

Global Single-Origin 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 8.9 bn
Forecast (2031)	USD 14.6 bn
CAGR (2021-2031)	8.6%
Study period	2021-2031
Largest region	North America · 34.2%
Fastest-growing region	Asia-Pacific · 10.9%
Market concentration	Low
Licence	Individual / Company

The global single-origin coffee market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Whole-bean products account for XX% of market value as specialty roasters, premium cafés and direct-to-consumer brands elevate provenance, processing method and producer identity. North America leads with a XX% share, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Traceable sourcing, lighter roast profiles, premium home brewing and origin-specific capsules are moving single-origin coffee from specialist retail into mainstream premium portfolios.

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Executive summary

The global single-origin coffee market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Whole-bean products account for XX% of market value as specialty roasters, premium cafés and direct-to-consumer brands elevate provenance, processing method and producer identity. North America leads with a XX% share, while Asia-Pacific is the fastest-growing region at a XX% CAGR. Traceable sourcing, lighter roast profiles, premium home brewing and origin-specific capsules are moving single-origin coffee from specialist retail into mainstream premium portfolios.

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

Key findings

- The global single-origin coffee market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Whole-bean coffee represented XX% of 2025 market value and will grow at a XX% CAGR through 2031.
- Arabica captured XX% of market value, reflecting its dominance in traceable specialty and differentiated sensory propositions.
- North America held XX% of global revenue in 2025; Asia-Pacific will grow fastest at a XX% CAGR.
- Online and direct-to-consumer channels represented XX% of 2025 sales and will advance at a XX% CAGR.
- USDA forecast world coffee production at a record XXX 60-kilogram bags in 2026/27, including XXX bags of Arabica.
- USDA forecast global coffee consumption at XXX 60-kilogram bags in 2026/27, led by the European Union, United States and Brazil.
- The International Coffee Organization reported 2024/25 world consumption of XXX bags and green-bean exports of XXX bags.

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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 Single-Origin Coffee Market Trends and Growth Drivers

Single-origin coffee sits at the intersection of premiumisation and supply-chain transparency. Its value is created not merely by bean quality but by the marketability of place: country, region, cooperative, estate, variety, altitude, harvest and processing information together form a differentiated product that conventional blends cannot replicate.

The category's growth is being reinforced by specialty cafés, home brewing, subscription commerce and more sophisticated sensory language. The SCA Coffee Value Assessment strengthens this shift by treating extrinsic information—including origin and production practices—as a formal component of coffee value alongside physical and sensory attributes.

The same specificity that supports premium pricing creates operational exposure. Crop disruption cannot be hidden through blending, seasonal lots require disciplined inventory management, and regulated markets increasingly demand plot-level traceability. Procurement capability and data quality are therefore becoming as important as roasting skill and brand design.

Growth drivers

Premium at-home coffee rituals

Investment in grinders, espresso machines and manual brewers has raised household willingness to purchase coffees differentiated by farm, altitude, variety and process. Whole-bean roasters and subscription businesses capture the clearest benefit because equipment ownership increases consumption frequency and supports higher ticket sizes.

Traceability becomes a purchase attribute

Consumers and trade buyers increasingly use producer identity, lot information and harvest data as signals of authenticity and quality. QR-enabled product histories and transparent sourcing relationships convert origin information into stronger pricing, loyalty and gifting appeal.

Specialty café expansion

Independent cafés and premium chains introduce consumers to rotating origins through pour-over, batch brew and espresso menus. These venues function as discovery channels that subsequently drive packaged-bean purchases through retail shelves, subscriptions and roaster websites.

Direct-to-consumer subscriptions

Subscription models reduce dependence on shelf space and let roasters sell seasonal micro-lots to geographically dispersed buyers. Customer data improves assortment planning, while recurring delivery supports fresher inventory and a broader origin rotation.

Processing-led flavour innovation

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Anaerobic fermentation, carbonic maceration, honey processing and controlled natural methods create distinctive flavour profiles that command attention and premium pricing. Limited availability accelerates trial, social sharing and collaborative releases between producers and roasters.

Premium single-serve accessibility

Origin-specific capsules, drip bags and concentrates allow consumers to access provenance-led coffee with lower preparation complexity. The formats recruit office, travel and convenience occasions while extending single-origin portfolios beyond specialist brewers.

Restraints

Green-coffee price inflation

High benchmark prices, elevated differentials and expensive working capital increase inventory exposure for roasters. Smaller operators face the greatest pressure because they have less hedging capacity and limited ability to spread procurement costs across broad portfolios.

Climate-driven crop variability

Heat, drought, excessive rain and coffee-leaf-rust pressure alter yields and cup consistency at origin. Single-origin portfolios cannot mask local supply disruptions through blending, making replacement sourcing and customer communication more difficult.

Traceability compliance burden

Plot geolocation, segregation, legality documentation and due-diligence statements require investment across farms, exporters, importers and roasters. Compliance costs weigh most heavily on fragmented smallholder supply chains and low-volume seasonal lots.

Inconsistent origin terminology

Country-level, regional, estate and microlot products are frequently presented under the same single-origin label despite different degrees of traceability. Uneven claims weaken consumer comparison and can dilute the premium attached to genuinely producer-specific coffees.

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Single-Origin Coffee Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium at-home coffee rituals	XXX	XXX	XXX
Traceability becomes a purchase attribute	XXX	XXX	XXX
Specialty café expansion	XXX	XXX	XXX
Direct-to-consumer subscriptions	XXX	XXX	XXX
Processing-led flavour innovation	XXX	XXX	XXX
Premium single-serve accessibility	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Green-coffee price inflation	XXX	XXX	XXX
Climate-driven crop variability	XXX	XXX	XXX
Traceability compliance burden	XXX	XXX	XXX
Inconsistent origin terminology	XXX	XXX	XXX

Source: XXX

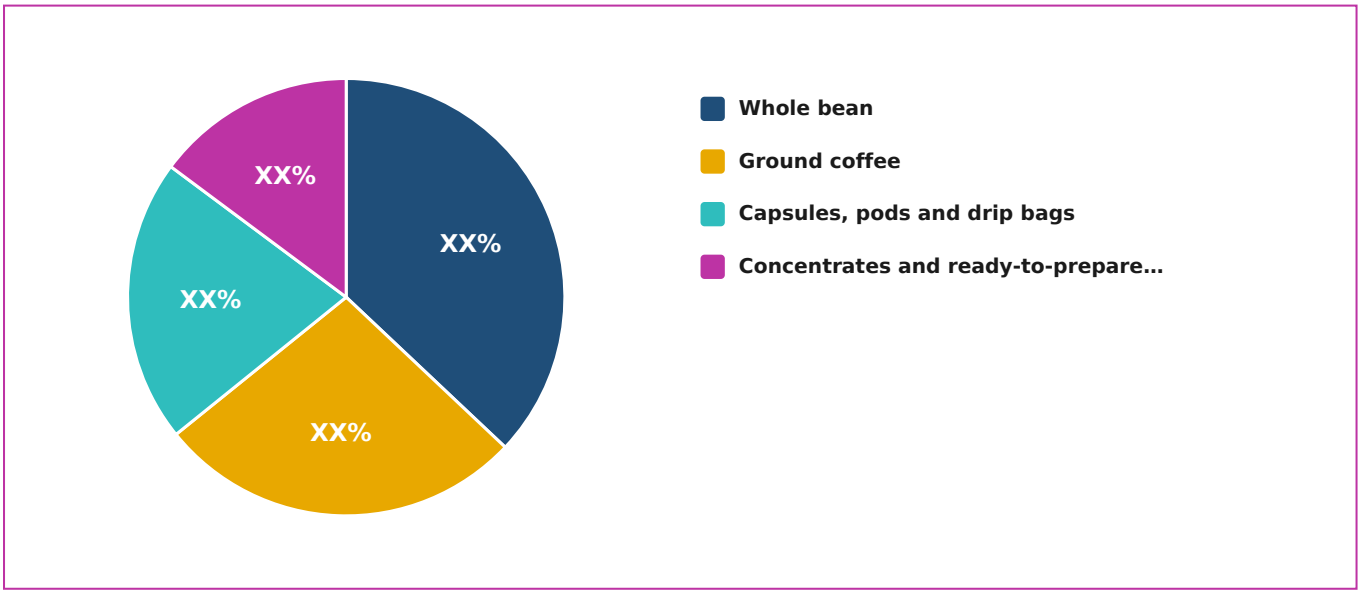
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Single-Origin Coffee Market Segmentation by Format, Species, Roast, Price and Channel

By Product Form

Whole bean anchors the market because it preserves aroma, supports visible quality cues and aligns with grinder ownership among engaged consumers. Ground coffee broadens accessibility through grocery and drip preparation. Capsules, pods and drip bags are growing fastest as brands translate farm and regional provenance into convenient single-cup formats.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole bean	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ground coffee	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Capsules, pods and drip bags	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Concentrates and ready-to-prepare formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Coffee Species

Arabica dominates differentiated origin programmes through its broad sensory range and the established reputation of Ethiopia, Colombia, Kenya, Central America and Brazil. Robusta is gaining value through improved agronomy, selective harvesting and fine-Robusta protocols in Uganda, Vietnam, India and

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Indonesia. Liberica and other species remain experimental but offer differentiation and climate-resilience narratives.

Value by coffee Species, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Arabica	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Robusta and fine Robusta	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liberica, Excelsa and other species	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Roast Profile

Medium roast provides the broadest consumer appeal and remains compatible with filter, automated and espresso preparation. Light roast is expanding through specialty cafés and manual brewing because it preserves acidity, floral character and processing distinctions. Dark roast retains a strong base in espresso-oriented and traditional premium markets but grows more slowly because it communicates origin differentiation less clearly.

Value by roast Profile, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Light roast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Medium roast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dark roast	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Price Tier

Premium single-origin coffee provides the category's volume base through recognizable countries and regions at accessible specialty prices. Super-premium products add producer, variety and processing information, while luxury microlots monetize rarity, competition scores and auction provenance. Supply scarcity and gifting demand support the fastest growth at the top of the price ladder.

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Value by price Tier, USD bn

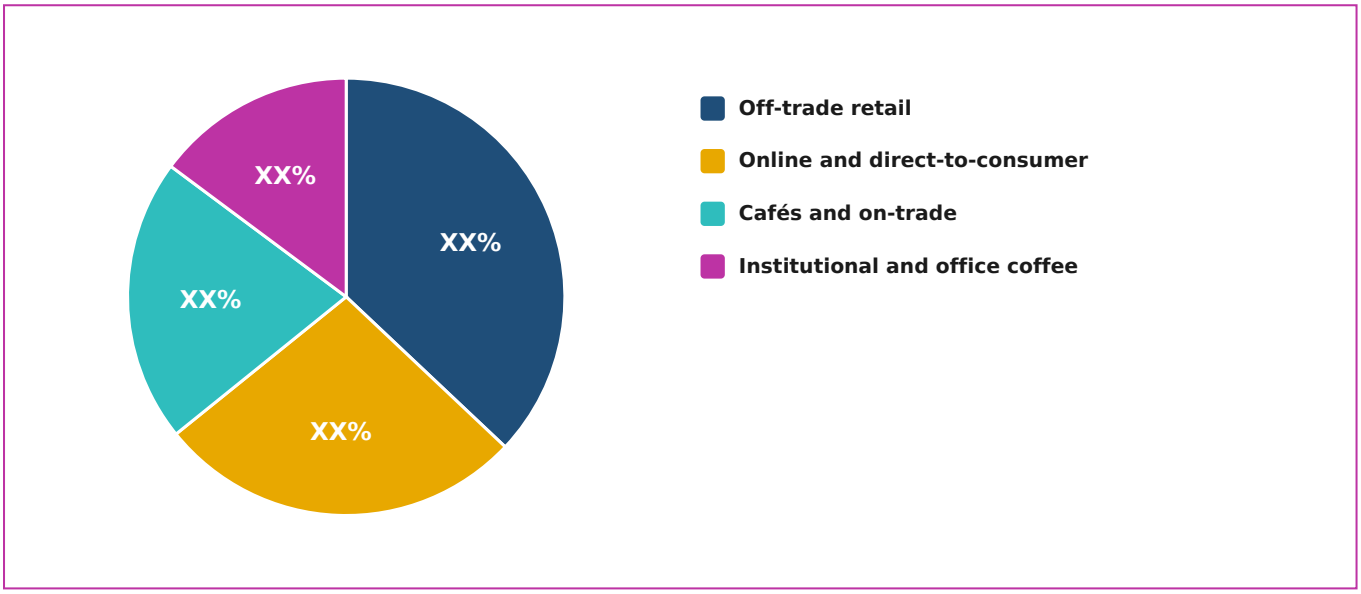
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Premium	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Super-premium	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Luxury, auction and competition microlot	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets, specialty grocers and roaster stores remain the largest channel through convenience and household reach. Cafés drive trial and sensory education, then convert drinkers into packaged-coffee customers. Online stores and subscriptions are gaining fastest because they support rapid lot rotation, detailed storytelling, freshness control and access to geographically dispersed enthusiasts.

Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Off-trade retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online and direct-to-consumer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cafés and on-trade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Institutional and office coffee	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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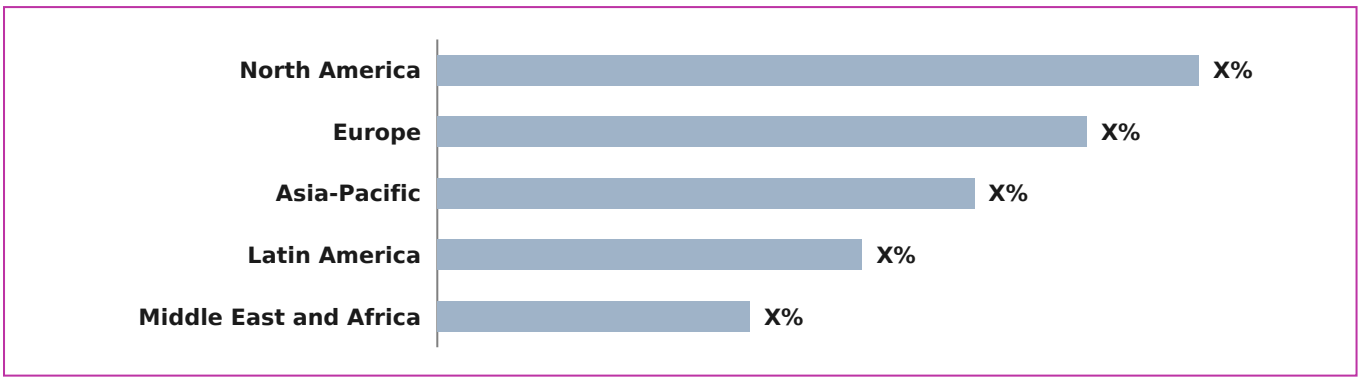
Single-Origin Coffee Market Regional Analysis and Country Outlook

North America generated XX% of global market value in 2025, supported by a dense specialty-roaster base, high household ownership of premium brewing equipment and mature direct-to-consumer logistics. The United States accounts for the majority of regional demand, while Canada over-indexes in ethically positioned whole bean and urban café retail. Mexico combines a growing domestic premium segment with access to traceable Chiapas, Oaxaca and Veracruz supply.

Europe represented XX% of 2025 value. Germany and the United Kingdom are major specialty retail and e-commerce markets, the Nordic countries sustain high per-capita demand for light-roasted traceable coffees, and Italy is expanding beyond traditional blends through specialty cafés and premium single-serve systems. EUDR implementation is accelerating plot-level geolocation, chain-of-custody controls and supplier consolidation across European import channels.

Asia-Pacific will advance at a XX% CAGR through 2031, the fastest regional rate. Japan and Australia provide established quality benchmarks, South Korea combines sophisticated café culture with rapid product rotation, and China's premium market is scaling through metropolitan cafés, social commerce and locally roasted imported green coffee. Producer markets including Indonesia and India are also retaining more differentiated coffee for domestic consumption, creating new origin-to-consumer propositions.

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
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

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

Source: XXX

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Single-Origin Coffee Market Competitive Landscape and Company Share

The market is structurally fragmented: the ten largest suppliers account for XX% of 2025 value, while thousands of regional roasters compete through freshness, sourcing relationships and local brand equity. Starbucks, Nestlé through Nespresso and Blue Bottle, JDE Peet's, Lavazza and illycaffè provide global reach, but specialist roasters lead many microlot, light-roast and subscription niches.

Scale competitors use procurement breadth, branded retail, capsules and grocery distribution to make single-origin products more accessible. Independent leaders such as Counter Culture Coffee, Intelligentsia, Stumptown, Coffee Collective, Square Mile and Tim Wendelboe differentiate through producer relationships, sensory education, seasonal rotation and transparent lot information.

Portfolio consolidation is increasing at the broader coffee-industry level. Keurig Dr Pepper's announced acquisition of JDE Peet's is designed to create a global pure-play coffee company, while Nestlé agreed in 2026 to sell Blue Bottle Coffee to Centurium Capital. Competitive advantage will increasingly depend on origin data infrastructure, green-coffee access, disciplined pricing and the ability to translate complex sourcing stories into simple consumer propositions.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Starbucks Corporation	XXX	XXX	XXX	XXX
Nestlé S.A.	XXX	XXX	XXX	XXX
JDE Peet's N.V.	XXX	XXX	XXX	XXX
Luigi Lavazza S.p.A.	XXX	XXX	XXX	XXX
illycaffè S.p.A.	XXX	XXX	XXX	XXX
Tchibo GmbH	XXX	XXX	XXX	XXX
Blue Bottle Coffee, Inc.	XXX	XXX	XXX	XXX
Counter Culture Coffee, Inc.	XXX	XXX	XXX	XXX
Intelligentsia Coffee, Inc.	XXX	XXX	XXX	XXX
Stumptown Coffee Roasters	XXX	XXX	XXX	XXX

Source: XXX

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Single-Origin Coffee Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031. Value growth will remain ahead of volume as roasters pass through elevated green-coffee costs, introduce smaller high-value lots and broaden premium formats. Whole bean will remain the largest product form, while direct-to-consumer sales and origin-specific capsules will record the strongest channel and format growth.

Base-case growth assumes expanding specialty participation, stable availability across major Arabica origins and sustained investment in traceability. An upside scenario emerges from faster Chinese specialty adoption, greater producer-country consumption and scalable single-serve innovation; a downside scenario centres on consecutive crop disruptions, severe retail price resistance and slower smallholder onboarding into regulated supply chains.

Winning portfolios will balance permanent hero origins with rotating discovery lots. Businesses that secure multi-year producer relationships, publish credible traceability data, preserve freshness and segment products by preparation method will achieve the strongest repeat purchase and gross-margin resilience.

Opportunities

- Origin-specific capsules and convenient premium formats
- Asian metropolitan specialty-coffee markets
- Producer-owned brands and origin-country value addition
- Digital passports, QR traceability and verifiable impact claims
- Premium robusta, fine robusta and climate-resilient varieties
- Corporate, hospitality and chef-led curated coffee programmes

> 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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