

Global Arabica Coffee Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



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

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

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

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 78.6 bn
Forecast (2031)	USD 114 bn
CAGR (2021-2031)	6.4%
Study period	2021-2031
Largest region	Europe · 34.8%
Fastest-growing region	Asia-Pacific · 8.4%
Market concentration	Moderate
Licence	Individual / Company

The global Arabica coffee market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, representing a XX% CAGR. Premium whole-bean coffee, specialty grades, single-origin sourcing and cold-coffee applications are increasing the value captured from each kilogram of Arabica. Europe remains the largest consuming region with XX% of market value, while Asia-Pacific is the fastest-growing region at an XX% CAGR. Supply remains anchored in Brazil, Colombia and Ethiopia, making climate resilience, traceability and origin diversification central to procurement strategy.

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Executive summary

The global Arabica coffee market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, representing a XX% CAGR. Premium whole-bean coffee, specialty grades, single-origin sourcing and cold-coffee applications are increasing the value captured from each kilogram of Arabica. Europe remains the largest consuming region with XX% of market value, while Asia-Pacific is the fastest-growing region at an XX% CAGR. Supply remains anchored in Brazil, Colombia and Ethiopia, making climate resilience, traceability and origin diversification central to procurement strategy.

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

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global Arabica production totaled XXX 60-kilogram bags in 2025/26 and is forecast by USDA to recover to XXX bags in 2026/27.
- Brazil produced XXX Arabica bags in 2025/26, equivalent to XX% of global Arabica output.
- Colombia and Ethiopia produced XXX and XXX Arabica bags respectively in 2025/26.
- Europe accounted for XX% of 2025 market value, followed by North America at XX%.
- Roasted whole-bean coffee represented XX% of market value and will grow at a XX% CAGR through 2031.
- Specialty-grade Arabica accounted for XX% of value and is the fastest-growing quality tier at a XX% CAGR.
- FAO recorded a XX% increase in world coffee prices during 2024, while December 2024 Arabica prices were XX% above the prior-year level.

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Market size and forecast

Market value by year, USD bn

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

Source: XXX

Year-over-year value change

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

Source: XXX

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Global Arabica Coffee Market Trends and Growth Drivers

Arabica enters the forecast period after an exceptional repricing cycle. Weather-related supply pressure, reduced inventories and higher financing costs lifted green-coffee prices, while roasters passed part of the increase into retail and foodservice pricing. The resulting market is larger in value but more demanding in working capital, procurement discipline and consumer-price management.

Demand is simultaneously moving toward higher-value formats. Whole-bean coffee, traceable specialty lots, capsules and cold-coffee products allow manufacturers to monetise quality, convenience and brand experience rather than competing solely on commodity cost. This shift supports sustained value growth even as mature-market hot-coffee volumes advance slowly.

Supply resilience now determines competitive advantage. Brazil's production cycle remains the largest swing factor, but multinational buyers are investing across Colombia, Ethiopia, Central America and emerging origins to diversify availability. Traceability systems, climate-resilient planting material, irrigation and farmer finance increasingly sit inside core sourcing strategy.

Growth drivers

Premium whole-bean and specialty trading-up

Consumers are allocating more spending to fresh whole-bean, single-origin and differentiated roast profiles, allowing roasters to widen the value gap between Arabica and mainstream blends. The mechanism is strongest in specialty retail, premium grocery and direct-to-consumer subscriptions, where provenance and sensory quality support higher unit revenue.

Cold coffee creates new consumption occasions

Espresso concentrates, cold-soluble coffee and ready-to-drink products are moving Arabica beyond the traditional hot-beverage occasion. Younger consumers, convenience-led formats and all-day consumption increase both household penetration and the addressable ingredient market for premium Arabica extracts.

Specialty café expansion in emerging cities

Independent cafés and scaled chains are introducing espresso-based Arabica beverages to urban consumers across China, India, Southeast Asia and the Gulf. Store expansion builds consumer knowledge of origin, processing and roast quality, creating a subsequent pull-through effect in packaged retail coffee.

Capsules and bean-to-cup convenience

Single-serve capsules and automated bean-to-cup machines reproduce café-style drinks with low preparation time and consistent dosing. The installed equipment base supports recurring purchases of higher-value Arabica pods and beans, strengthening category value even where beverage volumes grow moderately.

Traceable sourcing strengthens price realisation

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Verified origin, farm-level traceability and measurable environmental outcomes allow suppliers to secure preferred status with multinational roasters and premium brands. These programmes increase the proportion of coffee sold through differentiated contracts rather than undifferentiated commodity channels.

Farm renovation and improved cultivars

Replanting aging trees with disease-resistant and higher-yielding varieties raises output per hectare and stabilises farmer economics. Ethiopia, Honduras, Mexico and selected Colombian regions provide meaningful expansion potential as agronomy support and access to productive planting material improve.

Restraints

Climate-driven Arabica supply volatility

Arabica's exposure to temperature, rainfall timing, frost and high-altitude growing conditions creates pronounced production swings. Drought and heat in Brazil transmit quickly into benchmark prices, inventory policy and blend reformulation across global roasters.

High prices pressure consumer affordability

Elevated green-coffee costs require roasters to raise shelf prices, reduce promotional depth or compress margins. Price-sensitive households respond by buying smaller packs, reducing frequency or shifting toward blends with higher Robusta content.

Traceability and due-diligence expense

Plot-level geolocation, supplier documentation and risk assessment require new data systems and field verification. Large traders can spread these costs across substantial volumes, while smaller exporters and fragmented cooperatives face higher compliance costs per bag.

Smallholder financing and labour constraints

Many Arabica farms face limited access to renovation finance, rising harvest wages and competition for rural labour. Deferred pruning, fertiliser use and replanting restrict yield improvement and increase the risk of producer exit during adverse crop cycles.

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Arabica Coffee Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium whole-bean and specialty trading-up	XXX	XXX	XXX
Cold coffee creates new consumption occasions	XXX	XXX	XXX
Specialty café expansion in emerging cities	XXX	XXX	XXX
Capsules and bean-to-cup convenience	XXX	XXX	XXX
Traceable sourcing strengthens price realisation	XXX	XXX	XXX
Farm renovation and improved cultivars	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate-driven Arabica supply volatility	XXX	XXX	XXX
High prices pressure consumer affordability	XXX	XXX	XXX
Traceability and due-diligence expense	XXX	XXX	XXX
Smallholder financing and labour constraints	XXX	XXX	XXX

Source: XXX

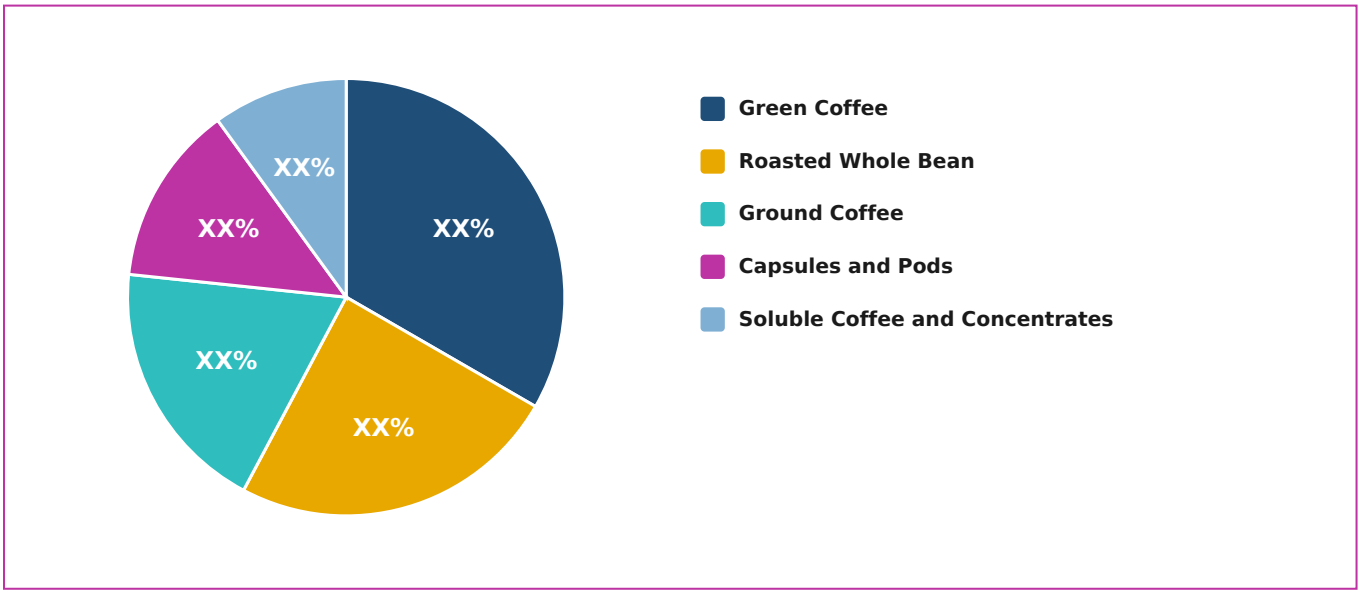
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Arabica Coffee Market Segmentation by Form, Quality, Processing and Channel

By Product Form

Green Arabica remains the largest form because international merchants and industrial roasters transact substantial volumes before roasting. Roasted whole bean gains from home grinding and specialty retail, while capsules convert lower physical volumes into high unit revenue. Concentrates and premium soluble products grow through cold-coffee convenience and scalable foodservice applications.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Green Coffee	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roasted Whole Bean	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ground Coffee	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Capsules and Pods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soluble Coffee and Concentrates	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

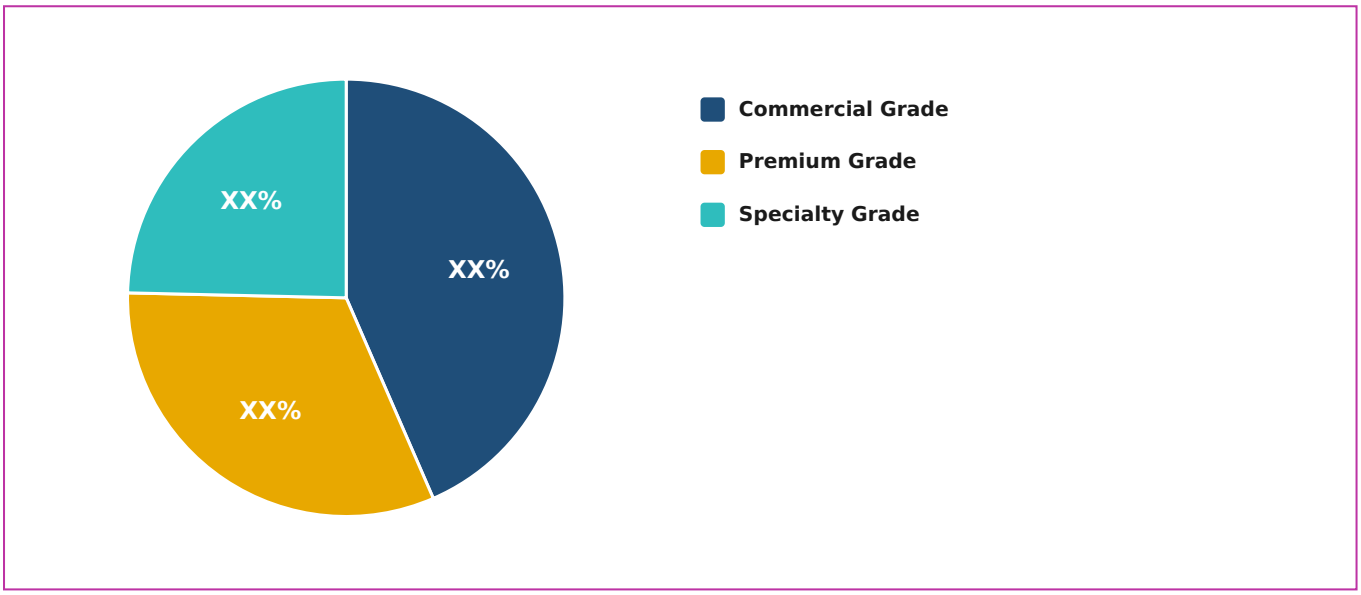
By Quality Tier

Commercial Arabica supplies large retail blends and mainstream foodservice, giving it the broadest volume base. Premium coffee grows as major brands add origin claims, fresher formats and higher-quality blends.

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Specialty grade captures the strongest growth through traceable micro-lots, direct trade and consumer willingness to pay for distinctive cup scores and processing methods.

Value share by quality Tier, 2025



Source: XXX

Value by quality Tier, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Commercial Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Premium Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Processing Method

Washed processing leads because Colombia, Central America, East Africa and other premium origins use it to deliver consistent acidity and clarity. Natural processing remains substantial due to Brazil and Ethiopia and is gaining visibility in fruit-forward specialty profiles. Honey, semi-washed and experimental fermentation methods expand from a smaller base as producers pursue higher differentiation and farm-gate value.

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Value by processing Method, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Washed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Natural or Dry Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Honey or Semi-washed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wet-hulled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other and Experimental	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Supermarkets, specialty grocery and convenience retail remain the largest route to market for packaged Arabica. Foodservice captures premium beverage demand through cafés, restaurants, hotels and workplaces, while industrial channels connect green-coffee traders with large roasters and beverage manufacturers. Direct-to-consumer subscriptions and e-commerce grow fastest through freshness, assortment and access to small origin lots.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and B2B	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct-to-consumer and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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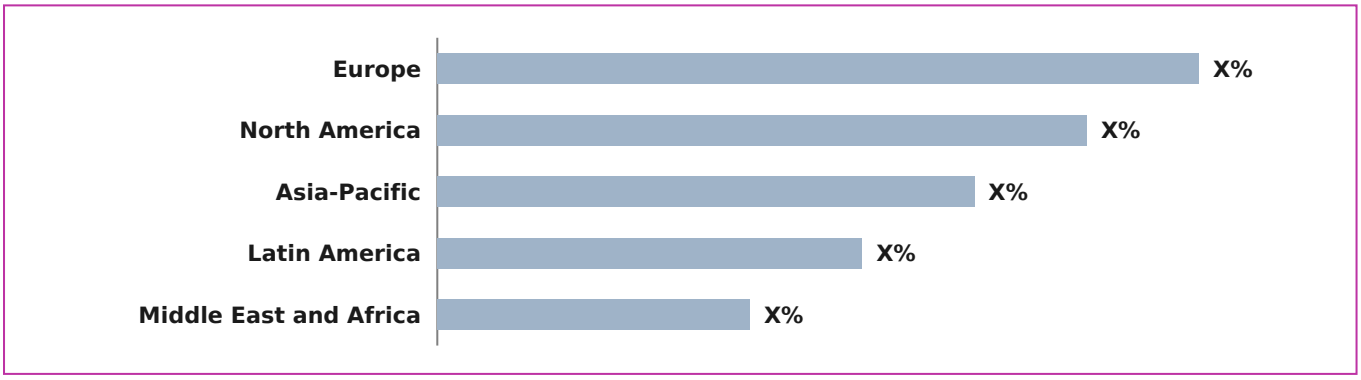
Arabica Coffee Market Regional Analysis and Country Outlook

Europe led the market with XX% of global value in 2025. Germany, Italy, France and the United Kingdom combine large roasted-coffee markets with established premium, capsule and out-of-home channels, while the Netherlands and Switzerland remain important trading and processing hubs. European growth will moderate to XX% annually, but premiumisation, traceable sourcing and high-value single-serve formats preserve the region's revenue leadership.

North America represented XX% of value, supported by high Arabica use in specialty cafés, branded packaged coffee and cold beverages. The United States anchors the region through its large chain-café estate, direct-to-consumer roasters and installed single-serve base. Growth increasingly comes from cold coffee, premium convenience and differentiated origins rather than major gains in traditional hot-coffee volume.

Asia-Pacific is forecast to expand at an XX% CAGR, the fastest of all regions. Japan and South Korea provide mature premium markets, while China, India, Indonesia and Southeast Asia add new urban consumers through cafés, e-commerce and ready-to-drink products. Latin America benefits from premium consumption in Brazil and Mexico alongside producer-country value addition, while the Middle East and Africa gain from specialty-café investment in the Gulf and expanding packaged-coffee demand in major African cities.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

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

Source: XXX

Market value by leading country, USD bn

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

Source: XXX

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Arabica Coffee Market Competitive Landscape and Company Share

The Arabica coffee market has moderate concentration. Nestlé, the combined Keurig Dr Pepper and JDE Peet's coffee operation, Starbucks and Lavazza control major global brands, roasting systems and customer relationships, but they compete with strong regional roasters and thousands of specialty businesses. Upstream trading is led by multinational merchants including Neumann Kaffee Gruppe, Louis Dreyfus Company, ofi, Sucafina, ECOM and Volcafe.

Keurig Dr Pepper's acquisition of JDE Peet's creates a scaled coffee platform spanning North American single-serve systems and JDE Peet's international brands. Nestlé competes across Nescafé, Nespresso and licensed Starbucks consumer products, while Starbucks uses its café network, sourcing programmes and packaged-coffee partnerships to shape premium demand. Lavazza, illy, Tchibo, UCC and Massimo Zanetti differentiate through roast expertise, foodservice distribution and geographic brand strength.

Strategic investment is moving toward cold-coffee manufacturing, proprietary extraction technology, supply traceability and climate-resilient farming. Scale is increasingly valuable for absorbing green-coffee volatility and regulatory costs, yet specialty operators retain defensible positions through freshness, producer relationships, micro-lots and local customer communities.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Nestlé S.A.	XXX	XXX	XXX	XXX
Keurig Dr Pepper Inc.	XXX	XXX	XXX	XXX
JDE Peet's N.V.	XXX	XXX	XXX	XXX
Starbucks Corporation	XXX	XXX	XXX	XXX
Luigi Lavazza S.p.A.	XXX	XXX	XXX	XXX
Tchibo GmbH	XXX	XXX	XXX	XXX
UCC Ueshima Coffee Co., Ltd.	XXX	XXX	XXX	XXX
illycaffè S.p.A.	XXX	XXX	XXX	XXX
Massimo Zanetti Beverage Group S.p.A.	XXX	XXX	XXX	XXX
Neumann Kaffee Gruppe	XXX	XXX	XXX	XXX

Source: XXX

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Arabica Coffee Market Forecast, Scenarios and Opportunities

The market will add USD XXX billion between 2025 and 2031. Volume recovery after the 2025/26 Arabica shortfall will moderate raw-material inflation, while premium formats and higher compliance costs keep the market's value trajectory above underlying consumption growth. Whole-bean, specialty, capsule and extract formats will capture a rising share of incremental revenue.

The base-case forecast assumes improving Brazilian output, steady Colombian renovation gains and continued Ethiopian production expansion. A favourable supply scenario would accelerate consumer recruitment through lower shelf-price inflation, whereas repeated Brazilian weather shocks would raise nominal market value but constrain volumes and intensify substitution toward Robusta.

Winning suppliers will combine diversified origin coverage, transparent farm data, disciplined price-risk management and products designed for cold, convenient and personalised preparation. Producer groups and exporters that deliver consistent cup quality together with verified land-use and social data will secure longer contracts and stronger differentials.

Opportunities

- Premium soluble and cold-dissolving Arabica formats
- Regenerative and verified deforestation-free supply programmes
- Specialty coffee expansion in China, India, Southeast Asia and the Gulf states
- Direct trade and digital traceability platforms connecting roasters with producer groups
- Climate-resilient varieties and precision-agriculture services
- Value-added roasting and packaging in producing countries
- Decaffeinated specialty Arabica and low-caffeine product lines

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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