

Global Beanless Coffee Market Growth 2026-2032

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Abstracts

The global Beanless Coffee market size is predicted to grow from US\$ 48.91 million in 2025 to US\$ 212 million in 2032; it is expected to grow at a CAGR of 20.7% from 2026 to 2032.

Beanless coffee refers to a coffee substitute that does not use traditional coffee beans. Instead, it employs bioengineering & food technology such as molecular reconstruction, fermentation & upcycling of food byproducts (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 biomanufacturing. 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 cafe 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 (caf?s & 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.

LP Information, Inc. (LPI) ' newest research report, the ?Beanless Coffee Industry Forecast? looks at past sales and reviews total world Beanless Coffee sales in 2025, providing a comprehensive analysis by region and market sector of projected Beanless Coffee sales for 2026 through 2032. With Beanless Coffee sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Beanless Coffee industry.

This Insight Report provides a comprehensive analysis of the global Beanless Coffee landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Beanless Coffee portfolios and capabilities, market entry strategies, market positions, and

geographic footprints, to better understand these firms' unique position in an accelerating global Beanless Coffee market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Beanless Coffee and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Beanless Coffee.

This report presents a comprehensive overview, market shares, and growth opportunities of Beanless Coffee market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Upcycled Food By-product

Fermented Legume / Grain

Cellular Agriculture

Hybrid / Multiple Sources

Segmentation by Form:

Whole Bean Replacement

Ground Powder

Liquid Concentrate

Ready-to-Drink (RTD)

Syrup / Powder for Food Industry

Segmentation by Application:

Home Brewing

Caf? & Restaurant (Foodservice)

Ready?to?Drink Retail

Food Industry Ingredient

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Beanless Coffee market?

What factors are driving Beanless Coffee market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Beanless Coffee market opportunities vary by end market size?

How does Beanless Coffee break out by Type, by Application?

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