Specialty coffee in 2026 — *a one-page brief*

Specialty is still the fastest-growing corner of coffee, but the growth has moved from new cafés to ready-to-drink and home brewing, while green-coffee prices squeeze margins.

$96B	8.4%	41%	+38%
Global specialty coffee sales, 2026	Annual growth, 2023–2026	Share of sales outside cafés	Arabica futures vs 2024 average

1 MARKET SIZE

A $96B market growing twice as fast as coffee overall

Specialty now makes up about 22% of global coffee spending, up from 17% in 2022. North America and Western Europe account for 58% of sales; East Asia is the fastest-growing region at 13% a year.

- **Cafés** still lead with $56B, but their share is slipping.
- **Average café ticket** reached $6.40, up 5% on 2025.

2 WHAT'S GROWING

Cold drinks and brewing at home

- **Ready-to-drink cold brew:** up 19% a year, now in mainstream grocery.
- **Home espresso and pods:** premium compatible pods grew 14%.
- **Decaf and low-caffeine:** specialty decaf up 11%, led by younger buyers.
- **Plant milks:** oat is in 44% of milk-based specialty drinks.

3 RISKS

Costs up, loyalty thinner

- **Green-coffee prices:** weather in Brazil and Vietnam keeps arabica volatile.
- **Labour:** café wages rose 7%, faster than ticket prices.
- **Price fatigue:** 1 in 3 buyers say they trade down when a drink passes $7.
- **Regulation:** EU deforestation rules add traceability costs for importers.

4 WHAT TO DO NEXT

Follow the cup out of the café

- **Launch a retail line** (bottled cold brew or pods) to reach buyers at home.
- **Hedge green coffee** 6–9 months ahead and lock direct-trade contracts.
- **Build the loyalty app** around order-ahead, not discounts.
- **Hold a sub-$5 core drink** to protect traffic as prices rise.

SALES BY CHANNEL, 2026

US$ billions · growth is the 2023–2026 annual rate

CHANNEL	SHARE	SALES	GROWTH	OUTLOOK
Cafés and coffee bars	59%	$56.4B	+5.1%	Steady; new openings slowing
Retail beans and ground	21%	$20.1B	+9.6%	Strong at home
Ready-to-drink	11%	$10.8B	+19.2%	Fastest-growing
Pods and capsules	6%	$6.2B	+14.0%	Premium pods lead
Subscriptions	3%	$2.5B	−2.3%	Churn is the problem
Total	**100%**	**$96.0B**	**+8.4%**	

Sources: the numbers in this brief are illustrative, written to show the format; they are not market data. A real brief would cite industry association reports, futures exchange data and company filings.