

Specialty Coffee & Cold Brew Concentrates Market Forecasts to 2034 - Global Analysis By Product Type (Specialty Coffee Concentrates and Cold Brew Concentrates), Coffee Bean Type, Flavor Profile, Packaging Format, Distribution Channel, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Specialty Coffee & Cold Brew Concentrates Market is accounted for \$0.7 billion in 2026 and is expected to reach \$1.4 billion by 2034 growing at a CAGR of 8.7% during the forecast period. Specialty Coffee and Cold Brew Concentrates represent a segment of premium coffee focused on superior bean quality, distinct origins, and refined preparation techniques. These offerings deliver a smooth, less acidic flavor and a more balanced profile than conventional coffee. Cold brew concentrates stand out for their convenience and adaptability, enabling consumers to adjust intensity by mixing with water or milk. Rising demand for quick yet high-quality beverages, busy urban routines, and growing appreciation for specialty coffee culture are boosting popularity. Furthermore, trends such as eco-friendly sourcing, transparency, and creative flavor enhancements continue to influence this market's development globally.

According to the International Coffee Organization (ICO), global coffee consumption increased by 1.4% to 175.1 million 60?kg bags in coffee year 2024/25, while global production was 177.5 million bags. This demonstrates the scale of the overall coffee market in which specialty segments such as cold brew are expanding.

Market Dynamics:

Driver:

Rising demand for premium and artisanal beverages

There is a noticeable increase in consumer preference for high-end and artisanal drinks that deliver enhanced flavor, authenticity, and distinctive experiences. Specialty coffee and cold brew concentrates cater to this shift by focusing on superior bean quality, unique sourcing, and refined brewing techniques. The trend is supported by a rising interest in coffee culture and a readiness among consumers to spend more on premium options. Younger urban populations are key contributors, seeking beverages that align with their identity and preferences. Consequently, companies are introducing innovative products such as single-origin coffees, limited-batch releases, and varied flavor combinations to meet evolving expectations.

Restraint:

High product cost and premium pricing sensitivity

The elevated cost associated with specialty coffee and cold brew concentrates acts as a barrier to widespread consumer adoption. Factors such as high-quality bean procurement, careful production techniques, and stringent standards contribute to premium pricing. This makes these products less accessible to cost-conscious buyers, particularly in emerging economies where spending priorities are more constrained. Although niche urban segments are willing to pay for quality, many consumers still consider such offerings as discretionary purchases. Moreover, variations in raw material pricing and logistics expenses can increase retail costs, making it difficult for brands to compete effectively with more affordable traditional coffee options.

Opportunity:

Expansion in emerging markets and urban centers

Developing regions and expanding urban areas offer strong growth potential for specialty coffee and cold brew concentrates. Increasing income levels, evolving consumer habits, and greater awareness of international coffee trends are motivating people to try premium beverages. Younger consumers are especially open to experimenting with unique flavors and convenient formats, boosting demand. The rise of organized retail outlets and e-commerce platforms is also enhancing availability and reach. Companies that adapt their products to local tastes and price expectations can

effectively capture new audiences, positioning these markets as important drivers of future growth and sustained business expansion.

Threat:

Intense competition from alternative beverage categories

A major challenge for the specialty coffee and cold brew concentrates market is the growing competition from other beverage segments such as energy drinks, ready-to-consume teas, enhanced water, and wellness drinks. These alternatives provide comparable convenience and sometimes additional functional advantages, appealing to similar groups of consumers. Strong promotional strategies, diverse product portfolios, and attractive pricing from competitors can restrict market expansion. Furthermore, well-established companies in these categories benefit from extensive distribution channels and strong brand visibility, increasing competitive pressure. To remain relevant, market players must consistently innovate and distinguish their offerings from competing beverages.

Covid-19 Impact:

The pandemic created both challenges and opportunities for the specialty coffee and cold brew concentrates market. The shutdown of cafés and foodservice venues led to a decline in on-premise consumption, negatively impacting sales initially. At the same time, there was a notable rise in at-home coffee consumption, driving demand for high-quality and convenient products like cold brew concentrates. Consumers increasingly relied on retail stores and online platforms to meet their needs. Although supply chain interruptions caused short-term difficulties, companies adapted by strengthening e-commerce presence and offering direct delivery options, enabling the market to recover and maintain growth momentum over time.

The cold brew concentrates segment is expected to be the largest during the forecast period

The cold brew concentrates segment is expected to account for the largest market share during the forecast period as they effectively meet consumer preferences for ease of use, balanced taste, and adaptability. These concentrates allow users to quickly prepare coffee by mixing with various liquids, offering flexibility and convenience. The smooth, less acidic profile appeals to a broad audience, including individuals who prefer milder coffee experiences. Increased presence in supermarkets and digital platforms,

combined with the introduction of new flavors and formats, has enhanced their popularity. As a result, cold brew concentrates continue to lead the segment by catering to evolving lifestyle needs and consumption habits.

The functional nutrition segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the functional nutrition segment is predicted to witness the highest growth rate as consumers increasingly prioritize health-oriented choices. There is a rising preference for beverages that deliver additional benefits such as improved focus, sustained energy, and wellness support. To meet this demand, manufacturers are incorporating natural ingredients, including botanicals and nutrients, into coffee concentrates. This trend is especially popular among younger demographics and individuals focused on healthy lifestyles. With growing interest in functional beverages and ongoing product innovation, this segment is expanding quickly, reflecting a broader shift toward combining nutrition with everyday beverage consumption.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to its mature coffee culture and high demand for premium beverage experiences. The region is supported by a large network of specialty coffee shops, innovative companies, and efficient distribution systems that enhance accessibility. Consumers increasingly favor convenient yet high-quality coffee options, encouraging the adoption of cold brew concentrates and similar products. Rising interest in ethically sourced beans, artisanal preparation, and diverse flavors further supports growth. Ongoing innovation and the expansion of online sales platforms continue to reinforce North America's leading role in the market.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, due to changing lifestyles, urban expansion, and increasing purchasing power. Consumers are becoming more aware of global coffee trends, leading to greater interest in premium and specialty beverages. The presence of both international and domestic coffee brands is further supporting this trend. Younger consumers are embracing convenient formats like cold brew concentrates, driving demand. Improved distribution through organized retail and online channels is making these products more accessible. As preferences shift toward high-quality coffee experiences, the region

continues to show rapid and consistent growth.

Key players in the market

Some of the key players in Specialty Coffee & Cold Brew Concentrates Market include Nestl? SA, Starbucks Corporation, Keurig Dr Pepper Inc., The J.M. Smucker Company, Chameleon Cold-Brew, La Colombe Coffee Roasters, Wandering Bear Coffee Co., Origin Coffee, Nextbio Co., Ltd., Reborn Coffee Inc., Westrock Coffee, Explorer Cold Brew, Grady's Cold Brew, Jot Coffee, Califia Farms, High Brew Coffee, Stok and Rise Brewing Co.

Key Developments:

In June 2026, Nestl? is partnering with US-based biotechnology company Helaina to advance early-life nutrition. The multiyear partnership aims to understand new bioactive proteins and their role in early-life development. The Swiss company says the work will contribute to its ongoing efforts to translate scientific insights into nutrition solutions for specific health benefits.

In June 2025, The J.M. Smucker Co.'s relationship with Pollinator Partnership (P2) has helped us provide habitat support and educational opportunities for our employees that benefit the monarchs and other pollinators that are so critical to our food supply and our world. The partnership first blossomed in 2015 with the creation of our beloved pollinator garden at The J.M. Smucker Co. Store near our headquarters in Orrville, OH.

Product Types Covered:

Specialty Coffee Concentrates

Cold Brew Concentrates

Coffee Bean Types Covered:

Arabica

Robusta

Blends

Single Origin

Flavor Profiles Covered:

Classic & Original

Flavored

Functional Infused

Packaging Formats Covered:

Bottles

Cans

Bag-in-Box & Bulk Packs

Ready-to-Mix Sachets

Distribution Channels Covered:

Retail

Online & E-Commerce

Foodservice

Institutional

End Users Covered:

Ready-to-Drink Beverages

Food & Dessert Recipes

Mixology & Cocktails

Functional Nutrition

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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