

Global Decaffeinated Coffee Market 2026

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

© shev.io — All rights reserved.

Disclaimer

This report was prepared by shev.io solely for information purposes. shev.io does not guarantee the accuracy and completeness of all information contained in the report, as the data in some sources may have been distorted inadvertently or deliberately. The information presented in this report must not be construed, directly or indirectly, as containing recommendations for further business action. All opinions and estimates contained in this report reflect the authors' judgement as at the date of publication and may be changed without notice.

shev.io accepts no liability for any loss or damage arising from any third party's use of the information contained in this report, including published opinions or conclusions, or for consequences caused by the incompleteness of the information presented. The information presented in this report is obtained from open sources. Additional information may be provided on request.

This document, or any part of it, may not be distributed without the written permission of shev.io, nor reproduced by any means.

© shev.io — All rights reserved.

Terms of use

This report is provided to the user under a **non-exclusive, non-transferable, limited licence** solely for internal use within the purposes for which the report was lawfully acquired.

The user **may not**, in whole or in part, transfer, sell, gift, publish or otherwise distribute the report to third parties, nor pass it to any other legal entities, partner organisations or external teams (including affiliated companies). It is prohibited to place the report (or fragments of it) in the public domain (websites, social networks, messengers, file-sharing services, open-link cloud storage) or to provide access through third-party services where this allows third parties to review the materials.

If the report is purchased by a **company**, its use is permitted **only by that company's employees** for internal tasks. Passing the report to contractors, consultants, freelancers, agencies and any external parties is prohibited.

All exclusive rights to the report — including its structure, texts, data selection, visualisations, tables, charts and design elements — belong to the rights holder (shev.io) or are used on lawful grounds. The user receives the right to use the report only within these terms.

Without shev.io's written consent it is prohibited to create derivative products based on the report, to use it as part of a commercially distributed product or service, or to remove or alter copyright notices.

The use of **short quotations** and fragments is permitted **only in internal documentation** (internal memos, reports, presentations, working correspondence), provided the meaning and context are preserved and the source is credited: *shev.io*. Any publication or use of the materials in places accessible to third parties is permitted only with shev.io's prior written consent.

© shev.io — All rights reserved.

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 21.8 bn
Forecast (2031)	USD 30.7 bn
CAGR (2021-2031)	5.8%
Study period	2021-2031
Largest region	Europe · 37.8%
Fastest-growing region	Asia-Pacific · 7.4%
Market concentration	Moderate
Licence	Individual / Company

The global decaffeinated coffee market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Premium whole-bean products, water-processed coffee and single-serve formats are moving decaf from a functional substitute into a higher-value specialty category. Europe retained XX% of global sales in 2025, while Asia-Pacific will record the fastest regional growth at XX% annually. The report quantifies demand by format, decaffeination process, roast, packaging, distribution channel and geography, supported by trade analysis, company disclosures and shev.io Research interviews.

© shev.io — All rights reserved.

Table of contents

1 Introduction and Market Scope

1.1 Decaffeinated Coffee Market Definition

1.2 Inclusions, Exclusions and Value-Chain Boundary

1.3 Study Period, Currency and Units

2 Research Methodology

2.1 Secondary Research Programme

2.2 Primary Interview Programme

2.3 Market Sizing and Triangulation

2.4 Forecast Model and Scenario Design

3 Executive Summary

3.1 Market Size and Growth Outlook

3.2 Segment and Regional Highlights

3.3 Strategic Findings

4 Decaffeinated Coffee Market Dynamics

4.1 Growth Drivers

4.2 Market Restraints

4.3 Emerging Opportunities

4.4 Porter's Five Forces Analysis

4.5 Pricing and Raw-Material Trends

5 Global Market Size and Forecast

5.1 Historical Market Value and Volume, 2021-2024

5.2 Base-Year Market Assessment, 2025

5.3 Market Forecast, 2026-2031

5.4 Downside, Base and Upside Scenarios

6 Market by Product Format

6.1 Ground Coffee

6.2 Instant and Soluble Coffee

6.3 Whole Bean Coffee

6.4 Pods and Capsules

7 Market by Decaffeination Process

7.1 Conventional Solvent Process

7.2 Water Process

7.3 Supercritical Carbon Dioxide Process

7.4 Sugarcane Ethyl Acetate Process

8 Market by Roast, Packaging and Distribution

© shev.io — All rights reserved.

8.1 Market by Roast Profile
8.2 Market by Packaging
8.3 Market by Distribution Channel

9 North America Decaffeinated Coffee Market

9.1 United States
9.2 Canada
9.3 Mexico
9.4 Rest of North America

10 Europe Decaffeinated Coffee Market

10.1 Germany
10.2 United Kingdom
10.3 Italy
10.4 France
10.5 Spain
10.6 Netherlands
10.7 Rest of Europe

11 Asia-Pacific Decaffeinated Coffee Market

11.1 China
11.2 Japan
11.3 South Korea
11.4 India
11.5 Australia
11.6 Indonesia
11.7 Rest of Asia-Pacific

12 Latin America Decaffeinated Coffee Market

12.1 Brazil
12.2 Colombia
12.3 Argentina
12.4 Rest of Latin America

13 Middle East and Africa Decaffeinated Coffee Market

13.1 Saudi Arabia
13.2 United Arab Emirates
13.3 South Africa
13.4 Turkey
13.5 Rest of Middle East and Africa

14 Competitive Landscape

14.1 Market Concentration and Company Share

© shev.io — All rights reserved.

14.2 Product, Process and Channel Benchmarking

14.3 Mergers, Acquisitions and Capacity Investment

15 Company Profiles

15.1 Nestlé S.A.

15.2 Keurig Dr Pepper Inc.

15.3 JDE Peet's N.V.

15.4 Starbucks Corporation

15.5 Luigi Lavazza S.p.A.

15.6 Massimo Zanetti Beverage Group S.p.A.

15.7 Tchibo GmbH

15.8 illycaffè S.p.A.

15.9 UCC Ueshima Coffee Co., Ltd.

15.10 Swiss Water Decaffeinated Coffee Inc.

16 Market Opportunities and Strategic Outlook

16.1 Priority Product and Process Opportunities

16.2 High-Growth Country Opportunities

16.3 Strategic Recommendations by Participant Type

© shev.io — All rights reserved.

List of tables

Table 1. Global Decaffeinated Coffee Market Snapshot, 2025 and 2031

Table 2. Leading Segments and Fastest-Growing Opportunities

Table 3. Market Definitions, Inclusions and Exclusions

Table 4. Primary Interview Sample by Company Type, Seniority and Region

Table 5. Data Sources, Conversion Factors and Confidence Rules

Table 6. Annual Global Market Value, 2021-2031

Table 7. Annual Global Market Volume and Average Selling Price, 2021-2031

Table 8. Market Value Forecast by Product Format, 2025-2031

Table 9. Market Value Forecast by Decaffeination Process, 2025-2031

Table 10. Market Value Forecast by Distribution Channel, 2025-2031

Table 11. Market Value Forecast by Region, 2025-2031

Table 12. Market Value and Volume by Product Format, 2021-2031

Table 13. Market Value and Volume by Decaffeination Process, 2021-2031

Table 14. Market Value and Volume by Roast Profile, 2021-2031

Table 15. Market Value and Volume by Packaging, 2021-2031

Table 16. Market Value and Volume by Distribution Channel, 2021-2031

Table 17. Market Value, Share and CAGR by Geography, 2021-2031

Table 18. North America Market by Country, 2021-2031

Table 19. Europe Market by Country, 2021-2031

Table 20. Asia-Pacific Market by Country, 2021-2031

Table 21. Latin America Market by Country, 2021-2031

Table 22. Middle East and Africa Market by Country, 2021-2031

Table 23. Regional Pricing, Consumption Intensity and Channel Benchmark

Table 24. Driver Impact Matrix by Geography and Time Horizon

Table 25. Restraint Impact Matrix by Geography and Time Horizon

Table 26. Porter's Five Forces Assessment for Decaffeinated Coffee

Table 27. Competitive Share, Brand Portfolio and Geographic Footprint

Table 28. Nestlé S.A. Company Profile

Table 29. Keurig Dr Pepper Inc. Company Profile

Table 30. JDE Peet's N.V. Company Profile

Table 31. Starbucks Corporation Company Profile

Table 32. Luigi Lavazza S.p.A. Company Profile

Table 33. Massimo Zanetti Beverage Group S.p.A. Company Profile

Table 34. Tchibo GmbH Company Profile

Table 35. illycaffè S.p.A. Company Profile

© shev.io — All rights reserved.

Table 36. UCC Ueshima Coffee Co., Ltd. Company Profile

Table 37. Swiss Water Decaffeinated Coffee Inc. Company Profile

Table 38. Decaffeinated Coffee Definitions and Caffeine Rules by Major Market

Table 39. Processing Technology, Solvent, Yield and Commercial Positioning Comparison

Table 40. Commercial Opportunity Scorecard, 2025-2031

Table 41. Base, Upside and Downside Forecast Assumptions

Table 42. Strategic Recommendations by Participant Type

Table 43. Market value by year, USD bn

Table 44. Year-over-year value change

Table 45. Drivers — impact on forecast

Table 46. Restraints — impact on forecast

Table 47. Value by product Format, USD bn

Table 48. Value by decaffeination Process, USD bn

Table 49. Value by roast Profile, USD bn

Table 50. Value by packaging, USD bn

Table 51. Value by distribution Channel, USD bn

Table 52. Market value by region, USD bn

Table 53. Market value by leading country, USD bn

Table 54. Leading companies

© shev.io — All rights reserved.

List of figures

Figure 1. Global Decaffeinated Coffee Market Value, 2021-2031

Figure 2. 2025 Decaffeinated Coffee Market Revenue Bridge to 2031

Figure 3. Research Triangulation and Validation Framework

Figure 4. Global Market Value and Year-on-Year Growth, 2021-2031

Figure 5. Global Decaffeinated Coffee Volume Index, 2021-2031

Figure 6. Forecast Scenario Comparison: Downside, Base and Upside

Figure 7. Product Format Share of Global Market, 2025

Figure 8. Decaffeination Process Share and CAGR, 2025-2031

Figure 9. Distribution Channel Share of Global Market, 2025

Figure 10. Regional Market Share, 2025

Figure 11. Regional Revenue CAGR, 2025-2031

Figure 12. Incremental Revenue Contribution by Region, 2025-2031

Figure 13. Driver and Restraint Impact on Market CAGR

Figure 14. Opportunity Attractiveness by Format and Process

Figure 15. Estimated Global Company Share, 2025

Figure 16. Competitive Positioning by Geographic Reach and Decaf Specialization

Figure 17. Decaffeination Process Value Chain and Cost Build-Up

Figure 18. Opportunity Ranking by Revenue Potential and Execution Difficulty

Figure 19. Value share by product Format, 2025

Figure 20. Value share by decaffeination Process, 2025

Figure 21. Growth rate by region, 2025-2031

© shev.io — All rights reserved.

Executive summary

The global decaffeinated coffee market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Premium whole-bean products, water-processed coffee and single-serve formats are moving decaf from a functional substitute into a higher-value specialty category. Europe retained XX% of global sales in 2025, while Asia-Pacific will record the fastest regional growth at XX% annually. The report quantifies demand by format, decaffeination process, roast, packaging, distribution channel and geography, supported by trade analysis, company disclosures and shev.io Research interviews.

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

Key findings

- Global decaffeinated coffee sales reached USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- The market will expand at a XX% CAGR from 2025 to 2031, ahead of the mature portions of the conventional packaged-coffee category.
- Europe generated XX% of 2025 market value, supported by established evening-coffee occasions and broad supermarket availability.
- Asia-Pacific accounted for XX% of 2025 sales and will grow at XX% annually through 2031.
- Ground coffee remained the largest format with XX% of market value, while pods and capsules will post the fastest format CAGR at XX%.
- Water-processed coffee represented XX% of sales and will grow at XX% annually as specialty roasters emphasize process transparency.
- Off-trade channels generated XX% of 2025 value, with e-commerce expanding at XX% annually.
- The International Coffee Organization reported global coffee consumption of XXX 60-kilogram bags in coffee year 2024/25.

© shev.io — All rights reserved.

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

© shev.io — All rights reserved.

Global Decaffeinated Coffee Market Trends and Growth Drivers

Decaffeinated coffee is moving from defensive consumption to active lifestyle choice. Sleep awareness and caffeine moderation are opening later-day occasions, while consumers increasingly expect decaf to match the origin information, roast freshness and sensory quality of regular specialty coffee.

The supply chain remains structurally more complex than conventional coffee. Green beans travel through a specialist decaffeination stage before roasting, introducing processing fees, yield loss, additional logistics and traceability requirements. Scale processors therefore influence both category economics and the pace at which new technologies reach the market.

Value growth will be driven as much by mix as by volume. Whole-bean specialty products, single-serve capsules, transparent water or sugarcane processes and direct subscriptions lift revenue per kilogram, while mass-market soluble and ground coffee preserve accessibility and global reach.

Growth drivers

Caffeine moderation broadens demand

Consumers are managing sleep quality, anxiety and total stimulant intake without abandoning coffee rituals. This expands decaf consumption beyond older or medically restricted cohorts and creates incremental afternoon and evening occasions for retailers and cafés.

Premium decaffeination improves cup quality

Water, carbon-dioxide and carefully controlled ethyl-acetate processes preserve more aroma and origin character than earlier mass-market products. Better sensory performance raises repeat purchase and enables specialty roasters to price decaf alongside premium regular coffee.

Single-serve formats remove household friction

Pods and capsules allow one household member to choose decaf without brewing a separate pot or leaving an opened bag unused. The convenience advantage is particularly strong in mixed-caffeine households, offices and hospitality settings.

Specialty roasters elevate decaf

Specialty operators increasingly publish origin, variety, process and tasting information for decaf with the same discipline applied to conventional microlots. Rotating releases and higher scoring green coffee are converting decaf into a discovery category rather than a compromise purchase.

Digital channels widen assortment

Online marketplaces, direct-to-consumer stores and subscriptions overcome the limited facings assigned to decaf in physical retail. Digital education also gives brands space to explain processing methods, residual

© shev.io — All rights reserved.

caffeine and brewing recommendations.

Asian coffee culture adds new occasions

Rapid café development and rising at-home coffee preparation are creating a larger addressable base across China, South Korea, India and Southeast Asia. Decaf benefits as these markets mature from novelty beverages toward wider choice by roast, origin and caffeine level.

Restraints

Processing raises delivered cost

Decaffeination adds freight, handling, yield loss and specialist processing charges before roasting. Smaller roasters also carry slower inventory turns and higher working-capital requirements, limiting price competitiveness against regular coffee.

Legacy taste perceptions suppress trial

Many consumers still associate decaf with stale inventory, dark roasting and muted flavor. Brands must fund sampling and education to demonstrate quality improvements, increasing customer-acquisition costs.

Premium green-coffee availability is narrow

Decaffeination economics favor consolidated lots, while specialty demand increasingly requires small, traceable and high-scoring batches. The mismatch restricts origin variety and can interrupt limited-edition programmes.

Retail and café assortment remains constrained

Decaf often receives one shelf-facing or one espresso option because operators prioritize faster-moving conventional products. Limited visibility reduces trial and reinforces the perception that the category offers little choice.

© shev.io — All rights reserved.

Decaffeinated Coffee Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Caffeine moderation broadens demand	XXX	XXX	XXX
Premium decaffeination improves cup quality	XXX	XXX	XXX
Single-serve formats remove household friction	XXX	XXX	XXX
Specialty roasters elevate decaf	XXX	XXX	XXX
Digital channels widen assortment	XXX	XXX	XXX
Asian coffee culture adds new occasions	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Processing raises delivered cost	XXX	XXX	XXX
Legacy taste perceptions suppress trial	XXX	XXX	XXX
Premium green-coffee availability is narrow	XXX	XXX	XXX
Retail and café assortment remains constrained	XXX	XXX	XXX

Source: XXX

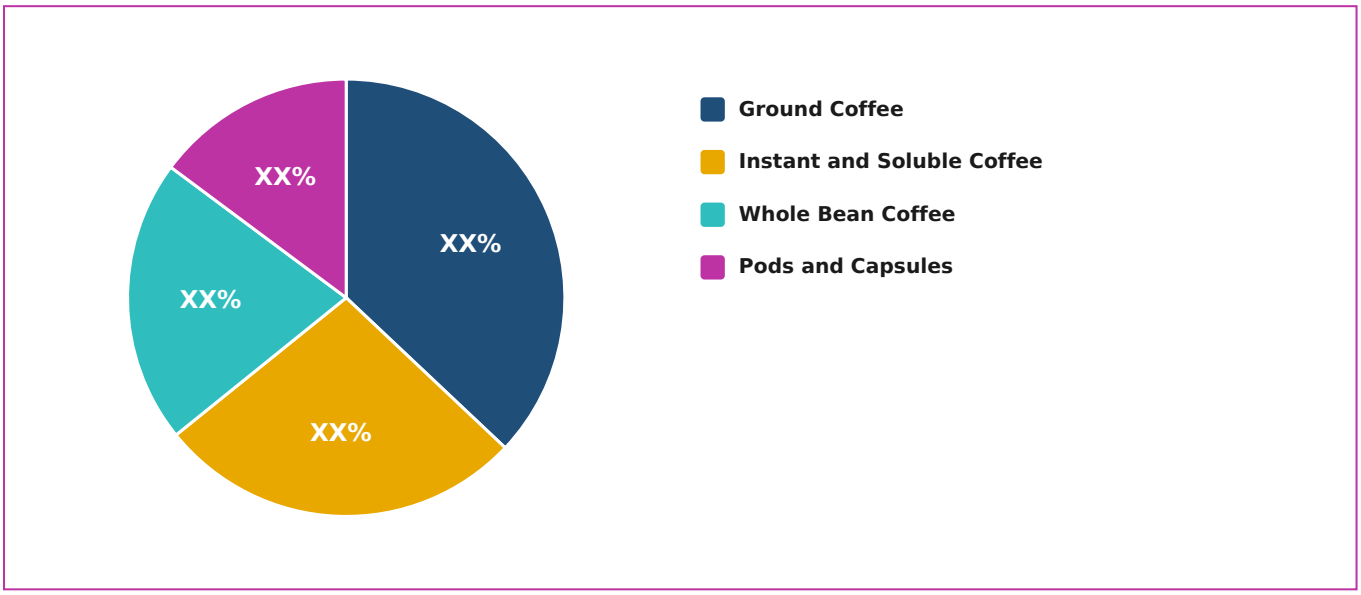
© shev.io — All rights reserved.

Decaffeinated Coffee Market Segmentation Analysis

By Product Format

Ground coffee retains the broadest retail distribution and supports filter, espresso and traditional brewing systems. Whole bean is gaining share as specialty roasters improve freshness and origin differentiation. Pods and capsules record the fastest growth because they simplify mixed-caffeine household and office consumption.

Value share by product Format, 2025



Source: XXX

Value by product Format, USD bn

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

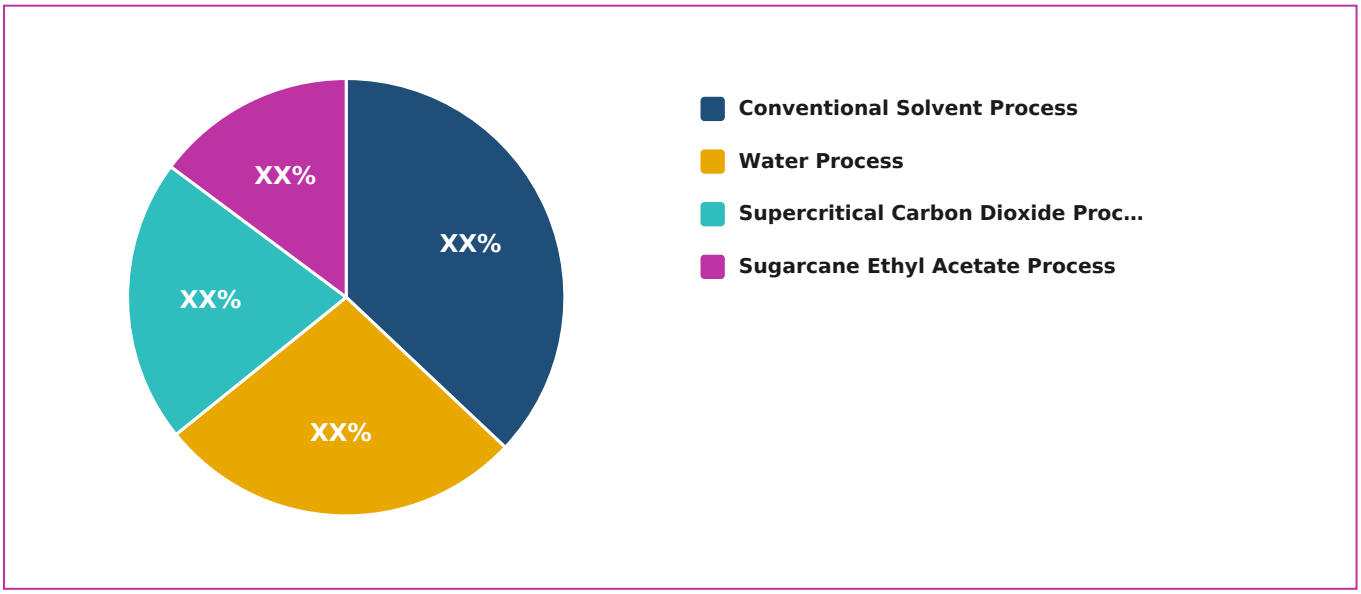
Source: XXX

By Decaffeination Process

Methylene-chloride and ethyl-acetate systems retain scale advantages and process much of the mass-market volume. Water processing is gaining value share through chemical-free positioning and close association with specialty coffee. Supercritical carbon dioxide offers strong selectivity and industrial consistency, while sugarcane-derived ethyl acetate is building a distinctive origin-linked proposition in Colombia.

© shev.io — All rights reserved.

Value share by decaffeination Process, 2025



Source: XXX

Value by decaffeination Process, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional Solvent Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Water Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supercritical Carbon Dioxide Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sugarcane Ethyl Acetate Process	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Roast Profile

Medium roasting balances sweetness, body and the reduced aromatic intensity that can follow decaffeination, making it the default for branded blends. Dark roast remains important in espresso and soluble products, where strong roast character signals intensity. Light roast is the fastest-growing profile as specialty producers use higher-grade green coffee and gentler processing.

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

© shev.io — All rights reserved.

By Packaging

Valve-equipped bags dominate ground and whole-bean coffee because they combine freshness protection with manageable unit costs. Jars remain central to soluble decaf and value-oriented retail. Capsules command the highest price per serving and are growing rapidly, while canned and bottled formats gain from premium gifting and prepared cold-coffee applications.

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Flexible Bags and Pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Jars and Canisters	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Single-Serve Capsules and Pods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cans, Bottles and Other Formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets retain leadership through scale brands, private labels and routine replenishment. E-commerce is the fastest-growing channel because it supports process education, subscriptions and deeper origin assortments. Cafés are strategically important for trial, but restaurants and institutional buyers remain selective because decaf volumes require separate inventory and preparation.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets and Hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online Retail and Subscriptions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty Coffee and Gourmet Stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience and Other Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cafés and Coffee Shops	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Restaurants, Hotels and Institutional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

© shev.io — All rights reserved.

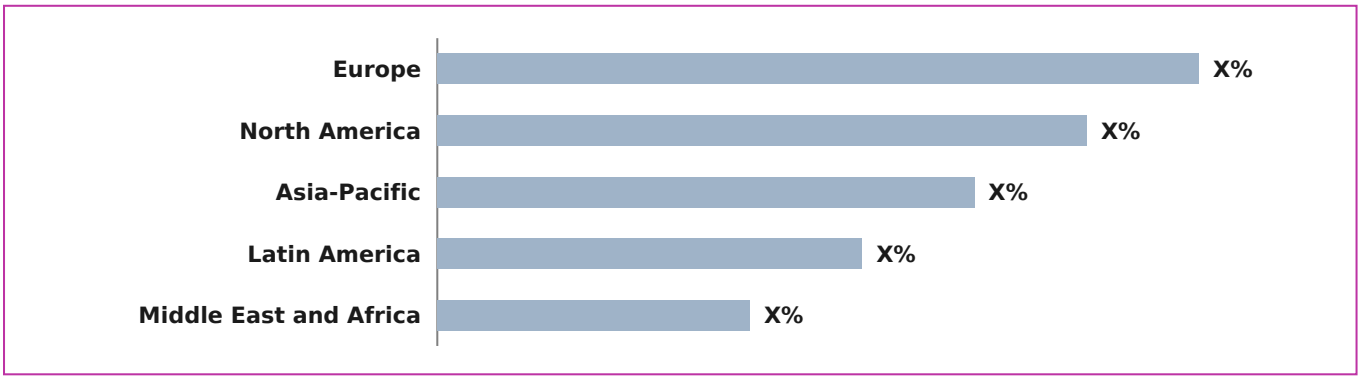
Decaffeinated Coffee Market Regional Analysis and Country Outlook

Europe led the global market with XX% of 2025 value. Germany, the United Kingdom, Italy, France and Spain combine established packaged-coffee demand with strong evening consumption, supermarket private labels and extensive capsule adoption. Germany is also strategically important to industrial decaffeination and premium-process expertise, while Italy supplies a large branded espresso and capsule portfolio.

North America represented XX% of global sales, led by the United States. Specialty whole-bean releases, direct-to-consumer subscriptions and water-process positioning are lifting average selling prices, while Keurig-compatible single-serve products provide mass-market scale. Canada benefits from a strong specialty segment and the presence of Swiss Water's decaffeination operations in British Columbia.

Asia-Pacific will grow at XX% annually through 2031. Japan and South Korea supply the region's established premium base, while China and India provide the largest incremental opportunity as café usage and home brewing expand. Latin America and the Middle East and Africa remain smaller value pools, but Brazil's domestic coffee scale, Colombia's sugarcane-process supply chain and premium hospitality demand in the Gulf create focused growth opportunities.

Growth rate by region, 2025-2031



Source: XXX

© shev.io — All rights reserved.

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

© shev.io — All rights reserved.

Decaffeinated Coffee Market Competitive Landscape and Company Share

The market is moderately concentrated at the branded level and more specialized at the decaffeination-processing stage. Nestlé, the combined Keurig Dr Pepper and JDE Peet's coffee platform, Starbucks, Lavazza and Massimo Zanetti Beverage Group compete through broad retail distribution, recognized brands and multi-format portfolios. Regional roasters and digital specialists retain meaningful share because origin transparency and roast freshness matter strongly in premium decaf.

Keurig Dr Pepper's acquisition of XX% of JDE Peet's shares in April 2026 materially increased consolidation across capsules, soluble coffee and packaged roast-and-ground products. The combination brings Keurig, Jacobs, L'OR, Peet's, Kenco, Tassimo and Senseo assets into a coffee platform with global sourcing and manufacturing leverage, including extensive decaf ranges.

Investment is shifting toward higher-throughput chemical-free processing, flexible small-batch runs and products designed for cold preparation. Swiss Water's 2026 Delta capacity project reflects stronger utilization, while Lavazza's international Decaf relaunch demonstrates how major brands are refreshing recipes, packaging and daypart positioning. Competitive advantage increasingly rests on sensory consistency, transparent processing claims and the ability to support multiple pack formats.

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
Massimo Zanetti Beverage Group S.p.A.	XXX	XXX	XXX	XXX
Tchibo GmbH	XXX	XXX	XXX	XXX
illycaffè S.p.A.	XXX	XXX	XXX	XXX
UCC Ueshima Coffee Co., Ltd.	XXX	XXX	XXX	XXX
Swiss Water Decaffeinated Coffee Inc.	XXX	XXX	XXX	XXX

Source: XXX

© shev.io — All rights reserved.

Decaffeinated Coffee Market Forecast and Commercial Opportunities

The market will add USD XXX billion in annual value between 2025 and 2031. Growth will be weighted toward premium whole-bean coffee, pods and capsules, water-processed offerings and digital channels, while traditional soluble decaf will remain important for affordability and convenience.

The central forecast assumes continued consumer interest in caffeine moderation, stable access to decaffeination capacity and gradual normalization of green-coffee costs. A stronger premiumization scenario would lift growth through higher process transparency and improved café availability; persistent raw-material inflation would preserve nominal value growth but slow household penetration in price-sensitive markets.

Suppliers that treat caffeine level as a portfolio architecture will outperform single-product decaf strategies. Full-caffeine, half-caff and decaf ranges sharing origins and flavor profiles can retain consumers across dayparts, while traceability, recyclable packaging and verified residual-caffeine specifications will increasingly influence retailer listings.

Opportunities

- Traceable single-origin water-processed coffee
- Premium decaf cold brew and ready-to-drink products
- Half-caff and configurable caffeine portfolios
- Subscription services built around rotating decaf origins
- Regional expansion in China, South Korea, India and Gulf markets
- Low-carbon decaffeination and recyclable capsule systems

> 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.

© shev.io — All rights reserved.