, home-brewing and fermentation applications where consistency and ease of handling command a premium.

Value share by product Category, 2025



Source: XXX

Value by product Category, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Base Malt	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty Malt	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Malt Extracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Form

Whole-kernel malt remains standard for large beverage producers that mill on site and require control over grist composition. Milled malt serves smaller users and food processors, while liquid and dry extracts remove mashing complexity and provide concentrated flavour, colour and fermentable solids. Dry extract is the fastest-growing form because of storage stability and economical international distribution.

Value by product Form, USD bn

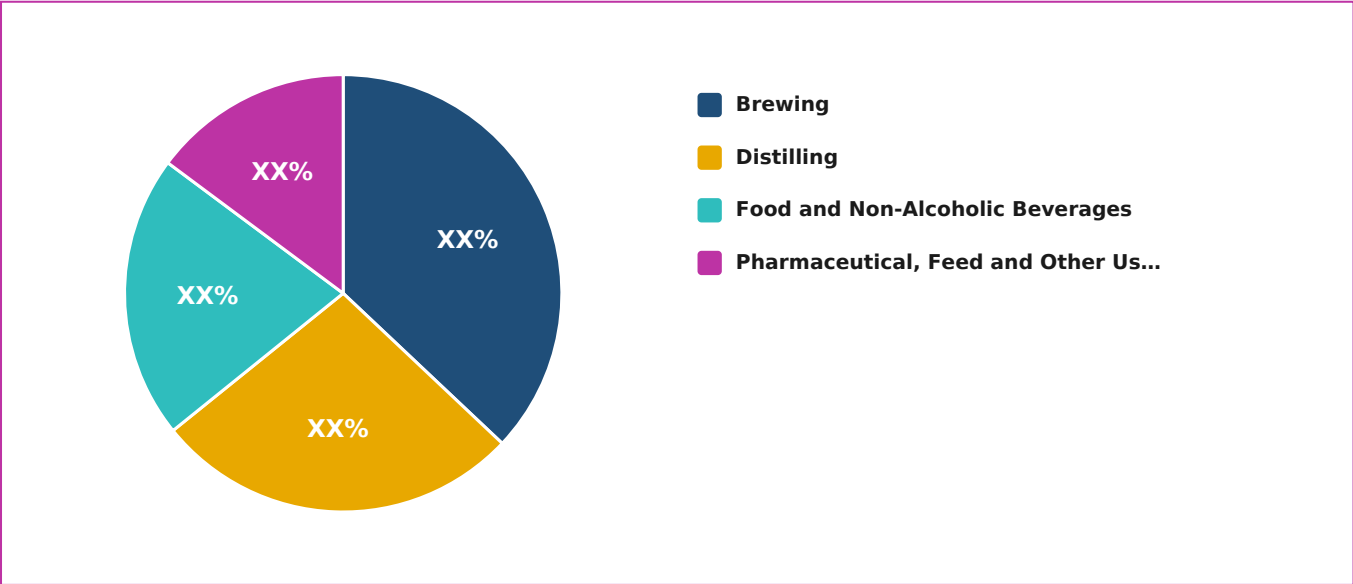
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole-Kernel Malt	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Milled Malt and Flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liquid Malt Extract	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dry Malt Extract	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Brewing remains the principal outlet, although mature-market beer softness moderates base-malt growth. Distilling gains from whisky capacity additions and the malt-intensive requirements of single malt. Food and beverage ingredients expand through bakery, cereals, confectionery, natural colours, sweetening and non-coffee roasted drinks.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Brewing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distilling	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food and Non-Alcoholic Beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical, Feed and Other Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Model

Direct supply dominates because large brewers and distillers contract volumes, specifications and delivery schedules over extended periods. Specialist distributors remain essential to craft producers that require mixed pallets, technical support and broad ingredient portfolios. Spot and digital sales grow from a small base as smaller buyers seek transparent availability and short lead times.

Value by distribution Model, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Producer Contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ingredient Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Spot, Digital and Other Channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

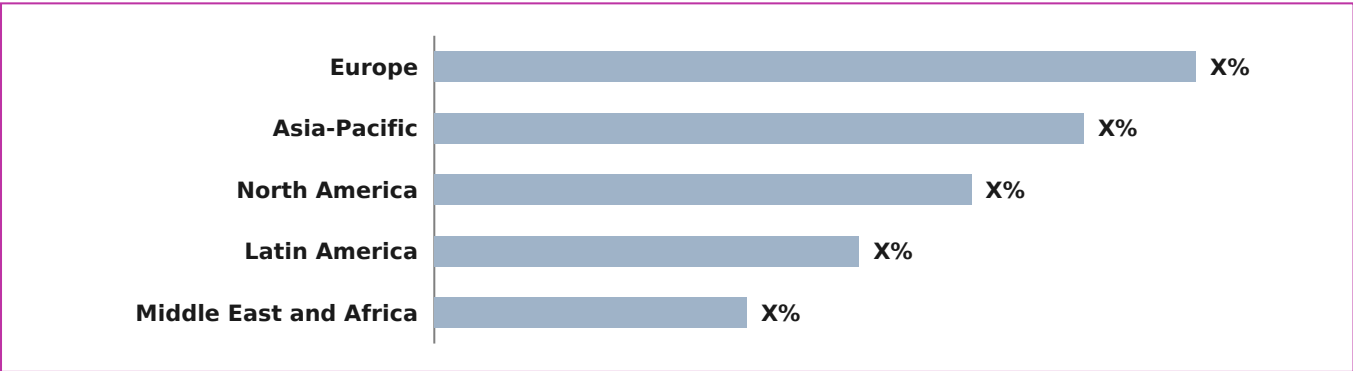
Malt Market Regional Analysis and Country Outlook

Europe generated XX% of global malt revenue in 2025, supported by dense brewing and distilling clusters, export-oriented malt capacity and established malting-barley systems in France, Germany, the United Kingdom, Denmark and Central Europe. EU malting capacity reached XXX tonnes in 2024. Germany anchors continental brewing demand, while the United Kingdom combines large brewing requirements with a structurally attractive Scotch-whisky malt market and ongoing capacity investment in Scotland.

Asia-Pacific is forecast to expand at XX% annually through 2031, the fastest regional rate. China remains the largest regional beer and malt base, while India supplies the clearest incremental distilling opportunity as premium domestic whisky grows and brewers add capacity. Southeast Asian markets favour efficient lager malt, and Australia provides a globally competitive barley and malt export platform.

North America benefits from diversified demand across industrial beer, craft brewing, food ingredients and a developing American single malt category. Latin American demand is concentrated in Brazil and Mexico, supported by major brewery networks and export-oriented barley systems in Argentina and Uruguay. Middle East and Africa remains smaller but strategically important as African brewers localise production and new malting investments reduce reliance on imported finished malt.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Malt Market Competitive Landscape and Company Share

The market is moderately concentrated: the two largest global malt groups control a substantial block of internationally traded capacity, while regional specialists retain strong positions in craft, organic, distilling and roasted malt. Soufflet Malt became the largest global operator after acquiring United Malt Group, creating a 3.7-million-tonne platform with 41 plants in 20 countries. Boortmalt follows with approximately XXX tonnes of capacity and a network spanning five continents.

Scale leaders compete through barley origination, freight optimisation, multi-region supply guarantees and long-term contracts with global brewers and distillers. Malteurop, Viking Malt and RahrBSG combine industrial scale with technical-service capabilities, while Muntons, Simpsons Malt, Crisp Malt, IREKS and BESTMALZ defend specialist positions through recipe support, distinctive kilning, extract production and close customer relationships.

Investment is shifting toward distilling malt, regenerative barley, thermal decarbonisation and adjacent food ingredients. Scottish projects from Boortmalt and Bairds Malt address whisky demand, Soufflet Malt's planned South African facility will colocate with HEINEKEN's Sedibeng brewery, and product innovations such as sprouted-grain sweetening systems and lower-peat smoked malt expand the industry's value proposition beyond commodity base malt.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Soufflet Malt	XXX	XXX	XXX	XXX
Boortmalt	XXX	XXX	XXX	XXX
Malteurop	XXX	XXX	XXX	XXX
Viking Malt	XXX	XXX	XXX	XXX
RahrBSG	XXX	XXX	XXX	XXX
Muntons	XXX	XXX	XXX	XXX
Simpsons Malt	XXX	XXX	XXX	XXX
Crisp Malt	XXX	XXX	XXX	XXX
IREKS	XXX	XXX	XXX	XXX
BESTMALZ	XXX	XXX	XXX	XXX

Source: XXX

Malt Market Forecast, Investment Priorities and Opportunities

By 2031, global malt demand will be larger, more application-specific and more closely tied to verified agricultural performance. Base malt will remain the volume foundation, but specialty malt, distilling grades and malt extracts will capture a rising share of incremental profit. Customers will increasingly contract for functional specifications, carbon performance, regional provenance and supply resilience together.

The central forecast assumes stable long-run beer volumes, continued premium whisky investment and progressive normalisation of barley and energy costs. A stronger premium-beverage cycle would lift capacity utilisation and specialty-malt pricing, while repeated harvest-quality failures would constrain volume but increase replacement and origination costs. Asia-Pacific and selected African markets provide the strongest structural volume upside.

Winning maltsters will combine multi-origin barley access with efficient plants, technical applications teams and credible decarbonisation programmes. Investment priorities include climate-resilient varieties, digital field-to-batch traceability, heat recovery, renewable kilning, water recirculation and flexible production lines capable of shorter specialty runs.

Opportunities

- Dedicated malt programmes for Indian, American and East Asian single malt whisky
- Low-carbon and mass-balance regenerative malt premiums
- Specialty roasted, smoked, heritage and craft malts
- Malt-based natural sweeteners, snacks, coffee alternatives and functional ingredients
- Local malting capacity in Africa and import-dependent Asian markets
- Digital quality traceability from barley field to brewhouse

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