

Cold Brew Coffee Market Forecasts to 2034 – Global Analysis By Product Type (Ready-to-Drink (RTD) Cold Brew Coffee, Cold Brew Coffee Concentrates, and Cold Brew Coffee Grounds), Coffee Bean Type, Flavor, Nature, Caffeine Content, Packaging Type, Distribution Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Cold Brew Coffee Market is accounted for \$4.2 billion in 2026 and is expected to reach \$17.8 billion by 2034 growing at a CAGR of 19.5% during the forecast period. Cold brew coffee is produced by steeping coffee grounds in cold water for extended periods, resulting in a smoother, less acidic beverage compared to traditional hot brewing methods. This distinctive flavor profile has captured consumer preference across demographics seeking refreshing coffee experiences. The market encompasses ready-to-drink formats, concentrates, and grounds, distributed through supermarkets, specialty cafes, and e-commerce platforms worldwide.

According to the National Coffee Association, 67% of American adults drank coffee daily in 2023.

Market Dynamics:

Driver:

Shifting consumer preferences toward premium coffee experiences

Consumers increasingly seek artisanal and craft beverage options that deliver superior

taste and quality perceptions. Cold brew's smoother flavor profile and reduced acidity appeal to coffee enthusiasts exploring alternatives to traditional preparations. This preference for premium experiences extends beyond taste to encompass packaging aesthetics and brand storytelling. Millennials and Gen Z consumers particularly value the craftsmanship association, willingly paying higher prices for cold brew products. The premium positioning enables higher margins for manufacturers while satisfying consumer desire for elevated daily rituals.

Restraint:

Higher production costs and pricing barriers

Cold brew production requires significantly more coffee grounds per serving than traditional brewing methods, increasing raw material expenses. The extended steeping time and specialized equipment needs further elevate manufacturing costs, translating to retail prices substantially above conventional coffee products. This pricing differential limits accessibility for budget-conscious consumers, particularly in developing markets. Economic downturns and inflationary pressures exacerbate this barrier as consumers prioritize affordability over premium experiences. Mass market adoption remains constrained until production efficiencies and economies of scale reduce final consumer pricing.

Opportunity:

Expansion into ready-to-drink and on-the-go formats

Convenience-focused packaging innovations present substantial growth opportunities through alignment with modern mobile lifestyles. Single-serve bottles, cans, and cartons enable cold brew consumption during commutes, workdays, and recreational activities where traditional brewing is impractical. Strategic partnerships with convenience stores, gas stations, and foodservice operators expand distribution beyond traditional grocery channels. The ready-to-drink format also facilitates flavor experimentation and seasonal offerings, maintaining consumer engagement throughout the year. This format evolution transforms cold brew from café specialty to everyday convenience beverage.

Threat:

Intensifying competition from alternative coffee innovations

The coffee category continuously evolves with new preparation methods and functional formulations competing for consumer attention. Nitro cold brew, draft lattes, and coffee-based energy drinks create crowded marketplace conditions that fragment consumer preferences. Hot brew innovations emphasizing single-origin storytelling and artisanal roasting also compete for premium positioning. This proliferation of options challenges cold brew's differentiation, potentially limiting category growth as consumers rotate among multiple coffee experiences. Established brands must continuously innovate to maintain relevance amid escalating competitive intensity.

Covid-19 Impact:

The COVID-19 pandemic disrupted cold brew's foodservice-dependent growth trajectory while accelerating retail channel expansion. Caf? closures temporarily reduced access to specialty cold brew preparations, driving consumers toward retail packaged products for home consumption. Home brewing experimentation increased as consumers explored cold brew concentrates and grounds during lockdown periods. E-commerce adoption accelerated significantly, with direct-to-consumer models gaining traction. This retail shift proved durable, with post-pandemic consumers maintaining hybrid consumption patterns combining occasional caf? visits with established home cold brew routines developed during restrictions.

The Ready-to-Drink (RTD) Cold Brew Coffee segment is expected to be the largest during the forecast period

The Ready-to-Drink (RTD) Cold Brew Coffee segment is expected to account for the largest market share during the forecast period, driven by unparalleled convenience and broad distribution accessibility. These pre-packaged beverages eliminate preparation requirements, enabling immediate consumption across diverse settings including workplaces, travel, and social activities. Refrigeration availability in convenience stores and supermarkets ensures widespread product visibility. Major beverage corporations have entered this segment through product launches and acquisitions, expanding shelf presence. The format's appeal to both dedicated coffee enthusiasts and casual consumers seeking refreshing alternatives ensures sustained category leadership.

The Robusta-based Cold Brew segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Robusta-based Cold Brew segment is predicted to witness the highest growth rate, driven by cost advantages and evolving consumer acceptance

of diverse flavor profiles. Robusta beans offer higher caffeine content and distinct flavor characteristics that appeal to consumers seeking bold, energizing experiences. Growing cultivation in Vietnam and Brazil ensures consistent supply at competitive prices. Manufacturers increasingly blend Robusta with Arabica to balance cost and quality, introducing consumers to Robusta's merits. Specialty-grade Robusta development further elevates quality perceptions, expanding acceptance beyond traditional price-sensitive segments.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by sophisticated coffee culture, high disposable incomes, and early cold brew adoption. The region's consumers demonstrate strong preference for premium, artisanal coffee experiences with willingness to pay premium prices. Extensive retail distribution networks across supermarkets, convenience stores, and specialty coffee shops provide broad consumer access. Major cold brew brands headquartered in the region continuously innovate through flavor experimentation and packaging advancements. Coffee shop culture normalization of cold brew as year-round offering reinforces sustained consumer engagement throughout seasons.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapidly expanding coffee consumption cultures and youthful demographics embracing Western beverage trends. Countries including China, South Korea, and Japan witness growing caf? cultures where cold brew features prominently as premium offering. Rising disposable incomes enable experimentation with higher-priced coffee formats. Local manufacturers develop regionally relevant flavor innovations incorporating Asian taste preferences. E-commerce penetration accelerates distribution beyond major urban centers. International coffee chains expanding throughout the region introduce cold brew to new consumer segments, accelerating adoption rates significantly.

Key players in the market

Some of the key players in Cold Brew Coffee Market include Starbucks Corporation, Nestl?, JAB Holding Company, Coca-Cola Company, PepsiCo, La Colombe Coffee Roasters, Stumptown Coffee Roasters, Blue Bottle Coffee, Califia Farms, Chameleon Cold-Brew, Wandering Bear Coffee, High Brew Coffee, Grady's Cold Brew, Illycaff?,

Dunkin' Brands Group, and UCC Ueshima Coffee.

Key Developments:

In January 2026, Starbucks unveiled a reimagined Loyalty Program launching on March 10, 2026. The new tiered system (Green, Gold, and Reserve) introduces 'Stars that never expire' for top-tier members and a lower 60-Star redemption tier to drive frequent, small-ticket purchases.

In January 2026, La Colombe received approval for a \$479 million expansion of its manufacturing facility in Michigan. The expansion is expected to create roughly 100 new jobs and significantly increase the production capacity of its popular canned 'Draft Latte' and cold brew lines.

Product Types Covered:

Ready-to-Drink (RTD) Cold Brew Coffee

Cold Brew Coffee Concentrates

Cold Brew Coffee Grounds

Coffee Bean Types Covered:

Arabica-based Cold Brew

Robusta-based Cold Brew

Liberica-based Cold Brew

Other Blends

Flavors Covered:

Original/Unflavored

Flavored

Natures Covered:

Conventional

Organic

Caffeine Contents Covered:

Regular Caffeine

Decaffeinated

Packaging Types Covered:

Bottles

Cans

Aseptic Cartons & Bags

Other Packaging Types

Distribution Channels Covered:

Off-Trade (Retail) Channels

On-Trade (Foodservice) Channels

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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