Global Craft Beer Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

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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Indicator	Value
Market size (2025)	USD 120.4 bn
Forecast (2031)	USD 174.7 bn
CAGR (2021-2031)	6.4%
Study period	2021-2031
Largest region	North America · 38.2%
Fastest-growing region	Asia-Pacific · 9%
Market concentration	Low
Licence	Individual / Company

The global craft beer market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Growth is shifting from brewery-count expansion toward premium pricing, taproom economics, distinctive local brands and higher-value formats. North America remains the largest regional market, while Asia-Pacific is advancing fastest as urban consumers adopt independent, imported and locally interpreted craft styles. The report quantifies demand by beer style, packaging, distribution channel, brewery model and geography, supported by producer-level research, trade data and structured industry interviews.

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Executive summary

The global craft beer market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Growth is shifting from brewery-count expansion toward premium pricing, taproom economics, distinctive local brands and higher-value formats. North America remains the largest regional market, while Asia-Pacific is advancing fastest as urban consumers adopt independent, imported and locally interpreted craft styles. The report quantifies demand by beer style, packaging, distribution channel, brewery model and geography, supported by producer-level research, trade data and structured industry interviews.

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

Key findings

- The global craft beer market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- North America represented XX% of global craft beer value in 2025, supported by high brewery density, premium price realization and mature taproom infrastructure.
- Asia-Pacific will expand at a XX% CAGR through 2031, the fastest regional rate, led by China, India, Japan, Australia and South Korea.
- Ales accounted for XX% of market value in 2025, with India pale ales and pale ales supplying the largest share of the style's revenue.
- Cans captured XX% of craft beer value in 2025 as brewers prioritized light protection, portability, lower freight weight and larger printable branding surfaces.
- Off-trade channels represented XX% of market value, while taprooms and brewpubs supported superior producer margins within the on-trade segment.
- Kirin Holdings recorded global beer consumption of XXX kilolitres in 2024, an increase of XX% from 2023.
- The Brewers Association reported U.S. craft production of XXX barrels in 2025, down XX%, while craft volume share increased to XX% because the wider U.S. beer category declined faster.

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 Craft Beer Market Trends and Growth Drivers

Craft beer is transitioning from a brewery-opening cycle to a productivity cycle. Capacity utilization, core-SKU velocity, taproom contribution and local distribution quality now explain more of the performance gap between operators than headline brewery counts. This transition creates consolidation opportunities while improving the long-term discipline of the category.

Demand remains supported by premiumization and consumers' interest in flavor, provenance and experience, but the route to growth differs by region. North American and European brewers must extract more value from stable or declining beer volumes, whereas Asia-Pacific operators can combine premium mix with an expanding consumer base and wider modern-retail access.

Portfolio architecture is becoming decisive. Approachable lagers, pale ales and alcohol-free variants recruit broader audiences, while rotating hop-forward, sour and barrel-aged releases sustain discovery and taproom traffic. The strongest operators use limited releases selectively while concentrating packaged distribution behind a small number of fresh, high-velocity brands.

Growth drivers

Premium flavor and occasion trading-up (+1.7% on CAGR)

Consumers continue to assign higher value to distinctive hops, fermentation methods, local provenance and limited releases even where total beer consumption is flat. This supports revenue growth through price and mix, particularly for established regional brewers, specialty retailers and destination taprooms.

Taproom and brewpub economics (+1.3% on CAGR)

Direct hospitality channels allow brewers to capture retail margins, test products rapidly and build communities without depending entirely on wholesalers. Food, events, memberships and merchandise also diversify revenue and make taproom-led operators more resilient than distribution-only microbreweries.

Cans and portable multipacks (+0.9% on CAGR)

Cans protect hop-sensitive beer from light, reduce logistics weight and provide a large surface for brand storytelling. Improved small-run filling equipment and mobile canning services allow smaller breweries to launch retail-ready formats without committing to large packaging assets.

Localized style innovation (+1.1% on CAGR)

Brewers are adapting established craft styles with indigenous grains, fruit, tea, coffee, spices and culinary flavors. Localized innovation differentiates domestic craft brands from imports and makes the category more relevant to younger legal-drinking-age consumers.

Emerging-market premiumization (+1.5% on CAGR)

Higher urban incomes, modern retail expansion and international travel are widening the addressable audience for premium beer in India, China, Southeast Asia and parts of Latin America. Local production and smaller pack sizes are reducing the price gap between imported craft beer and premium domestic lager.

Moderation-led portfolio expansion (+0.8% on CAGR)

Low-alcohol and alcohol-free variants let craft brands participate in weekday, lunch, fitness-adjacent and extended social occasions. Advances in yeast selection, arrested fermentation and dealcoholization are narrowing the sensory gap and supporting premium pricing.

Restraints

Mature-market beer contraction (-1.2% on CAGR)

Beer volumes are declining across several mature markets as consumers moderate alcohol intake and divide spending across spirits, wine, ready-to-drink products and non-alcoholic beverages. Craft brewers must therefore win share and price rather than rely on category-wide volume expansion.

High brewing and packaging costs (-1.0% on CAGR)

Malt, specialty hops, aluminum, glass, energy and refrigerated logistics represent a heavier cost burden for small breweries than for scaled competitors. Limited purchasing leverage and underutilized brewhouses compress margins when retail price increases encounter consumer resistance.

Route-to-market bottlenecks (-0.8% on CAGR)

Distributor consolidation and retailer assortment rationalization favor proven, high-velocity brands and reduce shelf access for smaller labels. Long supply chains also increase the risk of stale hop-forward beer, damaging repeat purchase and brand reputation.

Excise and compliance burden (-0.6% on CAGR)

Strength-based excise, product registration, deposit-return rules and evolving allergen or nutrition disclosures increase the fixed cost of portfolio complexity. Smaller producers face a disproportionate burden because compliance work is spread across fewer units and more experimental SKUs.

Craft Beer Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium flavor and occasion trading-up	XXX	XXX	XXX
Taproom and brewpub economics	XXX	XXX	XXX
Cans and portable multipacks	XXX	XXX	XXX
Localized style innovation	XXX	XXX	XXX
Emerging-market premiumization	XXX	XXX	XXX
Moderation-led portfolio expansion	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Mature-market beer contraction	XXX	XXX	XXX
High brewing and packaging costs	XXX	XXX	XXX
Route-to-market bottlenecks	XXX	XXX	XXX
Excise and compliance burden	XXX	XXX	XXX

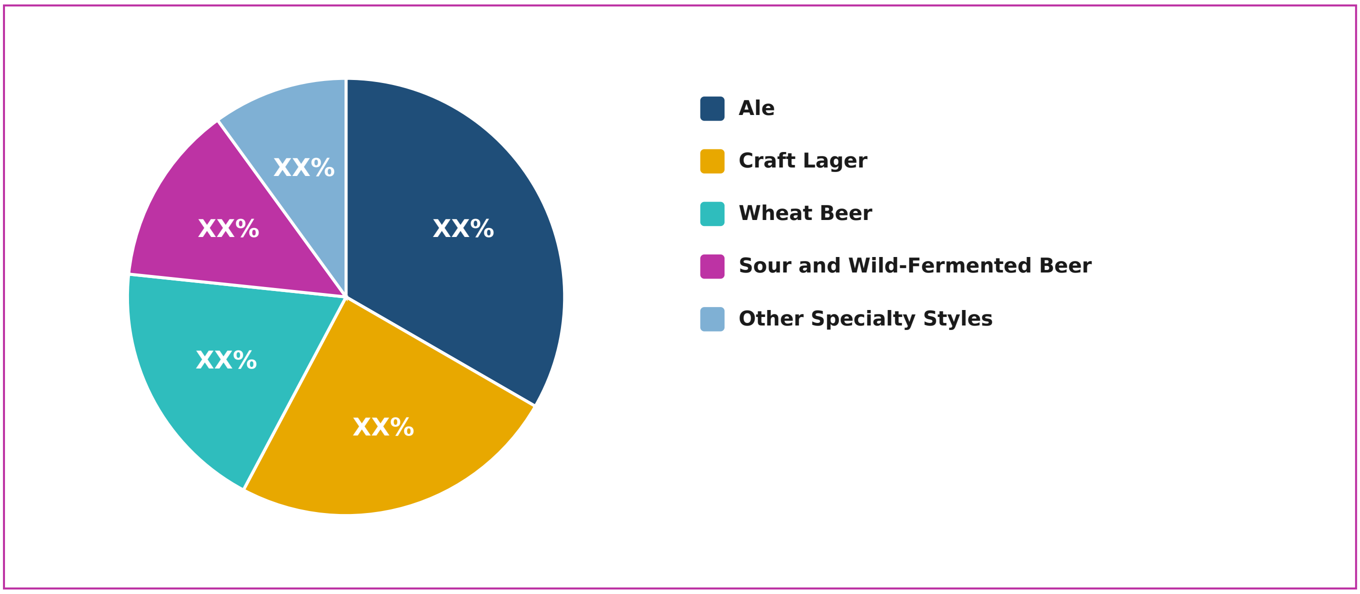
Source: XXX

Craft Beer Market Segmentation by Style, Packaging and Channel

By Beer Style

India pale ale, pale ale, stout and porter preserve the strongest association with modern craft brewing and support premium price points. Craft lager is gaining share as producers target mainstream-beer occasions with more accessible flavor profiles. Sour and wild-fermented beers expand fastest from a smaller base through culinary positioning, barrel programs and fruit-led innovation.

Value share by beer Style, 2025



Source: XXX

Value by beer Style, USD bn

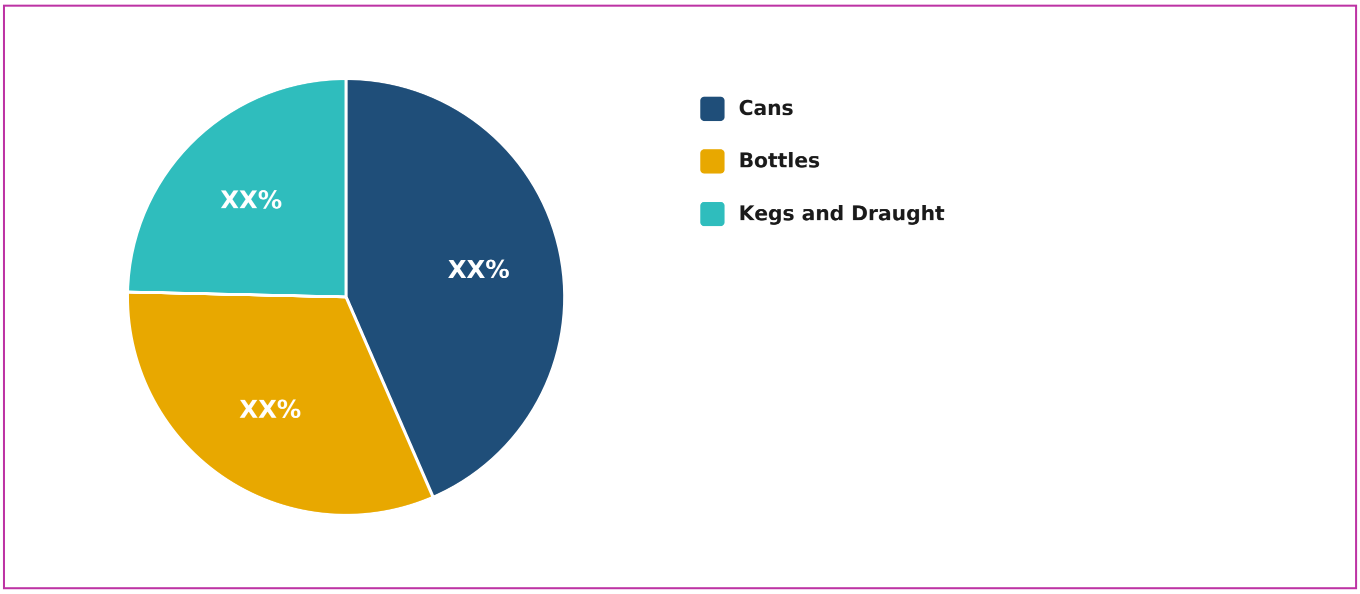
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Ale	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Craft Lager	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wheat Beer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sour and Wild-Fermented Beer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Specialty Styles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Cans lead through superior light protection, lower shipping weight, portability and strong shelf graphics. Bottles remain important for Belgian styles, barrel-aged releases, gift packs and markets where glass signals premium quality. Draught retains strategic importance because taprooms, brewpubs and independent bars deliver trial, freshness and higher producer revenue per litre.

Value share by packaging, 2025



Source: XXX

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Kegs and Draught	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets, specialty bottle shops, convenience stores and e-commerce provide the largest aggregate sales base and favor recognized regional brands with reliable supply. On-trade demand is fragmented across bars, restaurants, hotels, festivals and brewery venues. Taprooms grow fastest because they combine product sales with food, events and membership income while shortening the producer-to-consumer margin chain.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Off-trade Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Independent On-trade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brewery Taprooms and Brewpubs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct-to-consumer and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Brewery Model

Independent breweries dominate by operator count and preserve a compelling local-ownership proposition, but performance varies sharply by scale and route to market. Corporate-owned craft brands benefit from procurement, production and distributor access, while partnership and licensed models are expanding cross-border. Regional independents with concentrated distribution and productive taprooms are outperforming both very small distribution-led breweries and overextended national portfolios.

Value by brewery Model, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Independent Breweries	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Corporate-owned Craft Brands	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Licensed, Partnership and Contract-led Brands	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

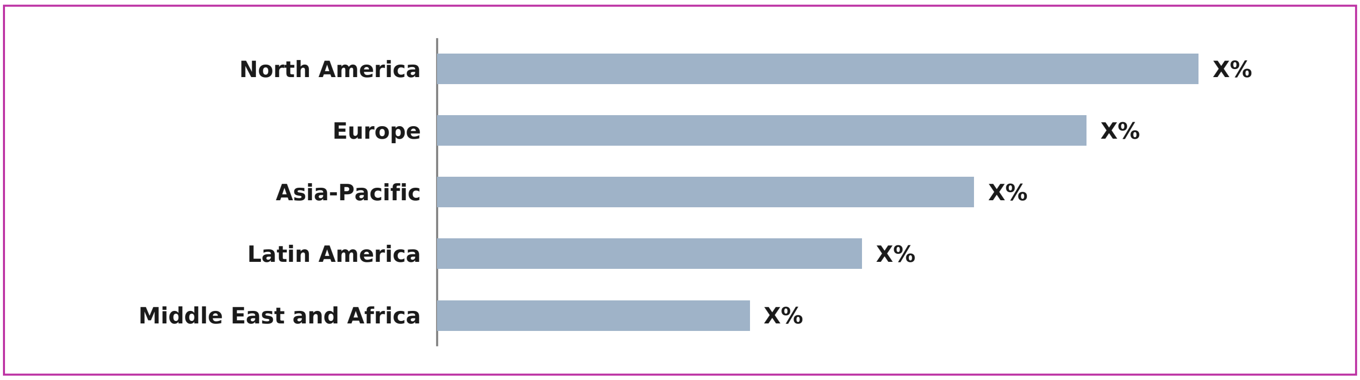
Craft Beer Market Regional Analysis and Country Outlook

North America generated XX% of global craft beer value in 2025. The United States anchors the region through its dense brewery network, developed taproom culture and large premium-beer revenue pool, although industry economics are shifting toward fewer openings, selective closures and stronger local operators. Canada remains attractive for regional craft lager, brewpub and seasonal portfolios, while Mexico combines domestic experimentation with tourism and U.S.-linked distribution.

Europe represented XX% of market value, supported by deep brewing traditions, strong on-trade consumption and a growing intersection between heritage styles and modern craft branding. The United Kingdom remains a major market for pale ale, stout and canned craft beer; Germany is led by specialty lager, wheat beer and alcohol-free innovation; and Belgium retains exceptional pricing power in abbey, Trappist, saison and sour styles. Excise differentiation, deposit-return systems and packaging regulation increasingly shape brewery investment decisions.

Asia-Pacific will expand at a XX% CAGR through 2031. China, India and Southeast Asia provide the largest incremental consumer pool, while Japan, Australia and South Korea supply advanced premium channels and strong product-development capability. Success in the region increasingly depends on local production, food-pairing occasions, lighter and more accessible flavor profiles, compact formats and ingredients with recognizable regional provenance.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	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

Craft Beer Market Competitive Landscape and Company Share

The global craft beer market has low concentration because thousands of local breweries compete alongside scaled regional specialists and craft portfolios owned by diversified beverage groups. Boston Beer, Sierra Nevada, Duvel Moortgat, Tilray Brands, Kirin-owned craft businesses, Sapporo-owned Stone Brewing and Monster Beverage's craft platform possess broader production and distribution reach, but local taproom operators retain defensible positions through freshness, community identity and direct consumer relationships.

Consolidation has entered a value-and-capacity phase rather than the high-multiple brand acquisition phase that characterized the earlier craft boom. Tilray's purchases of U.S. breweries from Anheuser-Busch and Molson Coors, followed by its 2026 acquisition of BrewDog assets, demonstrate how buyers can assemble regional capacity, taprooms and brand portfolios at scale. Carlsberg's minority investments in Mikkeller and Brasserie du Pays Flamand illustrate an alternative partnership model combining founder-led brand equity with larger distribution systems.

Competitive strategy is moving toward a smaller core assortment, local execution, hospitality-led margins, contract-production utilization and selective expansion into non-alcoholic beer and adjacent beverages. Operators that maintain freshness, improve brewhouse utilization and concentrate selling resources around defensible home markets will take share from overextended breweries carrying broad, slow-moving portfolios.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
The Boston Beer Company	XXX	XXX	XXX	XXX
Sierra Nevada Brewing Co.	XXX	XXX	XXX	XXX
Tilray Brands	XXX	XXX	XXX	XXX
Duvel Moortgat	XXX	XXX	XXX	XXX
D.G. Yuengling & Son	XXX	XXX	XXX	XXX
Kirin Holdings	XXX	XXX	XXX	XXX
Sapporo Holdings	XXX	XXX	XXX	XXX
Monster Beverage Corporation	XXX	XXX	XXX	XXX
Carlsberg Group	XXX	XXX	XXX	XXX
Brooklyn Brewery	XXX	XXX	XXX	XXX

Source: XXX

Craft Beer Market Forecast and Opportunities to 2031

The market will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Value growth will remain structurally stronger than volume growth as premium pricing, on-site revenue and higher-value specialty formats offset modest beer-category volumes in mature economies. Asia-Pacific will provide the largest incremental growth contribution, while North America will remain the biggest regional revenue pool.

The central forecast assumes measured input-cost normalization, continued premiumization and sustained consumer interest in local products, with brewery closures improving capacity discipline in saturated markets. An upside scenario emerges if alcohol-free craft beer scales faster and emerging-market distribution broadens; a downside scenario centers on prolonged on-trade weakness, excise increases and aggressive retail assortment reduction.

Winning portfolios will balance approachable craft lagers and pale ales with rotational products that create traffic and discovery. Capital will move toward flexible canning, small-batch fermentation, alcohol-removal capability, taproom productivity and digital demand planning rather than indiscriminate capacity additions.

Opportunities

- Premium craft lager positioned between mainstream beer and hop-forward ales
- Low- and no-alcohol craft beer with full-flavor credentials
- Taproom-led tourism, foodservice and membership revenue
- Cross-border licensing and local production of recognized craft brands
- Asian flavor innovation using tea, citrus, rice, spices and regional botanicals
- Data-led assortment reduction and freshness-focused regional distribution
- Regenerative barley, climate-resilient hops and circular packaging claims

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