

Global Brewery Equipment Market Assessment, By Equipment Type [Brewhouse Equipment, Fermentation Equipment, Cooling Equipment, Milling Equipment, Filtration Equipment, Others], By Brewery Type [Macro Brewery, Craft Brewery, Others], By Mode of Operation [Automatic, Manual], By End-user [Industrial, Commercial], By Region, Opportunities, and Forecast, 2018-2032F

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Report description:

Global brewery equipment market is projected to witness a CAGR of 6.36% during the forecast period 2025-2032, growing from USD 20.93 billion in 2024 to USD 34.28 billion in 2032F, owing to rising beer consumption, the expansion of craft breweries, and increasing automation in brewing processes. The growth in the demand for craft beer and the increased proliferation of microbreweries and brewpubs across the globe are the main drivers. Unique, locally brewed beers with customized flavors attract consumers, leading to the demand for dedicated small-scale brewing systems. The trend is quite strong in North America and Europe, and is also gaining pace in developing regions such as Asia-Pacific and Latin America.

Technological innovation is another key driver driving the market. Automation, IoT-based brewing systems, and AI-based fermentation controls are enhancing efficiency, consistency, and scalability in beer making. Energy-saving and modular brewing equipment is also picking up steam, enabling breweries to lower their operational costs while responding to changing production requirements. In addition, sustainability issues are encouraging breweries to use environmentally friendly measures, such as water recycling units, heat recovery technology, and waste minimization processes, both as a reaction to consumer pressures and to stricter environmental laws. For instance, in October 2022, AB InBev, the beer powerhouse behind Budweiser, opened a new brewery in Putian, China. This facility is all about creating top-notch beers to boost the local economy and enhance consumers' taste.

Evolving customer trends, such as the greater need for low-alcohol, non-alcoholic, and trial beers, also influence equipment specifications, with purpose-designed machinery for dealcoholizing and flavorizing gaining prominence. Combined, these factors

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are introducing a change and making a dynamic marketplace with innovation and sustainability.

Rising Demand for Craft Beer and Microbreweries Driving the Global Market Demand

The global brewery equipment industry is observing strong growth, driven primarily by the growing popularity of craft beer and the spread of microbreweries at an increasing rate worldwide. With more consumers demanding specialty, premium, and locally produced beers that are unique and flavorful, small-scale breweries are growing fast to fulfill these needs. This movement is especially significant in Europe and North America, where craft brewing culture and craft brewing heritage are firmly rooted. This trend has created a significant demand for dedicated brewing equipment designed for smaller-scale production volumes.

Homebrewers, brewpubs, and microbreweries are all purchasing more compact, efficient systems that allow them to try recipes while ensuring quality and consistency. As the craft brewing trend keeps building steam, the need for high-tech yet affordable brewery gear, ranging from mash tuns and fermenters to kegging and canning lines, is likely to increase steadily. Suppliers are meeting this demand with innovative, scalable solutions that range from startup microbreweries to growing craft beer brands, thereby promising continued growth in the worldwide brewery equipment market over the long term.

For instance, in September 2022, Probiocient Pte Ltd. and Origgin Pte Ltd., experts in nurturing early-stage deep-tech start-ups and venture co-creation, teamed up with The Brewerkz Company, Singapore's oldest craft brewery, to introduce the world's very first probiotic beer.

Technological Advancements in Brewing Equipment Driving the Global Brewery Equipment Market

The global brewery equipment market is undergoing significant transformation, driven by innovative technologies that are transforming the process of beer making. With breweries seeking increased efficiency, consistency, and sustainability, sophisticated brewing systems are becoming the need of the hour, especially for craft brewers operating in a highly competitive market. Automation and intelligent brewing technologies are leading this revolution. New breweries are implementing IoT-based systems that track and regulate brewing parameters, including temperature, pressure, and fermentation, in real time. These networked systems minimize human intervention, maximize resource efficiency, and deliver batch-to-batch consistency, which is key to keeping brand quality consistent. For instance, in November 2022, AB InBev, is transforming the beer industry through innovation by unlocking unprecedented insight into the needs of consumers.

Energy efficiency has also gained prominence, with advancements such as heat recovery systems, smart glycol cooling, and energy-efficient boiling technologies minimizing costs while reducing the impact on the environment. With these technologies powering operational excellence, the brewery equipment sector is projected to experience consistent growth, providing brewers with the equipment they require to succeed in a competitive and changing environment.

Macro Brewery Type Dominating to Propel the Growth of the Market

The global brewery equipment market is driven by the dominance of macro breweries owing to its large production volumes and consolidated commercial operations. Although craft breweries have received significant focus in the past few years, big beer manufacturers are still the major drivers of equipment demand, using their broad distribution networks and economies of scale to lead the market. Macro breweries demand high-volume, industrial-level brewing systems that produce millions of barrels per year. These involve computerized brewhouses, enormous fermentation tanks, and high-rate packaging lines intended for efficiency and consistency. Even as craft brewing expands, macro brewery is the industry's bedrock, forcing innovation and dictating standards of efficiency, automation, and export penetration. As beer demand increases globally, the market for high-performance brewery equipment with high capacity will grow further, bolstering the leading position of macro breweries in the market.

Europe is Leading the Global Brewery Equipment Market

Europe remains the leader in the global brewery equipment industry, combining a deep brewing history with technological advances to continue leading the industry. As the homeland of numerous world-famous beer styles and brewing traditions, the continent enjoys a unique density of experience, with Germany, Belgium, and the UK being important manufacturing centers for premium brewing equipment. For instance, in December 2024, according to European beer trends, Germany consumes the highest amount of beer. Europe's dominance is due to a range of competitive strengths, its breweries produce about one-quarter of all beer globally, maintaining robust local demand for both large commercial-scale equipment and dedicated craft brewing systems. Europe's active craft brewing scene has additionally widened the market by creating demand for versatile, small-batch equipment, as well as the continent's rigorous environmental regulations, which fuel ongoing innovation in water recycling and carbon-neutral brewing technologies. With its special blend of brewing heritage, engineering prowess, and sustainability, Europe is

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still the world's leading provider of brewery equipment, shipping its top-quality systems to breweries worldwide. The continent is poised to keep its leadership as new trends in automation, digitalization, and environmentally friendly production continue to drive the future of the brewing sector.

Impact of the U.S. Tariff on Global Brewery Equipment Market

- The imposition of U.S. tariffs on imported brewery equipment, particularly targeting steel and aluminum components from key manufacturing countries like China and Germany, has significantly disrupted the global brewery equipment market.
- These tariffs, initially implemented as part of broader trade protection measures, have increased costs for American craft breweries and commercial beer producers who rely on imported systems.
- Globally, the tariffs have forced manufacturers to restructure supply chains, with European and Chinese producers seeking alternative markets in Asia, Africa, and Latin America to offset reduced U.S. demand.

Key Players Landscape and Outlook

The global brewery equipment market is characterized by a competitive landscape dominated by several companies. These companies distinguish themselves through their global reach, comprehensive product portfolios, and ongoing investments in research and development. The market growth is fueled by rising demand for premium and craft beers, particularly among younger consumers, which is prompting breweries to invest in both large-scale and small-scale equipment. Automation and advanced process control are becoming standard requirements as breweries seek greater efficiency and consistency. However, the high capital and maintenance costs of advanced brewing equipment pose challenges, especially for smaller craft breweries and those in emerging markets. Regionally, Europe remains the largest market due to its established beer culture and concentration of equipment manufacturers, while North America is experiencing rapid growth driven by the craft beer movement. China is also emerging as a significant market, both as a consumer and as a producer of mid-range and automated brewery equipment. To maintain their competitive edge, leading companies are expanding their global presence, investing in automation, and offering tailored solutions for both macro breweries and the growing craft segment. Strategic partnerships, mergers, and acquisitions are common as firms seek to enhance their technological capabilities and broaden their market reach. Looking ahead, the competitive landscape is expected to remain dynamic, with ongoing consolidation among large players and increasing specialization among smaller, innovative firms.

For instance, in February 2025, Grupo Cuauhtemoc Moctezuma, SA de CV, also known as Heineken Guadalajara and ABB Ltd, has a long-running partnership keeping equipment safe and reliable while providing efficient and high-quality energy supply to Heineken Guadalajara.

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- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
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