Coffee-Appliance Market Sizing

Premium / super-automatic and connected "smart" segments — global and US

Prepared September 2026 · figures cited to named research firms; ranges shown, not averaged

Segment 1 Premium / super-automatic / bean-to-cup machines

SEGMENT (GEOGRAPHY)	SIZE	BASE YR	CAGR	FORECAST	SOURCE · PUB DATE	CONFIDENCE
Espresso + capsule machine (global)	$7.40B → $11.38B	2025	5.08%	2026–34	Fortune Business Insights · Aug 2026	High
Espresso + capsule (US)	$1.34B (~18% of global)	2025	—	—	Fortune Business Insights · Aug 2026	High
Automatic coffee machine, all auto formats (global)	$5.0B → $8.8B	2025	5.6%	2026–35	Global Market Insights · Aug 2026	High
Automatic coffee machine (US)	$1.119B (85% of N. Am.)	2024	—	—	Global Market Insights · Aug 2026	Medium
Bean-to-cup machines (global)	$1.12B → $1.95B	2024	7.2%	2025–33	DataHorizzon Research · Nov 2024	Medium
Bean-to-cup machines (global)	$9.41B → $13.38B	2026	5.9%	2026–32	ResearchAndMarkets · 2024/25	Low — outlier
Automatic espresso machines (global)	$5.17B → $9.52B	2025	6.3%	2026–35	Global Growth Insights · 2026	Low
Coffee machine, all types (global — context)	$7.2B → $11.3B	2025	6.0%	2026–33	Grand View Research · 2025	Medium
US household coffee machine, all types (context)	$3.47B → $4.7B	2026	6.30%	2026–31	Mordor Intelligence · 2025	Medium

Segment 2 Connected / "smart" (app-paired) coffee appliances

SEGMENT (GEOGRAPHY)	SIZE	BASE YR	CAGR	FORECAST	SOURCE · PUB DATE	CONFIDENCE
Smart coffee maker (global)	$396.4M → $1,841.3M	2023	16.6%	2024–33	Market.us · Oct 2024	Low–Med
Smart coffee maker (N. America)	$151.4M (38.2% share)	2023	—	—	Market.us · Oct 2024	Low–Med
Smart coffee maker (global)	$491.7M → $744.2M	2025	6.1%	2025–32	Market Glass / ResearchAndMarkets · Sep 2026	Low–Med
Smart coffee maker (US)	$145.2M	2025	—	—	Market Glass / ResearchAndMarkets · Sep 2026	Low–Med
Smart coffee maker (global)	$6.8B → $10.5B	2023	4.5%	2023–33	Fact.MR · Aug 2023 (broad def.)	Low

Segment definitions used (they drive the gaps)

- **FBI:** espresso machines (residential auto/semi-auto + commercial) plus capsule/pod machines — broadest "premium home + commercial" cut.
- **GMInsights:** electrically powered systems automating ≥one brewing stage (drip, espresso, bean-to-cup, capsule). "Premium" is a price tier (>$800), not a separate market.
- **DataHorizzon bean-to-cup:** machines that automate the whole process, grind → brew → dispense — the strictest super-automatic definition.
- **Market.us / Market Glass smart:** device with internet / Wi-Fi / Bluetooth connectivity controllable via smartphone app.
- **Fact.MR smart:** "automated brewers equipped with Wi-Fi and Bluetooth" — a much looser net, which is why its base is ~10× the others.

Where the sources disagree — and why

Premium segment — a ~7–8× spread, entirely definitional. "Premium coffee machine" runs from ~$1.1B (DataHorizzon, true grind-to-cup bean-to-cup only) to $7.4B (FBI, which bundles all espresso and capsule/pod, including Nespresso-style systems) and out to a $9.41B outlier (ResearchAndMarkets bean-to-cup, which appears to sweep in commercial/HoReCa volume). These measure different baskets, not the same market. The two defensible anchors are FBI ($7.40B, 2025, 5.08%) for premium espresso and DataHorizzon ($1.12B, 2024, 7.2%) for narrow super-automatic bean-to-cup — best read side by side rather than blended into one figure.

Smart / connected segment — not cleanly tracked as its own market. Estimates disagree by an order of magnitude: base size ~$396M (Market.us) and ~$492M (Market Glass) versus $6.8B (Fact.MR); CAGRs from 4.5% to 16.6%, with an older Global Industry Analysts figure implying ~37%. The gap is definitional — Fact.MR counts almost any Wi-Fi/Bluetooth-capable brewer, while Market.us and Market Glass restrict to genuinely app-paired devices. All are single-firm figures from smaller research shops (not Euromonitor / Statista / Grand View), so any single "smart coffee" number is directional only — the honest representation is a range (~$0.4B–6.8B depending on definition), not a point estimate.

Gaps & caveats. No major firm (Euromonitor, Statista, Grand View, Mordor) publishes a dedicated connected/app-paired coffee segment — an absence that is itself notable. US-specific super-automatic figures are thin; the cleanest US anchors are FBI's $1.34B (espresso+capsule, 2025) and Mordor's $3.47B (all household machines, 2026). The most cautious figures are the range-ends — ResearchAndMarkets bean-to-cup, Global Growth Insights, and Fact.MR — each single-source with less transparent methodology.

SOURCES

Fortune Business Insights; Global Market Insights; DataHorizzon Research; ResearchAndMarkets; Grand View Research; Mordor Intelligence; Market.us; Market Glass, Inc.; Fact.MR. Figures as published by each firm on the dates shown; not averaged. All dollar figures USD.