

Specialty Coffee Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Coffee, Tea & Beverages (Food & Beverage)
> ****Source:**** <https://www.mordorintelligence.com/industry-reports/specialty-coffee-market>
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
:---	:---
Base Market Size	USD 37.36 billion
Projected Forecast (2031)	USD 37.36 billion
Growth Rate (CAGR)	6.86 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

![Major players in Specialty Coffee industry](images/chart_2.png)

![Specialty Coffee Market Size](images/chart_3.png)

![Specialty Coffee Market Share by Product Type, 2025](images/chart_4.png)

![Specialty Coffee Market Share by Distribution Channels, 2025](images/chart_5.png)

![Specialty Coffee Market CAGR (%), Growth Rate by Region](images/chart_6.png)

![Specialty Coffee Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period

2021 - 2031

Market Size (2026)

USD 37.36 Billion

Market Size (2031)

USD 52.06 Billion

Growth Rate (2026 - 2031)

6.86 %

Fastest Growing Market

Asia-Pacific

Largest Market
|

North America
|

Market Concentration
|

Medium
|

Major Players

*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

|

Market Overview

Specialty Coffee Market Analysis by Mordor Intelligence

The specialty coffee market was valued at USD 35.0 billion in 2025 and is estimated to grow from USD 37.4 billion in 2026 to reach USD 52.1 billion by 2031, at a CAGR of 6.86% during the forecast period (2026-2031). The specialty coffee market is being shaped by premiumization, as consumers are spending more on coffees with clearer origin, better taste, and stronger sourcing credentials. In the United States, specialty coffee maintained its lead over traditional coffee in daily consumption in 2026, indicating that the specialty coffee market has moved beyond a niche position in a key demand center. The specialty coffee market is also absorbing supply pressure from weather-related crop disruptions in Brazil and Vietnam, yet premium pricing has continued to protect value realization for stronger brands. At the same time, functional positioning, single-serve innovation, and cold-format development are widening the addressable use cases for the specialty coffee market beyond the café occasion. Large branded players are responding with pod partnerships, store expansion, and loyalty-led customer retention, while smaller roasters continue to compete on provenance, roast identity, and local relevance.

Key Report Takeaways

- * By product type, instant coffee accounted for 56.38% of the specialty coffee market in 2025, while coffee pods and capsules recorded the highest projected CAGR at 7.65% through 2031.
- * By category, conventional coffee accounted for 75.47% of revenue in 2025, while organic coffee is forecast to expand at an 8.02% CAGR through 2031.
- * By distribution channel, retail represented 65.27% of revenue in 2025, while foodservice is advancing at a 7.85% CAGR through 2031.
- * By geography, North America held 34.25% of the specialty coffee market share in 2025, while Asia-Pacific registered the fastest projected CAGR at 8.03% through 2031.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of Specialty Coffee Market*

Drivers |
(~) % Impact on CAGR Forecasts |
Geographic Relevance |
Impact Timeline |

Growing Consumer Preference for Premium Coffee Products

|

+1.4%
|

Global, concentrated in North America, Europe, and APAC urban centres

|

Long term (≥ 4 years)

|

Rising Coffee Culture and Café Consumption

|

+1.3%

|

Global, accelerating in APAC, MEA, and South America

|

Medium term (2–4 years)

|

Expansion of Specialty Coffee Chains and Independent Cafés

|

+0.9%
|

APAC, MEA, South America
|

Medium term (2–4 years)
|

Increasing Demand for Single-Origin Coffee

|

+0.8%
|

North America, Europe, Japan, South Korea
|

Long term (≥ 4 years)
|

Product Innovation in Brewing Methods

|

+0.7%
|

Global, led by North America, Europe, and South Korea
|

Short to medium term
|

Health and Wellness Perceptions of Coffee

|

+0.6%
|

North America and Europe, with emerging traction in APAC
|

Medium to long term
|

Source: Mordor Intelligence
|

Competitive Landscape

Competitive Landscape

The specialty coffee market remains fragmented, with scale advantage concentrated more in distribution, systems, and branded reach than in any single dominant brand position. Nestlé, Starbucks, and JDE Peet's remain important because they can fund innovation, manage broad retail relationships, and sustain visibility across multiple formats. Nestlé reported 7.3% organic growth in its coffee business in 2025, which shows that global incumbents are still expanding even in a volatile sourcing environment. Starbucks reported USD 9.5 billion in consolidated net revenue in Q2 FY2026, which highlights the continued power of branded coffee platforms with strong retail and digital engagement. At the same time, a long tail of independent roasters continues to define the specialty coffee market through local credibility, micro-lot sourcing, and roast transparency.

Strategic moves in 2025 and 2026 show that competition in the specialty coffee market is being shaped by format control, system access, and customer retention tools. Keurig Dr Pepper and Nestlé USA extended their Starbucks K-Cup partnership in April 2026, which strengthened one of the largest licensed pod ecosystems in North America. Lavazza's June 2026 launch of Tabli in the United States was another important move because it challenged plastic-heavy single-serve systems with a new tab-based format. Starbucks also launched a redesigned three-tier loyalty structure in March 2026, which showed how digital retention and premium tiering are becoming more important in the specialty coffee market. These moves matter because taste alone is no longer enough to secure long-term advantage.

JDE Peet's added another layer to the competitive picture by pairing brand focus with portfolio reshaping. Its July 2025 brand-led strategy centered investment around Peet's, L'OR, and Jacobs, while productivity savings were meant to support reinvestment into growth drivers. The planned combination with Keurig Dr Pepper also points to a larger push toward system strength and broader household reach inside the specialty coffee market. This leaves meaningful room for mid-sized roasters that can offer specialty quality at more accessible price points without losing origin credibility.

Specialty Coffee Industry Leaders

*

Nestle S.A.

*

JDE Peet's N.V.

*

Luigi Lavazza S.p.A.

*

Keurig Dr Pepper Inc.

*

The J.M. Smucker Company

*

*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Component Component 3 Scope Of The Report Bottom

Global Specialty Coffee Market Report Scope

Product Type

Whole Bean Coffee
|

Ground Coffee
|

Instant Coffee
|

Coffee Pods and Capsules

Other Product Types

Segmentation Accordion Item

By Geography

North America

United States

|

Canada

|

Mexico

|

Rest of North America

|

Europe

|

Germany

|

|

United Kingdom

|

|

France

|

|

Italy
|

|

Spain
|

|

Netherlands
|

|

Sweden
|

|

Poland
|

|

Belgium

|

|

Rest of Europe

|

Asia-Pacific

|

China

|

|

India

|

|

Japan
|

|

Australia
|

|

South Korea
|

|

Vietnam
|

|

Indonesia
|

|

Thailand

|

|

Singapore

|

|

Rest of Asia-Pacific

|

South America

|

Brazil

|

|

Argentina

|

|

Chile

|

|

Peru

|

|

Colombia

|

|

Rest of South America
|

Middle East and Africa
|

United Arab Emirates
|

|

Saudi Arabia
|

|

South Africa
|

|

Nigeria
|

|

Egypt

|

|

Morocco

|

|

Turkey

|

|

Rest of Middle East and Africa

|

Frequently Asked Questions

What is the current size of specialty coffee in 2026 and where is it heading by 2031?

The specialty coffee market stands at USD 37.36 billion in 2026 and is forecast to reach USD 52.06 billion by 2031 at a 6.86% CAGR.

Which product type is growing the fastest in specialty coffee?

Coffee pods and capsules are the fastest-growing product type, with a projected 7.65% CAGR through 2031, supported by home brewing demand and single-serve system expansion.

Why does instant coffee still lead revenue despite premium trends?

Instant coffee held 56.38% of 2025 revenue because it combines convenience, affordability, and broad access, while premium instant formats are narrowing the quality gap.

Which region leads demand and which one is growing the fastest?

North America led with 34.25% revenue share in 2025, while Asia-Pacific is projected to expand the fastest at an 8.03% CAGR through 2031.