2025 NATIONAL COFFEE DATA TRENDS
SPECIALTY COFFEE REPORT

BY THE NATIONAL COFFEE ASSOCIATION USA

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National Coffee Association

Established in 1911, the National Coffee Association of U.S.A., Inc. (NCA) is the oldest trade association representing the $343 billion U.S. coffee industry. Through education, advocacy, and connection, the NCA serves hundreds of organizations—large and small—across the sector including roasters, manufacturers, traders, brokers, importers, exporters, retailers, wholesaler/distributors, growers, NGOs and allied companies. Visit ncausa.org to learn more.

The Mission of the National Coffee Association is to grow the U.S. coffee community through education, advocacy, and connection.

Our Core Values

Collegiality

NCA understands the meaning and importance of community members embracing mutual respect as we work together to create a stronger future for coffee.

Data-Driven

NCA collects and acts upon data to make informed decisions to address unmet and emerging market needs, streamline operations, and assess partnerships.

Inclusion

NCA provides diverse stakeholders the opportunity and platform to engage, have a voice, and serve the greater good of the coffee industry.

Sustainability

NCA invests in ensuring the sustainability of coffee, from crop to cup.

Transparency

NCA provides accurate and relevant information about coffee and the industry.

Table of Contents

04	Background
06	Research Methodology
12	Key Observations
16	The Macro View: Past-Day Coffee Penetration
17	Past-Day Penetration of Coffee Beverage Types
20	Mean Number of Coffee Cups Per Day
21	The Macro View: Past-Week Coffee Penetration
22	Past-Week Penetration of Coffee Beverage Types
25	Traditional vs. Specialty (Region, Age, Ethnicity)
31	Competitive Beverage Landscape
32	Past-Day Penetration of Other Beverage Types
33	Past-Day Penetration of Other Beverage Types by Subgroups
34	Temperature State
36	Penetration of Hot vs. Cold Traditional vs. Specialty
36	EBBs Hot vs. Cold
37	How Do Specialty Coffee Drinkers Consume Coffee?
38	Method of Preparation
40	Roast Type Consumed
41	Additives Used Yesterday
45	Preparation Location
47	Coffee Equities
50	Impact of Coffee Flavor Profile & Health Benefits on Purchase Intent
57	Consumer Profile

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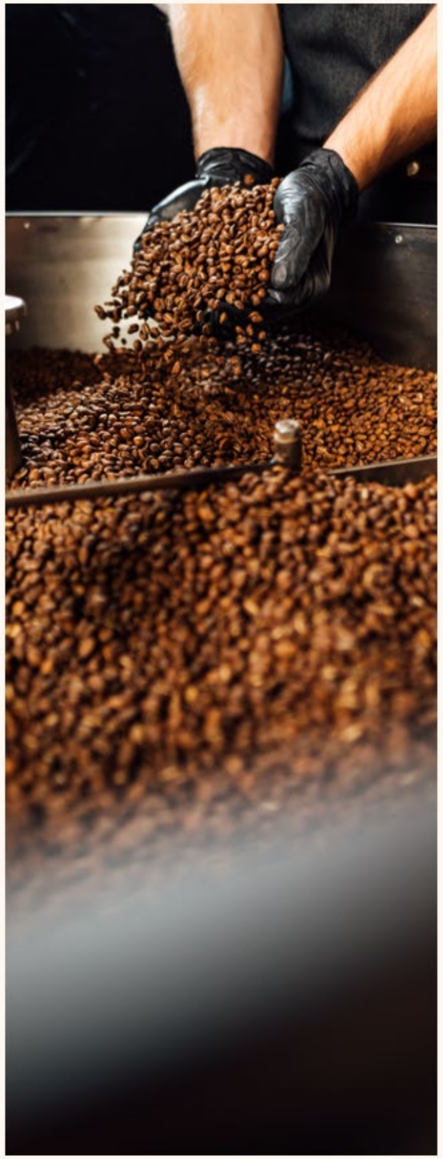
Background



Background

Since 1950, the National Coffee Association of U.S.A. has commissioned an annual survey of Americans regarding their consumption of coffee and, since 1993, their habits and practices related to espresso-based beverages.

The study provides the longest available statistical series on consumer drinking patterns related to coffee and other beverages. In the earliest years, the study was sponsored by the Pan American Coffee Bureau and then the International Coffee Organization. Since 1991, the study has been financed and conducted by the National Coffee Association of U.S.A.

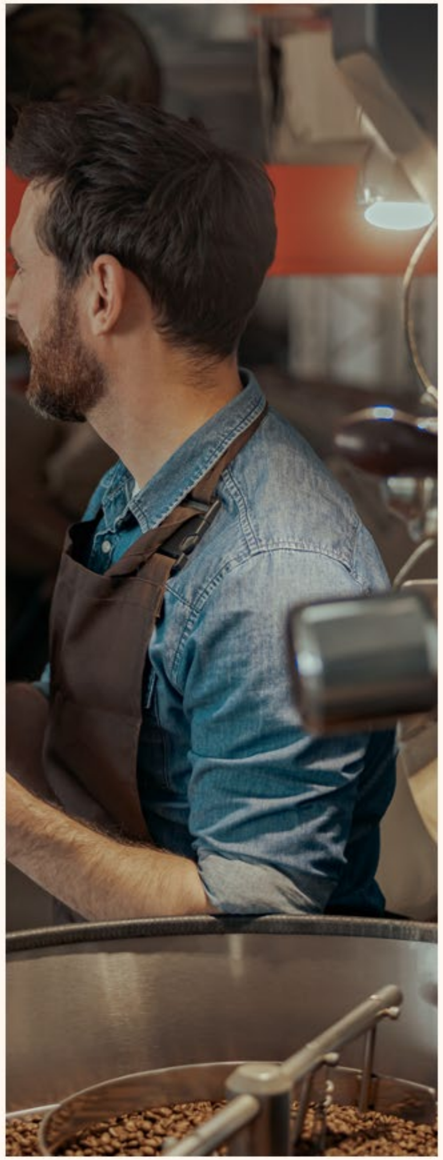
When the COVID-19 pandemic began in 2020, the NCA conducted the National Coffee Data Trends (NCDT) study twice yearly to keep abreast of changing consumer behavior.

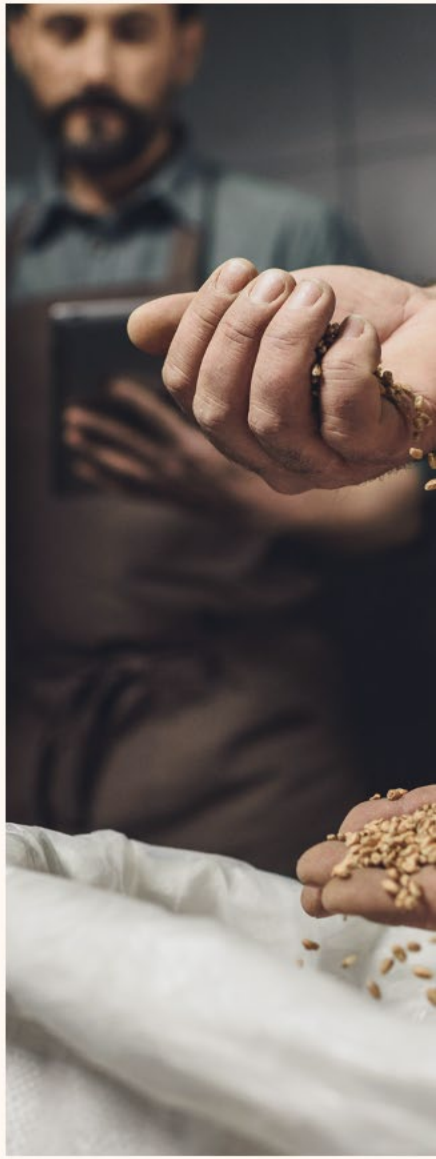
In 2025, it remains a bi-annual tracker with the first wave conducted in January and July marking the second wave of the year.

Data from this report utilizes the latest wave of the NCDT, conducted in January 2025. Where relevant, past years have been included for comparison or tracking.

The 2025 Specialty Coffee Report is produced in collaboration with the Specialty Coffee Association (SCA).

Research Methodology





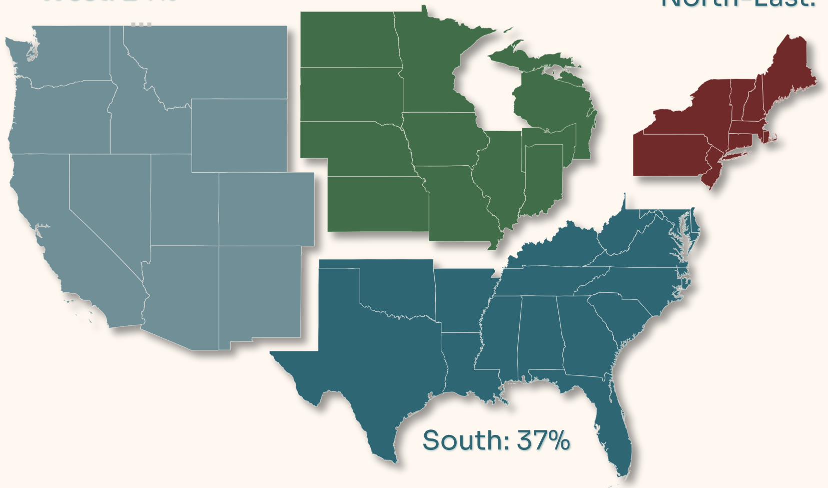
Methodology Summary

Data for this report was collected between January 6-20, 2025.

Respondents were screened to meet the following criteria:

- N=1,845 respondents, aged 18+.
- The weighted sample reflects the American population 18+, with interlocking quotas for age, gender, region and ethnicity.
- All respondents drank a beverage other than tap water past-day. Drinking coffee is not a requirement to participate in the research.
- Daily quotas were implemented to ensure a balanced sample by day of week.

REGION



AGE

13% 18-24

28% 25-39

34% 40-59

25% 60+

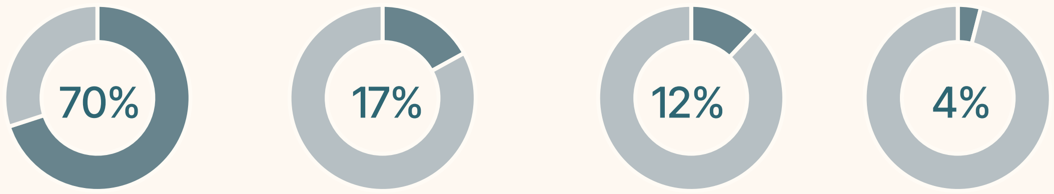
GENDER

51% Female

48% Male

*1% selected prefer not to say/prefer to identify as

ETHNICITY



Caucasian-American

Hispanic-American

African-American

Asian-American

Significance Testing & Margin of Error

Data in this report have been tested for statistical significance.

When numbers are tested across columns in a table, the following notation is used:

	Column A	Column B	Column C
Row 1	70 **BC**	42	41
Row 2	55	30	41
Row 3	32	27	37 **B**

The 70% in column A is significantly higher than both Column B and Column C

The 37% in column C is significantly higher than only Column B

When more than one year's data is reported on one chart, upwards/downwards triangles ▲▼ are used to indicate the number is significantly higher / lower than previous wave (at the 95% confidence level).

The margin of error on a sample size of 1,845 is +/- 2.3%.

Classification of Coffee Types

As of 2025, there are 13 coffee preparation options included in the NCDT: ten are classified as brewed, two are classified as "instant" and one is classified as "ready-to-drink":

Classified as "Brewed"

- Drip Coffee Maker
- Espresso Machine
- French Press / Plunger
- Moka Pot
- Percolator
- Disc/Capsule Machine
- Coffee Strainer
- Pour Over
- Cold Brewing
- Bean to Cup Brewer

Classified as "Instant"

- Instant Coffee
- Coffee Concentrate

Classified as "Ready-To-Drink"

- Bottled/Canned Coffee Drink

Nomenclature

"Past-Day" penetration refers to respondents who drank any type of coffee the day before they were interviewed. These respondents may not necessarily consume coffee every day.

Total Coffee:
Includes all coffee types.

Traditional Coffee – Not Specialty (TC-NS):
Traditional Coffee (Traditional Coffee, drunk hot or iced) that is not brewed from premium whole bean or ground varieties.

Traditional Coffee – Specialty (TC-S):
Traditional Coffee drunk hot or iced that is brewed from premium whole bean or ground varieties.

Café con Leche can be included in:
Traditional Coffee – Specialty; or Traditional Coffee – Not Specialty. The distinction is based on the respondent believing that the Café con leche was or was not specialty coffee — that is, brewed from premium whole bean or ground varieties. Café con leche is not included in Espresso-Based Beverages.

Specialty Coffee Beverages (SCB):
Traditional Coffee – Specialty, Espresso-Based Beverages, Non-Espresso-Based Beverages, and ready-to-drink coffee.

Espresso-Based Beverages (EBB):
Cappuccino, espresso, latte, caffé mocha, macchiato, flat white and caffè Americano.

Non-Espresso Based Beverages (NEBB):
Frozen blended coffee, cold brew coffee (not traditional iced coffee - made by steeping coffee in cold water for several hours) and nitro coffee (sometimes called draft) - iced or cold brew coffee infused with nitrogen).

Ready-to-Drink Coffee (RTD):
Purchased ready-to-drink in a bottle or can.

Nomenclature (cont'd)

The traditional and specialty coffee definitions now incorporate temperature state (hot/cold). Temperature state is not asked of RTD coffee beverages.

Instant Coffee:
Instant coffee from a can or jar (adding hot water to coffee granules or syrup in a cup) or instant coffee from single pre-measured stick pack (adding hot water to coffee granules in a cup). Instant coffee also includes coffee made from coffee concentrate.

Decaffeinated Coffee:
A cup of coffee that was decaffeinated or partially caffeinated (e.g. half caff).

Hot/Cold Traditional Coffee:

Hot traditional coffee: Traditional Coffee or Café con leche drunk hot.

Cold traditional coffee: Traditional Coffee or Café con leche drunk cold.

Hot/Cold Specialty Coffee:

Hot specialty coffee: Traditional coffee (specialty), Cappuccino, espresso, latte, caffé mocha, macchiato, flat white, caffè Americano and cold brew coffee drunk hot.

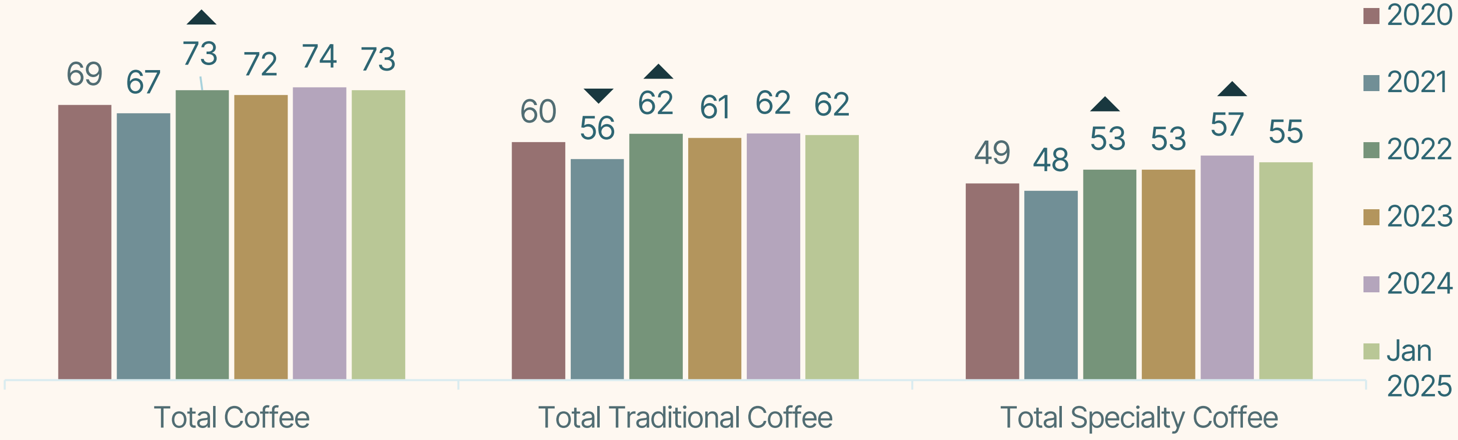
Cold specialty coffee: Traditional coffee (specialty), Cappuccino, espresso, latte, caffé mocha, macchiato, flat white, caffè Americano, frozen blended coffee, cold brew coffee and nitro coffee drunk cold.

Key Observations

Despite economic uncertainty at the start of 2025, specialty coffee is sustaining at elevated levels

55%

of Americans reported drinking a specialty coffee beverage past-week.

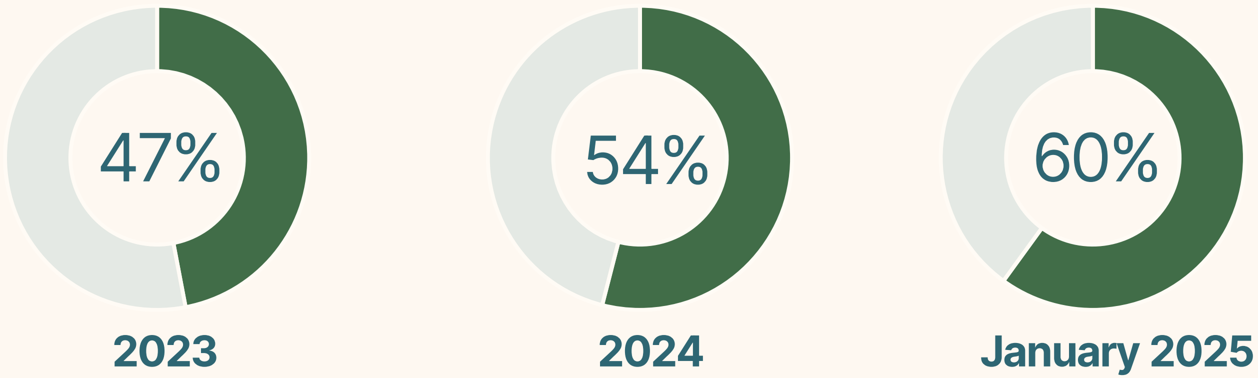


Past-Week Penetration of Coffee Beverage Types (%)

The past-week penetration of specialty coffee has increased by 6 percentage points since 2020, indicating a potential for continued growth in the specialty coffee segment, as more consumers seek out espresso and non-espresso-based beverages.

Specialty coffee drinkers are increasingly making sweeter coffees

Past-Day Usage of Sweeteners and/or Syrups (%)



60%

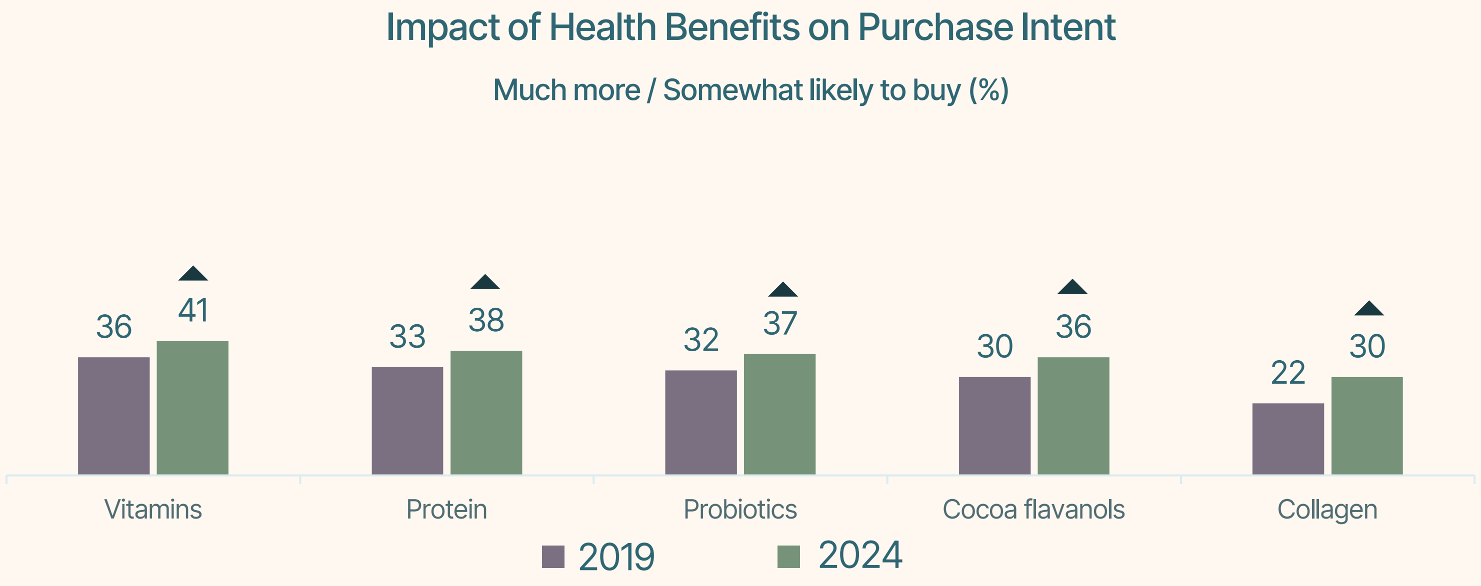
of specialty coffee drinkers used sweetener and/or syrup in their past-day coffee. (+6pp from 2024).

Sweetener usage among specialty coffee drinkers has shown a significant upward trajectory over the past two years. Americans aged 25-39 are the strongest users of sweeteners, with 68% of this group adding a sweetener or syrup into their coffee in the past day.

There are notable differences by ethnicity in the use of sweeteners: African-Americans are more likely to add honey (15%) to their coffee, while Hispanic-Americans tend to use brown sugar (65%) and Asian-Americans are more inclined to add stevia (14%).

This growing preference for sweeter coffee indicates evolving consumer tastes, which may reshape the specialty coffee flavor profile, and potentially, interest in specialty coffee innovations.

Coffee with even more functional health benefits: interest in coffee with health benefits aligns with broader beverage trends where added ingredients are growing



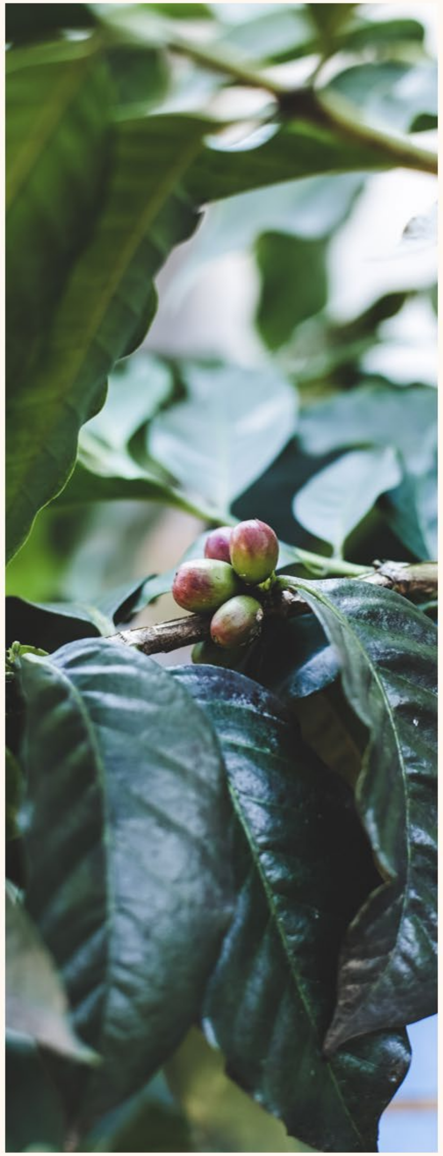
Since 2019, health benefits have become increasingly more motivating to coffee purchase, amongst specialty coffee drinkers. While overall interest remains somewhat niche, in 2024, more specialty drinkers say they would purchase a coffee that has added collagen (+8pp), probiotics (+5pp) or protein (+5pp).

This trend reflects a broader movement within the beverage industry, as consumers increasingly prioritize health and functional benefits in the items they consume.

When combined with the pursuit of more premium coffee experiences—whether through additives, beverage types or enhanced health benefits—this underscores consumers' desire for increasingly more diverse and specialized coffee experiences.

The Macro View:

Past-Day Coffee Consumption

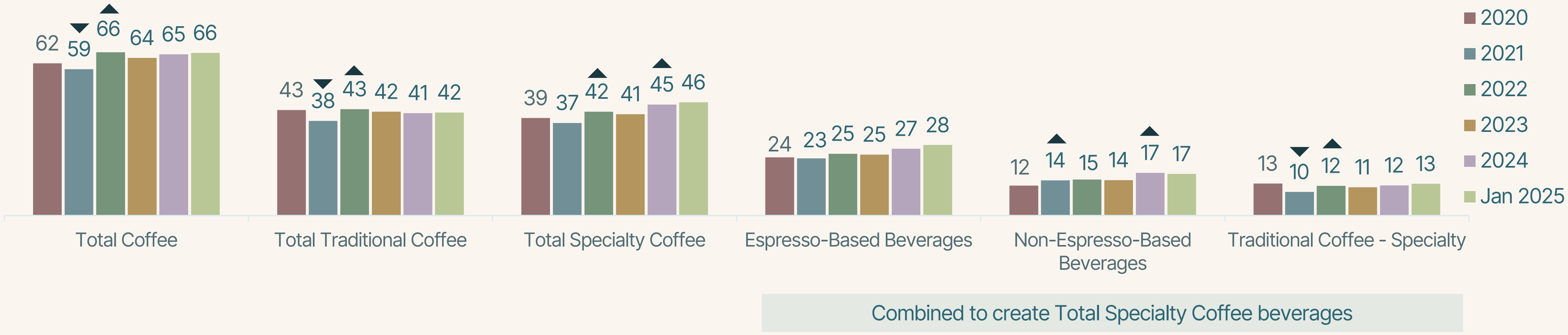


Past-Day Penetration of Coffee Beverage Types

In January 2025, the past-day penetration of specialty coffee is at 46%, the highest level recorded since 2020.

Penetration of specialty coffee is driven by strong consumption of Espresso Based Beverages (EBBs) (28%). Meanwhile, N-EBB penetration is sustaining at 17%, indicating the appeal for cold coffee beverages, even in winter.

Past-Day Penetration of Coffee Beverage Types (%)



Base: Total sample aged 18+ (2020 n=2,838; 2021 n=3,053; 2022 n=3,151; 2023 n=3,076; 2024 n=3678; Jan 2025 n=1845)

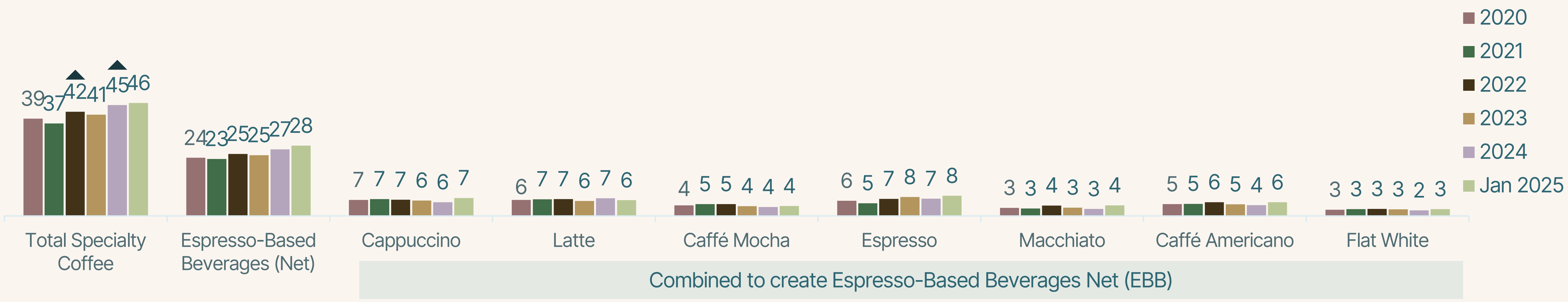
What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-Day Penetration of Specialty - EBBs

Within the specialty segment, the past-day penetration of espresso-based beverages (EBBs) has seen steady growth since 2020 (28%, +4pp vs. 2020).

At the past-day level, consumption of EBB subtypes has been steady over the past five years. Espressos (8%), lattes (6%), cappuccinos (7%), and caffè Americanos (6%) drive past-day consumption.

Past-Day Penetration of Specialty Espresso-Based Beverage Types (%)



Base: Total sample aged 18+ (2020 n=2,838; 2021 n=3,053; 2022 n=3,151; 2023 n=3,076; 2024 n=3678 ; Jan 2025 n=1845)

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

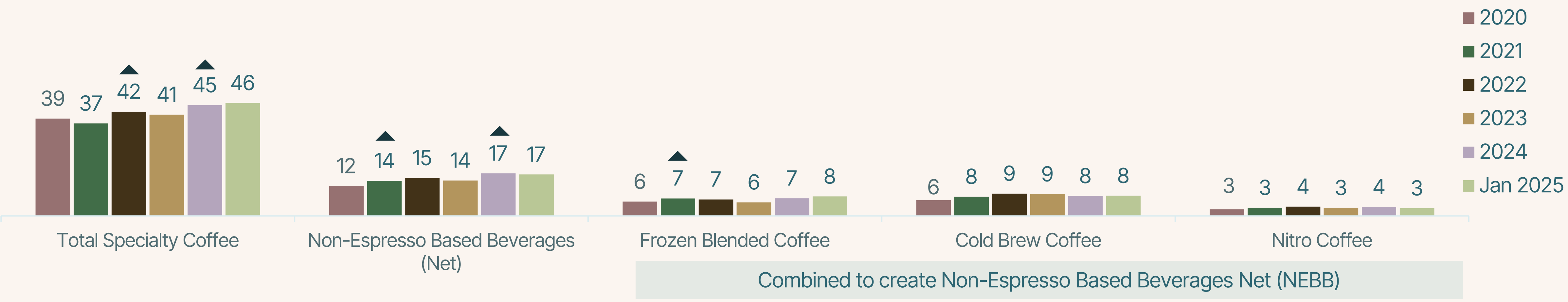
Past-Day Penetration of Specialty - N-EBBs

Past-day penetration of Non-Espresso Based Beverages (N-EBBs) sits at 17% in January 2025, which is on par with 2024.

Within N-EBBs, Cold Brew (8%) and Frozen Blended (8%) coffee types are driving past-day penetration.

All N-EBBs are prepared cold. The steady levels seen for these cold coffee beverages speak to the year-round appeal of cold coffee.

Past-Day Penetration of Specialty Non-Espresso Based Beverage Types (%)



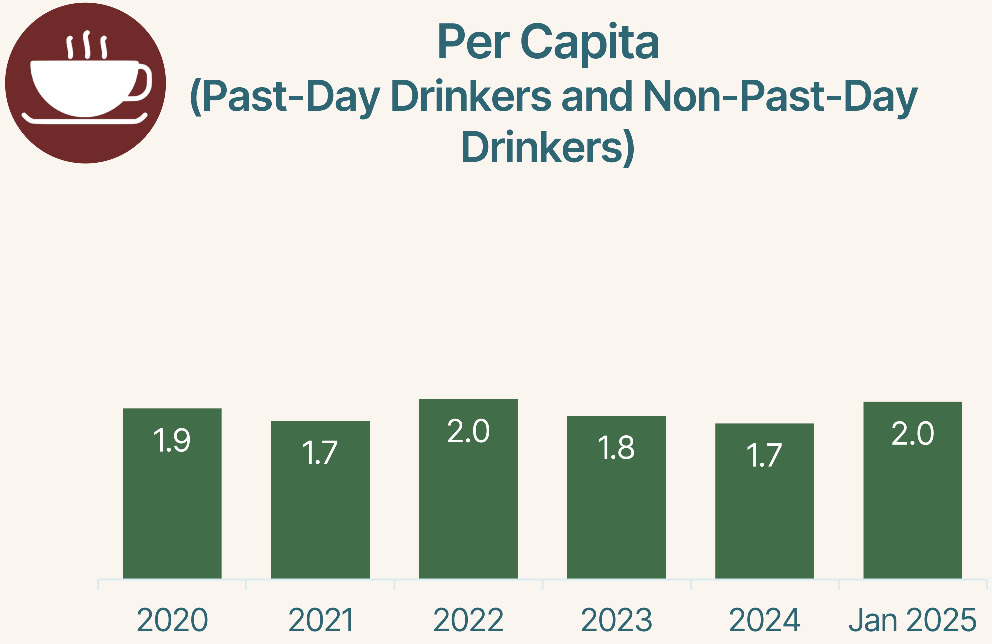
Base: Total sample aged 18+ (2020 n=2,838; 2021 n=3,053; 2022 n=3,151; 2023 n=3,076; 2024 n=3678; Jan 2025 n=1,845)

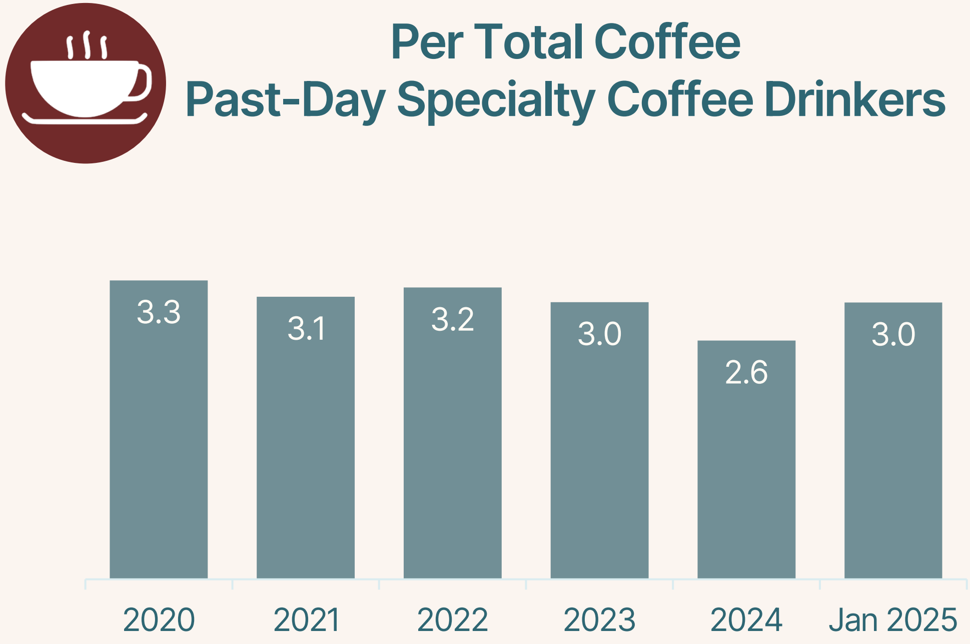
What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Mean Number of Coffee Cups Consumed in Past Day

In January 2025, the average number of cups consumed in the past day is 2.0 cups per capita.

This is higher among past-day specialty coffee drinkers (3.0 cups), and generally on par with levels seen in recent years.





Left Base: Total sample aged 18+, excluding "outliers"(2020 n=2,823; 2021 n=3,049; 2022 n=3,135; 2023 n= 3,061; 2024 n=3672; Jan 2025 n=1,837)

Right Base: Past-day specialty coffee drinkers age 18+, excluding "outliers"(2020 n=1,108; 2021 n=1,134; 2022 n=1,305; 2023 n=1,242; 2024 n=1,637; Jan 2025 n=832)

How many cups or glasses of [COFFEE/COFFEE BEVERAGE] did you drink [TIME OF DAY]?

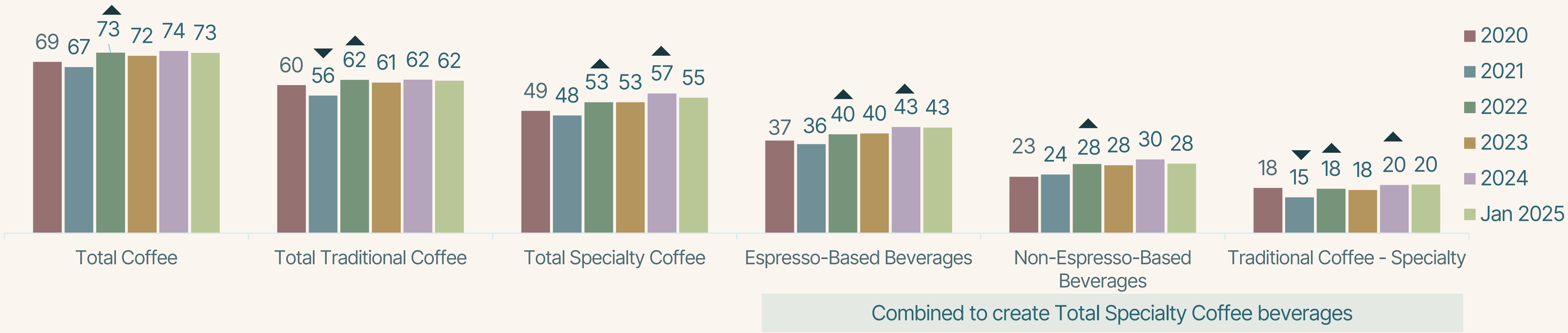
The Macro View:
Past-Week Coffee Consumption

Past-Week Penetration of Coffee Beverage Types

In January 2025, 73% of Americans consumed at least one cup of coffee in the past-week.

62% opted for traditional coffee, while 55% had at least one cup of specialty coffee. This is comparable with the levels observed in 2024. However, penetration of specialty coffee has increased by 6 percentage points since 2020, indicating a growing demand for specialty coffee.

Past-Week Penetration of Coffee Beverage Types (%)



Base: Total sample aged 18+ (2020 n=2,838; 2021 n=3,053; 2022 n=3,151; 2023 n=3,076; 2024 n=3678 ; Jan 2025 n=1845)

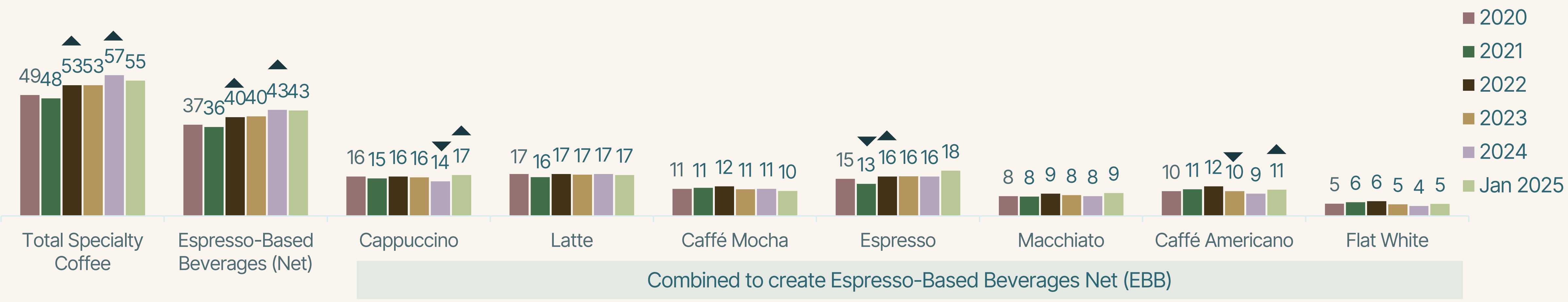
What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-Week Penetration of Specialty - EBBs

Within the specialty segment, espresso-based beverages (EBBs) have seen consistency since 2020. In January 2025, 43% of Americans had at least one espresso-based beverage in the past-week, which is on par with 2024.

Past-week penetration is primarily driven by espressos (18%), lattes (17%), cappuccinos (17%), and caffè Americanos (11%).

Past-Week Penetration of Specialty Espresso-Based Beverage Types (%)



Base: Total sample aged 18+ (2020 n=2,838; 2021 n=3,053; 2022 n=3,151; 2023 n=3,076; 2024 n=3678 ; Jan 2025 n=1845)

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

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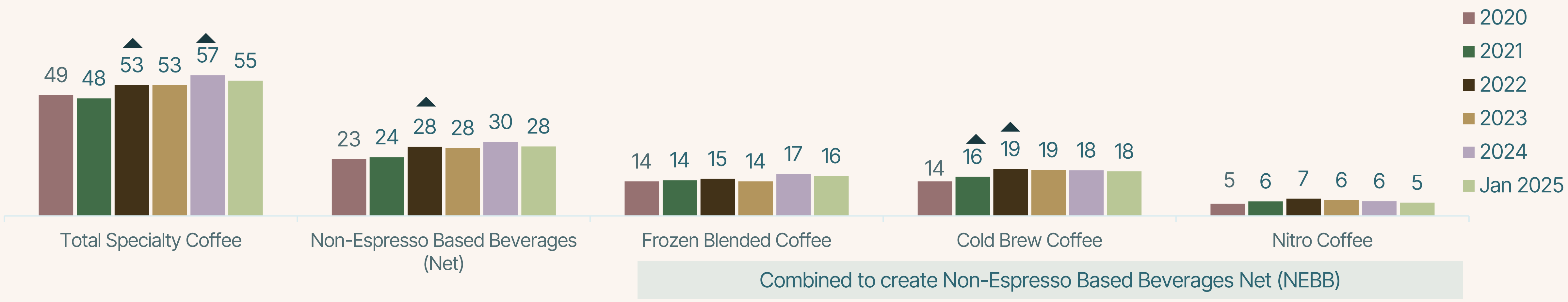
Past-Week Penetration of Specialty - N-EBBs

Past-week penetration of Non-Espresso Based Beverages (N-EBBs) sits at 28% in January 2025, which is on par with the last three years. The N-EBB segment grew during Covid-19 (2021) and has sustained at this level since.

Within N-EBBs, Cold Brew (18%) and Frozen Blended (16%) coffee types are driving past-week penetration.

All N-EBBs are prepared cold. The steady levels seen for these cold coffee beverages speak to the year-round appeal of cold coffee.

Past-Week Penetration of Specialty Non-Espresso Based Beverage Types (%)



Base: Total sample aged 18+ (2020 n=2,838; 2021 n=3,053; 2022 n=3,151; 2023 n=3,076; 2024 n=3678; Jan 2025 n=1,845)

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Traditional vs. Specialty Coffee By Age

Past-week penetration of specialty coffee beverages is primarily driven by those aged 25-59 (64%) and lowest among those aged 60+ (43%).
In contrast, traditional coffee is more likely to be consumed by the 60+ cohort vs. other age groups.
While overall coffee consumption among those aged 18-24 is lower vs other age cohorts, the youngest cohort are more likely to drink specialty coffee (46%) vs traditional (36%).

Past-Week Penetration of Traditional vs. Specialty Coffee by Age – Jan 2025 (%)	18-24 (A)	25-39 (B)	40-59 (C)	60+ (D)
Total Traditional Coffee	36	60 A	67 AB	71 AB
Total Specialty Coffee	46	64 AD	59 AD	43

Base: Total sample aged 18-24 n=244, 25-39 n=517, 40-59 n=622, 60+ n=462

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-Week Penetration of Specialty Coffee by Age

Past-Week Penetration of EBBs & N-EBBs By Age - Jan 2025	18-24 (A)	25-39 (B)	40-59 (C)	60+ (D)
Total Specialty Coffee Beverages	46	64 AD	59 AD	43
Espresso-Based Beverages	40 D	53 ACD	45 D	29
Cappuccino	14 D	23 ACD	18 D	9
Latte	22 CD	24 CD	14 D	8
Caffè Mocha	10 D	13 D	11 D	5
Espresso	19 D	25 CD	18 D	10
Macchiato	11 D	13 CD	9 D	3
Caffè Americano	5	13 AD	12 A	9
Flat White	2	7 AD	5 AD	2
Non-Espresso Based Beverages	30 D	39 ACD	27 D	16
Frozen Blended Coffee	21 CD	23 CD	14 D	8
Cold Brew Coffee	16 D	27 ACD	17 D	8
Nitro Coffee	5	9 CD	5	3

Base: Total sample aged 18-24 n=244, 25-39 n=517, 40-59 n=622, 60+ n=462
What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Within the specialty coffee segment, 25-39-year-olds are the most likely to have had an EBB in the past-week. This is driven by Cappuccinos (23%).

A similar trend is observed in the N-EBB segment, where the 25-39 cohort drives consumption (39%). Cold brew coffee is particularly prominent, with past-week penetration sitting at 27%.

Among those aged 18-24, frozen blended coffee (21%) is the most popular N-EBB.

Traditional vs. Specialty Coffee By Ethnicity

In January 2025, more than six-in-ten Asian and Hispanic-Americans had a specialty coffee beverage in the past-week, while penetration of traditional coffee is driven primarily by Caucasian- and Hispanic-Americans.

Past-Week Penetration of Traditional vs. Specialty Coffee by Ethnicity (%)	African-American (A)	Asian-American (B)	Caucasian-American (C)	Hispanic-American (D)
Total Traditional Coffee	51	52	64 AB	68 AB
Total Specialty Coffee	49	62 A	54	66 AC

Base: Total sample aged 18+ African-American n=221; Asian-American n=79, Caucasian-American n=1290, Hispanic-American n=319

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-Week Penetration of Specialty Coffee by Ethnicity

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Past-Week Penetration of EBBs & N-EBBs By Ethnicity - Jan 2025	African-American (A)	Asian-American (B)	Caucasian-American (C)	Hispanic-American (D)
Total Specialty Coffee Beverages	49	62 A	54	66 AC
Espresso-Based Beverages	41	51	41	53 AC
Cappuccino	15	33 ACD	15	20 C
Latte	14	24 AC	15	24 AC
Caffè Mocha	9	14	9	13 C
Espresso	14	27 AC	17	27 AC
Macchiato	10	13	8	16 AC
Caffè Americano	8	13	10	15 AC
Flat White	5	7	5	5
Non-Espresso Based Beverages	24	32	27	40 AC
Frozen Blended Coffee	12	15	16	25 ABC
Cold Brew Coffee	17	22	17	26 AC
Nitro Coffee	5	3	5	7

Base: Total sample aged 18+ African-American n=221; Asian-American n=79, Caucasian-American n=1290, Hispanic-American n=319

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-week penetration of EBBs is stronger among Asian- and Hispanic-Americans. Cappuccinos (33%), espressos (27%), and lattes (24%) have higher penetration among Asian-Americans.

Macchiato and Caffè Americano consumption tends to be driven by Hispanic-Americans, who are also more likely to consume espresso (27%) and latte (24%) compared to Caucasian and African-Americans.

Within the N-EBB segment, Hispanic-Americans have stronger penetration (40%) vs. other ethnicities; one-quarter of Hispanic-Americans had at least one cup of frozen blended coffee in the past-week.

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Traditional vs. Specialty Coffee By Region

Regionally, specialty coffee consumption is stronger in the West (58%), while consumption is lowest in the Midwest (50%).

Past-Week Penetration of Traditional vs. Specialty Coffee by Region (%)	Northeast (A)	Midwest (B)	South (C)	West (D)
Total Traditional Coffee	65 B	57	62	62
Total Specialty Coffee	55	50	55	58 B

Base: Total sample aged 18+ living in Northeast n=314, Midwest n=410, South n=687, West n=434

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-Week Penetration of Specialty Coffee by Region

Past-Week Penetration of EBBs & N-EBBs By Region - Jan 2025	Northeast (A)	Midwest (B)	South (C)	West (D)
Total Specialty Coffee Beverages	55	50	55	58 B
Espresso-Based Beverages	45	37	42	47 B
Cappuccino	19	16	15	18
Latte	16	14	16	20 B
Caffè Mocha	8	11	9	13 A
Espresso	19	15	18	21 B
Macchiato	7	6	9 B	14 ABC
Caffè Americano	15 BC	8	10	11
Flat White	5	2	6 B	5 B
Non-Espresso Based Beverages	25	25	29	32 AB
Frozen Blended Coffee	15	16	16	18
Cold Brew Coffee	17	15	19	20
Nitro Coffee	6	4	5	6

Base: Total sample aged 18+ living in Northeast n=314, Midwest n=410, South n=687, West n=434

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

In January 2025, 47% of those living in the West had an espresso-based beverage in the past week, which is higher than those in the Midwest (37%).

In the West, macchiato (14%) is higher than that in other regions, while Caffè Americanos tend to skew to those in the Northeast (15%).

Similar to patterns seen for espresso-based beverages, past-week penetration of N-EBBs is strongest in the West (32%). Beyond this, penetration of the N-EBBs remains relatively consistent across the regions.

Competitive Beverage Landscape

Past-Day Penetration of Other Beverage Types

What other beverages do specialty coffee drinkers consume? Specialty coffee drinkers are more likely than traditional coffee drinkers to have had a tea (53%), water with added vitamins/nutrients (40%), and flavored water (35%) yesterday. In contrast, traditional coffee drinkers were more likely to have drunk soda (46%) and milk/milk alternatives (38%). This suggests specialty coffee drinkers have an interest in a broader portfolio of drinks, particularly those with added flavor or functional benefits.

Past-Day Penetration of Other Beverage Types – Jan 2025	Traditional Coffee Drinkers (A)	Specialty Coffee Drinkers (B)
Soda (NET)	46 B	40
Milk/milk alternatives (NET)	38 B	31
Tea (NET)	39	53 A
Juice	27	26
Water with added vitamins/nutrients	24	40 A
Flavored water without added vitamins/nutrients	23	35 A
Sports/energy drinks (NET)	22	24
Frozen/slushie drinks	3	4
Matcha Tea	2	3
Bubble Tea	1	4 A

Base: Past-day coffee drinkers aged 18+ Traditional n=571; Specialty n=838

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Past-Day Penetration of Other Beverage Types

Specialty coffee drinkers aged 25-39 drive the consumption of non-coffee beverages. Flavored water and water with added health benefits have stronger past-day penetration among younger Americans (under aged 40). The overall consumption of different beverage types of younger consumers may indicate their preference for innovative and health-conscious options.

Bubble Tea is more likely to be consumed by specialty drinkers who are Asian-American (16%) likely influenced by cultural beverage preferences.

Past-Day Penetration of Other Beverage Types – Jan 2025	Specialty Coffee Drinkers	18-24 (A)	25-39 (B)	40-59 (C)	60+ (D)	African-American (E)	Asian-American (F)	Caucasian-American (G)	Hispanic-American (H)
Tea (NET)	53	59	57 D	50	47	61	71 GH	50	52
Water with added vitamins/nutrients	40	50 CD	47 CD	37 D	27	42	38	39	45
Flavored water without added vitamins/nutrients	35	46 CD	44 CD	31 D	21	40	45	34	34
Bubble Tea	4	5 D	5 D	4	1	8 G	16 GH	3	4

Base: Past-day specialty coffee drinkers aged 18-24 n=88, 25-39 n=270, 40-59 n=315, 60+ n=165; African-American n=87; Asian-American n=43, Caucasian-American n=575, Hispanic-American n=178

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

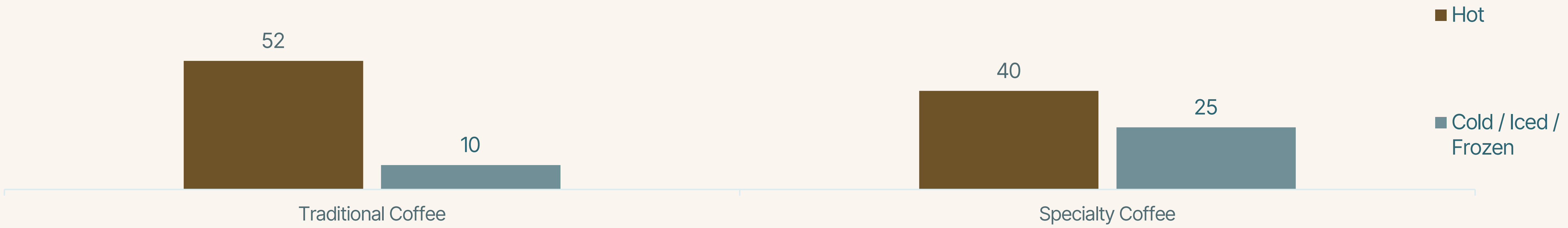
Temperature State

Past-Week Penetration of Traditional vs. Specialty

In January 2025, 40% of Americans consumed at least one hot specialty coffee beverage in the past week, while one-quarter consumed a cold specialty coffee. In comparison, Americans are more likely to consume traditional coffee hot (52%) than cold (10%).

Overall, this illustrates the flexibility and consumer preference of specialty coffee to be drunk hot or cold.

Past-Week Penetration of Temperature State Between Traditional vs. Specialty Coffee (%)



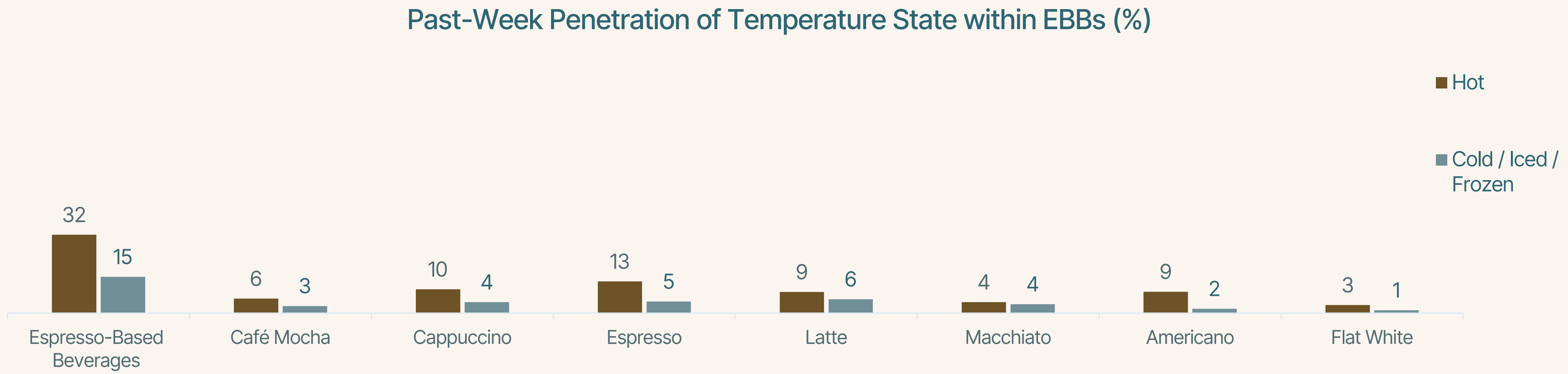
Base: Total sample aged 18+ (n=1,845)

What did you drink yesterday during each of the following times? Was the coffee you had yesterday hot, iced or frozen blended?

Past-Week Penetration of EBBs

In January 2025, 32% consumed a hot espresso-based beverage in the past-week while 15% had a cold EBB. Notably, even during the winter season, cold EBBs are consumed, demonstrating that cold coffee isn't just a seasonal beverage.

Of the espresso-based beverages, iced lattes (6%) are the most prevalent. This is followed by iced espressos (5%) and cappuccinos (4%).



Base: Total sample aged 18+ (n=1,845)

What did you drink yesterday during each of the following times? Was the coffee you had yesterday hot, iced or frozen blended?

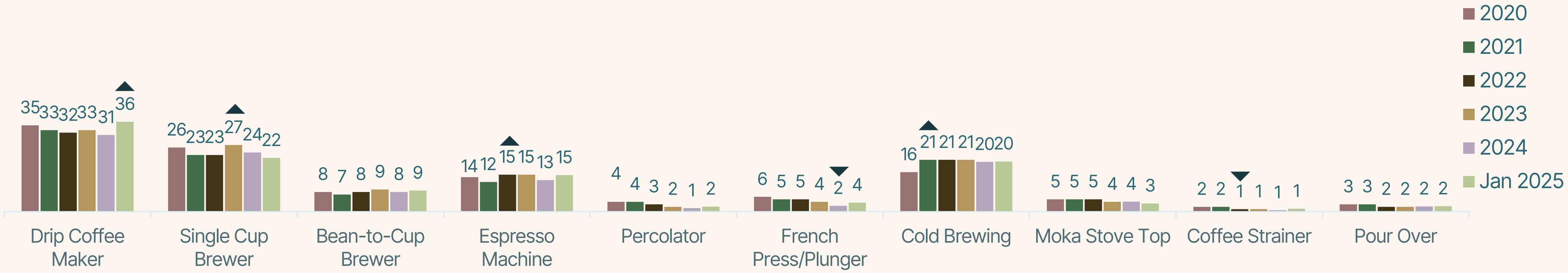
How Do Specialty Coffee Drinkers Consume Coffee?

Method of Preparation: Brewed Coffee

The drip coffee maker remains the most common method of preparation among past-day specialty coffee drinkers, with 36% having used this method to prepare a coffee in the past day. This is an increase vs 2024 (+5pp) but aligns with levels seen in 2020.

Single-cup brewers have experienced a softening since 2023. However, they continue to maintain at comparable levels to those observed in 2021-22. Cold brewing as a preparation method, has remained steady since 2021, and continues to be the third most used preparation method among specialty coffee drinkers.

Past-Day Usage of Brewed Preparation Methods (%)



Base: Past-Day Specialty Coffee Drinkers Aged 18+ (2020 n=1,122; 2021 n=1, 138; 2022 n=1,320; 2023 n=1,256; 2024 n=1,639; Jan 2025 n=838)

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Method of Preparation: Instant & RTD

21% of specialty coffee drinkers had an RTD coffee in the past day, which is also sustaining higher levels since 2024.

Overall, the elevated levels of RTD among specialty drinkers point to increasing availability of different RTD coffee beverages within the broader coffee category.

Past-Day Usage of Instant & RTD Preparation Methods (%)

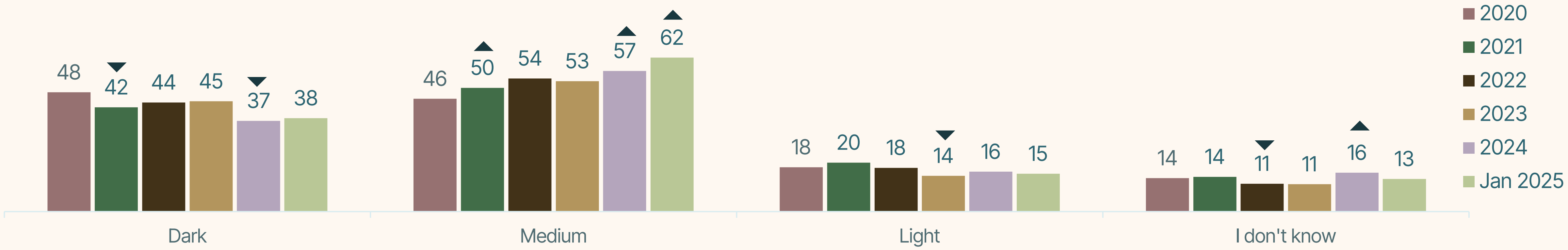
Base: Past-Day Specialty Coffee Drinkers Aged 18+ (2020 n=1,122; 2021 n=1, 138; 2022 n=1,320; 2023 n=1,256; 2024 n=1,639; Jan 2025 n=838)

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Coffee Roast Consumed Yesterday

In January 2025, 62% of past-day specialty coffee drinkers had a medium roast coffee, which has been steadily increasing since 2020. 38% opted for a dark roast coffee, which has been on a downwards trajectory since 2020 (-10pp).

Past-Day Coffee Roast Consumption (%)



Base: : Past-Day Specialty Coffee Drinkers Aged 18+ (2020 n=1,122; 2021 n=1,138; 2022 n=1,320; 2023 n=1,256; 2024 n=1,639; Jan 2025 n=838)

What was the roast of this [COFFEE/COFFEE BEVERAGE] you had yesterday [TIME OF DAY]?.

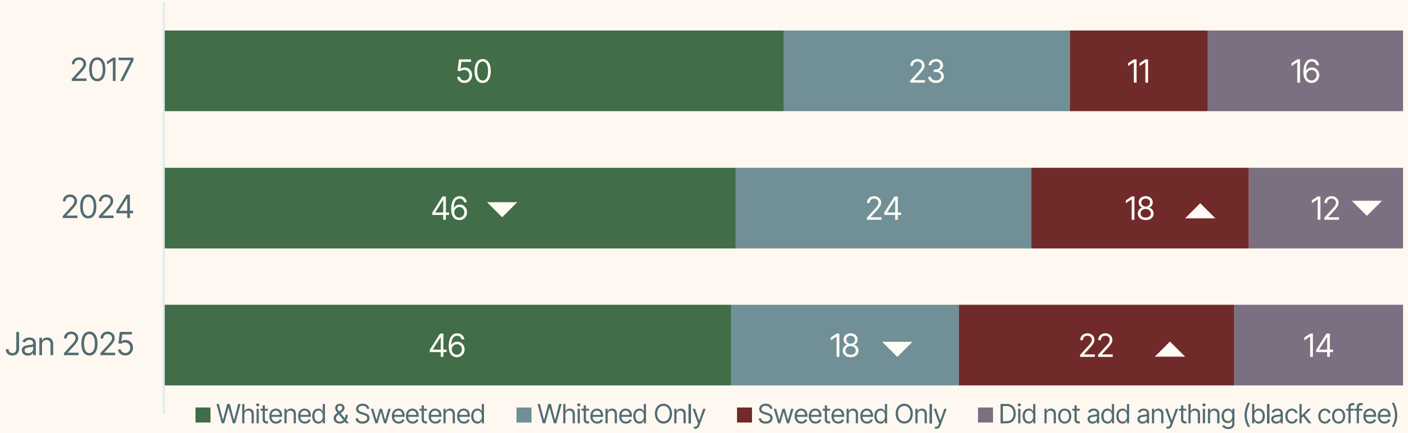
*Note that this sums to more than 100% because a coffee drinker can have more than one cup of coffee yesterday.

Macro View of Additives Usage

Among specialty coffee drinkers, past-day usage of sweeteners has increased since 2017. 22% of past-day specialty coffee drinkers used sweeteners in their coffee yesterday (+11pp). This may be attributed to a wider inclusion of different sweeteners into coffee beverages (i.e., flavored syrups, honey) and/or flavor varieties now, vs in 2017.

Meanwhile, in the same period, the use of whiteners has declined (-5pp), with 18% of specialty coffee drinkers whitening a coffee in the past day in 2025.

Share of Past-Day Coffee Drinkers By Additive Type (%)



Base: Past-Day Specialty Coffee Drinkers Aged 18+ (2017 n=1,315; 2024 n=1,639; Jan 2025 n=838)

What, if anything, was added to this [COFFEE/COFFEE BEVERAGE] you had yesterday [TIME OF DAY]? Select all that apply.

Past-Day Usage of Whiteners

In January 2025, among past-day specialty coffee drinkers, the overall usage of coffee whiteners has remained comparable with levels in 2024, with 57% of past-day specialty coffee drinkers adding whitener to a coffee beverage. The popular whiteners are milk/ milk alternatives, and liquid creamer, with approximately one-quarter of specialty drinkers adding either to their coffee.

Past-Day Usage of Whiteners (%)	2023	2024	Jan 2025
Half & Half / Milk / Milk Alternative / Creamer (Net)	63	60	57
Milk / Milk Alternative (Net)	32	29	28
Half & Half	14	13	14
Whole Milk	14	14	15
Reduced Fat Milk	6	6	5
Fat Free / Skim Milk	3	2	2
Milk Alternative (Subnet)	10	8	7
Almond	5	4	4
Soy	1	1	1
Oat	3	2	2
Barista-style milk	-	2	3

Past-Day Usage of Whiteners (%)	2023	2024	Jan 2025
Creamer (Net)	32	30	29
Liquid Creamer (Subnet)	27	26	26
Dairy	19	20	22
Dairy Alternative	3	4	3
Flavored	23	23	22
Unflavored	5	4	5
Powdered Creamer (Subnet)	7	5 ▼	5
Dairy	3	3	4
Dairy Alternative	1	1	-
Flavored	4	3	3
Unflavored	3	3	2

Base: Past-Day Specialty Coffee Drinkers Aged 18+ (2023 n=1,256; 2024 n=1,639; Jan 2025 n=838)

What, if anything, was added to this [COFFEE/COFFEE BEVERAGE] you had yesterday [TIME OF DAY]? Select all that apply.

Past-Day Usage of Sweeteners & Other Additives

Past-day usage of sweeteners in coffee amongst specialty coffee drinkers has been steadily increasing over the last two years. In January 2025, 60% of past-day specialty coffee drinkers added a sweetener or syrup to their coffee (+6pp vs. 2024; +13pp vs 2023). This increase is primarily driven by upticks in white sugar (35%), honey (8%) and maple syrup (4%) and suggests that consumer preferences may be shifting towards sweeter beverages.

Past-Day Usage of Sweeteners (%)	2023	2024	Jan 2025
Sweetener & Syrup (Net)	47	54 ▲	60 ▲
Sugar (Net)	30	38 ▲	44 ▲
White Sugar	20	28 ▲	35 ▲
Brown Sugar	6	7	9
Raw Sugar	8	6 ▼	6
Honey	5	5	8 ▲
Maple Syrup	3	2	4 ▲
Agave Syrup	2	1 ▼	2 ▲
Stevia	6	4 ▼	4
Other Natural Sweetener	2	2	3
Artificial Sweetener	6	7	8

Past-Day Usage of Other Additives (%)	2023	2024	Jan 2025
A flavor or flavored syrup (not a creamer)	10	8	7
An espresso shot	6	4 ▼	4
Alcohol	1	1	1
Water	7	2 ▼	3

Base: Past-Day Specialty Coffee Drinkers Aged 18+ (2023 n=1,256; 2024 n=1,639; Jan 2025 n=838)

What, if anything, was added to this [COFFEE/COFFEE BEVERAGE] you had yesterday [TIME OF DAY]? Select all that apply.

Past-Day Usage of Sweeteners by Subgroups

The use of sweeteners is primarily driven by Americans aged 25-39 (68%), who are also most likely to consume EBBs and N-EBBs. Artificial sweeteners are more common among specialty coffee drinkers aged 60+, while usage of flavored syrups remains comparable across the age cohorts.

In terms of ethnicity, African-American and Hispanic-American consumers are more likely to add sweeteners to their coffee in the past day, particularly white sugar. Hispanic-Americans drive the use of brown sugar (16%) while the use of stevia in coffee is driven by Asian-Americans.

Past-Day Usage of Sweeteners (%) Jan 2025	Past-Day Specialty Coffee Drinkers	18-24 (A)	25-39 (B)	40-59 (C)	60+ (D)	African-American (E)	Asian-American* (F)	Caucasian-American (G)	Hispanic-American (H)
n=	838	88	270	315	165	87	43	575	178
Sweetener & Syrup (Net)	60	61	68 CD	58	50	71 FG	52	57	67 G
Sugar (Net)	44	48 D	56 CD	41 D	25	57 FG	29	40	56 FG
White Sugar	35	41	42 CD	33 D	22	45 FG	25	32	41 G
Brown Sugar	9	10 D	16 CD	7	3	11	2	7	16 FG
Raw Sugar	6	5	10 CD	4	3	9	4	5	7
Honey	8	10	11 D	7	4	15 GH	8	7	6
Maple Syrup	4	5	8 CD	2	2	6	6	3	7 G
Agave Syrup	2	3	2	2	-	2	2	2	2
Stevia	4	5	4	4	3	1	14 EGH	3	5
Other Natural Sweeteners	3	6 C	3	1	3	3	2	3	4
Artificial Sweetener	8	8	5	6	15 BC	7	2	7	8
A flavor or flavored syrup (not a creamer)	7	7	8	7	6	9	7	7	6

Base: Past-Day Specialty Coffee Drinkers Aged 18+ I *Caution: Small base size

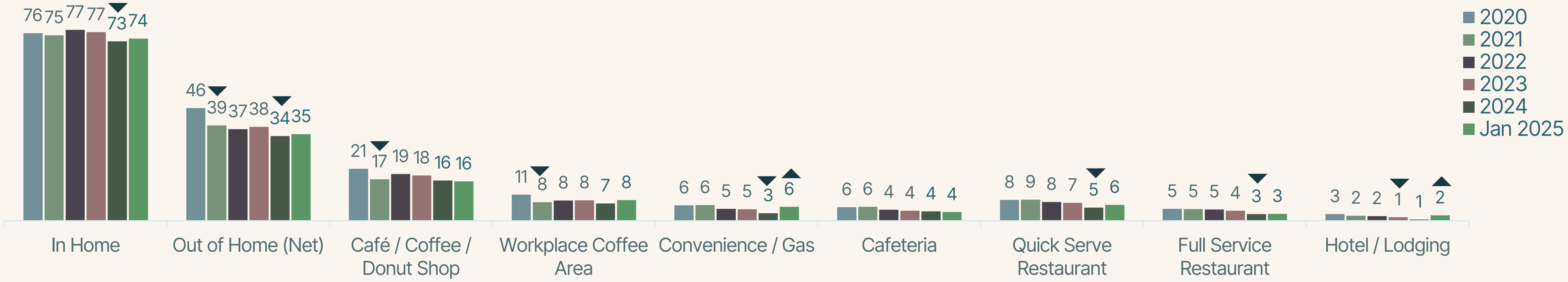
What, if anything, was added to this [COFFEE/COFFEE BEVERAGE] you had yesterday [TIME OF DAY]? Select all that apply.

Past-Day Preparation Location

In January 2025, past-day in-home coffee preparation amongst specialty coffee drinkers remains steady vs. 2024, with 74% of specialty coffee drinkers preparing at least one cup of coffee at home. Out-of-home coffee preparation remains softer vs. 2020 (35%), which demonstrates the shift in consumer behavior as a result of the pandemic.

Preparation at convenience and gas stores (6%, +3% vs. 2024) has rebounded to levels observed in 2020-21, which reflects the importance of convenience for American coffee drinkers.

Past-Day Preparation Location (%)



Base: Past-Day Specialty Coffee Drinkers Aged 18+ excl. RTD only respondents (2020 n=1,066; 2021 n=1, 138; 2022 n=1,320; 2023 n=1,256; 2024 n=1,560; Jan 2025 n=790)

Where was the [COFFEE/COFFEE BEVERAGE] you had yesterday [TIME OF DAY] prepared?

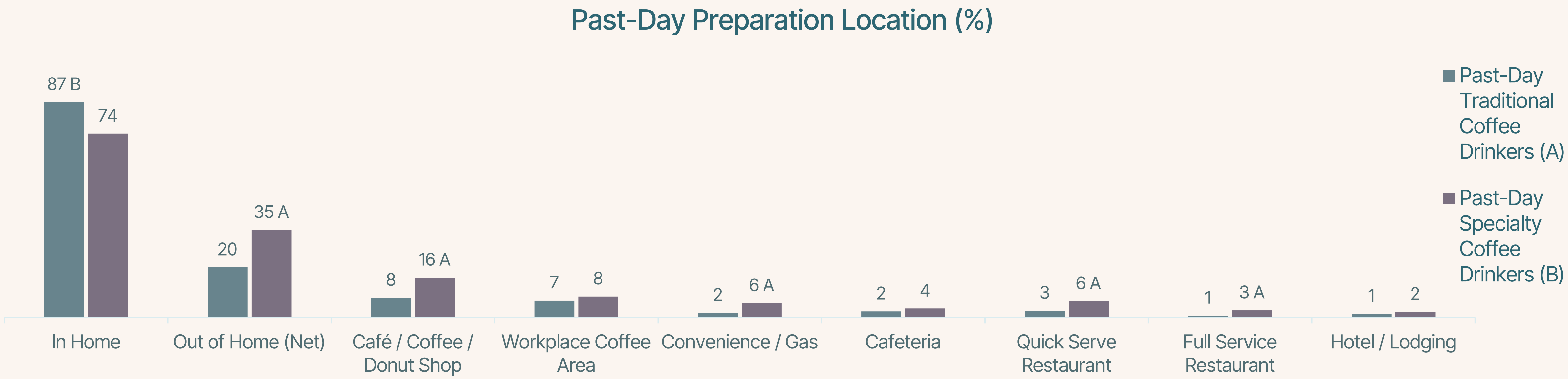
Note: the In Home and Out of Home (Net) numbers sum to more than 100% because a person can have a coffee prepared in home and OOH in the same day.

Past-Day Preparation Location

Comparison Between Specialty & Traditional Coffee Drinkers

35% of those who had a specialty coffee beverage yesterday had at least one coffee prepared out of home. This is largely driven by coffee made in cafes/ donut shops, restaurants (both quick service and full service), workplaces and convenience stores and reflects the important role that OOH plays in the specialty coffee segment.

In contrast, only 20% of traditional coffee drinkers had a coffee prepared outside of the home.



Base: Past-Day Specialty Coffee Drinkers Aged 18+ excl. RTD only respondents (Jan 2025 n=790); Past-Day Traditional Coffee Drinkers Aged 18+ excl. RTD only respondents (Jan 2025 n=571)

What did you drink yesterday during each of the following times? This may include any beverage that you drank at home or outside your home and may have come in a cup, can or bottle.

Coffee Equities

Note: This section refers to data from 2024

Coffee Equities

Agreement with coffee equities is mostly consistent with previous years for specialty coffee drinkers, with majority agreeing that coffee plays a central role in energizing and helping one to focus and perform. Compared to 2019, fewer specialty drinkers have heard about health risks of drinking coffee (-5pp), however, there has been an uptick in those who have been advised to limit the amount of coffee they drink (+4pp vs 2019). In late 2024, the FDA recognized coffee as a 'healthy' beverage; this may have an impact on consumer perception over time.

Agreement to Statements on Coffee (%) Strongly / Somewhat Agree	2019	2023	2024
n=	*1,131*	*627*	*847*
Coffee wakes me up and gets me going	83	86	86
Coffee helps me get things done	71	79 ▲	79
Coffee improves my mental focus	71	81 ▲	78
Coffee is one of several beverages I drink to give me energy	68	75 ▲	78
Coffee is a trendy thing to drink	61	70 ▲	68
It is important to limit my caffeine intake	66	69	67
Coffee is good for my health	57	62 ▲	61
Coffee improves my physical endurance	53	62 ▲	58
In the past year, I have heard information about the health benefits of drinking coffee	60	59	55
Most coffee is grown in an environmentally sustainable way	51	55	53
I pay a lot of attention to news and medical reports about coffee and caffeine	45	45	40
In the past year, I have heard information about the health risks of drinking coffee	45	38 ▼	40
My doctor has advised me to limit the amount of coffee I drink	29	28	33 ▲
I've heard bad things about coffee in the news	35	31	30

Base: Past-Day Specialty Coffee Drinkers Aged 18+

Here is a list of statements about coffee. For each one, please indicate if you agree completely, agree somewhat, disagree somewhat or disagree completely with the statement.

Coffee Equities by Age & Ethnicity

Specialty drinkers aged 25-39 are more likely to view coffee as trendy, and to have heard about the benefits of drinking coffee, while 18-24s are most likely to have heard of the risks (57%).

African- and Asian-Americans are more attuned to negative sentiments about coffee, compared to Caucasian and Hispanic-American consumers.

Agreement to Statements on Coffee (%) Strongly / Somewhat Agree	Past-Day Specialty Coffee Drinkers	18-24 (A)	25-39 (B)	40-59 (C)	60+ (D)	African-American (E)	Asian-American* (F)	Caucasian - American (G)	Hispanic-American (H)
n=	847	96	272	320	159	91	57	556	168
Coffee wakes me up and gets me going	86	72	85	88	91	81	84	88	83
Coffee helps me get things done	79	74	82	80	75	75	84	80	74
Coffee improves my mental focus	78	70	80	78 A	80	75	82	80 H	71
Coffee is one of several beverages I drink to give me energy	78	70	79	79	80	80	77	78	77
Coffee is a trendy thing to drink	68	70	74 AD	67	62	75	72	68	65
It is important to limit my caffeine intake	67	71	67	63	73 C	70	80 G	67	69
Coffee is good for my health	61	56	61	64	59	57	62	62	63
Coffee improves my physical endurance	58	56	64 D	58 D	47	58	61	58	55
In the past year, I have heard information about the health benefits of drinking coffee	55	51	60 D	54	50	58	65	54	58
Most coffee is grown in an environmentally sustainable way	53	48	56	50	55	58	52	52	54
I pay a lot of attention to news and medical reports about coffee and caffeine	40	38	45 D	40	35	55 GH	45	37	40
In the past year, I have heard information about the health risks of drinking coffee	40	57 CD	48 CD	33	29	50 G	56 G	36	44
My doctor has advised me to limit the amount of coffee I drink	33	41 CD	39 CD	29	26	50 FGH	33	30	35
I've heard bad things about coffee in the news	30	42 CD	37 CD	24	20	40 G	41 G	27	33

Base: Past-Day Specialty Coffee Drinkers Aged 18+

Here is a list of statements about coffee. For each one, please indicate if you agree completely, agree somewhat, disagree somewhat or disagree completely with the statement.

Impact of Coffee Flavor Profile & Health Benefits on Purchase Intent

Note: This section refers to data from 2024

Impact of Coffee Flavor/Aroma on Purchase Intent

Adding flavor or aroma notes of 'Smooth' (71%) and 'Rich' (67%) is likely to have the most significant influence on purchase intent among specialty coffee drinkers, and this has remained consistent since 2023. In addition, 57% of specialty coffee drinkers indicate that a 'sweet flavor profile' positively affects their interest in buying coffee. In contrast, fruity, floral and green/vegetative flavors or aromas tend to be less motivating to purchase.

Impact of Coffee Flavor/Aroma on Purchase Intent (%) Much more / Somewhat likely to buy	2023	2024
n=	*627*	*847*
Roasted	64	65
Sweet	53	57
Chocolate	46	52 ▲
Nutty	49	50
Spice	36	38
Bright	34	35
Fruity	21	29 ▲
Floral	22	27 ▲
Green or vegetative	18	18

Impact of Coffee Descriptor on Purchase Intent (%) Much more / Somewhat likely to buy	2023	2024
n=	*627*	*847*
Smooth	68	71
Rich	68	67
Bold	56	58
Full bodied	58	54
Balanced	50	50
Mild	33	41 ▲
Bright character	34	35
Complex	34	32

Base: Past-Day Specialty Coffee Drinkers Aged 18+

What effect do each of these flavor / aroma have on your interest in buying their coffee?

Impact of Coffee Flavor/Aroma on Purchase Intent

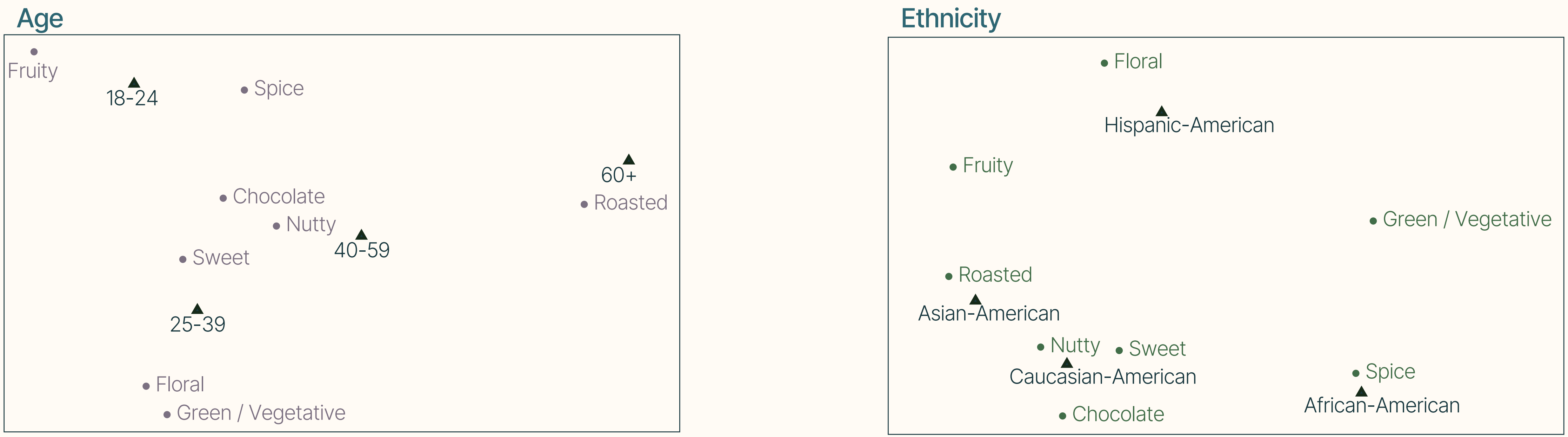
ncdt

A correspondence map shows how flavors/aromas are positioned among different age and ethnicity cohorts within specialty drinkers.

Specialty drinkers aged 18-24 are influenced more by fruity and spicy flavors, while the 60+ cohort is motivated primarily by a 'roasted' flavor profile.

Hispanic-Americans are influenced more by floral flavor/aromas while Caucasian-Americans are drawn more to nutty, sweet and chocolate flavors. While this does not mean *all* Hispanic-Americans are drawn to floral notes, correspondence mapping allows us to visualize which flavor profiles are more distinct among certain demographic groups.

Correspondence Map – How Does Flavor/ Aroma Impact Coffee Purchase



Base: Past-Day Specialty Coffee Drinkers Aged 18+ (n=847)

What effect do each of these flavor / aroma have on your interest in buying their coffee?

How to Interpret the Correspondence map? A Correspondence Map is a visual map, aimed at illustrating the relationships between variables. The closer the two labels are to each other, the stronger their association.

nca we serve coffee

Specialty Coffee Association

Impact of Health Benefits on Purchase Intent

Claims about added health benefits have had a consistent impact on coffee purchase decision among specialty coffee drinkers since 2023. In 2024, added antioxidants (42%) and vitamins (41%) are more likely to motivate specialty drinkers than claims of added collagen or CBD (30%), however, interest in most health benefits in coffee has grown since 2019. This reflects current trends in the broader food & beverage industry, as consumers increasingly place greater importance on health and products' functional benefits.

Impact of Health Benefits on Purchase Intent (%) Much more / Somewhat likely to buy	2019	2023	2024
n=	*1,131*	*627*	*847*
Includes added antioxidants	41	42	42
Includes added vitamins	36	41	41
Healthy ingredients like turmeric or matcha added to the coffee	35	40	39
Includes added protein	33	38	38
Includes added probiotics	32	36	37
Includes added cocoa flavanols	30	35	36
Includes added Omega 3	35	35	36
Includes added collagen	22	31	30
Includes added CBD (cannabidiol)	26	30	30

Base: Past-Day Specialty Coffee Drinkers Aged 18+

Here are some things that a coffee company could say about their coffee. What effect do each of these have on your interest in buying their coffee?

Impact of Health Benefits on Purchase Intent

Older specialty coffee drinkers (aged 60+) are less likely to be motivated by health claims vs. other age cohorts.
Health claims tend to have a similar impact on purchase among ethnic cohorts; added protein is a stronger motivator for African-Americans, while ingredients like turmeric or matcha have a greater impact on Hispanic- and Asian-Americans.

Impact of Health Benefits on Purchase Intent (%) Much more / Somewhat likely to buy - 2024	Total Past-Day Specialty Coffee Drinkers	18-24 (A)	25-39 (B)	40-59 (C)	60+ (D)	African-American (E)	Asian-American* (F)	Caucasian-American (G)	Hispanic-American (H)
n=	847	96	272	320	159	91	57	556	168
Includes added antioxidants	42	42	42 D	45	34	49	48	41	40
Includes added vitamins	41	42 D	47 D	43 D	25	41	46	40	40
Healthy ingredients like turmeric or matcha added to the coffee	39	35 D	45 D	44 D	22	42	44	36	46 G
Includes added protein	38	42 D	45 D	40 D	22	47 G	41	36	39
Includes added probiotics	37	41 D	44 D	38 D	22	45	32	36	38
Includes added cocoa flavanols	36	42 D	42 D	38 D	20	42	36	34	39
Includes added Omega 3	36	33	40 D	38 D	27	38	36	36	36
Includes added collagen	30	29	35 D	32 D	19	32	32	27	38 G
Includes added CBD (cannabidiol)	30	31 D	34 D	34 D	15	30	21	30	34

Base: Past-Day Specialty Coffee Drinkers Aged 18+

Here are some things that a coffee company could say about their coffee. What effect do each of these have on your interest in buying their coffee?

Impact of Coffee Certifications on Purchase Intent

During the pandemic, in 2020, coffee certifications had less of an impact on consumer purchase decisions. This reflects a shift in priorities during difficult times, with consumers focusing more on immediate needs over higher-order benefits such as sustainability.

As of 2024, this was still in the process of recovery, as purchase intent levels for most certifications were still below that of pre-pandemic times. To effectively motivate specialty coffee drinkers, it is crucial to continue to communicate and educate consumers about the value of certifications.

Impact of Coffee Certifications on Purchase Intent (%) Much more / Somewhat likely to buy	2017	2020	2024
n=	*1,315*	*1,122*	*847*
Organic Certified	56	51 ▼	56 ▲
Fair Trade Certified	58	51 ▼	55
Rainforest Alliance Certified	56	51 ▼	52
Bird friendly Certified	46	39 ▼	41
Conservation International Certified	50	39 ▼	41
Shade Grown Certified	43	29 ▼	37 ▲

Base: Past-Day Specialty Coffee Drinkers Aged 18+

Here are some things that a coffee company could say about their coffee. What effect do each of these have on your interest in buying their coffee?

Impact of Coffee Claims on Purchase Intent

In 2024, roast level continues to be the most motivating claim to purchase (70%) among specialty coffee drinkers, while interest in ‘blended’ coffee has increased (+6pp vs 2023), alongside instructions for using coffee for different brewing methods (+7pp). This reflects specialty coffee drinkers’ interest in experimentation and coffee beverage variety.

Impact of Coffee Claims on Purchase Intent (%) Much more / Somewhat likely to buy	2019	2023	2024
n=	*1,131*	*627*	*847*
The level of roast is specified	68	70	70
Coffee produced from a single origin	53	54	58
Grown on farms that treat workers well	59	64 ▲	58 ▼
Grown in an environmentally sustainable way	59	59	57
The company supports the communities in which the coffee is produced	54	56	57
Blended coffee	47	50	56 ▲
The grind is specified	54	57	53
Provides instructions for how to use the coffee for different brewing methods	44	46	53 ▲
Made with 100% Arabica beans	46	51 ▲	52
There is information about the region where the coffee is grown	50	52	51
Donates a percent of proceeds to a charitable cause	52	53	50
Recycled or compostable packaging	49	52	50
Free from GMOs	51	50	49
There is information about the farm where the coffee is grown	47	47	48
Small batch	38	45 ▲	42
Made with 100% Robusta beans	34	39 ▲	34 ▼

Base: Past-Day Specialty Coffee Drinkers Aged 18+

Here are some things that a coffee company could say about their coffee. What effect do each of these have on your interest in buying their coffee?

Consumer Profile

This infographic provides a demographic and attitudinal summary of those who've had a specialty coffee beverage in the past week. For example, 22% of consumers who had at least one specialty coffee in the past week were Hispanic-American.

Compared to traditional drinkers, past-week specialty coffee drinkers tend to be younger and have a higher HH income. They also tend to rate their financial situation more positively, vs six months ago.

In 2025, they were more inclined to drink a large-sized coffee in the past-week. Broadly, this illustrates the higher level of engagement with coffee among specialty coffee drinkers.

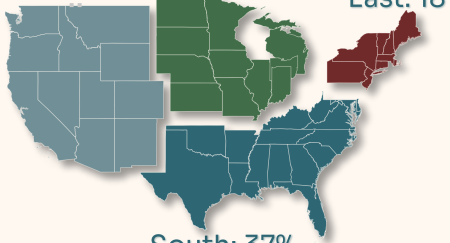
Who are Past-Week Specialty Coffee Drinkers?

GENDER

50% Female

50% Male

REGION



ETHNICITY

68% Caucasian-American

22% Hispanic-American

13% African-American

4% Asian-American

AGE

43.6

Mean age

(48.0 among past-week traditional coffee drinkers)

INCOME

$67.1K

Mean household income

($59.2K among past-week traditional coffee drinkers)

FINANCIAL PERCEPTIONS SINCE 2021

Indicate That Their Personal Financial Situation Is Much/Somewhat Better Vs. Six Months Ago (%)

2021	2022	2023	2024	January 2025
29%	30%	30%	30%	35%

ATTITUDES & PREFERENCES

17% of past-week specialty coffee drinkers opted for a large size cup of coffee in the past-week

Base: Past-Week Specialty Coffee Drinkers Aged 18+ (n=1,005)

XX Over-index to Total Past-week Traditional Coffee drinkers (>= 120)

XX Under-index to Total Past-week Traditional Coffee drinkers (<= 80)

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2025 National Coffee Data Trends

SPECIALTY COFFEE REPORT

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