

# Global Beanless Coffee Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Beanless Coffee market size is expected to reach \$ 210 million by 2032, rising at a market growth of 19.5% CAGR during the forecast period (2026-2032).

Beanless coffee refers to a coffee substitute that does not use traditional coffee beans. Instead, it employs bio-engineering & food technology — such as molecular reconstruction, fermentation & upcycling of food by-products (okara, broken rice, date seeds, chickpeas, etc.) or cellular agriculture — to mimic the flavor, aroma, color & mouthfeel of conventional coffee. Distinguished from decaf coffee or traditional grain-based substitutes (e.g., chicory, barley), beanless coffee is a product of modern food tech driven by climate change, supply chain risks & health trends. It represents the coffee industry's shift from “plantation & harvest” to “bio-manufacturing”. Its core value lies in cost stability (20–50% cheaper raw materials), significantly lower carbon footprint (60–94% less water & emissions), and customizable caffeine content. Beanless coffee is used in RTD beverages, fresh-ground/cold-brew alternatives, food ingredients (ice cream, chocolate), wholesale café supply & home brewing. The significance of studying this category lies in the fact that the industrialization of beanless coffee directly reflects our ability to use food biotechnology to substitute traditional agriculture, making it a key indicator of a sustainable food innovation ecosystem.

Beanless coffee is a novel coffee substitute produced through biotechnology such as molecular reconstruction, fermentation, or cellular agriculture, designed to mimic the flavor and aroma of traditional coffee. Its core value lies in decoupling coffee production from climate-dependent agriculture, reducing raw material costs by 20–50% and cutting the carbon footprint by 60–94%. On pricing, B2B beanless coffee powder or concentrate typically sells at 50–80% of conventional coffee prices, while retail ready-to-drink products are priced at USD 3–6 per bottle (comparable to premium cold brew).

Whole-bean replacements are more expensive due to complex processing. Margins diverge significantly: companies with proprietary fermentation and preprocessing technologies (e.g., Atomo, Prefer) achieve 50–60% gross margins on B2B raw materials, whereas smaller brands relying on contract manufacturing face 20–30% margins due to limited scale and channel costs. Downstream primary applications: ready-to-drink retail accounts for 40–45% of consumption (the fastest-growing segment), home brewing 25–30%, foodservice (cafés & restaurants) 15–20%, and food industry ingredients 10–15%. Incremental demand is driven by a surge in coffee bean prices (futures hitting a 47-year high in 2025), extreme weather threatening traditional growing regions, and rising compliance costs from the EU Deforestation Regulation. Landscape: Atomo Coffee leads in North America with first-mover advantages and supply partnerships (e.g., Cargill); Prefer, Koppie, and Wake have completed pilot or industrial-scale production lines in Singapore, Belgium, and South Korea respectively. Major food conglomerates such as Ajinomoto have entered the space through co-developed RTD products, demonstrating beanless coffee's feasibility in large-scale foodservice chains. Uncertainties include consumer acceptance (flavor gaps and “authenticity” concerns), novel food regulatory approval timelines that affect market entry, and the risk that a fall in conventional coffee prices could erode beanless coffee's cost advantage. Conclusion: Beanless coffee represents a frontier shift from “plantation agriculture” to “bio-manufacturing” in the global coffee industry. The period 2025–2026 marks the critical inflection point from lab validation to commercial scaling. Growth is driven by raw material cost pressure and sustainable consumption trends. Structural features include high technological barriers, significant first-mover advantages in scaling, and rapid sub-category iteration. Over the next three years, players that successfully ramp up industrial capacity and secure stable B2B partnerships will dominate the market, while consumer education and flavor refinement remain core challenges for category growth.

This report studies the global Beanless Coffee production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Beanless Coffee and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Beanless Coffee that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Beanless Coffee total production and demand, 2021-2032, (Tons)

Global Beanless Coffee total production value, 2021-2032, (USD Million)

Global Beanless Coffee production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Beanless Coffee consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Beanless Coffee domestic production, consumption, key domestic manufacturers and share

Global Beanless Coffee production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Beanless Coffee production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Beanless Coffee production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Beanless Coffee market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Atomo Coffee, Ajinomoto, Prefer, Koppie, Wake (SANS), Nordic Approach, Ciao Coffee, Sans Cafe / Sans Foundry, Agros, Minus Coffee, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Beanless Coffee market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Beanless Coffee Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Beanless Coffee Market, Segmentation by Type:

Upcycled Food By?product

Fermented Legume / Grain

Cellular Agriculture

Hybrid / Multiple Sources

#### Global Beanless Coffee Market, Segmentation by Form:

Whole Bean Replacement

Ground Powder

Liquid Concentrate

Ready?to?Drink (RTD)

Syrup / Powder for Food Industry

#### Global Beanless Coffee Market, Segmentation by Application:

Home Brewing

Caf? & Restaurant (Foodservice)

Ready?to?Drink Retail

Food Industry Ingredient

Others

#### Companies Profiled:

Atomo Coffee

Ajinomoto

Prefer

Koppie

Wake (SANS)

Nordic Approach

Ciao Coffee

Sans Cafe / Sans Foundry

Agros

Minus Coffee

Morrow Coffee

Future Beans

Compound Foods (B2B platform)

Northern Wonder

Amoras Coffee (Rize)

Good Coffee (CloudKey Ventures)

Stem (Colombian by?product platform)

Taika Coffee

Lunar Coffee

Bosque Coffee

Outside (coffee extension line)

Nectar Coffee

Noah's Coffee

Lunar Coffee (Asia brand)

Meuri Coffee

Yezin Coffee

Origin Coffee Lab (blending brand)

Afineur (biotech tool)

#### Key Questions Answered:

1. How big is the global Beanless Coffee market?
2. What is the demand of the global Beanless Coffee market?
3. What is the year over year growth of the global Beanless Coffee market?
4. What is the production and production value of the global Beanless Coffee market?
5. Who are the key producers in the global Beanless Coffee market?
6. What are the growth factors driving the market demand?

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