



RESEARCH REPORT

Global Gluten-free Beer Market Research Report - Forecast to 2023



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Table of Contents

1	Executive Summary	13
2	Market Introduction	18
2.1	Definition.....	19
2.2	Scope of the Study.....	19
2.3	Assumptions	19
2.4	Market Structure	20
2.5	Key Takeaways	20
2.6	Key Buying Criteria.....	21
3	Research Methodology	22
3.1	Research Process	23
3.2	Primary Research.....	23
3.3	Secondary Research	24
3.4	Market Size Estimation	25
3.5	Forecast Model	25
4	Market Dynamics	26
4.1	Introduction.....	27
4.2	Drivers	27
4.2.1	Increasing incidence of gluten intolerance.....	27
4.2.2	Shift in eating habits.....	28
4.2.3	Easy availability of gluten-free beer.....	28
4.3	Restraints.....	28
4.3.1	Regulatory framework	28
4.3.2	Higher prices of gluten-free beer	28
4.4	Opportunities.....	29
4.4.1	Product innovations leading to wider options for consumers.....	29
4.4.2	Strong marketing initiatives for product promotion	29
4.5	Challenges	29
4.5.1	Consumer perception of the taste of gluten-free beer	29
5	Market Factor Analysis	30
5.1	Value Chain Analysis.....	31
5.2	Supply Chain Analysis.....	33
5.3	Porter's Five Forces Analysis	34



5.3.1	Threat of New Entrants	34
5.3.2	Bargaining Power of Suppliers	35
5.3.3	Threat of Substitutes	35
5.3.4	Bargaining Power of Buyers	35
5.3.5	Competitive Rivalry.....	35
6	Global Gluten-free Beer Market, by Type.....	36
6.1	Overview.....	37
6.1.1	Gluten-free beer	37
6.1.2	Gluten-reduced beer	37
7	Global Gluten-free Beer Market, by Packaging.....	40
7.1	Overview.....	41
7.1.1	Cans.....	41
7.1.2	Bottles	41
7.1.3	Others	41
8	Global Gluten-free Beer Market, by Region	45
8.1	Introduction.....	46
8.2	North America.....	46
8.2.1	U.S.	49
8.2.2	Canada	51
8.2.3	Mexico	52
8.3	Europe.....	54
8.3.1	U.K.....	57
8.3.2	Germany	59
8.3.3	France.....	60
8.3.4	Italy	62
8.3.5	Spain.....	63
8.3.6	Rest of Europe.....	65
8.4	Asia Pacific	67
8.4.1	Australia & New Zealand	70
8.4.2	Japan.....	71
8.4.3	China.....	73
8.4.4	Rest of Asia Pacific	74
8.5	Rest of the World	76
8.5.1	South America	79
8.5.2	Middle East.....	80



8.5.3	Africa	82
9	Company Profiles.....	84
9.1	New Belgium Brewing Company, Inc.	85
9.1.1	Company Overview	85
9.1.2	Products Offered	85
9.1.3	Key Developments.....	85
9.1.4	Key Strategies.....	85
9.2	Les Brasseurs Sans Gluten Inc. (Glutenberg)	86
9.2.1	Company Overview	86
9.2.2	Products Offered	86
9.2.3	Key Developments.....	87
9.2.4	Key Strategies.....	87
9.3	Joseph James Brewing Company, Inc.....	88
9.3.1	Company Overview	88
9.3.2	Products Offered	88
9.3.3	Key Developments.....	88
9.3.4	Key Strategies.....	88
9.4	Stone Brewing Co.....	89
9.4.1	Company Overview	89
9.4.2	Products Offered	89
9.4.3	Key Developments.....	89
9.4.4	Key Strategies.....	89
9.5	Ground Breaker Brewing and Gastropub	90
9.5.1	Company Overview	90
9.5.2	Products Offered	90
9.5.3	Key Developments.....	90
9.5.4	Key Strategies.....	91
9.6	New Planet Beer Co.	92
9.6.1	Company Overview	92
9.6.2	Products Offered	92
9.6.3	Key Developments.....	92
9.6.4	Key Strategies.....	92
9.7	Brasserie De Brunehaut S.A.	93
9.7.1	Company Overview	93
9.7.2	Products Offered	93



9.7.3	Key Developments	93
9.7.4	Key Strategies.....	93
9.8	Omission Brewing Co.....	94
9.8.1	Company Overview	94
9.8.2	Products Offered	94
9.8.3	Key Developments.....	94
9.8.4	Key Strategies.....	94
9.9	Lakefront Brewery Inc.	95
9.9.1	Company Overview	95
9.9.2	Products Offered	95
9.9.3	Key Developments.....	95
9.9.4	Key Strategies.....	95
9.10	Redbridge Beer.....	96
9.10.1	Company Overview	96
9.10.2	Products Offered	96
9.10.3	Key Developments.....	96
9.10.4	Key Strategies.....	96
9.11	Whistler Brewing Company	97
9.11.1	Company Overview	97
9.11.2	Product Offered	97
9.11.3	Key Developments.....	97
9.11.4	Key Strategies.....	97
9.12	Ipswich Ale Brewery	98
9.12.1	Company Overview	98
9.12.2	Product Offered	98
9.12.3	Key Developments.....	98
9.12.4	Key Strategies.....	98
9.13	Dogfish Head Craft Brewery Inc.....	99
9.13.1	Company Overview	99
9.13.2	Products Offered	99
9.13.3	Key Developments.....	99
9.13.4	Key Strategies.....	99
9.14	Epic Brewing Company	100
9.14.1	Company Overview	100
9.14.2	Product Offered	100



9.14.3	Key Developments	100
9.14.4	Key Strategies.....	101
9.15	Bellfield Brewery Ltd.	102
9.15.1	Company Overview	102
9.15.2	Products Offered	102
9.15.3	Key Developments.....	102
9.15.4	Key Strategies.....	102
10	Conclusion	103
10.1	Key Findings.....	104



List of Tables

TABLE 1	GLOBAL: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 (USD MILLION)	14
TABLE 2	GLOBAL: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 ('000 LITERS)	14
TABLE 3	GLOBAL: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	15
TABLE 4	GLOBAL: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	15
TABLE 5	GLOBAL GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	16
TABLE 6	GLOBAL GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	16
TABLE 7	LIST OF ASSUMPTIONS	19
TABLE 8	GLOBAL GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 (USD MILLION)	37
TABLE 9	GLOBAL GLUTEN-FREE BEER (GLUTEN-FREE BEER) MARKET, BY REGION, 2016-2023 ('000 LITERS)	38
TABLE 10	GLOBAL GLUTEN-FREE BEER (GLUTEN-REDUCED BEER) MARKET, BY REGION, 2016-2023 (USD MILLION)	38
TABLE 11	GLOBAL GLUTEN-FREE BEER (GLUTEN-REDUCED BEER) MARKET, BY REGION, 2016-2023 ('000 LITERS)	39
TABLE 12	GLOBAL GLUTEN-FREE BEER (CANS) MARKET, BY REGION, 2016-2023 (USD MILLION)	42
TABLE 13	GLOBAL GLUTEN-FREE BEER (CANS) MARKET, BY REGION, 2016-2023 ('000 LITERS)	42
TABLE 14	GLOBAL GLUTEN-FREE BEER (BOTTLES) MARKET, BY REGION, 2016-2023 (USD MILLION)	43
TABLE 15	GLOBAL GLUTEN-FREE BEER (BOTTLES) MARKET, BY REGION, 2016-2023 ('000 LITERS)	43
TABLE 16	GLOBAL GLUTEN-FREE BEER (OTHERS) MARKET, BY REGION, 2016-2023 (USD MILLION)	44
TABLE 17	GLOBAL GLUTEN-FREE BEER (OTHERS) MARKET, BY REGION, 2016-2023 ('000 LITERS)	44
TABLE 18	NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 (USD MILLION)	47
TABLE 19	NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 ('000 LITERS)	47
TABLE 20	NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	48
TABLE 21	NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	48
TABLE 22	NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	48
TABLE 23	NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	49
TABLE 24	U.S.: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	49
TABLE 25	U.S.: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	50
TABLE 26	U.S.: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	50
TABLE 27	U.S.: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	50
TABLE 28	CANADA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	51
TABLE 29	CANADA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	51
TABLE 30	CANADA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	51
TABLE 31	CANADA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	52
TABLE 32	MEXICO: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	52
TABLE 33	MEXICO: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	53
TABLE 34	MEXICO: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	53
TABLE 35	MEXICO: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	53
TABLE 36	EUROPE: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 (USD MILLION)	55
TABLE 37	EUROPE: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 ('000 LITERS)	55
TABLE 38	EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	56
TABLE 39	EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	56
TABLE 40	EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	56
TABLE 41	EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	57
TABLE 42	U.K: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	57
TABLE 43	U.K: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	57



TABLE 44	U.K: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	58
TABLE 45	U.K: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	58
TABLE 46	GERMANY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	59
TABLE 47	GERMANY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	59
TABLE 48	GERMANY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	59
TABLE 49	GERMANY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	60
TABLE 50	FRANCE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	60
TABLE 51	FRANCE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	61
TABLE 52	FRANCE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	61
TABLE 53	FRANCE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	61
TABLE 54	ITALY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	62
TABLE 55	ITALY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	62
TABLE 56	ITALY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	62
TABLE 57	ITALY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	63
TABLE 58	SPAIN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	63
TABLE 59	SPAIN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	64
TABLE 60	SPAIN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	64
TABLE 61	SPAIN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	64
TABLE 62	REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	65
TABLE 63	REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	65
TABLE 64	REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	66
TABLE 65	REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	66
TABLE 66	ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 (USD MILLION)	67
TABLE 67	ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 ('000 LITERS)	68
TABLE 68	ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	68
TABLE 69	ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	68
TABLE 70	ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	69
TABLE 71	ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	69
TABLE 72	AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	70
TABLE 73	AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	70
TABLE 74	AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	70
TABLE 75	AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	71
TABLE 76	JAPAN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	71
TABLE 77	JAPAN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	72
TABLE 78	JAPAN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	72
TABLE 79	JAPAN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	72
TABLE 80	CHINA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	73
TABLE 81	CHINA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	73
TABLE 82	CHINA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	73
TABLE 83	CHINA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	74
TABLE 84	REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	74
TABLE 85	REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	75
TABLE 86	REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	75
TABLE 87	REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	75
TABLE 88	REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 (USD MILLION)	76
TABLE 89	REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 ('000 LITERS)	77



TABLE 90	REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	77
TABLE 91	REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	78
TABLE 92	REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	78
TABLE 93	REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	78
TABLE 94	SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	79
TABLE 95	SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	79
TABLE 96	SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	80
TABLE 97	SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	80
TABLE 98	MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	80
TABLE 99	MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	81
TABLE 100	MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	81
TABLE 101	MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	82
TABLE 102	AFRICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)	82
TABLE 103	AFRICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)	82
TABLE 104	AFRICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)	83
TABLE 105	AFRICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)	83



List of Figures

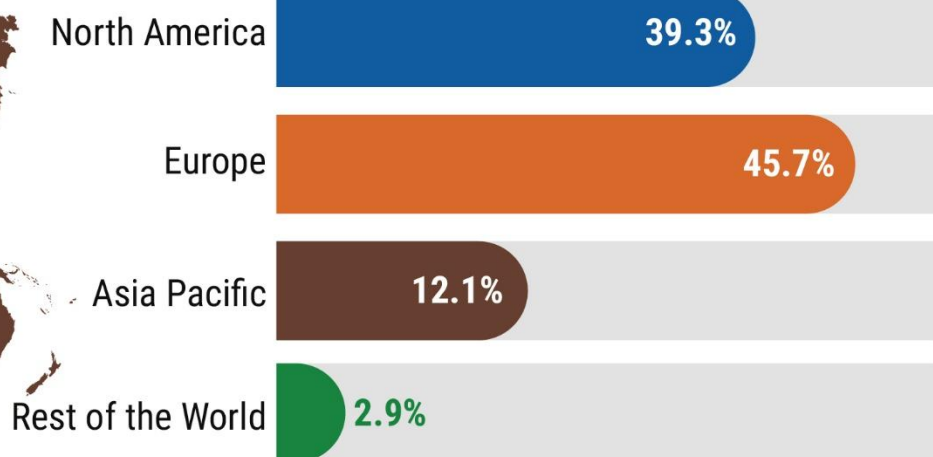
FIGURE 1	GLOBAL GLUTEN-FREE BEER MARKET SHARE (%), BY REGION (2017 & 2023)	15
FIGURE 2	GLOBAL GLUTEN-FREE BEER MARKET SHARE (%), BY TYPE (2017 & 2023)	16
FIGURE 3	EUROPE GLUTEN-FREE BEER MARKET SHARE (%), BY PACKAGING (2017 & 2023)	17
FIGURE 4	GLOBAL GLUTEN-FREE BEER MARKET: MARKET STRUCTURE	20
FIGURE 5	KEY TAKEAWAYS OF THE GLOBAL GLUTEN-FREE BEER MARKET	20
FIGURE 6	KEY BUYING CRITERIA OF GLOBAL GLUTEN-FREE BEER	21
FIGURE 7	RESEARCH PROCESS OF MRFR	23
FIGURE 8	TOP DOWN & BOTTOM-UP APPROACH	25
FIGURE 9	MARKET DYNAMICS OF GLOBAL GLUTEN-FREE BEER MARKET	27
FIGURE 10	VALUE CHAIN ANALYSIS: GLOBAL GLUTEN-FREE BEER MARKET	31
FIGURE 11	SUPPLY CHAIN ANALYSIS: GLOBAL GLUTEN-FREE BEER MARKET	33
FIGURE 12	PORTER'S FIVE FORCES ANALYSIS OF THE GLOBAL GLUTEN-FREE BEER MARKET	34
FIGURE 13	GLOBAL GLUTEN-FREE BEER MARKET, BY TYPE 2017 & 2023 (USD MILLION)	37
FIGURE 14	GLOBAL GLUTEN-FREE BEER MARKET, BY DISTRIBUTION CHANNEL 2017 & 2023 (USD MILLION)	41
FIGURE 15	GLOBAL GLUTEN-FREE BEER MARKET, BY REGION 2017 & 2023 (USD MILLION)	46
FIGURE 16	NORTH AMERICA GLUTEN-FREE BEER MARKET, BY COUNTRY 2017 & 2023 (USD MILLION)	47
FIGURE 17	EUROPE GLUTEN-FREE BEER MARKET, BY COUNTRY 2017 & 2023 (USD MILLION)	54
FIGURE 18	ASIA PACIFIC GLUTEN-FREE BEER MARKET, BY COUNTRY 2017 & 2023 (USD MILLION)	67
FIGURE 19	REST OF THE WORLD GLUTEN-FREE BEER MARKET, BY REGION 2017 & 2023 (USD MILLION)	76





GLOBAL GLUTEN-FREE BEER MARKET

Global Gluten-Free Beer Market, By Region, 2018 (%)



DRIVERS

- Increasing incidence of gluten-intolerance
- Shift in consumer's eating habits
- Easy availability of gluten-free beer

CHALLENGE

- Consumer's perception to the taste of the gluten-free beer

OPPORTUNITIES

- Product innovations leading to wider options for the consumers
- Strong marketing initiatives taken to promote the product



Executive Summary

CHAPTER 1

Global gluten-free beer market has witnessed continued demand during the last few years and is projected to reach USD 651.1 Million at a CAGR of 14.90% by 2023 in terms of value. Gluten-free beer market has witnessed substantial innovation in terms of new product launches along with research & development and collaboration by the industrial players.

TABLE 1 GLOBAL: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
North America	100.0	112.9	127.9	145.5	166.8	192.5	224.0	262.0	15.42%
Europe	117.5	132.0	148.8	168.3	191.6	219.2	252.5	291.9	14.43%
Asia Pacific	30.7	34.7	39.4	44.9	51.5	59.3	68.7	79.9	15.20%
Rest of the World	7.5	8.4	9.4	10.6	12.1	13.8	15.5	17.9	13.76%
Total	255.6	288.0	325.4	369.3	421.9	484.8	560.7	651.6	14.90%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer market is projected to witness a CAGR of 14.90% and it is projected to reach USD 651.6 Million during the forecast period 2018-2023. Europe is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 291.9 Million by the end of 2023. However, North America is projected to register the substantial growth rate (15.42%) during the forecast period 2018-2023.

TABLE 2 GLOBAL: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 ('000 LITERS)

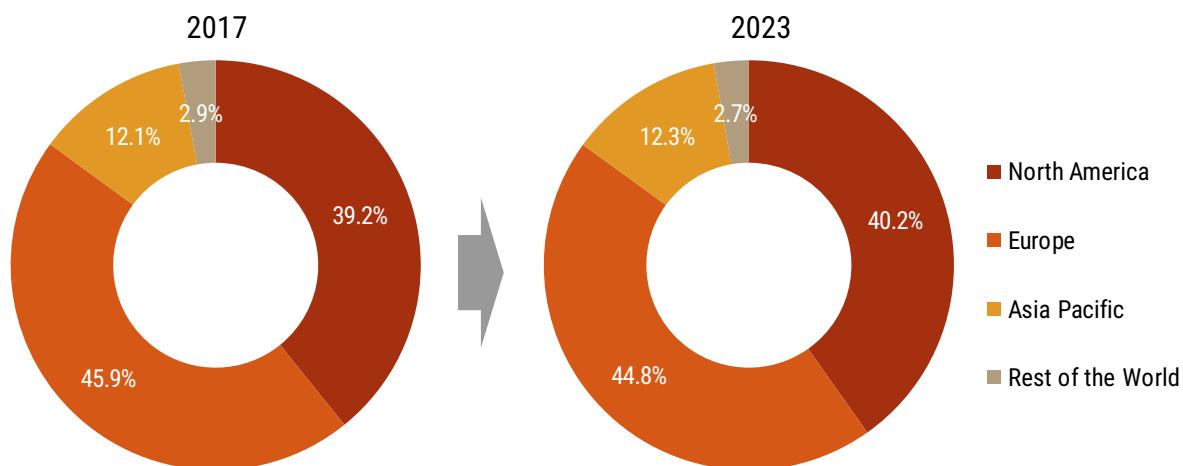
Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
North America	11,764.5	13,051.4	14,495.8	16,084.5	18,049.1	20,250.5	22,880.7	26,184.9	12.55%
Europe	13,272.0	14,647.4	16,166.8	17,935.3	19,950.3	22,264.3	25,028.0	28,182.8	11.76%
Asia Pacific	3,968.2	4,358.1	4,786.2	5,294.1	5,891.6	6,558.5	7,355.4	8,236.6	11.47%
Rest of the World	1,114.5	1,217.2	1,336.7	1,476.7	1,638.0	1,823.4	1,983.8	2,227.9	10.76%
Total	30,119.3	33,274.2	36,785.5	40,790.6	45,529.1	50,896.7	57,247.9	64,832.3	12.00%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer market is projected to witness a CAGR of 12.00% and it is projected to reach to 26,184.9 '000 liters during the forecast period 2018-2023. Europe is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 28,182.8 '000 liters by the end of 2023. However, North America is projected to register the substantial growth rate (12.55%) during the forecast period 2018-2023.



FIGURE 1 GLOBAL GLUTEN-FREE BEER MARKET SHARE (%), BY REGION (2017 & 2023)



Source: Industry Expert, Secondary Research, and MRFR Analysis

TABLE 3 GLOBAL: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	171.1	192.5	217.3	246.3	281.0	322.4	372.3	432.0	14.74%
Gluten-reduced beer	84.5	95.4	108.1	123.0	141.0	162.4	188.4	219.6	15.22%
Total	255.6	288.0	325.4	369.3	421.9	484.8	560.7	651.6	14.90%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer market is projected to witness a CAGR of 14.90% and it is projected to reach USD 651.6 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 432.0 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.22%) during the forecast period 2018-2023.

TABLE 4 GLOBAL: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

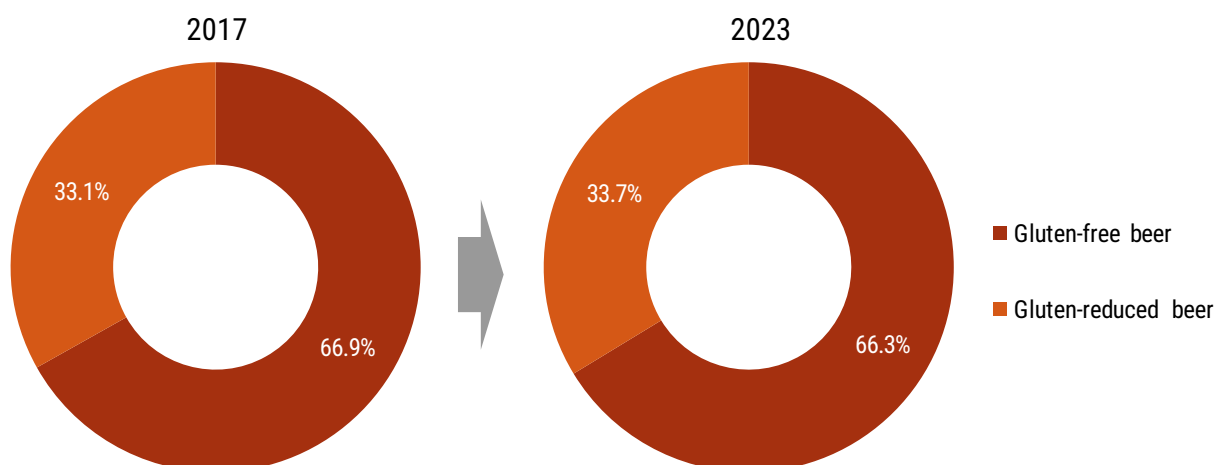
Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	20,307.8	22,404.1	24,734.3	27,389.5	30,529.2	34,081.3	38,279.8	43,292.0	11.85%
Gluten-reduced beer	9,811.5	10,870.1	12,051.2	13,401.1	14,999.8	16,815.4	18,968.1	21,540.3	12.32%
Total	30,119.3	33,274.2	36,785.5	40,790.6	45,529.1	50,896.7	57,247.9	64,832.3	12.00%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer market is projected to witness a CAGR of 12.00% and it is projected to reach to 64,832.3 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 43,292.0 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.32%) during the forecast period 2018-2023.



FIGURE 2 GLOBAL GLUTEN-FREE BEER MARKET SHARE (%), BY TYPE (2017 & 2023)



Source: Industry Expert, Secondary Research, and MRFR Analysis

TABLE 5 GLOBAL GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	52.5	59.3	67.3	76.6	87.9	101.4	117.8	137.5	15.37%
Bottles	141.0	158.5	178.7	202.4	230.8	264.6	305.4	354.0	14.65%
Others	62.2	70.2	79.4	90.2	103.2	118.8	137.5	160.2	15.07%
Total	255.6	288.0	325.4	369.3	421.9	484.8	560.7	651.6	14.90%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer market is projected to witness a CAGR of 14.90% and it is projected to reach USD 651.6 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 354.0 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.37%) during the forecast period 2018-2023.

TABLE 6 GLOBAL GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

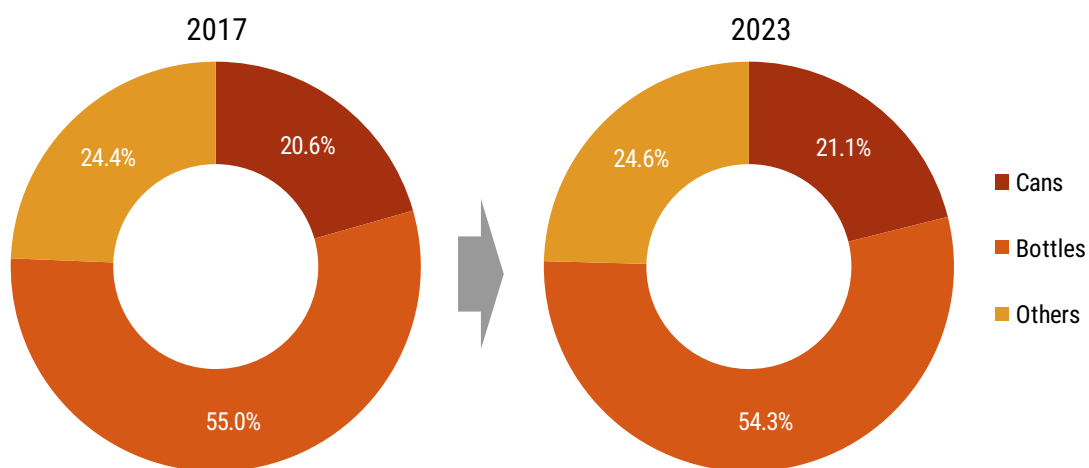
Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	6,327.4	7,017.1	7,787.4	8,668.4	9,713.0	10,900.0	12,307.1	13,991.1	12.43%
Bottles	16,011.3	17,649.9	19,469.8	21,542.8	23,992.6	26,762.4	30,036.7	33,939.9	11.76%
Others	7,780.6	8,607.2	9,528.3	10,579.4	11,823.5	13,234.3	14,904.1	16,901.3	12.15%
Total	30,119.3	33,274.2	36,785.5	40,790.6	45,529.1	50,896.7	57,247.9	64,832.3	12.00%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer market is projected to witness a CAGR of 12.00% and it is projected to reach to 64,832.3 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 33,939.9 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.43%) during the forecast period 2018-2023.



FIGURE 3 EUROPE GLUTEN-FREE BEER MARKET SHARE (%), BY PACKAGING (2017 & 2023)



Source: Industry Expert, Secondary Research, and MRFR Analysis



Market Introduction

CHAPTER 2

2.1 Definition

Gluten-free beer is free from gluten, owing to the ingredients used in the preparation of the drink. In gluten-free beer, raw materials such as sorghum, buckwheat, millets, and others are used which do not contain gluten. The gluten-free beer was introduced in the market for people suffering from wheat allergies and celiac diseases. Consumption of standard beer causes trouble in the immune system of individuals suffering from gluten-intolerance. However, gluten-free beer eliminates that issue and is consumable even by gluten intolerants. Moreover, their gluten-free beer is available in a variety of flavors and taste which is promoting the growth of the market.

2.2 Scope of the Study

- To provide detailed analysis of the market structure along with forecast for the next 6 years of various segments and sub-segments of the global gluten-free beer market
- To provide insights into factors affecting the market growth
- To analyze the global gluten-free beer market based on various tools such as supply chain analysis, and Porter's five force analysis
- To provide historical and forecast revenue & volume of the market segments and sub-segments with respect to regions and their respective key countries
- To provide country-level analysis of the market with respect to the current market size and future prospective
- To provide country-level analysis of the market for segments by type, packaging, and region
- To provide strategic profiling of key players in the market, comprehensively analyzing their core competencies, and drawing a competitive landscape for the market
- To track and analyze competitive developments such as joint ventures, strategic alliances, mergers and acquisitions, new product developments, and research and developments in the gluten-free beer market

2.3 Assumptions

TABLE 7 LIST OF ASSUMPTIONS

Parameter	Assumption & Limitations
Currency value	All the forecasts are done with the revenue (USD Million) & volume ('000 liters) calculated under the standard assumption that the globally accepted currency - the U.S. Dollar's value remains constant over the next five years.
Exchange rates and currency Conversion	For conversion of various currencies to USD, average historical exchange rates were used according to the year specified. For all historical and current exchange rates required for calculations & currency conversions - OANDA - website was used in this research study.
Niche market segments	For niche market segments where accurate data of the respective timeline was not available, the data was calculated using trend line analysis. In some instances, where mathematical and statistical models could not be applied to arrive at the number, generalization of specific related trends to that market was done.
Qualitative analysis	The qualitative analysis done from the quantitative data arrived at is solely based on the understanding of the market and its trends by the team of experts involved in making this report.



Parameter	Assumption & Limitations
Average Selling Prices (ASP)	The ASPs, wherever applied, are calculated using all kinds of suitable statistical and mathematical methods and considering external qualitative factors affecting the prices. All the calculations interconnected between the tables are done considering the finalized ASPs.

Source: MRFR Analysis

2.4 Market Structure

FIGURE 4 GLOBAL GLUTEN-FREE BEER MARKET: MARKET STRUCTURE



Source: MRFR Analysis

2.5 Key Takeaways

FIGURE 5 KEY TAKEAWAYS OF THE GLOBAL GLUTEN-FREE BEER MARKET

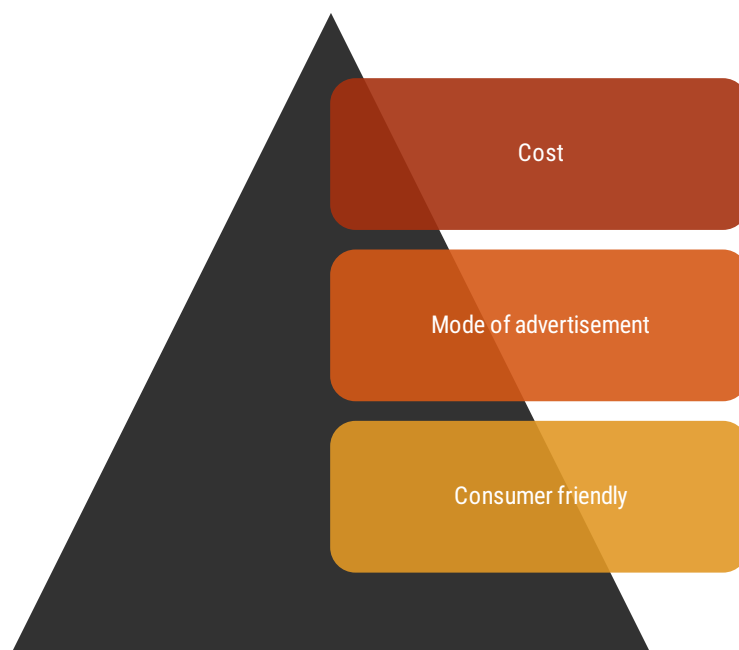


Source: Secondary Research and MRFR Analysis



2.6 Key Buying Criteria

FIGURE 6 KEY BUYING CRITERIA OF GLOBAL GLUTEN-FREE BEER



Source: Secondary Research and MRFR Analysis



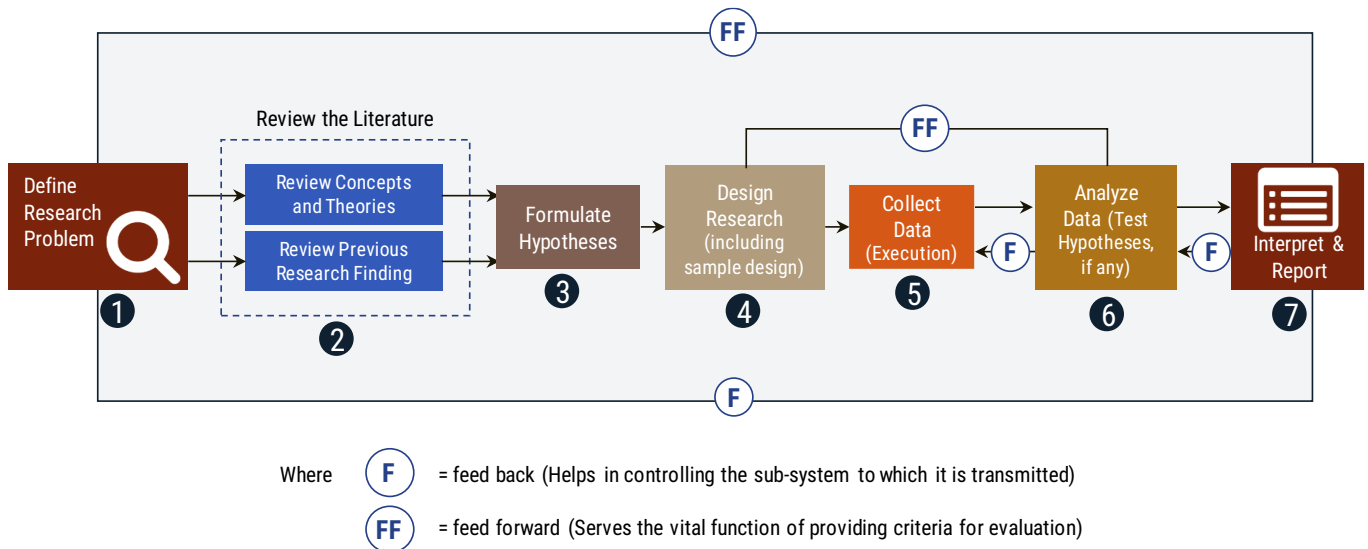
Research Methodology

CHAPTER 3

3.1 Research Process

Market Research Future research is conducted by industry experts who offer insight into industry structure, market segmentations, technology assessment, competitive landscape (CL), penetration, as well as on emerging trends. Besides primary interviews (~ 80%) and secondary research (~ 20%), their analysis is based on their years of professional expertise in respective industries. Our analysts also predict where the market will be headed in the next five to ten years, by analyzing historical trends and current market positions. Furthermore, the varying trends of segments & categories geographically presented are studied and are estimated based on primary & secondary research.

FIGURE 7 RESEARCH PROCESS OF MRFR

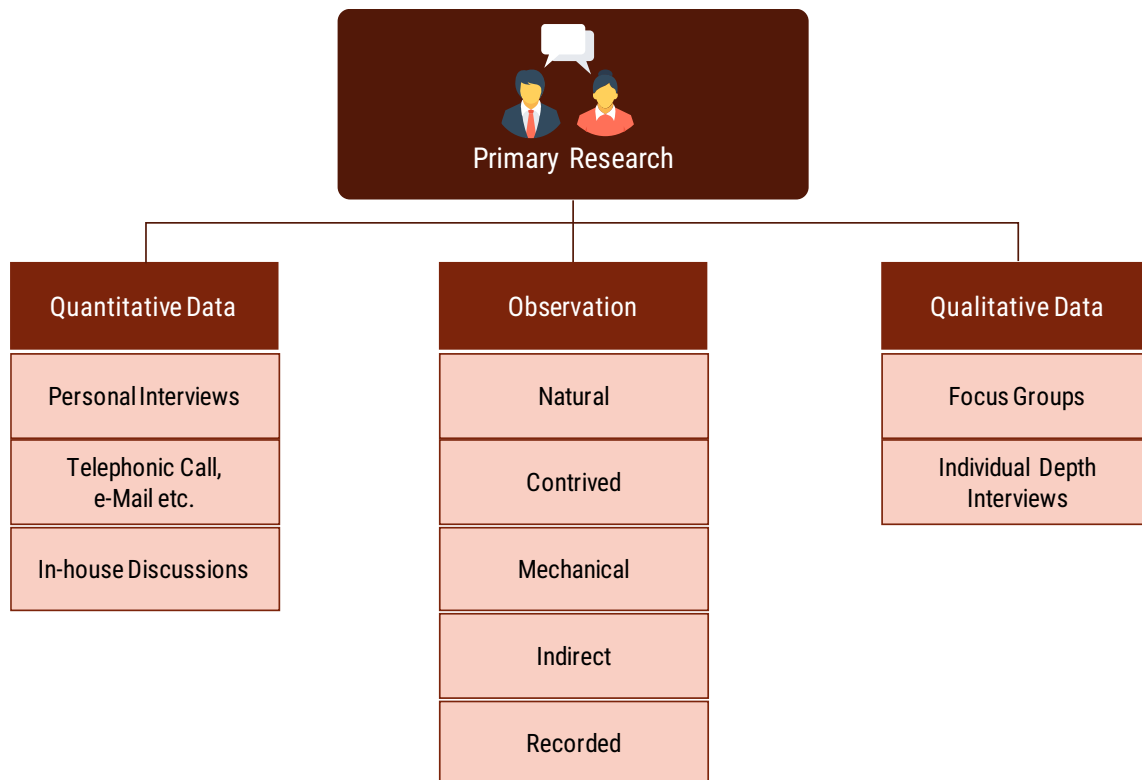


Source: MRFR Analysis

3.2 Primary Research

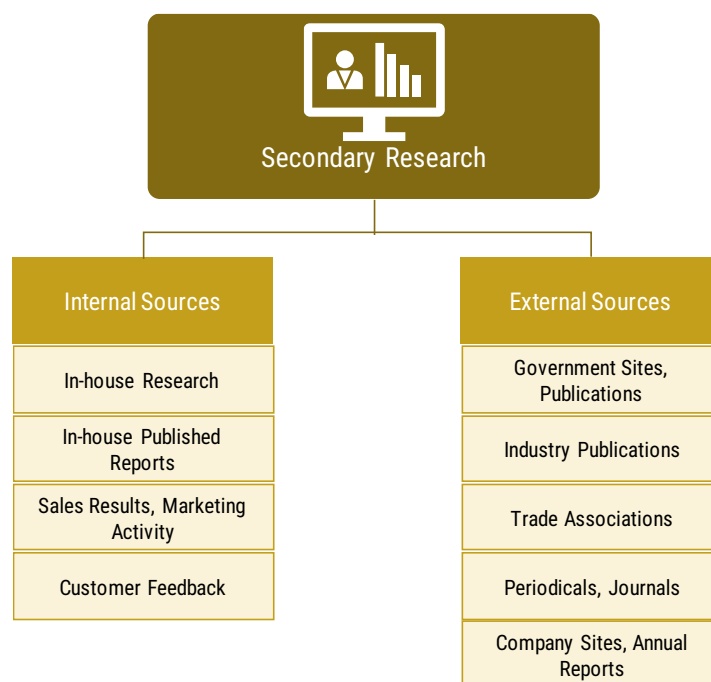
Extensive primary research was conducted to gain a deeper insight of the market and the industry performance. In this report we have conducted primary surveys (interviews) with the key level executives (VP, CEO's, Marketing Director, Business Development Manager and many more) of the major players who are active in the market. In addition to analyzing the current and historical trends, our analysts predict where the market is headed, over the next five to ten years.





3.3 Secondary Research

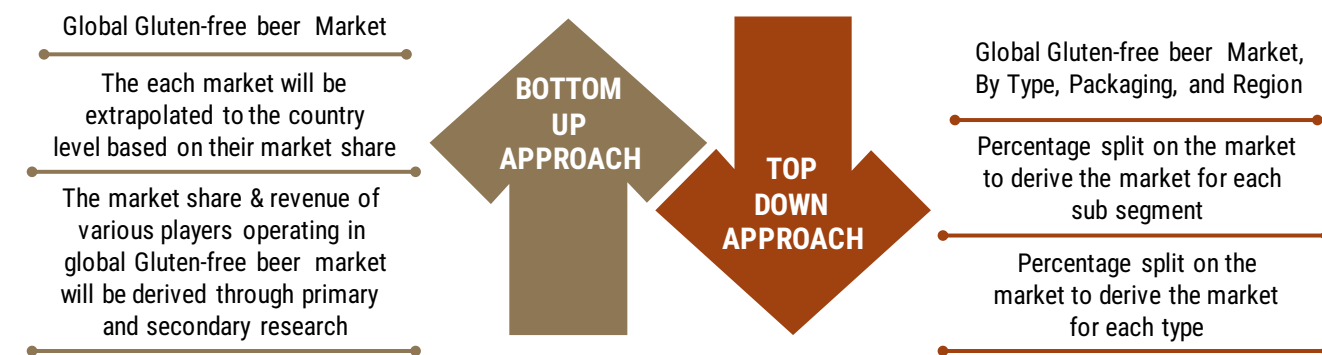
Secondary research was mainly used to collect and identify information useful for extensive, technical, market-oriented, and commercial study of the gluten-free beer market. It was also used to obtain key information about major players, market classification and segmentation according to the industry trends, geographical markets, & developments related to the market and technology perspectives. For this study, analysts have gathered information from various credible sources, such as annual reports, SEC filings, journals, white papers, corporate presentations, company web sites, international organization of food & beverages manufacturers, some paid databases and many others.



3.4 Market Size Estimation

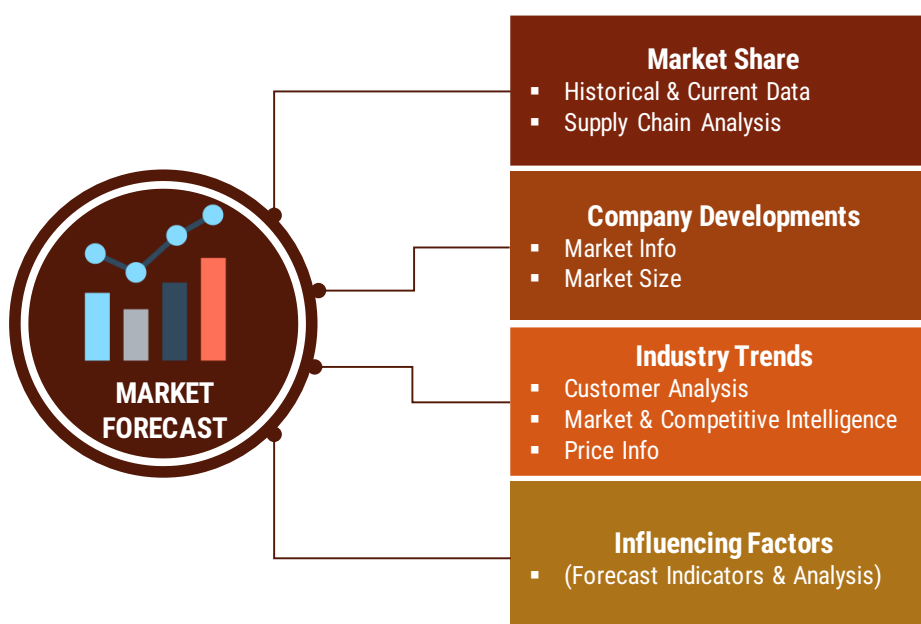
Both, top-down and bottom-up approaches were used to estimate and validate the size of the market and to estimate the size of various other dependent submarkets of the overall gluten-free beer market. The key players in the market were identified through secondary research and their market contributions in the respective geographies were determined through primary and secondary research. This entire procedure included the study of the annual and financial reports of top market players and extensive interviews for key insights with industry leaders such as CEOs, VPs, directors, and marketing executives. All percentage shares, splits, and breakdowns were determined using secondary sources and verified through primary sources. All the possible parameters that affect the market have been covered in this research study have been accounted for, viewed in extensive detail, verified through primary research, and analyzed to get the final quantitative and qualitative data. This data has been consolidated and added with detailed inputs and analysis from market research future and has been presented in this report. The following figure shows an illustrative representation of the overall market size estimation process employed for this study.

FIGURE 8 TOP DOWN & BOTTOM-UP APPROACH



Source: MRFR Analysis

3.5 Forecast Model



Source: MRFR Analysis

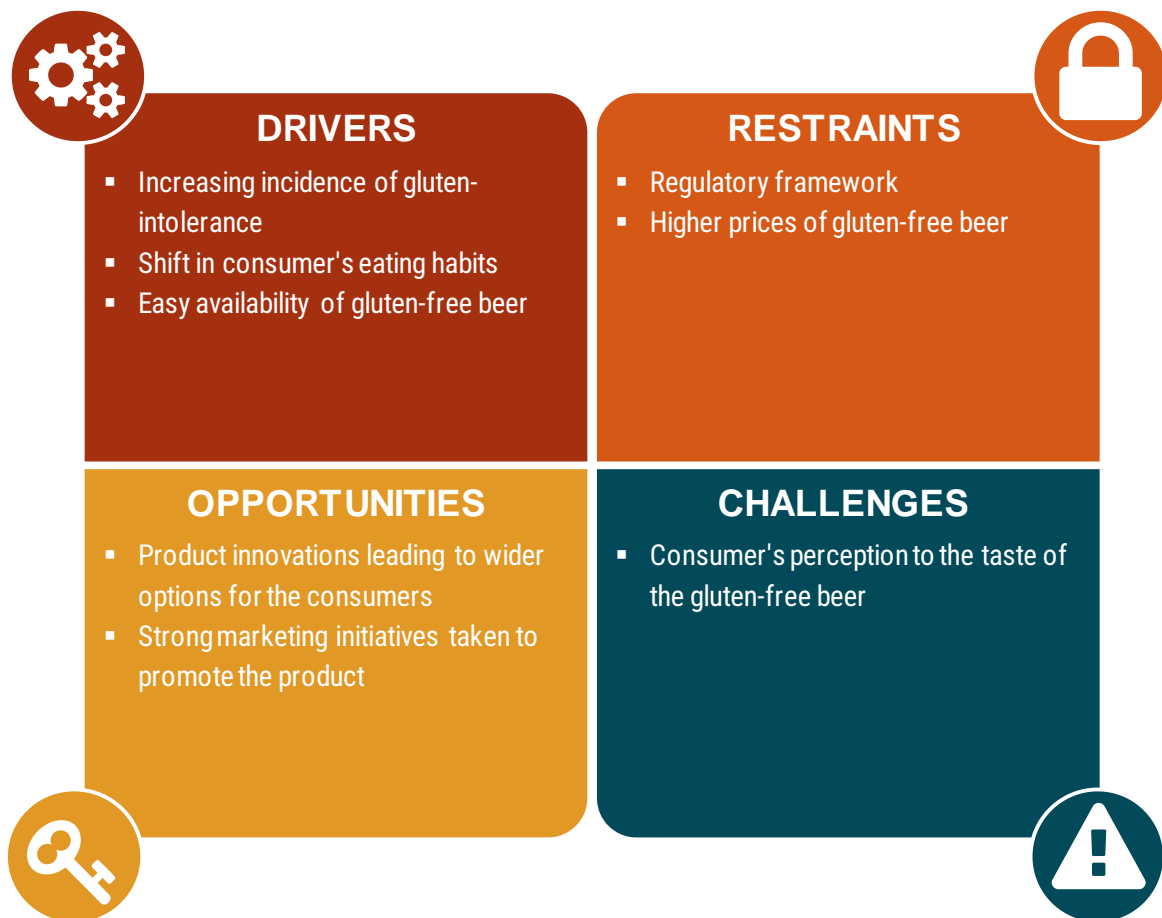


Market Dynamics

CHAPTER 4

4.1 Introduction

FIGURE 9 MARKET DYNAMICS OF GLOBAL GLUTEN-FREE BEER MARKET



Source: MRFR Analysis

4.2 Drivers

4.2.1 Increasing incidence of gluten intolerance

Gluten intolerance is caused due to reaction to gluten, a protein found in wheat, barley, and rye. Celiac disease is termed to be the most severe form of gluten intolerance and is spreading worldwide. If an individual suffering from celiac diseases consumes gluten, the immune system of the individual might be destroyed. In the past, celiac disease was considered as a rare disease limited to the region of Europe. However, in recent times it has been observed that celiac disease has a worldwide prevalence. Although, the rate of prevalence varies in different regions, it has been observed that the disease is the most prevalent in North America and Europe. It has been reported that more than 3 million people in the US suffer from celiac disease.

Moreover, almost 30-40 % of cases go undiagnosed, which if considered might increase the count of gluten intolerant population. Thus, due to a continuous increase in the prevalence of gluten intolerance, people tend to incline towards gluten-free food, which is a major driver for gluten-free beer market. Beer is made of ingredients high in gluten, due to which individuals suffering from gluten intolerance cannot consume beer and tend to incline towards the gluten-free alternative. As the number of gluten intolerant cases are rising, so is the demand for gluten-free beer.



4.2.2 Shift in eating habits

In recent times, it has been observed that people are seeking for more clarity with the ingredients used in the product they are consuming and are becoming more conscious about health. They are aware of the ingredients used in the preparation of the food they are consuming and how does it affect their health. There is more awareness among the consumers, and they choose to take up different diets for their health reasons. For instance, the increasing incidence of gluten intolerance is influencing consumers to shift towards gluten-free food & beverages. This has triggered the growth of the gluten-free beer market. Individuals suffering from gluten intolerance have no reasons to avoid beer with the availability of gluten-free beer, which has largely attracted the beer lovers suffering from gluten intolerance.

4.2.3 Easy availability of gluten-free beer

The availability of gluten-free beer is at ease with the increasing number of breweries setting up every year. Along with the development of retail outlets, there is an increase in the number of craft breweries which is supporting the availability of gluten-free beer to the consumers and leading to the growth of the market. As per the record, the number of operating breweries in the US grew by 16% in the year 2017 from 2016. This increasing count in several breweries is assisting in easy availability of gluten-free beer to the consumers who tend to increase the market growth of the product.

4.3 Restraints

4.3.1 Regulatory framework

The regulatory framework defines the necessary infrastructure which allows the control, direction, and implementation of a proposed course of action, rule, principle or law. Gluten-free beer is commercially available and is gaining popularity among the alcoholic consumers; however, there are a unique set of challenges and hurdles faced by brewers as there are multiple regulations at the federal, state and local levels of government in different states and regions. At the state level, brewers need to comply with additional rules defined; brewers need to obtain a license from the state to operate in the market. In addition to this, there are additional regulations in the form of franchise laws which keeps a check on brewers' ability to sell beer directly to consumers, instead mandating it to be sold through distributors. Moreover, they need to undergo rigorous testing and documentation processes required to comply with the Alcohol and Tobacco Tax and Trade Bureau (TTB) and Food and Drug Administration (FDA). These set of regulations will restrict the market growth.

4.3.2 Higher prices of gluten-free beer

The price of a product is mainly derived from the cost of production incurred by the manufacturer. In the case of gluten-free beer, the prices of raw materials are higher in comparison to that of normal beer. Here, the ingredients used such as sorghum, buckwheat, millets, and others are available at a higher cost than that of barley, wheat, and rye. Whereas, in the case of gluten-reduced beer, the processing cost is higher than the normal beer as it involves the addition of enzymes which tend to increase the overall production cost of the product. Moreover, gluten-free beer and gluten-reduced beer are specialty products which set a high value for the product in the market than the normal beer. Henceforth, the higher prices of the product restrict the demand for the product which however hampers the growth of the overall gluten-free beer market.



4.4 Opportunities

4.4.1 Product innovations leading to wider options for consumers

High focus on R&D sector has led to innovations in the product line of the gluten-free beer. New varieties and product development have attracted more consumers towards the gluten-free beer and its sale. Consumers usually have a perception for the taste of gluten-free beer for which many consumers deny spending on the product. For this reason, the breweries invest in launching new flavors and modifications in the taste of the gluten-free beer. For instance; initially, there was an only gluten-free blonde beer made available by Glutenberg. Gradually, they introduced American pale ale, Red ale, India pale ale, and many others. This increased the variety of options for the consumers which creates an opportunistic market for the product. Moreover, consumers follow a trend of experimentation in food and drink which supports the growth of a variety of gluten-free beers.

4.4.2 Strong marketing initiatives for product promotion

Marketing initiatives taken by manufacturers have a high impact on the minds of the consumers which plays a vital role in the purchasing decision of the consumers. The awareness for gluten intolerance is increasing gradually among the population, and so is the awareness of gluten-free products through marketing. Strong marketing initiatives through various channels have created awareness among the consumers of the various products available in the market for the gluten intolerant population. Similarly, the key players of gluten-free beer are constantly taking efforts to promote their product variety and make consumers aware of the same. Attractive packaging also plays a crucial role in the promotion of the product. Thus, the manufacturers are investing heavily on packaging and promotional activities of their products.

4.5 Challenges

4.5.1 Consumer perception of the taste of gluten-free beer

The consumers have a common perception regarding the taste of the product. They tend to be apprehensive about gluten-free beer. As per traditional thought process, consumers like the taste of beer because of the ingredients used in the process. However, in gluten-free beer, the ingredients vary from normal beer which changes the taste. Due to this reason, many consumers refrain from consuming gluten-free beer. However, the key players are launching a variety of flavors in the product and investing in product innovations which modify the taste of the product which is rather favorable to the consumers.



CHAPTER 5

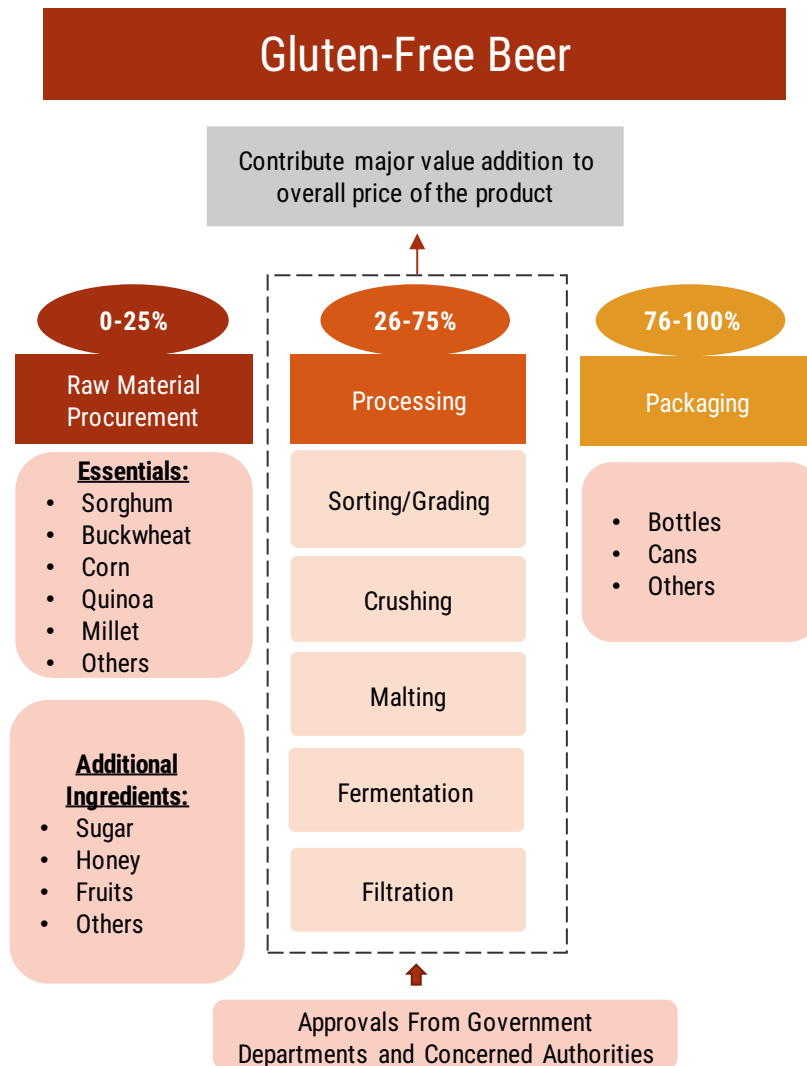
Market Factor Analysis

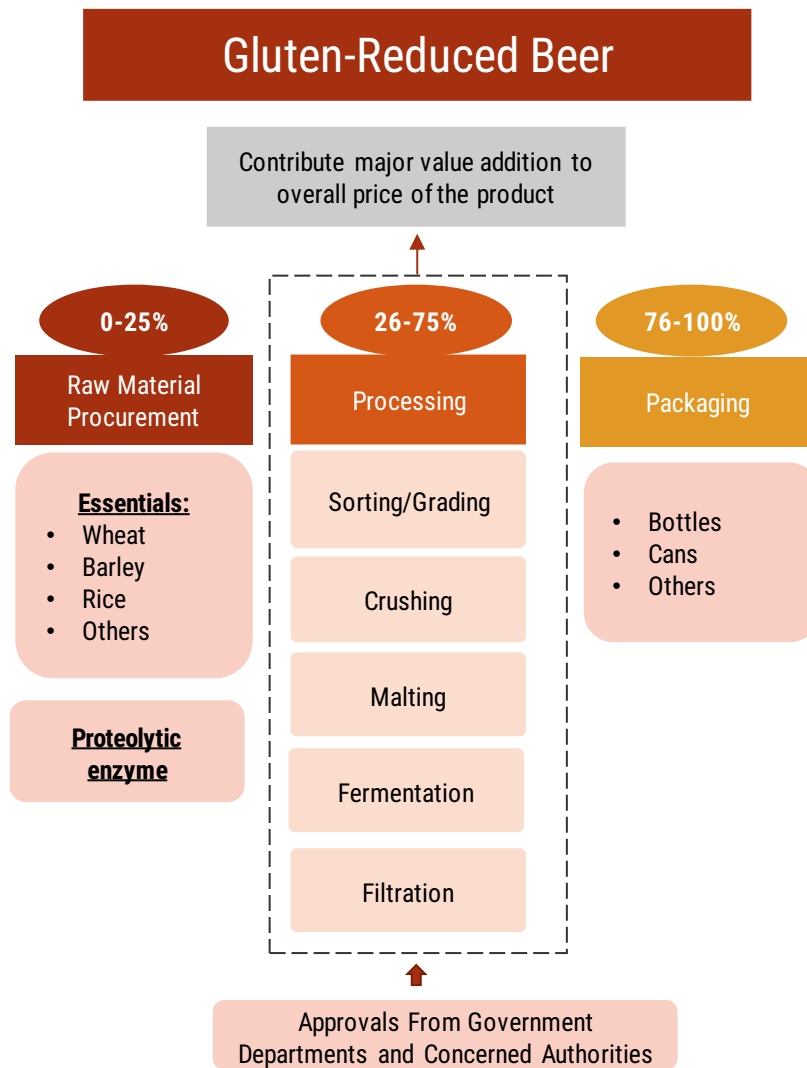
5.1 Value Chain Analysis

Value chain analysis is used to evaluate the activities of gluten-free beer manufacturers. The major aim is to identify the stages most important to the gluten-free beer manufacturers and the ones that need to be upgraded to gain economic advantage. It will try to accomplish core actions at lesser costs than competitors. When a company is proficient in manufacturing goods at lower costs than the competitor's price or to provide higher quality products, it makes higher profits.

Value chain analysis checks the value addition at each stage involved in the production, processing, and packaging of gluten-free beers. The participants in the value chain of the gluten-free beer market include raw material supplier and manufacturers.

FIGURE 10 VALUE CHAIN ANALYSIS: GLOBAL GLUTEN-FREE BEER MARKET





Source: MRFR Analysis

Raw Material: Agricultural products such as sorghum, millet, buckwheat, and quinoa are purchased from farmers and agricultural supply companies throughout the country. These raw materials are further sent for quality check to quality check department. This part of the value chain plays a very important role, as the quality of raw material defines the taste of the final product.

Processing: In the processing method, the raw material undergoes through various methods to derive the final product. Herein, they first break down the grains into a fine flour where the cereals are crushed reducing it to dust. In the next step, the grain is soaked in hot water to extract its sugars. Then after, the wort is extracted through the press filter. The wort is boiled and different types of sugar are added to provide taste and give aromas to the beer. In the next process, the liquid is separated from the solid and transferred to the fermentation tanks. Then, the yeast is added and it is during the fermentation process that the yeast will transform the previously extracted sugars into alcohol. The beer is then filtered towards the conditioning tanks, where CO₂ is injected in order to produce a clear and carbonated liquid.

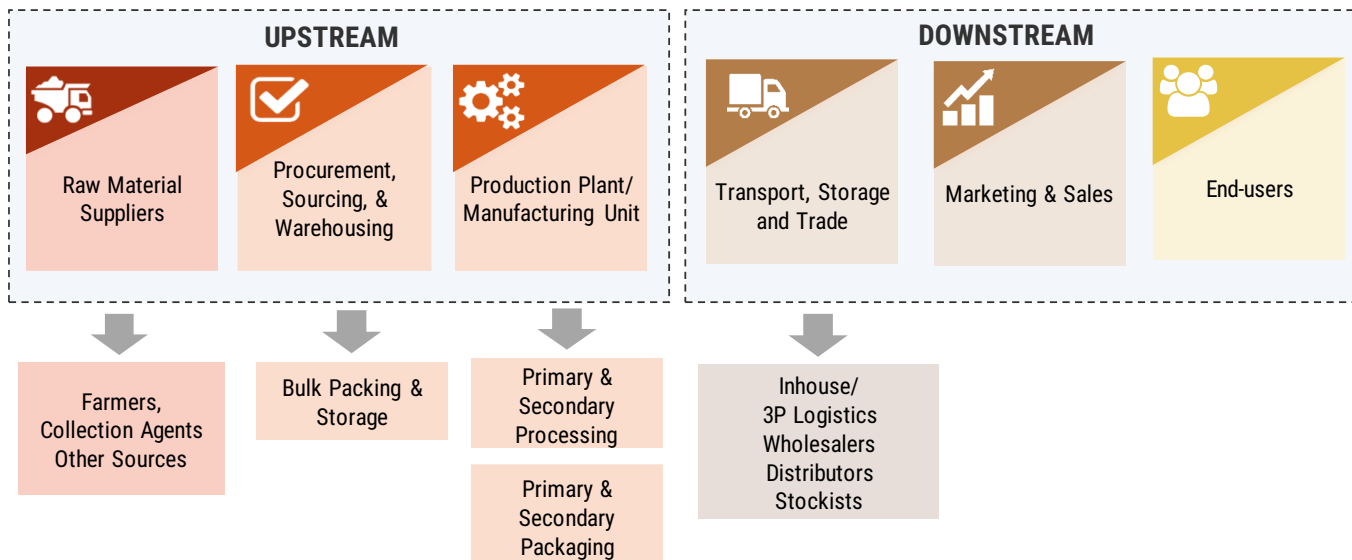
Packaging: Packaging is an important stage in value chain analysis. Appropriate packaging assists in providing optimum oxygen supply and temperature for inoculation and fermentation to occur during processing. Gluten-free beer is mainly packed in bottles and cans and distributed further to the end users. Thus, the packaging is the last step of value addition in the product, after which the product is ready to reach out to the end users.



5.2 Supply Chain Analysis

The supply chain is the sequence of processes, which include all the activities and players involved in the production and distribution of a commodity, right from the procurement of raw materials to final delivery of the product to end users. It involves the system of managing the flow of goods and services from the point of origin to the point of consumption. It is an integrated method of transforming the resources, raw materials, and components into the final product, which is ready to be delivered to the end customer.

FIGURE 11 SUPPLY CHAIN ANALYSIS: GLOBAL GLUTEN-FREE BEER MARKET



Source: MRFR Analysis

The above diagram checks the various stages involved in the distribution of gluten-free beer. The supply chain of gluten-free beer is divided into upstream and downstream channels. The upstream channel begins from procurement of raw material, which includes millet, buckwheat, corn, quinoa, and others. They are further traded and marketed for processing in the production plant wherein the raw materials undergo through various processes to prepare gluten-free beer. This trading might involve various channel partners in the process.

In the downstream channel, the finished goods are taken away from the production plant to the end users. The product is stored and then distributed to the end users through on-trade and off-trade distribution channel. There are different intermediaries involved in the process, including bulk merchants, wholesalers, and distributors who assist in mediating the process.



5.3 Porter's Five Forces Analysis

Michael Porter's Five Forces model gives a framework that models the gluten-free beer market, which is influenced by five factors. The strategic business managers, trying to create an edge over competitive firms in the global gluten-free beer market, can utilize this model to comprehend the industry connection better, in which the company operates. The components of each of the forces and the degree of impact of each component in the context of the global gluten-free beer market have been broken down and analyzed.

FIGURE 12 PORTER'S FIVE FORCES ANALYSIS OF THE GLOBAL GLUTEN-FREE BEER MARKET



Source: MRFR Analysis

5.3.1 Threat of New Entrants

The gluten-free beer market offers lucrative opportunities to manufacturers due to the ever-increasing popularity of gluten-free products. There is a continuous demand for gluten-free beer due to increasing cases of celiac diseases and gluten-intolerance among people. All these factors offer rewarding prospects to the new entrants in the market.

The gluten-free beer business is competitive and expanding. Owing to the increasing cases of gluten-intolerance among the consumers in North America and Europe, the demand for gluten-free beer is high in these regions. Additionally, key players in the gluten-free beer market have their prominent presence in countries, including the US, Canada, Germany, and the UK. The initial investments in the gluten-free beer market are high, including the raw material costs, certification cost, and approval from regulating bodies. Production cost of gluten-free beer is identified to range from moderate to high because of high investments required in production equipment, skilled labour inputs, maintenance cost, and safety testing & certification.

Shifting consumer preferences have raised the demand for gluten-free beer for which the raw materials are present in abundance across the globe. Major players in the gluten-free beer market have a prominent presence across developed countries, which makes the market highly competitive.

Based on this, the threat of new entrants to the global gluten-free beer market is **moderate-high**.



5.3.2 Bargaining Power of Suppliers

Suppliers for gluten-free beer are the producers, distributors, importers, and independent suppliers. Due to the availability of large number of supplier option to the manufacturers, the suppliers have low bargaining power. In addition, the low switching cost tends to lower the supplier's power.

Bargaining power of suppliers is a crucial factor in the gluten-free beer industry. Suppliers maintain a strong relationship with the buyers or the manufacturers of the end-product and focus on maintaining strong business relations to maintain the end-product quality. The suppliers tend to differentiate in terms of sourcing, supplier relationship, and product functionality, creating product differentiation and uniqueness of suppliers.

Many suppliers is present across all the major regions for which the manufacturers have the freedom to switch between suppliers. This tends to reduce the bargaining power of suppliers.

Therefore, the bargaining power of suppliers is **low** in the global gluten-free beer market.

5.3.3 Threat of Substitutes

There are no substitutes for gluten-free beer. However, gluten-free beer possesses an internal threat of substitution. This is backed up by the fact that with the rising population of gluten-intolerance, many breweries are introducing gluten-free beer with various modifications to improve the taste. Furthermore, gluten-free beer is expensive for which the consumers may tend to switch to different drink to avoid gluten.

Hence, the threat of substitute in the global gluten-free beer market is **moderate**.

5.3.4 Bargaining Power of Buyers

The bargaining power of buyers is directly proportional to the consumer's ability and willingness to pay for products. It includes the pressure that consumers exert on manufacturers to procure higher quality products and better customer service at lower prices.

Gluten-free beer has a limited customer base owing to its specific characteristics. Growing consumer awareness, and high demand for superior quality products has raised the demand for the product globally. Increasing per capita disposable income and urbanization will ensure further escalation in demand for gluten-free beer.

The presence of small and medium scale regional manufacturers in the gluten-free beer market is tend to attract many consumers. Furthermore, the presence of a wide product range tends to decrease the switching cost. The consumers are well-educated about the product and they no longer have brand loyalty, which determines the bargaining power of buyers on these two major factors. However, absence of close substitute to the product limits the bargaining power of the consumers.

The bargaining power of buyers is **moderate to high** in the global gluten-free beer market.

5.3.5 Competitive Rivalry

The gluten-free beer market is marked by high intensity of rivalry. Established market players indulge in an aggressive rivalry where the market players are targeting their competitors in terms of quality and price, thus, making the industry competitive and reducing profit potential for the existing firms. The players in the market are competing based on new product launches, prices, product features, and marketing activities. The competition is getting intensified due to many regional small & medium sized breweries. Thus, product differentiation is highly needed to enter and capture the market share in such scenarios. Moreover, the key players tend to have very strong hold and control on their market. Their focus remains more on controlling exiting consumer base by providing quality products to the consumers.

Hence, the competitive rivalry in the global gluten-free beer market is **moderate**.



Global Gluten-free Beer Market, by Type

CHAPTER 6

6.1 Overview

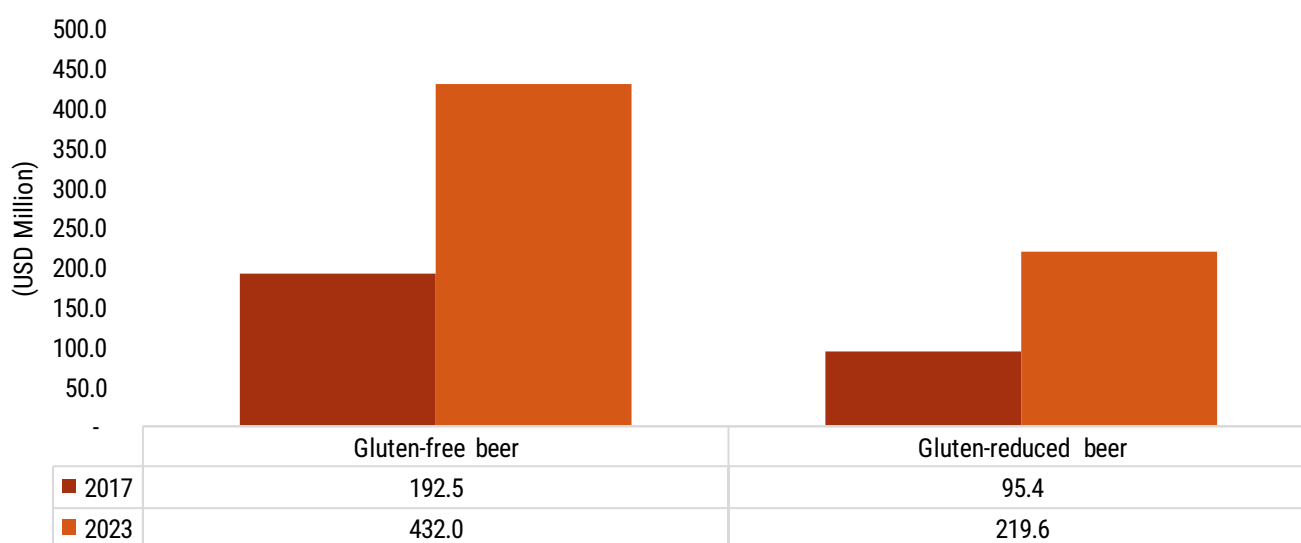
6.1.1 Gluten-free beer

Gluten-free beer is free from wheat or other related grains. These beers are made with gluten-free ingredients such as sorghum, buckwheat, millet, and quinoa. Using these gluten-free alternatives, the brewing process is like that of malted barley, but the parameters such as germination and fermentation conditions, pH of mashing, yeast strain used, temperatures, and storage conditions must be adjusted depending on the raw material used.

6.1.2 Gluten-reduced beer

Gluten-reduced beers are made from wheat, barley, or rye, and further treated with enzymes such as 'Clarex' to break-down gluten proteins. The enzymes help in breaking down the gluten molecule into smaller pieces that are too small to be detected in laboratory tests.

FIGURE 13 GLOBAL GLUTEN-FREE BEER MARKET, BY TYPE 2017 & 2023 (USD MILLION)



Source: MRFR Analysis, Secondary Research

TABLE 8 GLOBAL GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	67.1	75.6	85.6	97.3	111.3	128.3	149.1	174.1	15.26%
Europe	78.4	88.1	99.1	111.9	127.2	145.4	167.3	193.1	14.28%
Asia-Pacific	20.5	23.2	26.3	29.9	34.3	39.4	45.6	52.9	15.04%
Rest of the World	5.1	5.6	6.3	7.2	8.1	9.3	10.4	12.0	13.60%
Total	171.1	192.5	217.3	246.3	281.0	322.4	372.3	432.0	14.74%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (gluten-free beer) market is projected to witness a CAGR of 14.74% and it is projected to reach USD 432.0 Million during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 193.1 Million by the end of 2023. However, North America region is projected to register the substantial growth rate (15.26%) during the forecast period 2018-2023.



TABLE 9 GLOBAL GLUTEN-FREE BEER (GLUTEN-FREE BEER) MARKET, BY REGION, 2016-2023 ('000 LITERS)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	7,953.4	8,811.1	9,772.6	10,828.6	12,134.3	13,595.4	15,339.9	17,530.7	12.40%
Europe	8,911.3	9,821.5	10,825.6	11,993.6	13,322.9	14,847.9	16,668.0	18,743.6	11.60%
Asia-Pacific	2,665.9	2,923.7	3,206.4	3,541.7	3,935.8	4,375.1	4,899.6	5,478.7	11.31%
Rest of the World	777.2	847.7	929.6	1,025.6	1,136.1	1,263.0	1,372.3	1,539.0	10.61%
Total	20,307.8	22,404.1	24,734.3	27,389.5	30,529.2	34,081.3	38,279.8	43,292.0	11.85%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (gluten-free beer) market is projected to witness a CAGR of 11.85% and it is projected to reach to 43,292.0 '000 liters during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 17,530.7 '000 liters by the end of 2023. However, North America region is projected to register the substantial growth rate (12.40%) during the forecast period 2018-2023.

TABLE 10 GLOBAL GLUTEN-FREE BEER (GLUTEN-REDUCED BEER) MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	32.9	37.2	42.3	48.2	55.4	64.2	74.9	87.9	15.75%
Europe	39.0	44.0	49.7	56.4	64.3	73.8	85.3	98.8	14.75%
Asia-Pacific	10.1	11.5	13.1	15.0	17.2	19.9	23.1	27.0	15.53%
Rest of the World	2.4	2.7	3.1	3.5	4.0	4.5	5.1	5.9	14.08%
Total	84.5	95.4	108.1	123.0	141.0	162.4	188.4	219.6	15.22%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (gluten-reduced beer) market is projected to witness a CAGR of 15.22% and it is projected to reach USD 219.6 Million during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 98.8 Million by the end of 2023. However, North America region is projected to register the substantial growth rate (15.75%) during the forecast period 2018-2023.



TABLE 11 GLOBAL GLUTEN-FREE BEER (GLUTEN-REDUCED BEER) MARKET, BY REGION, 2016-2023 ('000 LITERS)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	3,811.1	4,240.3	4,723.2	5,255.9	5,914.8	6,655.1	7,540.8	8,654.2	12.88%
Europe	4,360.7	4,825.9	5,341.1	5,941.7	6,627.4	7,416.4	8,360.0	9,439.2	12.06%
Asia-Pacific	1,302.3	1,434.4	1,579.7	1,752.4	1,955.8	2,183.5	2,455.7	2,757.9	11.79%
Rest of the World	337.3	369.5	407.1	451.1	501.9	560.4	611.6	688.9	11.09%
Total	9,811.5	10,870.1	12,051.2	13,401.1	14,999.8	16,815.4	18,968.1	21,540.3	12.32%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (gluten-reduced beer) market is projected to witness a CAGR of 15.22% and it is projected to reach to 21,540.3 '000 liters during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 9,439.2 '000 liters by the end of 2023. However, North America region is projected to register the substantial growth rate (12.88%) during the forecast period 2018-2023.



Global Gluten-free Beer Market, by Packaging

CHAPTER 7

7.1 Overview

7.1.1 Cans

Can is one of the major packaging solutions among the beverage's manufacturers. The demand for can packaging is increasing at a high pace owing to the convenience. On-the-go lifestyles of the consumers are anticipated to drive the sales of can packaging. Manufacturers of gluten-free beer have started using recycle aluminum owing to the recycled property. The can segment projected to expand at a CAGR of 15.37% in terms of value.

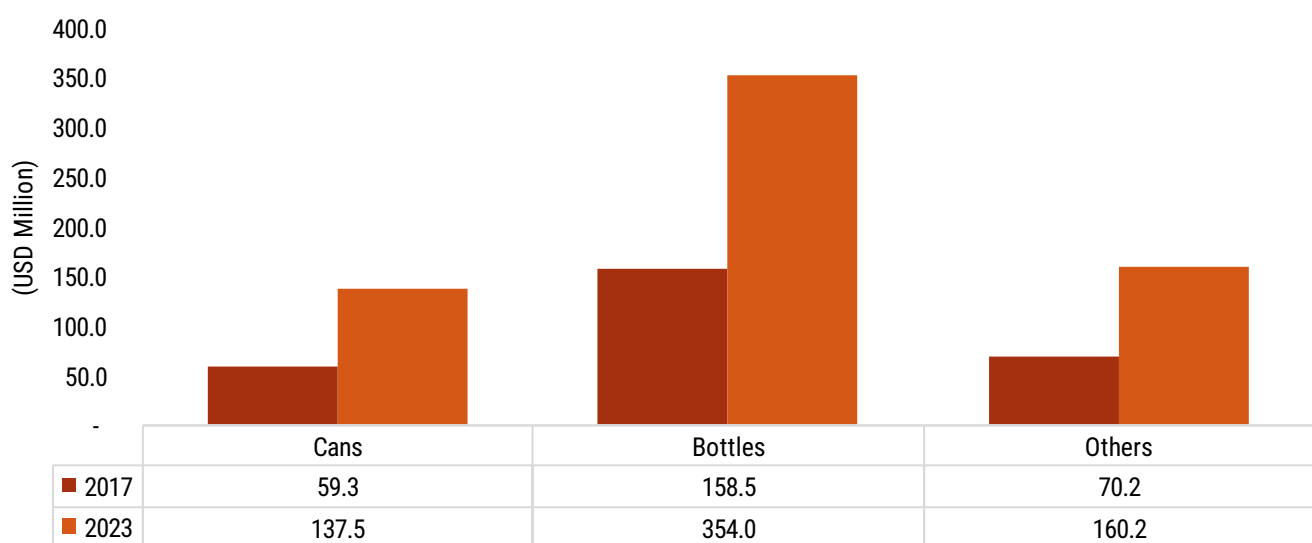
7.1.2 Bottles

Bottles are the most popular packaging solutions among beverage manufacturers. Consumers are attracted to glass bottles as they are durable, hygienic, and aesthetically pleasing. Bottles are accounting for a significant market share in the gluten-free beer market due to the various factors. One of the major factors for the rising growth of bottles segment is their high holding capacity. However, the segment is estimated to retain its dominance throughout the forecast period of 2018-2023.

7.1.3 Others

In the others segment, kegs and barrels are considered in the global gluten-free beer market. The food service industry has been witnessing a massive growth both in developed and developing economies. Many micro-breweries have been set up in Europe and North America over the last few years. Due to the mounting growth of the foodservice industry, the demand for kegs, barrels, and other packaging solutions will be increased at an exponential growth rate.

FIGURE 14 GLOBAL GLUTEN-FREE BEER MARKET, BY DISTRIBUTION CHANNEL 2017 & 2023 (USD MILLION)



Source: MRFR Analysis, Secondary Research



TABLE 12 GLOBAL GLUTEN-FREE BEER (CANS) MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	20.3	23.0	26.1	29.8	34.3	39.8	46.5	54.6	15.93%
Europe	23.9	27.0	30.5	34.6	39.6	45.5	52.6	61.0	14.88%
Asia-Pacific	6.7	7.6	8.6	9.9	11.4	13.1	15.3	17.8	15.63%
Rest of the World	1.6	1.8	2.1	2.3	2.7	3.1	3.4	4.0	14.19%
Total	52.5	59.3	67.3	76.6	87.9	101.4	117.8	137.5	15.37%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (cans) market is projected to witness a CAGR of 15.37% and it is projected to reach USD 137.5 Million during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 61.0 Million by the end of 2023. However, North America region is projected to register the substantial growth rate (15.93%) during the forecast period 2018-2023.

TABLE 13 GLOBAL GLUTEN-FREE BEER (CANS) MARKET, BY REGION, 2016-2023 ('000 LITERS)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	2,492.9	2,776.1	3,095.0	3,447.2	3,882.8	4,372.9	4,959.5	5,697.2	12.98%
Europe	2,736.7	3,031.9	3,359.2	3,740.9	4,177.2	4,679.6	5,280.8	5,969.2	12.19%
Asia-Pacific	853.1	940.8	1,037.5	1,152.5	1,287.9	1,439.8	1,621.4	1,822.5	11.93%
Rest of the World	244.7	268.2	295.7	327.8	365.0	407.8	445.4	502.2	11.18%
Total	6,327.4	7,017.1	7,787.4	8,668.4	9,713.0	10,900.0	12,307.1	13,991.1	12.43%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (cans) market is projected to witness a CAGR of 12.43% and it is projected to reach to 13,991.1 '000 liters during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 5,969.2 '000 liters by the end of 2023. However, North America region is projected to register the substantial growth rate (12.98%) during the forecast period 2018-2023.



TABLE 14 GLOBAL GLUTEN-FREE BEER (BOTTLES) MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	54.9	61.9	70.0	79.4	90.9	104.6	121.4	141.6	15.13%
Europe	64.9	72.8	81.9	92.5	105.1	120.0	138.0	159.2	14.21%
Asia-Pacific	17.1	19.2	21.8	24.8	28.4	32.6	37.7	43.7	14.95%
Rest of the World	4.1	4.5	5.1	5.7	6.5	7.4	8.3	9.5	13.49%
Total	141.0	158.5	178.7	202.4	230.8	264.6	305.4	354.0	14.65%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (bottles) market is projected to witness a CAGR of 14.65% and it is projected to reach USD 354.0 Million during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 159.2 Million by the end of 2023. However, North America region is projected to register the substantial growth rate (15.13%) during the forecast period 2018-2023.

TABLE 15 GLOBAL GLUTEN-FREE BEER (BOTTLES) MARKET, BY REGION, 2016-2023 ('000 LITERS)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	6,213.1	6,875.9	7,618.2	8,432.4	9,439.3	10,564.8	11,907.9	13,594.3	12.28%
Europe	7,090.8	7,811.1	8,605.3	9,528.9	10,579.7	11,784.9	13,223.0	14,862.0	11.55%
Asia-Pacific	2,127.7	2,331.4	2,554.6	2,819.2	3,130.1	3,476.2	3,889.5	4,345.3	11.21%
Rest of the World	579.7	631.5	691.8	762.3	843.5	936.5	1,016.3	1,138.3	10.47%
Total	16,011.3	17,649.9	19,469.8	21,542.8	23,992.6	26,762.4	30,036.7	33,939.9	11.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (bottles) market is projected to witness a CAGR of 11.76% and it is projected to reach to 33,939.9 '000 liters during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 14,862.0 '000 liters by the end of 2023. However, North America region is projected to register the substantial growth rate (12.28%) during the forecast period 2018-2023.



TABLE 16 GLOBAL GLUTEN-FREE BEER (OTHERS) MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	24.8	28.0	31.8	36.3	41.6	48.1	56.1	65.8	15.63%
Europe	28.6	32.2	36.4	41.2	46.9	53.8	62.0	71.7	14.56%
Asia-Pacific	7.0	7.9	9.0	10.2	11.7	13.6	15.7	18.3	15.40%
Rest of the World	1.8	2.0	2.3	2.6	2.9	3.4	3.8	4.4	13.98%
Total	62.2	70.2	79.4	90.2	103.2	118.8	137.5	160.2	15.07%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (others) market is projected to witness a CAGR of 15.07% and it is projected to reach USD 160.2 Million during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 71.7 Million by the end of 2023. However, North America region is projected to register the substantial growth rate (15.63%) during the forecast period 2018-2023.

TABLE 17 GLOBAL GLUTEN-FREE BEER (OTHERS) MARKET, BY REGION, 2016-2023 ('000 LITERS)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (2018-2023)
North America	3,058.6	3,399.5	3,782.7	4,204.9	4,727.0	5,312.8	6,013.3	6,893.4	12.75%
Europe	3,444.5	3,804.4	4,202.3	4,665.5	5,193.4	5,799.8	6,524.2	7,351.7	11.84%
Asia-Pacific	987.4	1,085.9	1,194.1	1,322.5	1,473.6	1,642.6	1,844.4	2,068.9	11.62%
Rest of the World	290.1	317.5	349.2	386.5	429.5	479.0	522.1	587.3	10.96%
Total	7,780.6	8,607.2	9,528.3	10,579.4	11,823.5	13,234.3	14,904.1	16,901.3	12.15%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Global gluten-free beer (others) market is projected to witness a CAGR of 12.15% and it is projected to reach to 16,901.3 '000 liters during the forecast period 2018-2023. Europe segment is anticipated to account for the maximum market proportion in the global gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 7,351.7 '000 liters by the end of 2023. However, North America region is projected to register the substantial growth rate (12.75%) during the forecast period 2018-2023.



Global Gluten-free Beer Market, by Region

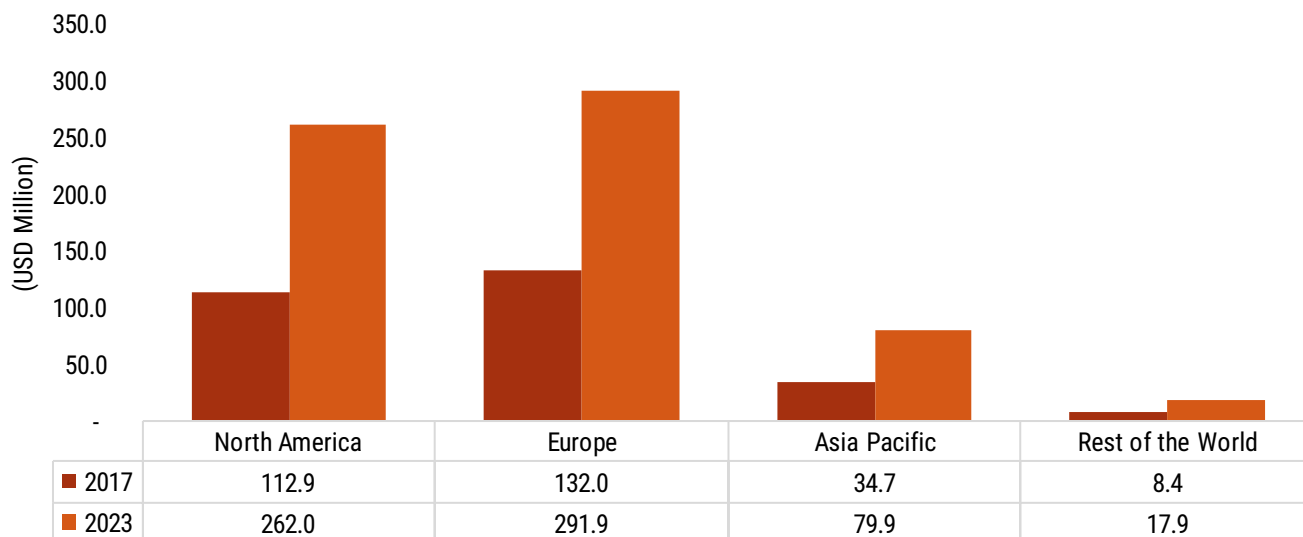
CHAPTER 8

8.1 Introduction

The report on the Global Gluten-free beer market has been segmented based on:

- North America
- Europe
- Asia Pacific
- Rest of the World

FIGURE 15 GLOBAL GLUTEN-FREE BEER MARKET, BY REGION 2017 & 2023 (USD MILLION)



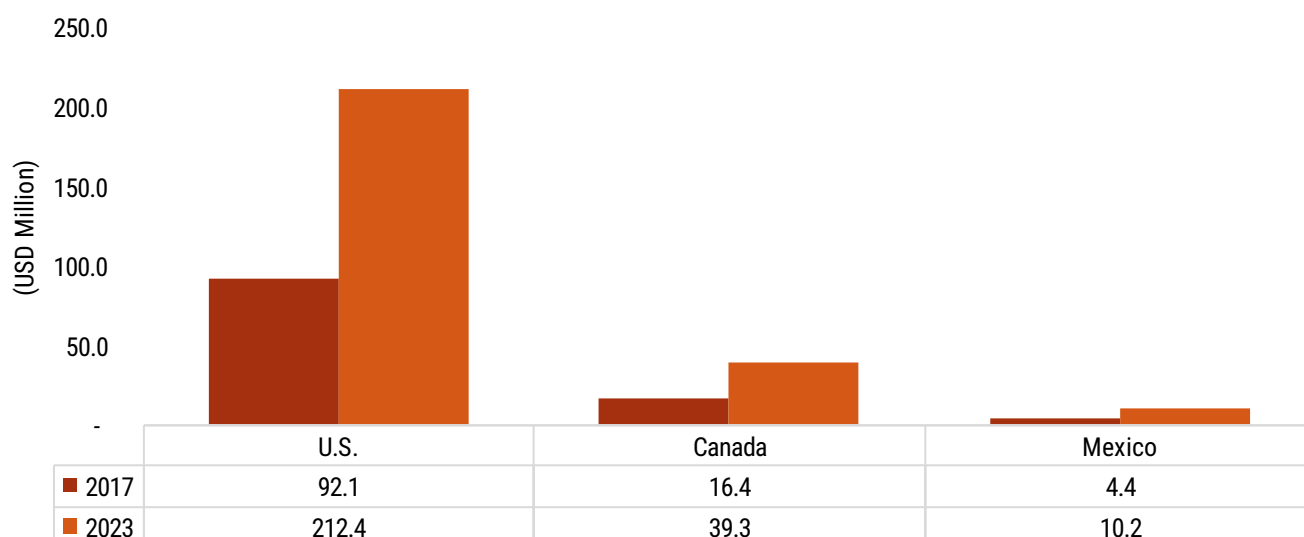
Source: MRFR Analysis, Secondary Research

8.2 North America

North America is one of the lucrative regions among the manufacturers of gluten-free beer. North America is accounting for 39.30% of market proportion in the year 2018, and it is projected to expand at a high growth during the forecast period of 2018-2023. The growth of the region is anticipated to be driven by various factors. Continuous product innovation is one of the major factors for the growth of the market. Rapid advancements have been noticed in the gluten-free beer market, starting from the various inclusions of raw materials to packaging. Manufacturers of gluten-free beer have adopted various technologies to achieve the desirable taste of beer. The advancement in technology has resulted in the introduction of a wide variety of gluten-free beer, which, in turn, escalates the demand for gluten-free beer in the region. In North America, the US is estimated to retain its dominance throughout the forecast period of 2018-2023. Over 1% of the US population is diagnosed with celiac disease while at least 80% of the population are undiagnosed or misdiagnosed, and the growing consciousness toward a healthy diet is one of the main factors for the increasing demand for gluten-free beer. With the introduction of various new products in the market, the market remains highly fragmented with both branded and private labels targeting for market share. The new FDA regulation of gluten-free products will also enable consumers to gain trust to choose products wisely.



FIGURE 16 NORTH AMERICA GLUTEN-FREE BEER MARKET, BY COUNTRY 2017 & 2023 (USD MILLION)



Source: MRFR Analysis, Secondary Research

TABLE 18 NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 (USD MILLION)

Country	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
U.S.	81.7	92.1	104.3	118.5	135.7	156.4	181.8	212.4	15.30%
Canada	14.4	16.4	18.7	21.3	24.6	28.5	33.4	39.3	16.05%
Mexico	3.8	4.4	4.9	5.6	6.5	7.5	8.8	10.2	15.66%
Total	100.0	112.9	127.9	145.5	166.8	192.5	224.0	262.0	15.42%

Source: Industry Expert, Secondary Research, and MRFR Analysis

North America gluten-free beer market is projected to witness a CAGR of 15.42% and it is projected to reach USD 262.0 Million during the forecast period 2018-2023. The U.S. is anticipated to account for the maximum market proportion in the North America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 212.4 Million by the end of 2023. However, Canada is projected to register the substantial growth rate (16.05%) during the forecast period 2018-2023.

TABLE 19 NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 ('000 LITERS)

Country	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
U.S.	9,611.6	10,652.6	11,819.9	13,100.8	14,683.0	16,453.5	18,572.3	21,236.0	12.43%
Canada	1,700.0	1,895.1	2,116.4	2,359.6	2,662.2	3,003.1	3,409.2	3,927.7	13.16%
Mexico	452.9	503.8	559.5	624.1	703.9	793.8	899.2	1,021.2	12.79%
Total	11,764.5	13,051.4	14,495.8	16,084.5	18,049.1	20,250.5	22,880.7	26,184.9	12.55%

Source: Industry Expert, Secondary Research, and MRFR Analysis

North America gluten-free beer market is projected to witness a CAGR of 12.55% and it is projected to reach to 26,184.9 '000 liters during the forecast period 2018-2023. The U.S. is anticipated to account for the maximum market proportion in the North America



gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 21,236.0 '000 liters by the end of 2023. However, Canada is projected to register the substantial growth rate (13.16%) during the forecast period 2018-2023.

TABLE 20 NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	67.1	75.6	85.6	97.3	111.3	128.3	149.1	174.1	15.26%
Gluten-reduced beer	32.9	37.2	42.3	48.2	55.4	64.2	74.9	87.9	15.75%
Total	100.0	112.9	127.9	145.5	166.8	192.5	224.0	262.0	15.42%

Source: Industry Expert, Secondary Research, and MRFR Analysis

North America gluten-free beer market is projected to witness a CAGR of 15.42% and it is projected to reach USD 262.0 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the North America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 174.1 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.75%) during the forecast period 2018-2023.

TABLE 21 NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	7,953.4	8,811.1	9,772.6	10,828.6	12,134.3	13,595.4	15,339.9	17,530.7	12.40%
Gluten-reduced beer	3,811.1	4,240.3	4,723.2	5,255.9	5,914.8	6,655.1	7,540.8	8,654.2	12.88%
Total	11,764.5	13,051.4	14,495.8	16,084.5	18,049.1	20,250.5	22,880.7	26,184.9	12.55%

Source: Industry Expert, Secondary Research, and MRFR Analysis

North America gluten-free beer market is projected to witness a CAGR of 15.42% and it is projected to reach to 26,184.9 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the North America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 17,530.7 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.88%) during the forecast period 2018-2023.

TABLE 22 NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	20.3	23.0	26.1	29.8	34.3	39.8	46.5	54.6	15.93%
Bottles	54.9	61.9	70.0	79.4	90.9	104.6	121.4	141.6	15.13%
Others	24.8	28.0	31.8	36.3	41.6	48.1	56.1	65.8	15.63%
Total	100.0	112.9	127.9	145.5	166.8	192.5	224.0	262.0	15.42%

Source: Industry Expert, Secondary Research, and MRFR Analysis



North America gluten-free beer market is projected to witness a CAGR of 15.42% and it is projected to reach USD 262.0 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the North America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 141.6 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.93%) during the forecast period 2018-2023.

TABLE 23 NORTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	2,492.9	2,776.1	3,095.0	3,447.2	3,882.8	4,372.9	4,959.5	5,697.2	12.98%
Bottles	6,213.1	6,875.9	7,618.2	8,432.4	9,439.3	10,564.8	11,907.9	13,594.3	12.28%
Others	3,058.6	3,399.5	3,782.7	4,204.9	4,727.0	5,312.8	6,013.3	6,893.4	12.75%
Total	11,764.5	13,051.4	14,495.8	16,084.5	18,049.1	20,250.5	22,880.7	26,184.9	12.55%

Source: Industry Expert, Secondary Research, and MRFR Analysis

North America gluten-free beer market is projected to witness a CAGR of 12.55% and it is projected to reach to 26,184.9 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the North America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 13,594.3 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.98%) during the forecast period 2018-2023.

8.2.1 U.S.

TABLE 24 U.S.: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	54.7	61.6	69.7	79.1	90.4	104.1	120.8	140.9	15.12%
Gluten-reduced beer	27.0	30.5	34.6	39.4	45.3	52.3	61.0	71.6	15.64%
Total	81.7	92.1	104.3	118.5	135.7	156.4	181.8	212.4	15.30%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.S. gluten-free beer market is projected to witness a CAGR of 15.30% and it is projected to reach USD 212.4 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the U.S. gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 140.9 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.64%) during the forecast period 2018-2023.



TABLE 25 U.S.: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	16.5	18.7	21.2	24.2	27.9	32.3	37.7	44.3	15.81%
Bottles	44.7	50.3	56.9	64.5	73.7	84.7	98.2	114.3	14.99%
Others	20.4	23.1	26.2	29.8	34.1	39.4	45.9	53.9	15.53%
Total	81.7	92.1	104.3	118.5	135.7	156.4	181.8	212.4	15.30%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.S. gluten-free beer market is projected to witness a CAGR of 15.30% and it is projected to reach USD 212.4 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the U.S. gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 114.3 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.81%) during the forecast period 2018-2023.

TABLE 26 U.S.: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	6,487.8	7,180.1	7,955.4	8,804.8	9,853.8	11,026.1	12,428.0	14,189.9	12.27%
Gluten-reduced beer	3,123.8	3,472.5	3,864.5	4,296.1	4,829.1	5,427.4	6,144.3	7,046.1	12.76%
Total	9,611.6	10,652.6	11,819.9	13,100.8	14,683.0	16,453.5	18,572.3	21,236.0	12.43%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.S. gluten-free beer market is projected to witness a CAGR of 15.30% and it is projected to reach to 21,236.0 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the U.S. gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 14,189.9 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.76%) during the forecast period 2018-2023.

TABLE 27 U.S.: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	2,042.5	2,272.4	2,531.1	2,816.2	3,168.5	3,564.3	4,038.8	4,635.8	12.87%
Bottles	5,077.8	5,613.5	6,212.9	6,868.7	7,678.7	8,582.8	9,663.5	11,021.5	12.15%
Others	2,491.3	2,766.7	3,075.9	3,415.9	3,835.8	4,306.4	4,870.0	5,578.7	12.64%
Total	9,611.6	10,652.6	11,819.9	13,100.8	14,683.0	16,453.5	18,572.3	21,236.0	12.43%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.S. gluten-free beer market is projected to witness a CAGR of 12.43% and it is projected to reach to 21,236.0 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the U.S. gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 11,021.5 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.87%) during the forecast period 2018-2023.



8.2.2 Canada

TABLE 28 CANADA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	9.8	11.0	12.6	14.4	16.5	19.2	22.4	26.3	15.92%
Gluten-reduced beer	4.7	5.3	6.1	7.0	8.1	9.4	11.0	13.0	16.30%
Total	14.4	16.4	18.7	21.3	24.6	28.5	33.4	39.3	16.05%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Canada gluten-free beer market is projected to witness a CAGR of 16.05% and it is projected to reach USD 39.3 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Canada gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 26.3 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (16.30%) during the forecast period 2018-2023.

TABLE 29 CANADA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	3.0	3.4	3.9	4.4	5.1	6.0	7.0	8.3	16.49%
Bottles	8.0	9.1	10.3	11.8	13.6	15.7	18.4	21.6	15.82%
Others	3.4	3.9	4.5	5.1	5.9	6.9	8.0	9.4	16.18%
Total	14.4	16.4	18.7	21.3	24.6	28.5	33.4	39.3	16.05%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Canada gluten-free beer market is projected to witness a CAGR of 16.05% and it is projected to reach USD 39.3 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Canada gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 21.6 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (16.49%) during the forecast period 2018-2023.

TABLE 30 CANADA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	1,156.0	1,287.2	1,435.8	1,598.9	1,801.9	2,030.3	2,302.2	2,649.3	13.03%
Gluten-reduced beer	544.0	607.9	680.6	760.6	860.3	972.8	1,107.0	1,278.5	13.44%
Total	1,700.0	1,895.1	2,116.4	2,359.6	2,662.2	3,003.1	3,409.2	3,927.7	13.16%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Canada gluten-free beer market is projected to witness a CAGR of 13.16% and it is projected to reach to 3,927.7 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Canada



gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 2,649.3 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (13.44%) during the forecast period 2018-2023.

TABLE 31 CANADA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	356.1	398.4	446.5	499.6	565.6	640.3	729.4	843.3	13.56%
Bottles	896.4	997.2	1,111.4	1,236.5	1,392.2	1,567.2	1,775.5	2,041.2	12.93%
Others	447.4	499.5	558.5	623.5	704.4	795.6	904.4	1,043.2	13.31%
Total	1,700.0	1,895.1	2,116.4	2,359.6	2,662.2	3,003.1	3,409.2	3,927.7	13.16%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Canada gluten-free beer market is projected to witness a CAGR of 13.16% and it is projected to reach to 3,927.7 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Canada gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 2,041.2 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (13.56%) during the forecast period 2018-2023.

8.2.3 Mexico

TABLE 32 MEXICO: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	2.6	3.0	3.3	3.8	4.4	5.1	5.9	6.9	15.50%
Gluten-reduced beer	1.2	1.4	1.6	1.8	2.1	2.5	2.9	3.3	16.00%
Total	3.8	4.4	4.9	5.6	6.5	7.5	8.8	10.2	15.66%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Mexico gluten-free beer market is projected to witness a CAGR of 15.66% and it is projected to reach USD 10.2 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Mexico gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 6.9 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (16.00%) during the forecast period 2018-2023.



TABLE 33 MEXICO: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	0.8	0.9	1.0	1.1	1.3	1.5	1.8	2.1	16.12%
Bottles	2.2	2.4	2.7	3.1	3.6	4.2	4.9	5.6	15.47%
Others	0.9	1.0	1.2	1.4	1.6	1.8	2.1	2.5	15.70%
Total	3.8	4.4	4.9	5.6	6.5	7.5	8.8	10.2	15.66%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Mexico gluten-free beer market is projected to witness a CAGR of 15.66% and it is projected to reach USD 10.2 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Mexico gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 5.6 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (16.12%) during the forecast period 2018-2023.

TABLE 34 MEXICO: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	309.6	343.9	381.4	424.9	478.6	539.0	609.8	691.6	12.64%
Gluten-reduced beer	143.4	159.9	178.1	199.2	225.3	254.8	289.5	329.6	13.10%
Total	452.9	503.8	559.5	624.1	703.9	793.8	899.2	1,021.2	12.79%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Mexico gluten-free beer market is projected to witness a CAGR of 12.79% and it is projected to reach to 1,021.2 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Mexico gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 691.6 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (13.10%) during the forecast period 2018-2023.

TABLE 35 MEXICO: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	94.3	105.3	117.4	131.4	148.7	168.3	191.4	218.1	13.20%
Bottles	238.8	265.2	294.0	327.3	368.4	414.7	468.9	531.5	12.58%
Others	119.8	133.4	148.2	165.5	186.8	210.8	238.9	271.5	12.87%
Total	452.9	503.8	559.5	624.1	703.9	793.8	899.2	1,021.2	12.79%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Mexico gluten-free beer market is projected to witness a CAGR of 12.79% and it is projected to reach to 1,021.2 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Mexico gluten-free



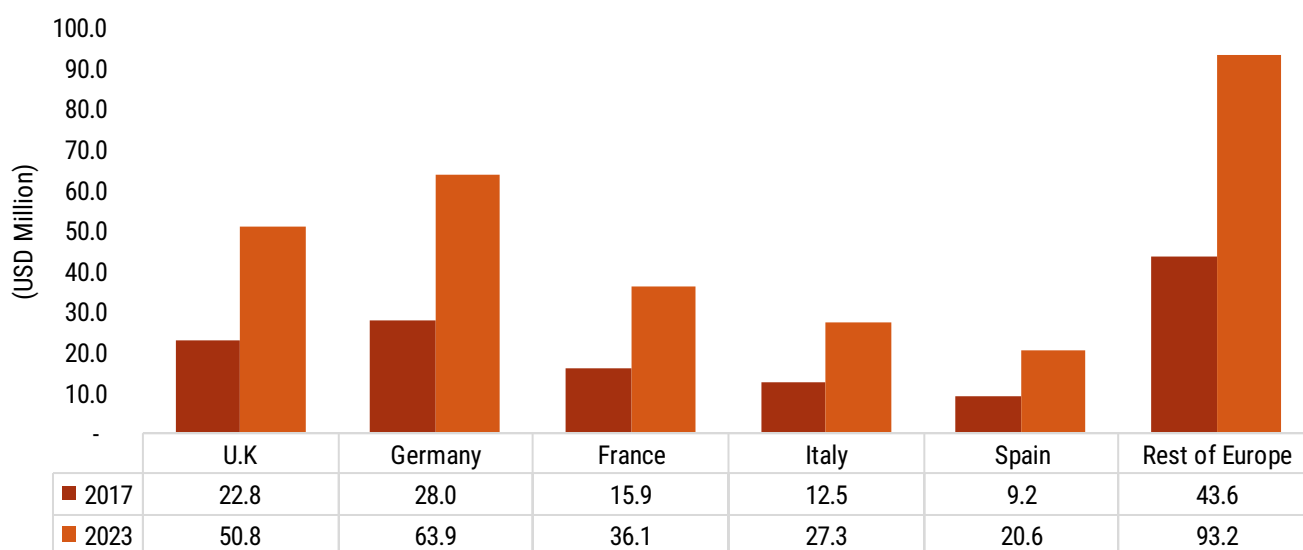
beer market over the forecast period of 2018-2023. The segment is projected to reach to 531.5 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (13.20%) during the forecast period 2018-2023.

8.3 Europe

Europe is also accounting for a significant market share in the global gluten-free beer market in the year 2018, and the trend is expected to continue throughout the forecast period 2018-2023. Europe is also expected to witness steady growth during the forecast period of 2018-2023 due to the early adopter. The growth of the Europe gluten-free beer market is anticipated to be driven by rising gluten intolerance among the consumers in Europe. In Europe, there are approximately 1% of the overall population are suffering from celiac diseases. The European market is also witnessing high growth even among non-celiac patients with an increasing number of product launches. Moreover, the consumption of beer is exceptionally high in the European countries as compared to the other regions. the micro-breweries have been set up in developed economies of European countries.

Moreover, micro-breweries are one of the major manufacturers of gluten-free beer. Rising growth of online retailing is one of the major factors gaining traction in the Europe gluten-free beer market over the last few years. Mainly, key manufacturers are emphasizing to increase their presence in the e-commerce to intensify the volume sales of gluten-free beer. Germany and the UK are the major countries in the Europe gluten-free beer market and accounting for a collectively significant market share of 38.6% in the year of 2018.

FIGURE 17 EUROPE GLUTEN-FREE BEER MARKET, BY COUNTRY 2017 & 2023 (USD MILLION)



Source: MRFR Analysis, Secondary Research



TABLE 36 EUROPE: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 (USD MILLION)

Country	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
U.K	20.3	22.8	25.7	29.1	33.2	38.1	43.9	50.8	14.58%
Germany	24.8	28.0	31.7	36.0	41.2	47.4	55.0	63.9	15.08%
France	14.1	15.9	18.0	20.5	23.4	26.9	31.1	36.1	14.88%
Italy	11.2	12.5	14.1	15.9	18.1	20.7	23.7	27.3	14.19%
Spain	8.2	9.2	10.4	11.7	13.4	15.3	17.7	20.6	14.68%
Rest of Europe	38.9	43.6	48.9	55.0	62.2	70.8	81.0	93.2	13.77%
Total	117.5	132.0	148.8	168.3	191.6	219.2	252.5	291.9	14.43%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Europe gluten-free beer market is projected to witness a CAGR of 14.43% and it is projected to reach USD 291.9 Million during the forecast period 2018-2023. Rest of Europe is anticipated to account for the maximum market proportion in the Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 93.2 Million by the end of 2023. However, Germany is projected to register the substantial growth rate (15.08%) during the forecast period 2018-2023.

TABLE 37 EUROPE: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 ('000 LITERS)

Country	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
U.K	2,289.4	2,531.1	2,796.9	3,106.4	3,461.4	3,869.5	4,354.9	4,906.6	11.90%
Germany	2,803.1	3,105.3	3,441.9	3,836.4	4,289.3	4,813.5	5,453.6	6,172.0	12.39%
France	1,592.6	1,767.9	1,961.0	2,184.5	2,441.9	2,731.8	3,083.4	3,486.2	12.20%
Italy	1,263.5	1,387.1	1,527.8	1,693.1	1,881.3	2,097.3	2,350.1	2,635.1	11.52%
Spain	922.4	1,019.5	1,126.8	1,251.0	1,393.9	1,558.5	1,758.2	1,985.5	12.00%
Rest of Europe	4,401.0	4,836.6	5,312.4	5,864.0	6,482.5	7,193.6	8,027.7	8,997.4	11.11%
Total	13,272.0	14,647.4	16,166.8	17,935.3	19,950.3	22,264.3	25,028.0	28,182.8	11.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Europe gluten-free beer market is projected to witness a CAGR of 11.76% and it is projected to reach to 28,182.8 '000 liters during the forecast period 2018-2023. Rest of Europe is anticipated to account for the maximum market proportion in the Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 8,997.4 '000 liters by the end of 2023. However, Germany is projected to register the substantial growth rate (12.39%) during the forecast period 2018-2023.



TABLE 38 EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	78.4	88.1	99.1	111.9	127.2	145.4	167.3	193.1	14.28%
Gluten-reduced beer	39.0	44.0	49.7	56.4	64.3	73.8	85.3	98.8	14.75%
Total	117.5	132.0	148.8	168.3	191.6	219.2	252.5	291.9	14.43%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Europe gluten-free beer market is projected to witness a CAGR of 14.43% and it is projected to reach USD 291.9 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 193.1 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.75%) during the forecast period 2018-2023.

TABLE 39 EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	8,911.3	9,821.5	10,825.6	11,993.6	13,322.9	14,847.9	16,668.0	18,743.6	11.60%
Gluten-reduced beer	4,360.7	4,825.9	5,341.1	5,941.7	6,627.4	7,416.4	8,360.0	9,439.2	12.06%
Total	13,272.0	14,647.4	16,166.8	17,935.3	19,950.3	22,264.3	25,028.0	28,182.8	11.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Europe gluten-free beer market is projected to witness a CAGR of 11.76% and it is projected to reach to 28,182.8 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 18,743.6 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.06%) during the forecast period 2018-2023.

TABLE 40 EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	23.9	27.0	30.5	34.6	39.6	45.5	52.6	61.0	14.88%
Bottles	64.9	72.8	81.9	92.5	105.1	120.0	138.0	159.2	14.21%
Others	28.6	32.2	36.4	41.2	46.9	53.8	62.0	71.7	14.56%
Total	117.5	132.0	148.8	168.3	191.6	219.2	252.5	291.9	14.43%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Europe gluten-free beer market is projected to witness a CAGR of 14.43% and it is projected to reach USD 291.9 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Europe gluten-free



beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 159.2 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.88%) during the forecast period 2018-2023.

TABLE 41 EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	2,736.7	3,031.9	3,359.2	3,740.9	4,177.2	4,679.6	5,280.8	5,969.2	12.19%
Bottles	7,090.8	7,811.1	8,605.3	9,528.9	10,579.7	11,784.9	13,223.0	14,862.0	11.55%
Others	3,444.5	3,804.4	4,202.3	4,665.5	5,193.4	5,799.8	6,524.2	7,351.7	11.84%
Total	13,272.0	14,647.4	16,166.8	17,935.3	19,950.3	22,264.3	25,028.0	28,182.8	11.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Europe gluten-free beer market is projected to witness a CAGR of 11.76% and it is projected to reach to 28,182.8 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 14,862.0 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.19%) during the forecast period 2018-2023.

8.3.1 U.K

TABLE 42 U.K: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	13.1	14.8	16.7	18.8	21.4	24.5	28.3	32.6	14.41%
Gluten-reduced beer	7.1	8.0	9.1	10.3	11.8	13.6	15.7	18.2	14.89%
Total	20.3	22.8	25.7	29.1	33.2	38.1	43.9	50.8	14.58%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.K gluten-free beer market is projected to witness a CAGR of 14.58% and it is projected to reach USD 50.8 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the U.K gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 32.6 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.89%) during the forecast period 2018-2023.

TABLE 43 U.K: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	4.3	4.8	5.5	6.2	7.1	8.2	9.5	11.1	15.02%
Bottles	11.1	12.5	14.1	15.9	18.1	20.7	23.8	27.5	14.30%
Others	4.8	5.5	6.2	7.0	8.0	9.2	10.6	12.3	14.81%
Total	20.3	22.8	25.7	29.1	33.2	38.1	43.9	50.8	14.58%

Source: Industry Expert, Secondary Research, and MRFR Analysis



The U.K gluten-free beer market is projected to witness a CAGR of 14.58% and it is projected to reach USD 50.8 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the U.K gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 27.5 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.02%) during the forecast period 2018-2023.

TABLE 44 U.K: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	1,495.0	1,650.3	1,820.9	2,019.4	2,246.8	2,508.0	2,818.3	3,170.7	11.73%
Gluten-reduced beer	794.4	880.8	976.0	1,087.0	1,214.6	1,361.6	1,536.5	1,736.0	12.21%
Total	2,289.4	2,531.1	2,796.9	3,106.4	3,461.4	3,869.5	4,354.9	4,906.6	11.90%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.K gluten-free beer market is projected to witness a CAGR of 11.90% and it is projected to reach to 4,906.6 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the U.K gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 3,170.7 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.21%) during the forecast period 2018-2023.

TABLE 45 U.K: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	492.9	547.0	606.8	676.5	756.6	849.1	959.2	1,084.9	12.32%
Bottles	1,262.6	1,392.5	1,535.0	1,700.7	1,890.5	2,108.3	2,367.0	2,660.4	11.63%
Others	533.9	591.6	655.1	729.2	814.2	912.2	1,028.7	1,161.4	12.13%
Total	2,289.4	2,531.1	2,796.9	3,106.4	3,461.4	3,869.5	4,354.9	4,906.6	11.90%

Source: Industry Expert, Secondary Research, and MRFR Analysis

The U.K gluten-free beer market is projected to witness a CAGR of 11.90% and it is projected to reach to 4,906.6 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the U.K gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 2,660.4 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.32%) during the forecast period 2018-2023.



8.3.2 Germany

TABLE 46 GERMANY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	16.2	18.2	20.6	23.4	26.7	30.7	35.6	41.3	14.94%
Gluten-reduced beer	8.6	9.8	11.1	12.6	14.5	16.7	19.4	22.6	15.34%
Total	24.8	28.0	31.7	36.0	41.2	47.4	55.0	63.9	15.08%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Germany gluten-free beer market is projected to witness a CAGR of 15.08% and it is projected to reach USD 63.9 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Germany gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 41.3 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.34%) during the forecast period 2018-2023.

TABLE 47 GERMANY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	5.1	5.8	6.5	7.5	8.6	9.9	11.5	13.5	15.50%
Bottles	13.6	15.3	17.3	19.6	22.4	25.7	29.8	34.5	14.85%
Others	6.1	6.9	7.9	8.9	10.2	11.8	13.7	16.0	15.23%
Total	24.8	28.0	31.7	36.0	41.2	47.4	55.0	63.9	15.08%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Germany gluten-free beer market is projected to witness a CAGR of 15.08% and it is projected to reach USD 63.9 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Germany gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 34.5 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.50%) during the forecast period 2018-2023.

TABLE 48 GERMANY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	1,838.2	2,034.0	2,251.8	2,506.8	2,799.4	3,137.8	3,550.7	4,013.7	12.25%
Gluten-reduced beer	964.8	1,071.3	1,190.1	1,329.5	1,489.9	1,675.8	1,902.9	2,158.4	12.64%
Total	2,803.1	3,105.3	3,441.9	3,836.4	4,289.3	4,813.5	5,453.6	6,172.0	12.39%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Germany gluten-free beer market is projected to witness a CAGR of 12.39% and it is projected to reach to 6,172.0 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Germany gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 4,013.7 '000 liters by



the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.64%) during the forecast period 2018-2023.

TABLE 49 GERMANY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	582.2	647.3	720.0	805.5	903.8	1,017.9	1,157.4	1,314.6	12.79%
Bottles	1,469.9	1,625.0	1,797.4	1,999.2	2,230.6	2,498.0	2,824.3	3,189.7	12.16%
Others	750.9	833.0	924.4	1,031.7	1,154.9	1,297.6	1,471.9	1,667.7	12.52%
Total	2,803.1	3,105.3	3,441.9	3,836.4	4,289.3	4,813.5	5,453.6	6,172.0	12.39%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Germany gluten-free beer market is projected to witness a CAGR of 12.39% and it is projected to reach to 6,172.0 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Germany gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 3,189.7 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.79%) during the forecast period 2018-2023.

8.3.3 France

TABLE 50 FRANCE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	9.7	10.9	12.3	14.0	16.0	18.3	21.2	24.5	14.73%
Gluten-reduced beer	4.4	5.0	5.7	6.5	7.5	8.6	10.0	11.6	15.21%
Total	14.1	15.9	18.0	20.5	23.4	26.9	31.1	36.1	14.88%

Source: Industry Expert, Secondary Research, and MRFR Analysis

France gluten-free beer market is projected to witness a CAGR of 14.88% and it is projected to reach USD 36.1 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the France gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 24.5 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.21%) during the forecast period 2018-2023.



TABLE 51 FRANCE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	3.0	3.4	3.8	4.3	5.0	5.7	6.7	7.8	15.30%
Bottles	7.7	8.7	9.8	11.1	12.7	14.5	16.8	19.4	14.68%
Others	3.5	3.9	4.4	5.0	5.8	6.6	7.7	8.9	14.97%
Total	14.1	15.9	18.0	20.5	23.4	26.9	31.1	36.1	14.88%

Source: Industry Expert, Secondary Research, and MRFR Analysis

France gluten-free beer market is projected to witness a CAGR of 14.88% and it is projected to reach USD 36.1 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the France gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 19.4 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.30%) during the forecast period 2018-2023.

TABLE 52 FRANCE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	1,098.6	1,217.9	1,349.2	1,501.0	1,675.6	1,872.1	2,110.3	2,382.8	12.05%
Gluten-reduced beer	494.0	550.0	611.9	683.6	766.3	859.7	973.1	1,103.4	12.52%
Total	1,592.6	1,767.9	1,961.0	2,184.5	2,441.9	2,731.8	3,083.4	3,486.2	12.20%

Source: Industry Expert, Secondary Research, and MRFR Analysis

France gluten-free beer market is projected to witness a CAGR of 12.20% and it is projected to reach to 3,486.2 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the France gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 2,382.8 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.52%) during the forecast period 2018-2023.

TABLE 53 FRANCE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	337.0	375.4	418.0	467.3	524.2	588.6	666.7	756.5	12.60%
Bottles	833.4	924.5	1,024.7	1,140.6	1,274.1	1,424.3	1,606.4	1,814.9	12.11%
Others	422.2	468.0	518.4	576.6	643.6	719.0	810.3	914.8	12.03%
Total	1,592.6	1,767.9	1,961.0	2,184.5	2,441.9	2,731.8	3,083.4	3,486.2	12.20%

Source: Industry Expert, Secondary Research, and MRFR Analysis

France gluten-free beer market is projected to witness a CAGR of 12.20% and it is projected to reach to 3,486.2 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the France gluten-free



beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,814.9 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.60%) during the forecast period 2018-2023.

8.3.4 Italy

TABLE 54 ITALY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	7.6	8.5	9.5	10.7	12.2	13.9	15.9	18.3	14.04%
Gluten-reduced beer	3.6	4.0	4.6	5.2	5.9	6.8	7.8	9.0	14.50%
Total	11.2	12.5	14.1	15.9	18.1	20.7	23.7	27.3	14.19%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Italy gluten-free beer market is projected to witness a CAGR of 14.19% and it is projected to reach USD 27.3 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Italy gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 18.3 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.50%) during the forecast period 2018-2023.

TABLE 55 ITALY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	2.2	2.5	2.8	3.1	3.6	4.1	4.8	5.5	14.63%
Bottles	6.3	7.0	7.8	8.8	10.0	11.5	13.1	15.1	13.99%
Others	2.7	3.1	3.4	3.9	4.4	5.1	5.8	6.7	14.27%
Total	11.2	12.5	14.1	15.9	18.1	20.7	23.7	27.3	14.19%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Italy gluten-free beer market is projected to witness a CAGR of 14.19% and it is projected to reach USD 27.3 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Italy gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 15.1 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.63%) during the forecast period 2018-2023.

TABLE 56 ITALY: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	859.2	942.0	1,036.1	1,146.7	1,272.5	1,416.7	1,585.4	1,775.3	11.37%
Gluten-reduced beer	404.3	445.1	491.6	546.4	608.8	680.6	764.7	859.8	11.83%
Total	1,263.5	1,387.1	1,527.8	1,693.1	1,881.3	2,097.3	2,350.1	2,635.1	11.52%

Source: Industry Expert, Secondary Research, and MRFR Analysis



Italy gluten-free beer market is projected to witness a CAGR of 11.52% and it is projected to reach to 2,635.1 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Italy gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,775.3 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.83%) during the forecast period 2018-2023.

TABLE 57 ITALY: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	252.7	278.5	307.8	342.4	381.9	427.4	480.7	541.0	11.94%
Bottles	683.9	749.5	824.0	911.6	1,011.1	1,125.2	1,258.6	1,408.7	11.32%
Others	326.9	359.1	395.9	439.1	488.3	544.7	610.8	685.4	11.60%
Total	1,263.5	1,387.1	1,527.8	1,693.1	1,881.3	2,097.3	2,350.1	2,635.1	11.52%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Italy gluten-free beer market is projected to witness a CAGR of 11.52% and it is projected to reach to 2,635.1 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Italy gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,408.7 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (11.94%) during the forecast period 2018-2023.

8.3.5 Spain

TABLE 58 SPAIN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	5.6	6.2	7.0	8.0	9.1	10.4	12.0	13.9	14.53%
Gluten-reduced beer	2.6	2.9	3.3	3.8	4.3	5.0	5.8	6.7	15.00%
Total	8.2	9.2	10.4	11.7	13.4	15.3	17.7	20.6	14.68%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Spain gluten-free beer market is projected to witness a CAGR of 14.68% and it is projected to reach USD 20.6 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Spain gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 13.9 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.00%) during the forecast period 2018-2023.



TABLE 59 SPAIN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	1.7	1.9	2.2	2.5	2.9	3.3	3.8	4.4	15.10%
Bottles	4.6	5.2	5.8	6.6	7.5	8.6	9.9	11.4	14.48%
Others	1.9	2.1	2.4	2.7	3.0	3.5	4.0	4.7	14.77%
Total	8.2	9.2	10.4	11.7	13.4	15.3	17.7	20.6	14.68%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Spain gluten-free beer market is projected to witness a CAGR of 14.68% and it is projected to reach USD 20.6 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Spain gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 11.4 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.10%) during the forecast period 2018-2023.

TABLE 60 SPAIN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	631.1	696.6	768.9	852.5	948.7	1,059.3	1,193.5	1,346.0	11.85%
Gluten-reduced beer	291.3	322.9	357.9	398.4	445.2	499.2	564.7	639.5	12.31%
Total	922.4	1,019.5	1,126.8	1,251.0	1,393.9	1,558.5	1,758.2	1,985.5	12.00%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Spain gluten-free beer market is projected to witness a CAGR of 12.00% and it is projected to reach to 1,985.5 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Spain gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,346.0 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.31%) during the forecast period 2018-2023.

TABLE 61 SPAIN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	198.3	220.0	244.0	271.8	304.0	341.1	386.1	437.6	12.39%
Bottles	498.3	549.7	606.5	672.2	747.6	834.4	939.7	1,059.3	11.80%
Others	225.8	249.8	276.3	307.0	342.3	383.0	432.4	488.6	12.08%
Total	922.4	1,019.5	1,126.8	1,251.0	1,393.9	1,558.5	1,758.2	1,985.5	12.00%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Spain gluten-free beer market is projected to witness a CAGR of 12.00% and it is projected to reach to 1,985.5 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Spain gluten-free



beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,059.3 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.39%) during the forecast period 2018-2023.

8.3.6 Rest of Europe

TABLE 62 REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	26.3	29.4	33.0	37.1	41.9	47.6	54.3	62.4	13.62%
Gluten-reduced beer	12.6	14.2	15.9	18.0	20.4	23.3	26.7	30.8	14.09%
Total	38.9	43.6	48.9	55.0	62.2	70.8	81.0	93.2	13.77%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of Europe gluten-free beer market is projected to witness a CAGR of 13.77% and it is projected to reach USD 93.2 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Rest of Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 62.4 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.09%) during the forecast period 2018-2023.

TABLE 63 REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	7.7	8.6	9.7	10.9	12.4	14.2	16.3	18.8	14.22%
Bottles	21.7	24.2	27.1	30.4	34.4	39.1	44.6	51.2	13.58%
Others	9.6	10.8	12.1	13.6	15.4	17.6	20.1	23.2	13.86%
Total	38.9	43.6	48.9	55.0	62.2	70.8	81.0	93.2	13.77%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of Europe gluten-free beer market is projected to witness a CAGR of 13.77% and it is projected to reach USD 93.2 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Rest of Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 51.2 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.22%) during the forecast period 2018-2023.



TABLE 64 REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	2,989.2	3,280.7	3,598.7	3,967.2	4,379.9	4,854.0	5,409.7	6,055.2	10.97%
Gluten-reduced beer	1,411.8	1,555.9	1,713.7	1,896.8	2,102.6	2,339.6	2,618.0	2,942.1	11.42%
Total	4,401.0	4,836.6	5,312.4	5,864.0	6,482.5	7,193.6	8,027.7	8,997.4	11.11%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of Europe gluten-free beer market is projected to witness a CAGR of 11.11% and it is projected to reach to 8,997.4 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Rest of Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 6,055.2 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.42%) during the forecast period 2018-2023.

TABLE 65 REST OF EUROPE: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	873.6	963.7	1,062.6	1,177.5	1,306.7	1,455.6	1,630.6	1,834.6	11.54%
Bottles	2,342.7	2,569.9	2,817.6	3,104.5	3,425.7	3,794.7	4,227.0	4,729.0	10.91%
Others	1,184.7	1,303.0	1,432.2	1,582.0	1,750.1	1,943.4	2,170.1	2,433.8	11.19%
Total	4,401.0	4,836.6	5,312.4	5,864.0	6,482.5	7,193.6	8,027.7	8,997.4	11.11%

Source: Industry Expert, Secondary Research, and MRFR Analysis

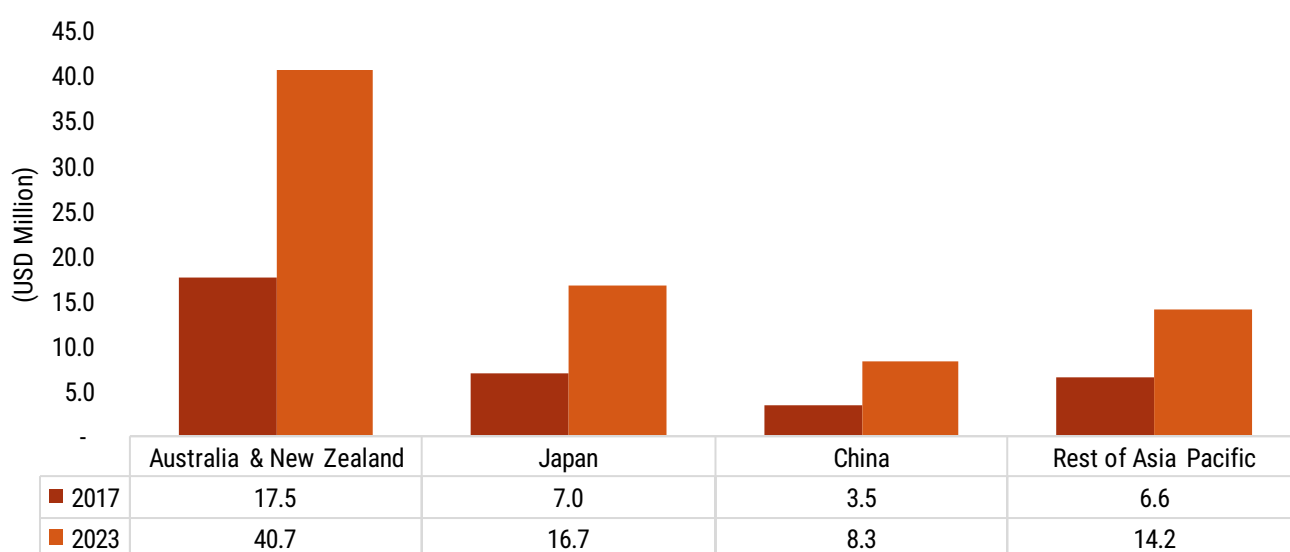
Rest of Europe gluten-free beer market is projected to witness a CAGR of 11.11% and it is projected to reach to 8,997.4 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Rest of Europe gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 4,729.0 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (11.54%) during the forecast period 2018-2023.



8.4 Asia Pacific

Asia-Pacific is considered to be the lucrative destination among the gluten-free beer manufacturers. The region is accounting for approximately 12.1% of the overall market proportion in the year 2018. However, Asia-Pacific is projected to expand at a substantial growth rate of 15.20% in terms of volume during the forecast period of 2018-2023. The growth of the gluten-free beer market in Asia-Pacific is anticipated to be driven by various factors. Mass urbanization coupled with growing middle-income population group is the key factors for the rising consumption of gluten-free beer products. In this region, Australia & New Zealand are collectively holding a major market share Asia-Pacific. Australia has seen a rise in the number of cardiac disorders due to unhealthy food habits owing to changing lifestyles. Changing lifestyles and working culture are adding to the demand for gluten-free beer in Australia & New Zealand. Due to the increasing adoption of healthy food & beverages habits, consumers have started consuming gluten-free beer instead of conventional beer.

FIGURE 18 ASIA PACIFIC GLUTEN-FREE BEER MARKET, BY COUNTRY 2017 & 2023 (USD MILLION)



Source: MRFR Analysis, Secondary Research

TABLE 66 ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 (USD MILLION)

Country	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Australia & New Zealand	15.5	17.5	19.9	22.7	26.1	30.1	34.9	40.7	15.37%
Japan	6.2	7.0	8.0	9.2	10.6	12.3	14.3	16.7	15.81%
China	3.1	3.5	4.0	4.6	5.3	6.1	7.1	8.3	15.61%
Rest of Asia Pacific	5.9	6.6	7.4	8.4	9.5	10.8	12.4	14.2	13.84%
Total	30.7	34.7	39.4	44.9	51.5	59.3	68.7	79.9	15.20%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Asia Pacific gluten-free beer market is projected to witness a CAGR of 15.20% and it is projected to reach USD 79.9 Million during the forecast period 2018-2023. Australia & New Zealand is anticipated to account for the maximum market proportion in the Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 40.7 Million by the end of 2023. However, Japan is projected to register the substantial growth rate (15.81%) during the forecast period 2018-2023.



TABLE 67 ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY COUNTRY, 2016-2023 ('000 LITERS)

Country	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Australia & New Zealand	2,004.0	2,202.1	2,419.9	2,678.8	2,985.9	3,329.1	3,738.0	4,194.9	11.63%
Japan	803.6	885.1	975.4	1,082.6	1,210.1	1,355.7	1,528.4	1,723.1	12.05%
China	402.8	443.7	489.1	543.2	606.8	678.8	762.8	856.6	11.86%
Rest of Asia Pacific	757.9	827.2	901.7	989.5	1,088.8	1,195.0	1,326.2	1,462.0	10.15%
Total	3,968.2	4,358.1	4,786.2	5,294.1	5,891.6	6,558.5	7,355.4	8,236.6	11.47%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Asia Pacific gluten-free beer market is projected to witness a CAGR of 11.47% and it is projected to reach to 8,236.6 '000 liters during the forecast period 2018-2023. Australia & New Zealand is anticipated to account for the maximum market proportion in the Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 4,194.9 '000 liters by the end of 2023. However, Japan is projected to register the substantial growth rate (12.05%) during the forecast period 2018-2023.

TABLE 68 ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	20.5	23.2	26.3	29.9	34.3	39.4	45.6	52.9	15.04%
Gluten-reduced beer	10.1	11.5	13.1	15.0	17.2	19.9	23.1	27.0	15.53%
Total	30.7	34.7	39.4	44.9	51.5	59.3	68.7	79.9	15.20%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Asia Pacific gluten-free beer market is projected to witness a CAGR of 15.20% and it is projected to reach USD 79.9 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 52.9 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.53%) during the forecast period 2018-2023.

TABLE 69 ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	2,665.9	2,923.7	3,206.4	3,541.7	3,935.8	4,375.1	4,899.6	5,478.7	11.31%
Gluten-reduced beer	1,302.3	1,434.4	1,579.7	1,752.4	1,955.8	2,183.5	2,455.7	2,757.9	11.79%
Total	3,968.2	4,358.1	4,786.2	5,294.1	5,891.6	6,558.5	7,355.4	8,236.6	11.47%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Asia Pacific gluten-free beer market is projected to witness a CAGR of 11.47% and it is projected to reach to 8,236.6 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Asia



Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 5,478.7 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.79%) during the forecast period 2018-2023.

TABLE 70 ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	6.7	7.6	8.6	9.9	11.4	13.1	15.3	17.8	15.63%
Bottles	17.1	19.2	21.8	24.8	28.4	32.6	37.7	43.7	14.95%
Others	7.0	7.9	9.0	10.2	11.7	13.6	15.7	18.3	15.40%
Total	30.7	34.7	39.4	44.9	51.5	59.3	68.7	79.9	15.20%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Asia Pacific gluten-free beer market is projected to witness a CAGR of 15.20% and it is projected to reach USD 79.9 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 43.7 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.63%) during the forecast period 2018-2023.

TABLE 71 ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	853.1	940.8	1,037.5	1,152.5	1,287.9	1,439.8	1,621.4	1,822.5	11.93%
Bottles	2,127.7	2,331.4	2,554.6	2,819.2	3,130.1	3,476.2	3,889.5	4,345.3	11.21%
Others	987.4	1,085.9	1,194.1	1,322.5	1,473.6	1,642.6	1,844.4	2,068.9	11.62%
Total	3,968.2	4,358.1	4,786.2	5,294.1	5,891.6	6,558.5	7,355.4	8,236.6	11.47%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Asia Pacific gluten-free beer market is projected to witness a CAGR of 11.47% and it is projected to reach to 8,236.6 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 4,345.3 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (11.93%) during the forecast period 2018-2023.



8.4.1 Australia & New Zealand

TABLE 72 AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	10.2	11.5	13.1	14.9	17.1	19.7	22.8	26.5	15.20%
Gluten-reduced beer	5.3	6.0	6.8	7.8	9.0	10.4	12.1	14.2	15.69%
Total	15.5	17.5	19.9	22.7	26.1	30.1	34.9	40.7	15.37%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Australia & New Zealand gluten-free beer market is projected to witness a CAGR of 15.37% and it is projected to reach USD 40.7 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Australia & New Zealand gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 26.5 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.69%) during the forecast period 2018-2023.

TABLE 73 AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	3.6	4.1	4.6	5.3	6.1	7.1	8.2	9.6	15.78%
Bottles	8.3	9.4	10.7	12.2	13.9	16.0	18.5	21.5	15.08%
Others	3.6	4.0	4.6	5.3	6.1	7.0	8.1	9.5	15.62%
Total	15.5	17.5	19.9	22.7	26.1	30.1	34.9	40.7	15.37%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Australia & New Zealand gluten-free beer market is projected to witness a CAGR of 15.37% and it is projected to reach USD 40.7 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Australia & New Zealand gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 21.5 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (15.78%) during the forecast period 2018-2023.

TABLE 74 AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	1,322.6	1,451.3	1,592.4	1,760.2	1,959.0	2,181.0	2,445.3	2,740.1	11.47%
Gluten-reduced beer	681.3	750.9	827.5	918.6	1,026.8	1,148.1	1,292.7	1,454.8	11.95%
Total	2,004.0	2,202.1	2,419.9	2,678.8	2,985.9	3,329.1	3,738.0	4,194.9	11.63%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Australia & New Zealand gluten-free beer market is projected to witness a CAGR of 11.63% and it is projected to reach to 4,194.9 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion



in the Australia & New Zealand gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 2,740.1 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.95%) during the forecast period 2018-2023.

TABLE 75 AUSTRALIA & NEW ZEALAND: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	456.9	503.9	555.7	617.4	690.6	772.8	870.8	980.8	12.03%
Bottles	1,040.7	1,140.6	1,250.2	1,380.4	1,534.6	1,706.6	1,911.3	2,139.4	11.34%
Others	506.4	557.6	614.0	681.1	760.6	849.7	955.9	1,074.7	11.85%
Total	2,004.0	2,202.1	2,419.9	2,678.8	2,985.9	3,329.1	3,738.0	4,194.9	11.63%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Australia & New Zealand gluten-free beer market is projected to witness a CAGR of 11.63% and it is projected to reach to 4,194.9 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Australia & New Zealand gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 2,139.4 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.03%) during the forecast period 2018-2023.

8.4.2 Japan

TABLE 76 JAPAN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	4.2	4.7	5.4	6.1	7.1	8.2	9.5	11.1	15.67%
Gluten-reduced beer	2.0	2.3	2.7	3.0	3.5	4.1	4.8	5.6	16.08%
Total	6.2	7.0	8.0	9.2	10.6	12.3	14.3	16.7	15.81%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Japan gluten-free beer market is projected to witness a CAGR of 15.81% and it is projected to reach USD 16.7 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Japan gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 11.1 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (16.08%) during the forecast period 2018-2023.



TABLE 77 JAPAN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	1.3	1.4	1.6	1.9	2.2	2.5	3.0	3.5	16.23%
Bottles	3.6	4.1	4.6	5.3	6.1	7.0	8.1	9.5	15.59%
Others	1.4	1.6	1.8	2.0	2.3	2.7	3.2	3.7	15.98%
Total	6.2	7.0	8.0	9.2	10.6	12.3	14.3	16.7	15.81%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Japan gluten-free beer market is projected to witness a CAGR of 15.81% and it is projected to reach USD 16.7 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Japan gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 9.5 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (16.23%) during the forecast period 2018-2023.

TABLE 78 JAPAN: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	542.5	596.9	657.0	728.3	813.2	909.9	1,024.6	1,153.8	11.92%
Gluten-reduced beer	261.1	288.3	318.5	354.3	397.0	445.8	503.8	569.3	12.32%
Total	803.6	885.1	975.4	1,082.6	1,210.1	1,355.7	1,528.4	1,723.1	12.05%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Japan gluten-free beer market is projected to witness a CAGR of 12.05% and it is projected to reach to 1,723.1 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Japan gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 1,153.8 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.32%) during the forecast period 2018-2023.

TABLE 79 JAPAN: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	161.7	178.7	197.7	220.2	247.1	277.8	314.3	355.6	12.46%
Bottles	446.4	490.7	539.7	597.9	667.0	745.7	839.1	944.1	11.83%
Others	195.5	215.7	238.0	264.6	296.1	332.2	375.0	423.4	12.21%
Total	803.6	885.1	975.4	1,082.6	1,210.1	1,355.7	1,528.4	1,723.1	12.05%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Japan gluten-free beer market is projected to witness a CAGR of 12.05% and it is projected to reach to 1,723.1 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Japan gluten-free



beer market over the forecast period of 2018-2023. The segment is projected to reach to 944.1 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.46%) during the forecast period 2018-2023.

8.4.3 China

TABLE 80 CHINA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	2.1	2.4	2.7	3.1	3.6	4.2	4.8	5.6	15.45%
Gluten-reduced beer	1.0	1.1	1.3	1.5	1.7	2.0	2.3	2.7	15.93%
Total	3.1	3.5	4.0	4.6	5.3	6.1	7.1	8.3	15.61%

Source: Industry Expert, Secondary Research, and MRFR Analysis

China gluten-free beer market is projected to witness a CAGR of 15.61% and it is projected to reach USD 8.3 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the China gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 5.6 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (15.93%) during the forecast period 2018-2023.

TABLE 81 CHINA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	0.6	0.7	0.8	1.0	1.1	1.3	1.5	1.7	16.03%
Bottles	1.7	1.9	2.2	2.5	2.9	3.4	3.9	4.5	15.40%
Others	0.8	0.9	1.0	1.1	1.3	1.5	1.7	2.0	15.69%
Total	3.1	3.5	4.0	4.6	5.3	6.1	7.1	8.3	15.61%

Source: Industry Expert, Secondary Research, and MRFR Analysis

China gluten-free beer market is projected to witness a CAGR of 15.61% and it is projected to reach USD 8.3 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the China gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 4.5 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (16.03%) during the forecast period 2018-2023.

TABLE 82 CHINA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	276.7	304.4	335.1	371.7	414.7	463.2	519.8	583.0	11.71%
Gluten-reduced beer	126.1	139.3	154.0	171.5	192.2	215.6	242.9	273.6	12.18%
Total	402.8	443.7	489.1	543.2	606.8	678.8	762.8	856.6	11.86%

Source: Industry Expert, Secondary Research, and MRFR Analysis



China gluten-free beer market is projected to witness a CAGR of 11.86% and it is projected to reach to 856.6 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the China gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 583.0 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (12.18%) during the forecast period 2018-2023.

TABLE 83 CHINA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	82.0	90.7	100.3	111.8	125.4	140.8	158.8	179.0	12.28%
Bottles	214.8	236.2	259.9	288.1	321.3	358.8	402.4	451.1	11.66%
Others	106.0	116.8	128.9	143.2	160.1	179.2	201.5	226.5	11.94%
Total	402.8	443.7	489.1	543.2	606.8	678.8	762.8	856.6	11.86%

Source: Industry Expert, Secondary Research, and MRFR Analysis

China gluten-free beer market is projected to witness a CAGR of 11.86% and it is projected to reach to 856.6 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the China gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 451.1 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (12.28%) during the forecast period 2018-2023.

8.4.4 Rest of Asia Pacific

TABLE 84 REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	4.0	4.5	5.1	5.8	6.5	7.4	8.5	9.7	13.69%
Gluten-reduced beer	1.8	2.1	2.3	2.6	3.0	3.4	3.9	4.5	14.16%
Total	5.9	6.6	7.4	8.4	9.5	10.8	12.4	14.2	13.84%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of Asia Pacific gluten-free beer market is projected to witness a CAGR of 13.84% and it is projected to reach USD 14.2 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Rest of Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 9.7 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.16%) during the forecast period 2018-2023.



TABLE 85 REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	1.2	1.3	1.5	1.7	2.0	2.2	2.6	3.0	14.26%
Bottles	3.4	3.8	4.3	4.9	5.5	6.2	7.1	8.2	13.65%
Others	1.3	1.4	1.6	1.8	2.1	2.3	2.7	3.1	13.93%
Total	5.9	6.6	7.4	8.4	9.5	10.8	12.4	14.2	13.84%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of Asia Pacific gluten-free beer market is projected to witness a CAGR of 13.84% and it is projected to reach USD 14.2 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Rest of Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 8.2 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.26%) during the forecast period 2018-2023.

TABLE 86 REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	524.1	571.2	621.9	681.5	749.0	820.9	909.9	1,001.8	10.00%
Gluten-reduced beer	233.8	255.9	279.8	307.9	339.8	374.0	416.3	460.2	10.46%
Total	757.9	827.2	901.7	989.5	1,088.8	1,195.0	1,326.2	1,462.0	10.15%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of Asia Pacific gluten-free beer market is projected to witness a CAGR of 10.15% and it is projected to reach to 1,462.0 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Rest of Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,001.8 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (10.46%) during the forecast period 2018-2023.

TABLE 87 REST OF ASIA PACIFIC: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	152.5	167.5	183.8	203.0	224.9	248.4	277.5	307.0	10.81%
Bottles	425.9	463.9	504.8	552.8	607.2	665.1	736.8	810.7	9.94%
Others	179.6	195.7	213.1	233.6	256.8	281.4	311.9	344.3	10.07%
Total	757.9	827.2	901.7	989.5	1,088.8	1,195.0	1,326.2	1,462.0	10.15%

Source: Industry Expert, Secondary Research, and MRFR Analysis

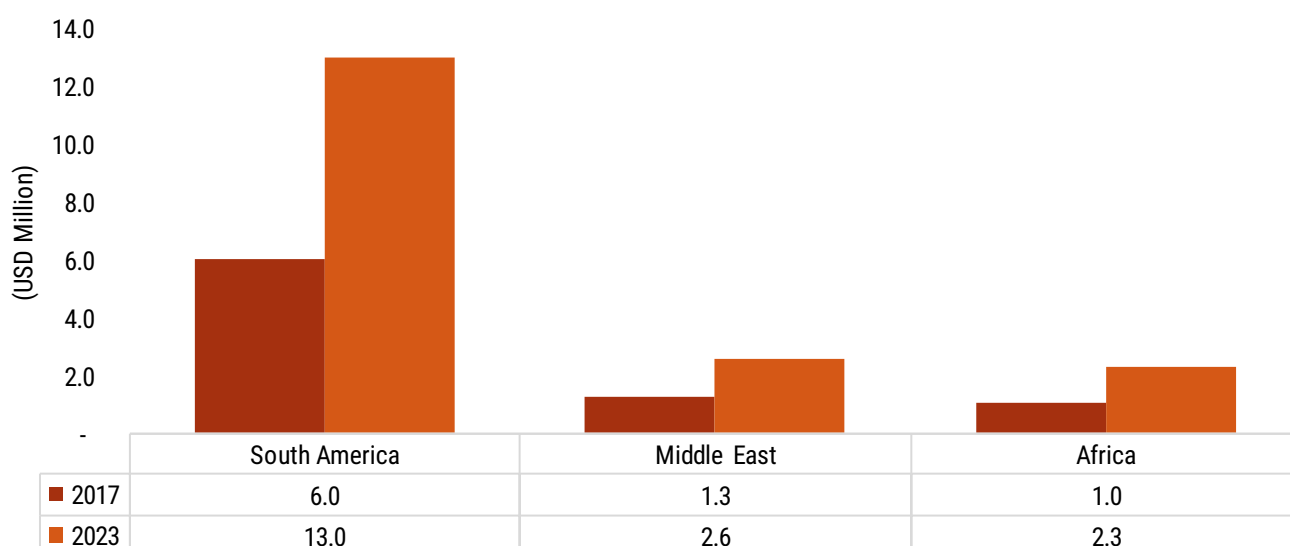


Rest of Asia Pacific gluten-free beer market is projected to witness a CAGR of 10.15% and it is projected to reach to 1,462.0 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Rest of Asia Pacific gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 810.7 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (10.81%) during the forecast period 2018-2023.

8.5 Rest of the World

Rest of the World consists of South America, the Middle East, and Africa. This segment is estimated to reach USD 17.9 million by the end of 2023, registering a growth rate of 13.76%. Among the segments, South America is estimated to retain its dominance throughout the forecast period of 2018-2023. Among the South America countries, Brazil is holding a significant market share of gluten-free beer in terms of consumption owing to the high growth of craft beer among the consumers. The Middle East is estimated to account for a 15.03% market share in the Rest of the World gluten-free beer market. The growth of the gluten-free beer will be low in the Middle Eastern countries owing to the regulations on alcohol consumption. However, Africa is projected to expand at a high growth rate of 14.25% during the forecast period of 2018-2023. South Africa is the major consumption of gluten-free beer in Africa, and the country is estimated to witness a double-digit growth rate in the coming decade.

FIGURE 19 REST OF THE WORLD GLUTEN-FREE BEER MARKET, BY REGION 2017 & 2023 (USD MILLION)



Source: MRFR Analysis, Secondary Research

TABLE 88 REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 (USD MILLION)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
South America	5.42	6.05	6.79	7.71	8.79	10.04	11.25	12.99	13.86%
Middle East	1.13	1.26	1.41	1.59	1.80	2.03	2.26	2.58	12.85%
Africa	0.94	1.04	1.17	1.33	1.52	1.74	1.96	2.28	14.25%
Total	7.49	8.35	9.37	10.64	12.11	13.82	15.48	17.85	13.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis



Rest of the World gluten-free beer market is projected to witness a CAGR of 13.76% and it is projected to reach USD 17.85 Million during the forecast period 2018-2023. South America is anticipated to account for the maximum market proportion in the Rest of the World gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 12.99 Million by the end of 2023. However, Africa is projected to register the substantial growth rate (14.25%) during the forecast period 2018-2023.

TABLE 89 REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY REGION, 2016-2023 ('000 LITERS)

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
South America	806.4	881.3	968.4	1,070.8	1,188.9	1,324.9	1,442.4	1,621.2	10.85%
Middle East	168.9	183.7	200.9	220.8	243.1	268.4	289.6	321.7	9.87%
Africa	139.3	152.3	167.4	185.2	206.1	230.1	251.7	284.9	11.23%
Total	1,114.5	1,217.2	1,336.7	1,476.7	1,638.0	1,823.4	1,983.8	2,227.9	10.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of the World gluten-free beer market is projected to witness a CAGR of 10.76% and it is projected to reach to 2,227.9 '000 liters during the forecast period 2018-2023. South America is anticipated to account for the maximum market proportion in the Rest of the World gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,621.2 '000 liters by the end of 2023. However, Africa is projected to register the substantial growth rate (11.23%) during the forecast period 2018-2023.

TABLE 90 REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	5.06	5.64	6.32	7.16	8.14	9.27	10.37	11.95	13.60%
Gluten-reduced beer	2.43	2.71	3.05	3.48	3.97	4.54	5.10	5.90	14.08%
Total	7.49	8.35	9.37	10.64	12.11	13.82	15.48	17.85	13.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of the World gluten-free beer market is projected to witness a CAGR of 13.76% and it is projected to reach USD 17.85 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Rest of the World gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 11.95 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.08%) during the forecast period 2018-2023.



TABLE 91 REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	777.2	847.7	929.6	1,025.6	1,136.1	1,263.0	1,372.3	1,539.0	10.61%
Gluten-reduced beer	337.3	369.5	407.1	451.1	501.9	560.4	611.6	688.9	11.09%
Total	1,114.5	1,217.2	1,336.7	1,476.7	1,638.0	1,823.4	1,983.8	2,227.9	10.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of the World gluten-free beer market is projected to witness a CAGR of 10.76% and it is projected to reach to 2,227.9 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Rest of the World gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,539.0 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.09%) during the forecast period 2018-2023.

TABLE 92 REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	1.63	1.82	2.05	2.34	2.67	3.06	3.44	3.98	14.19%
Bottles	4.06	4.52	5.06	5.73	6.51	7.41	8.27	9.52	13.49%
Others	1.80	2.01	2.26	2.57	2.93	3.35	3.76	4.35	13.98%
Total	7.49	8.35	9.37	10.64	12.11	13.82	15.48	17.85	13.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Rest of the World gluten-free beer market is projected to witness a CAGR of 13.76% and it is projected to reach USD 17.85 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Rest of the World gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 9.52 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.19%) during the forecast period 2018-2023.

TABLE 93 REST OF THE WORLD: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	244.7	268.2	295.7	327.8	365.0	407.8	445.4	502.2	11.18%
Bottles	579.7	631.5	691.8	762.3	843.5	936.5	1,016.3	1,138.3	10.47%
Others	290.1	317.5	349.2	386.5	429.5	479.0	522.1	587.3	10.96%
Total	1,114.5	1,217.2	1,336.7	1,476.7	1,638.0	1,823.4	1,983.8	2,227.9	10.76%

Source: Industry Expert, Secondary Research, and MRFR Analysis



Rest of the World gluten-free beer market is projected to witness a CAGR of 10.76% and it is projected to reach to 2,227.9 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Rest of the World gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,138.3 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (11.18%) during the forecast period 2018-2023.

8.5.1 South America

TABLE 94 SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	3.64	4.06	4.55	5.16	5.88	6.70	7.50	8.65	13.70%
Gluten-reduced beer	1.77	1.99	2.24	2.55	2.91	3.34	3.75	4.34	14.19%
Total	5.42	6.05	6.79	7.71	8.79	10.04	11.25	12.99	13.86%

Source: Industry Expert, Secondary Research, and MRFR Analysis

South America gluten-free beer market is projected to witness a CAGR of 13.86% and it is projected to reach USD 12.99 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the South America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 8.65 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.19%) during the forecast period 2018-2023.

TABLE 95 SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	1.21	1.35	1.53	1.74	1.99	2.28	2.57	2.97	14.28%
Bottles	2.86	3.19	3.57	4.04	4.60	5.24	5.85	6.74	13.57%
Others	1.35	1.51	1.69	1.93	2.20	2.52	2.83	3.28	14.09%
Total	5.42	6.05	6.79	7.71	8.79	10.04	11.25	12.99	13.86%

Source: Industry Expert, Secondary Research, and MRFR Analysis

South America gluten-free beer market is projected to witness a CAGR of 13.86% and it is projected to reach USD 12.99 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the South America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 6.74 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.28%) during the forecast period 2018-2023.



TABLE 96 SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	559.1	610.1	669.5	739.2	819.6	912.1	991.6	1,113.0	10.70%
Gluten-reduced beer	247.3	271.1	298.9	331.5	369.3	412.8	450.8	508.3	11.20%
Total	806.4	881.3	968.4	1,070.8	1,188.9	1,324.9	1,442.4	1,621.2	10.85%

Source: Industry Expert, Secondary Research, and MRFR Analysis

South America gluten-free beer market is projected to witness a CAGR of 10.85% and it is projected to reach to 1,621.2 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the South America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 1,113.0 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.20%) during the forecast period 2018-2023.

TABLE 97 SOUTH AMERICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	181.8	199.4	220.0	244.1	272.0	304.2	332.4	375.0	11.26%
Bottles	407.5	444.1	486.8	536.8	594.4	660.6	717.4	804.1	10.56%
Others	217.1	237.7	261.7	289.9	322.5	360.0	392.7	442.1	11.06%
Total	806.4	881.3	968.4	1,070.8	1,188.9	1,324.9	1,442.4	1,621.2	10.85%

Source: Industry Expert, Secondary Research, and MRFR Analysis

South America gluten-free beer market is projected to witness a CAGR of 10.85% and it is projected to reach to 1,621.2 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the South America gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 804.1 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (11.26%) during the forecast period 2018-2023.

8.5.2 Middle East

TABLE 98 MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	0.77	0.86	0.96	1.08	1.22	1.38	1.53	1.74	12.72%
Gluten-reduced beer	0.36	0.40	0.45	0.51	0.58	0.66	0.73	0.84	13.13%
Total	1.13	1.26	1.41	1.59	1.80	2.03	2.26	2.58	12.85%

Source: Industry Expert, Secondary Research, and MRFR Analysis



Middle East gluten-free beer market is projected to witness a CAGR of 12.85% and it is projected to reach USD 2.58 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Middle East gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 1.74 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (13.13%) during the forecast period 2018-2023.

TABLE 99 MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	0.23	0.25	0.29	0.32	0.37	0.42	0.47	0.53	13.26%
Bottles	0.67	0.74	0.82	0.93	1.05	1.18	1.31	1.49	12.64%
Others	0.24	0.27	0.30	0.34	0.38	0.43	0.48	0.55	13.03%
Total	1.13	1.26	1.41	1.59	1.80	2.03	2.26	2.58	12.85%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Middle East gluten-free beer market is projected to witness a CAGR of 12.85% and it is projected to reach USD 2.58 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Middle East gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 1.49 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (13.26%) during the forecast period 2018-2023.

TABLE 100 MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	118.6	128.9	140.8	154.6	170.0	187.5	202.1	224.2	9.75%
Gluten-reduced beer	50.2	54.8	60.1	66.2	73.1	80.9	87.5	97.5	10.16%
Total	168.9	183.7	200.9	220.8	243.1	268.4	289.6	321.7	9.87%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Middle East gluten-free beer market is projected to witness a CAGR of 9.87% and it is projected to reach to 321.7 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Middle East gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 224.2 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (10.16%) during the forecast period 2018-2023.



TABLE 101 MIDDLE EAST: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	34.4	37.5	41.2	45.4	50.2	55.6	60.2	67.2	10.30%
Bottles	95.7	103.9	113.5	124.5	136.8	150.7	162.3	180.0	9.67%
Others	38.8	42.2	46.3	50.9	56.1	62.1	67.1	74.4	9.99%
Total	168.9	183.7	200.9	220.8	243.1	268.4	289.6	321.7	9.87%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Middle East gluten-free beer market is projected to witness a CAGR of 9.87% and it is projected to reach to 321.7 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Middle East gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 180.0 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (10.30%) during the forecast period 2018-2023.

8.5.3 Africa

TABLE 102 AFRICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 (USD MILLION)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	0.65	0.72	0.81	0.92	1.05	1.20	1.35	1.56	14.10%
Gluten-reduced beer	0.29	0.32	0.37	0.42	0.48	0.55	0.62	0.72	14.57%
Total	0.94	1.04	1.17	1.33	1.52	1.74	1.96	2.28	14.25%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Africa gluten-free beer market is projected to witness a CAGR of 14.25% and it is projected to reach USD 2.28 Million during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Africa gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 1.56 Million by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (14.57%) during the forecast period 2018-2023.

TABLE 103 AFRICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 (USD MILLION)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	0.19	0.21	0.24	0.27	0.31	0.36	0.41	0.47	14.68%
Bottles	0.53	0.59	0.67	0.76	0.86	0.99	1.11	1.29	14.05%
Others	0.21	0.24	0.27	0.30	0.35	0.40	0.45	0.52	14.34%
Total	0.94	1.04	1.17	1.33	1.52	1.74	1.96	2.28	14.25%

Source: Industry Expert, Secondary Research, and MRFR Analysis



Africa gluten-free beer market is projected to witness a CAGR of 14.25% and it is projected to reach USD 2.28 Million during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Africa gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to USD 1.29 Million by the end of 2023. However, cans segment is projected to register the substantial growth rate (14.68%) during the forecast period 2018-2023.

TABLE 104 AFRICA: GLUTEN-FREE BEER MARKET, BY TYPE, 2016-2023 ('000 LITERS)

Type	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Gluten-free beer	99.5	108.7	119.3	131.8	146.5	163.4	178.5	201.8	11.09%
Gluten-reduced beer	39.8	43.6	48.1	53.4	59.6	66.7	73.2	83.1	11.58%
Total	139.3	152.3	167.4	185.2	206.1	230.1	251.7	284.9	11.23%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Africa gluten-free beer market is projected to witness a CAGR of 11.23% and it is projected to reach to 284.9 '000 liters during the forecast period 2018-2023. Gluten-free beer segment is anticipated to account for the maximum market proportion in the Africa gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 201.8 '000 liters by the end of 2023. However, gluten-reduced beer is projected to register the substantial growth rate (11.58%) during the forecast period 2018-2023.

TABLE 105 AFRICA: GLUTEN-FREE BEER MARKET, BY PACKAGING, 2016-2023 ('000 LITERS)

Packaging	2016	2017	2018	2019	2020	2021	2022	2023	CAGR % (2018-2023)
Cans	28.5	31.3	34.5	38.3	42.8	48.0	52.7	60.0	11.69%
Bottles	76.5	83.5	91.6	101.1	112.3	125.2	136.6	154.2	10.99%
Others	34.3	37.5	41.3	45.7	50.9	56.9	62.4	70.8	11.38%
Total	139.3	152.3	167.4	185.2	206.1	230.1	251.7	284.9	11.23%

Source: Industry Expert, Secondary Research, and MRFR Analysis

Africa gluten-free beer market is projected to witness a CAGR of 11.23% and it is projected to reach to 284.9 '000 liters during the forecast period 2018-2023. Bottles segment is anticipated to account for the maximum market proportion in the Africa gluten-free beer market over the forecast period of 2018-2023. The segment is projected to reach to 154.2 '000 liters by the end of 2023. However, cans segment is projected to register the substantial growth rate (11.69%) during the forecast period 2018-2023.



Company Profiles

CHAPTER 19

9.1 New Belgium Brewing Company, Inc.

9.1.1 Company Overview

Company Headquarters: Colorado, US

Founded: 1990

Workforce: 210 employees as of Dec 2017

Company Working: New Belgium Brewing Company, Inc. manufactures and sells beers. It produces a wide range of ale and lager beers in the United States. The company also sells drinkware, apparel, accessories, cycling products, beer decor, and other products online.

Company Revenue: USD 90.57 Million (2017)

9.1.2 Products Offered

Product	Description
Glutiny Pale Ale	The company offers gluten-reduced beer. This product is fermented from grains containing gluten and crafted to remove gluten. The gluten content of this product cannot be verified, and this product may contain gluten.

Source: Company Website and Press Releases

9.1.3 Key Developments

Date	Developments
Nov-2015	Product Launch- The company launched two gluten-free beer: Glutiny Pale Ale and Glutiny Golden Ale. The two beers are available in the New Belgium markets.

Source: Company Website and Press Releases

9.1.4 Key Strategies

The key strategy of the company is business expansion. It is highly focused on the expansion of their footprints by increasing the number of stores in a short span of time. Moreover, it has been focusing on the packaging of the product. Apart from this, the company is highly focusing on improvising its e-commerce business.



9.2 Les Brasseurs Sans Gluten Inc. (Glutenberg)

9.2.1 Company Overview

Company Headquarters: Quebec, Canada

Founded: 2010

Workforce: 25 employees as of Dec 2015

Company Working: Les Brasseurs Sans Gluten Inc. manufactures gluten-free craft beers in Canada. The brewery makes different types of beer using grains such as millet, buckwheat, corn, quinoa, and amaranth. The company has increased its production capacity and has also expanded in terms of distribution network. It distributes its gluten-free beer range in Australia, Sweden, Norway, Spain, and France. The company sells its gluten-free beer under the brand name of Glutenberg.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.2.2 Products Offered

Products		Description
Regular Products	Blonde	Glutenberg's Blonde is the proud originator of the series, the pioneer of real good gluten-free beer. Airy and lemony, this golden-hued beer reveals floral and lightly herbal notes, making room for a dry and tasty finale.
	APA	The American Pale Ale is Glutenberg's first incursion in the universe of hoppy beers. A savory concoction with citrusy notes, this beer perfectly showcases the brewery's versatility. Its orange and grapefruit aromas softly temper the straight-up character of American hops by endowing it with a slight touch of bitterness.
	Red	The Glutenberg Red stands out by the great complexity of its creation and taste. Brewed using two types of chestnuts, each requiring a specific roasting method, this unctuous beer with a roasted nut fragrance reveals unique flavors of caramel and coffee.
	IPA	Glutenberg's IPA is a dream come true for micro-brewed beer fans. A true little bomb of flavors, it presents a perfect harmony between citrus aroma, hops freshness and bitterness. This beer guarantees a soft contact with taste buds, releasing apricot and soft caramel notes.
	White	The Glutenberg White's distinction lies in its quinoa and amaranth composition, which endows it with a noticeable grainy profile, ensuring a steady mouth-feel. Soft and refreshing, with hints of coriander and curaçao, the White is the perfect nectar to quench your thirst.
	Non-alcoholic	Glutenberg non-alcoholic beer stands out by its aromas of herbs and cereals, as well as by its dry and tart finish.
Seasonal Products	Double IPA	The Glutenberg Double IPA is an instant classic with a sweet bitterness.
	Assemblage 1	Assemblage 1 consists of hopped mango beer refined in brandy barrels, to which was added a refreshing and tart beer. The result is dominant flavors of wood and marmalade, pineapple scents, and a frank bitterness that expresses itself in the finish.
	Assemblage 2	Assemblage 2 reveals unique aromas of tropical fruits and honey. Wild yeasts bring spicy and herbaceous flavors to the beer. The finish is sour and refreshing.



Products		Description
	GOSE	The Glutenberg Gose can be qualified as a sour beer, a type of beer that has gained overwhelming popularity in the world of craft brewing.
	Stout	Glutenberg Stout stands out by its opaque black color, its powerful cocoa bean accents, and its unique toasted cereal flavors.
Serie Gastronomie	Myrcene De Glace	The Myrcene de glace is a hybrid between beer and ice-wine. Made from Citra and Cascade hops, as well as a sweet fern, it is infused with Vidal Marc, a noble grape variety from Quebec.

Source: Company Website and Press Releases

9.2.3 Key Developments

Month & Year	Developments
Dec-2013	Expansion- The company has expanded its distribution network of gluten-free beer range in the United States.

Source: Company Website and Press Releases

9.2.4 Key Strategies

The company is making efforts in enhancing their marketing and distribution channel. The company sees its key strategy as investing in research and product development. The company believes in strengthening its presence across the geographies. Moreover, improvements in operational efficiency and general cost awareness have been important components to meet the consumer demands. These strategies aim to differentiate their offerings from that of the competitors.



9.3 Joseph James Brewing Company, Inc.

9.3.1 Company Overview

Company Headquarters: Henderson, US

Founded: 2008

Company Working: The company is located near the Las Vegas strip, US which offers huge consumer base for craft beer, and further to gluten-free beer market. This is the only production brewery in South Nevada which serves craft beer.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.3.2 Products Offered

Product	Description
Fox Tail Pale Ale	Fox Tail Pale Ale is brewed from a base of organic rice; this ale is undeniably unique. Solid hop bitterness is complimented with pear-like esters reminiscent of dry cider.

Source: Company Website and Press Releases

9.3.3 Key Developments

There have been no recent developments by the company in the gluten-free beer market.

9.3.4 Key Strategies

Joseph James Brewing Company, Inc. is frequently coming up with new product launches, which are healthy for the consumers and thus, grabbing the attention of increasing health-conscious population. The company is also focusing on its distribution channel along with product launches. Moreover, the company is currently undergoing several growth strategies to strengthen its product portfolio.



9.4 Stone Brewing Co.

9.4.1 Company Overview

Company Headquarters: California, US

Founded: 2011

Workforce: 13 employees as of May 2018

Company Working: Stone Brewing Co. produces and sells beers. It also sells tees, hats, growlers, and bottle openers online. The company has its operations in Shanghai, Napa, and Berlin. The company has grown from a small micro-brewery with just two founders into one of the largest craft breweries in the United States. The company aims to providing unique beers while maintaining the quality at the same time.

Company Revenue: USD 0.31 Million (2018)

9.4.2 Products Offered

Product	Description
Stone Delicious IPA	The product is gluten-removed beer incredibly flavorful and hopped in the typically heavy-handed way. Stone Delicious IPA is also fermented in a manner that breaks down and removes gluten, rendering gluten levels so significantly that the beer qualifies as a "gluten-reduced" ale per the U.S. Food and Drug Administration.

Source: Company Website and Press Releases

9.4.3 Key Developments

Month & Year	Developments
Jan-2015	Product Launch- The company launched Stone Delicious IPA gluten-reduces beer, a citrusy ale dry-hopped exclusively with El Dorado hops.

Source: Company Website and Press Releases

9.4.4 Key Strategies

Expansion of manufacturing capabilities to enhance efficiency is among the key strategies of the company. The company also plans to expand its operations to the existing and new geographical markets to increase their revenue stream further. The company is spending more on R&D and focusing on developing new and innovative products. The company is focused on delivering quality products with integrity and with respect for the environment.



9.5 Ground Breaker Brewing and Gastropub

9.5.1 Company Overview

Company Headquarters: Portland, US

Founded: 2011

Company Working: Ground Breaker Brewing and Gastropub is a dedicated gluten-free brewery. The company ensures every beer that is prepared is naturally gluten-free. The company engages in brewing, bottling, and distributing gluten-free beer.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.5.2 Products Offered

Products		Description
Year-Round Beers	PALE ALE	Pale Ale is brewed to be bright and crisp. We dry hop with Cascade and Meridian hops to provide a floral aroma with elements of citrus and pine.
	DARK ALE	Dark Ale uses very dark, espresso-like roasted chestnuts and lentils along with dark Belgian-style candi for a roasty flavor and aroma with notes of chocolate and dark fruits.
	IPA NO. 5	IPA No. 5 is brewed with roasted chestnuts, roasted lentils, and Belgian-style candi sugar. Crystal and Santiam hops are used during the boil and for dry-hopping. Crystal hops bring the classic Northwest IPA pine and citrus notes while Santiam adds hints of tropical and stone fruits.
	OLALLIE ALE	Olallie is brewed with blackberries and rose hips and then finished with copious amounts of Crystal hops for a classic Northwest aroma. Olallie is made light and dry with only a hint of bitterness.
Roll Up Door Series	IMPERIAL IPA	A uniquely American style, this double India Pale Ale boasts enough alcohol and bitterness to satisfy even the most enthusiastic Northwest hophead.
	CANCELLATION	A pale ale brewed with milk thistle, goji berries, dandelion root, burdock root, lemons, and schisandra berries.
	IMPERIAL DARKNESS	Deeply roasted chestnuts and lentils contribute to the above-the-rest body of this massive beer. With roasted cocoa nibs added to the mash and a generous amount of vanilla and coffee to the fermenter.

Source: Company Website and Press Releases

9.5.3 Key Developments

Month & Year	Developments
Mar-2018	Partnership/ Expansion- The company has partnered to bring award-winning gluten-free craft beer to the Centennial State. Ground Breaker beers are beginning to make their ways to stores across Colorado. Ground Breaker's year-round and seasonal lineups will be available, including many Great American Beer.

Source: Company Website and Press Releases



9.5.4 Key Strategies

The company majorly focuses on its growth strategy. The company also focuses on identifying new paths to enhance performance and generate revenue through diversified products. The company is spending more on R&D and focusing on developing new and innovative products in the gluten-free beer segment.



9.6 New Planet Beer Co.

9.6.1 Company Overview

Company Headquarters: Colorado, US

Founded: 2009

Company Working: New Planet Beer Co. manufacturers gluten-free beers, which are locally crafted in breweries in small batches. The company has its headquarters in Boulder, Colorado. In 2017, the company moved its brewing operations to Denver, Colorado, to a state-of-the-art brewery.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.6.2 Products Offered

Products	Description
Blonde Ale	The beer is light and refreshing prepared with mild citrus notes and a crisp, clean finish.
Pale Ale	The beer is strong in taste prepared with rich citrus notes and a distinct finish.
Tread Lightly Ale	The beer is a well-balanced and easy to drink with subtle citrus hop character and a crisp, clean finish.
Seclusion IPA	The beer is brewed with light malts, and dry hopped to create a hop forward citrus note. This four-times hopped IPA is robust and aromatic with just the right amount of bitterness.

Source: Company Website and Press Releases

9.6.3 Key Developments

Month & Year	Developments
Jan-2013	Product Launch- New Planet Beer Company, has launched great-tasting gluten-free beers Blonde Ale, Raspberry Ale, and Pale Ale.

Source: Company Website and Press Releases

9.6.4 Key Strategies

The company is strongly positioned in the gluten-free beer market and driving its growth by providing gluten-free beer with different flavors. The company is deeply committed to scientific innovation of new products and driving sustained long-term growth through greater flexibility, external orientation, speed, and ultimately, greater returns. Furthermore, the company is focused on creating brand awareness through various promotional activities.



9.7 Brasserie De Brunehaut S.A.

9.7.1 Company Overview

Company Headquarters: Brunehaut, Belgium

Founded: 1991

Company Working: Brasserie De Brunehaut S.A. manufactures gluten-free beers. The company keeps its products traditional by retaining the entirely natural brewing method for late fermentation beers which is refermented in bottles and kegs. At the same time modern, because modern and high-performance machinery ensures scrupulous compliance with hygiene regulations and a top-quality production with consistent flavor.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.7.2 Products Offered

Products	Description
Brunehaut White Organic & Gluten-free	It has a slightly stronger color than white beers. The beer is light, fine head with average maintenance.
Brunehaut Blond Organic	It is a very pleasant beer marked by bitterness. In addition to the yeast, it has a scent of acacia, even of small white flowers.
Brunehaut Amber Organic	It is a red beer with an old tawny color, delicate amber with cognac accents.
Brunehaut Triple Organic	The beer had a coppery appearance and maintained, antique or light with a good persistent head.

Source: Company Website and Press Releases.

9.7.3 Key Developments

There have been no recent developments by the company in the gluten-free beer market.

9.7.4 Key Strategies

The company holds a broad product portfolio in the gluten-free beer range and is also involved in new product launches to broaden its product portfolio. It is also focused on the strategic distribution of their products. The company is involved in the distribution of their products through the e-commerce platform which is a major strategy to expand their business. By doing this, the company doesn't need to incur additional cost to open new distribution centers.



9.8 Omission Brewing Co.

9.8.1 Company Overview

Company Headquarters: Oregon, US

Founded: 2012

Company Working: Omission Brewing Co. engages in brewing and sales of gluten-free craft beers in the United States and internationally. The company sells its beers directly to consumers in draft form in kegs, cans, and bottles at restaurants, bars, and liquor stores; and in cans and bottles at supermarkets, warehouse clubs, convenience stores, and drug stores. Omission Brewing Co. is operational as a successful brand of Craft Brew Alliance, Inc.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.8.2 Products Offered

Products	Description
Ultimate Light Golden Ale	Omission Ultimate Light Golden Ale is crafted to remove gluten.
IPA Bold and Hoppy	Omission IPA is a bold, hop forward Northwest-style IPA. The finish is crisp, clean, and refreshing.
Pale Ale Hoppy and Easy-Drinking	Omission Pale Ale is a hoppy and easy-drinking American Pale Ale. Brewed to showcase the Cascade hop profile, Omission Pale Ale's floral aroma is complemented by caramel malt body, making for a delicious craft beer.
Lager Bright and Crisp	Omission Lager is a refreshing and crisp beer, brewed in the traditional lager style. Omission Lager's aromatic hop profile offers a unique, easy-drinking beer for those looking for a lighter and approachable beer style.

Source: Company Website and Press Releases

9.8.3 Key Developments

Month & Year	Developments
Apr-2017	Product Launch- The company launched the ultimate light golden ale gluten-free beer. It is the perfect choice for beer drinkers who are looking for a lighter option but still want to enjoy the full flavor of a delicious craft beer.

Source: Company Website and Press Releases

9.8.4 Key Strategies

The company is highly focused on new product launches and expanding their product offerings. Their new product offerings are more inclined towards the gluten-free trend in the market. They are introducing new ingredients which fulfill their goal of offering health and wellness products. However, distribution channel will be the major focus of their strategic planning, in the coming years, along with the expansion of geographical footprints. The company is also involved in building strong customer connections through quality product offerings.



9.9 Lakefront Brewery Inc.

9.9.1 Company Overview

Company Headquarters: Wisconsin, US

Founded: 1987

Workforce: 105 employees as of Dec 2017

Company Working: Lakefront Brewery Inc. is a pioneer in making spirits and beers. As of year, 2017 the company was among one of largest craft breweries in Wisconsin. It produces over 50,000 barrels in 2016. The company currently offers more than 20 different beers with distribution in over 30 states, Australia, Canada, South Korea, and Ukraine.

Company Revenue: USD 20.22 Million (2017)

9.9.2 Products Offered

Products	Description
New Grist	New Grist is a one-of-a-kind beer brewed without wheat or barley. It is the first gluten-free beer granted label approval by the U.S. Government. Each batch gets tested for gluten content before bottling and shipping. Sorghum, rice, hops, water, and gluten-free yeast, combine to form a crisp, refreshing session beer brewed for those with celiac disease, or anyone with an appreciation for great-tasting, handmade beer.
New Grist Ginger	This beer is lightly prepared by ginger and malted sorghum. New Grist Ginger goes great with any variety of ginger-infused Asian dishes.

Source: Company Website and Press Releases

9.9.3 Key Developments

Month & Year	Developments
May-2015	Product Launch- The company launched a new gluten-free beer: New Grist Ginger. It is a specially-formulated beer which is free from gluten. The beer is brewed with rice, sorghum—instead of malted barley—hops and natural ginger.

Source: Company Website and Press Releases

9.9.4 Key Strategies

With close competitors around, the company is highly involved in research and following the trend of producing gluten-free alcoholic beverages. The company has involved itself in providing organic/gluten-free beers, which is receiving huge acceptance in the market. The company is highly focusing on refranchising strategy, which focuses on extracting the productivity, driving the top line growth and checking whether innovation sticks in the marketplace. Moreover, the company is making huge investments for the expansion of their production in the emerging markets.



9.10 Redbridge Beer

9.10.1 Company Overview

Company Headquarters: Missouri, US

Founded: 2012

Company Working: Redbridge Beer manufactures gluten-free beer without wheat or barley. The brewery produces full-bodied lager, brewed from sorghum for a well-balanced, moderately hopped taste. The company distributes its own gluten-free beers, as well as brands by other manufacturers through independent wholesalers in the United States and internationally. Redbridge Beer is a successful gluten-free beer brand which is operational under Anheuser-Busch Companies, LLC.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.10.2 Products Offered

Product	Description
Redbridge	Redbridge is a hearty, full-bodied lager brewed using imported Hallertau and domestic Cascade hops. It is brewed with sorghum and has a well-balanced, moderately hopped taste.

Source: Company Website and Press Releases

9.10.3 Key Developments

There have been no recent developments by the company in the gluten-free beer market.

9.10.4 Key Strategies

The company is committed to developing innovative and quality products for which it enormously invests in the R&D sector. In addition to developing new products, the R&D staff improves existing products based on advances in ingredients, packaging, and technology. With this strong emphasis on research, the company consistently introduces new products in the market. The company's primary focus is growing in gluten-free beer segment for which they are involved in a partnership with various companies having a presence in the gluten-free beer segment.



9.11 Whistler Brewing Company

9.11.1 Company Overview

Company Headquarters: Whistler, Canada

Founded: 2002

Workforce: 131 employees as of December 2017

Company Working: Whistler Brewing Company produces and markets beer under the brand name Whistler. The product portfolio of the company includes Whistler Cream Ale, Whistler Premium Lager, and Whistler Black Tusk. Whistler Brewing Company Ltd. started operating as a subsidiary of Big Rock Brewery Inc. since June 2001.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.11.2 Product Offered

Product	Description
Gluten Free Forager Lager	The company offers gluten-free beer under core beers category and is available in 330 ml bottles. Craft Gluten Free Lager is made with a grist of sorghum and rice. It's hop forward and full of character. Alcohol by volume is 5%, and the hops included are Bravo and Sterling.

Source: Company Website and Press Releases

9.11.3 Key Developments

There have been no recent developments by the company in the gluten-free beer market.

9.11.4 Key Strategies

The company plans to focus more on marketing strategies to expand the business and create strong brand visibility among consumers. The company is mainly inclined towards providing wide varieties of beer to attract customers as well as build consumer loyalty through product quality. It is expected that the company would introduce more products and try to expand in other parts of the region and building more manufacturing units to increase production size in the forecast period.



9.12 Ipswich Ale Brewery

9.12.1 Company Overview

Company Headquarters: Massachusetts, US

Founded: 2016

Workforce: 11-50 employees as of December 2017

Company Working: The Ipswich Ale Brewery opened its onsite restaurant with the name Ipswich Ale Brewer's Table, that features 15 tap lines and a diverse menu with a mix of tastes ranging from brewpub to New American cuisine. Ipswich also operates in the UK and stands as one of the oldest craft breweries in New England with a portfolio of classically styled beers that have become quite the local tradition.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.12.2 Product Offered

Product	Description
Ipswich Celia Saison	The company offers gluten free beer under Year-Round category. This sorghum-based gluten free offering is inspired by the rustic farmhouse ales of Belgium. Notes of zesty Curacao orange peel are matched with peppery Belgian yeast for a complex, yet quite quaffable Saison.

Source: Company Website and Press Releases

9.12.3 Key Developments

There have been no recent developments by the company in the gluten-free beer market.

9.12.4 Key Strategies

Ipswich brewery is mainly focused towards providing a great experience for the consumers who visit the restaurant by combining great food, great beer, and great friendship. The restaurant provides an eclectic menu and live concerts to attract a crowd. The company also believes in widening the product line by introducing new and innovative products that would create a demand for beer among consumers over other beverages. In the coming years, it is expected that the company would introduce more varieties of gluten-free beers to set a strong foothold in the gluten-free beer market.



9.13 Dogfish Head Craft Brewery Inc.

9.13.1 Company Overview

Company Headquarters: Delaware, US

Founded: 1995

Workforce: 100 employees as of December 2016

Company Working: Dogfish Head Craft Brewery operates into brewing and sales of gluten-free beers. The company offers brews and spirits. Dogfish also operates a restaurant and offers its products through a network of distributors and wholesalers to beer stores, bars, and restaurants.

Company Revenue: USD 39.18 Million (2016)

9.13.2 Products Offered

Product	Description
Dogfish Head Tweekson'ale	This sorghum-based ale is released four times a year in between their seasonal suds. Flavored with strawberries, sweetened with a bit of buckwheat honey, and topped off with hints of molasses and mild hops, the brew has a mild, fruity taste.
Ipswich Ale Celia Saison	Celia Saison was inspired by the rustic farmhouse ales of Belgium. The product is made from sorghum syrup; this beer has a spicy note that pairs well with tastes of Curaçao orange peels and Celeia hops.

Source: Company Website and Press Releases

9.13.3 Key Developments

Month & Year	Developments
September-2014	Expansion- The company announced a plan to build a new distillery in Milton, Delaware, the US
April-2013	Partnership- The company partnered with Charles Wells, to introduce the Dogfish Head DNA New World beer.

Source: Company Website and Press Releases

9.13.4 Key Strategies

Dogfish focuses on introducing new and innovative products by having its own research and development team to attract new consumers. Innovative packaging of products is also a part of the key strategies followed by the company. The company is partnering with companies to enter different regions with its brand. The company has also built a distillery to expand its distribution reach and increase productivity to cater to rising demand of the consumers. It is expected that the company will introduce new products and take steps to expand, geographically, during the forecast period.



9.14 Epic Brewing Company

9.14.1 Company Overview

Company Headquarters: Utah, US

Founded: 1992

Workforce: 100 employees as of December 2017

Company Working: Epic Brewing Company operates as a brewery and produces beer. Epic Brewing Company opened in Salt Lake City, Utah, with six fermentation tanks giving it the flexibility to create a variety of small batch, artisanal beer. The company operates in Denver as well as Salt Lake City and produces 39 plus beers.

Company Revenue: USD 39.18 Million (2016)

9.14.2 Product Offered

Product	Description
Glutenator	This product is the 18th release of the gluten-free Glutenator category and is made with light-bodied millet, brown rice, sweet potatoes, and molasses along with plenty of American hops. This beer has a golden color, aromas of hops and sweet potatoes with a sweet grain flavor and a clean, sorghum-free finish

Source: Company Website and Press Releases

9.14.3 Key Developments

Month & Year	Developments
December-2017	Acquisition- Epic Brewing purchased Telegraph Brewing Company, Santa Barbara's first and original craft brewery, and announced investment plans to expand Telegraph and broaden the brewery's reach as an additional brand in the Epic family.
August-2017	Partnership/Expansion- Epic Brewing announced about its new partnership with Breakthru Beverage Illinois to strengthen distribution in Illinois.
February-2017	Partnership/Expansion- Epic Brewing announced about its new partnership with Delta Pacific Distribution and Mussetter Distributing which expands its distribution footprint across Northern California.
June-2016	Partnership/Expansion- Epic Brewing continues its expansion on the east coast with distribution in Maryland by partnering with Backup Beverage LLC, Maryland's newest craft beer distributor.
January-2016	Partnership/Expansion- Epic Brewing announced about its expansion into the Massachusetts market by partnering with Atlantic Importing and Distributing Co. to handle the distribution across the state.

Source: Company Website and Press Releases



9.14.4 Key Strategies

Epic Brewing Company has always focused on introducing a variety of flavors in beer that has been a success. The company has mainly been focussing on expanding and strengthening distribution in the US by opening breweries and acquiring major companies in this region. Experimenting with ingredients and adding new flavors is one of the key strategies followed by the company to grow customer base. The company involves rapid expansion and increasing production but follows the principle of small batch production. Epic believes there is a beer for every person and every occasion.



9.15 Bellfield Brewery Ltd.

9.15.1 Company Overview

Company Headquarters: Edinburgh, UK

Founded: 2016

Workforce: Around ten employees as of December 2017

Company Working: Bellfield Brewery produces gluten free beer. The company is UK's first, dedicated gluten-free microbrewery and offers a range of products that include a wide variety of styles from lagers and ales to porters and stouts, with all its recipes designed in-house.

Company Revenue: This is a privately held company. Hence, the financial information is not available in the public domain.

9.15.2 Products Offered

Products & Description

This company is the UK's first dedicated gluten-free brewery, producing beer in small batches and uses traditional methods combined with non-traditional ingredients. Bellfield offers gluten-free beer as Bohemian Pilsner and Lawless Village IPA.

Source: Company Website and Press Releases

9.15.3 Key Developments

There have been no recent developments by the company in the gluten-free beer market.

9.15.4 Key Strategies

The company is majorly spending money on research and development so that it can produce certified gluten-free craft beers that everyone can enjoy. The company also produces beer in small batches, using traditional brewing methods combined with non-traditional ingredient and can be enjoyed by both coeliacs and consumers who wish to avoid gluten in their drinks. Bellfield is focussing on fundraising to accelerate international sales and expand in the UK and other parts of the globe. Increasing production and expanding geographically are expected to be the key strategies of the company in the forecast period.



Conclusion

10.1 Key Findings

- The global gluten-free beer market is estimated to grow at a rate of 14.90% during the period from 2018 to 2023. Increasing consumer inclination towards the healthy food & beverages is anticipated to drive the global gluten-free beer market.
- Gluten-free beer accounts for the largest market share in the global gluten-free beer market. However, gluten-reduced beer is projected to witness a CAGR of 15.22% during the forecast period.
- Key manufacturers are emphasizing in the mergers & acquisitions and new product launch to enhance the volume sales in the developed nations.
- Online retailing is one of the upcoming trends in the developing countries of Asia Pacific region. Increasing internet penetration coupled with the rising presence of e-commerce companies, the sales of the alcoholic beverages is expected to increase at a high pace. Gluten-free beer is one of the major alcoholic beverages among the consumers who are suffering from celiac diseases.
- Europe is estimated to account for the major market share in the global gluten-free beer market throughout the forecast period. However, North America region is projected to expand at a high growth rate during the forecast period of 2018-2023.
- Gluten-free beer manufacturers are now focusing more towards innovative techniques and use of new ingredients in order to enhance the intensify the sales of gluten-free beer.





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