Market Size

Total Addressable Market (TAM):
Customers/Users: 380k - 3.4M
Revenue: $19M - $171.9M

Serviceable Addressable Market (SAM):
Customers/Users: 860k
Revenue: $43M

Executive Summary

MUD/WTR is a coffee alternative that provides energy and focus without the jitters, consisting of 100% organic cacao, ayurvedic herbs, and functional mushrooms. The Total Addressable Market (TAM) for MUD/WTR is estimated to be between $19 million and $171.9 million, with a potential customer base ranging from 380,000 to 3.4 million globally. The Serviceable Addressable Market (SAM) in the U.S., which is MUD/WTR's primary market, is estimated at $43 million, with a potential customer base of 860,000.

These estimates are based on the projected growth of the global coffee substitute market, which is expected to reach $1.9 billion by 2032, and the global functional food and beverage market, which is projected to reach $343.8 billion by 2028. MUD/WTR positions itself as a healthy, functional alternative to coffee, aligning with consumer trends towards wellness, organic, and functional ingredients.

Key competitors in the space include RYZE, Everyday Dose, and Rasa, which offer similar mushroom-based coffee alternatives. RYZE's product is priced at $36 per 30 servings, while Everyday Dose is priced at $39.99 per 30 servings, and Rasa's products range from $0.93 to $1.60 per cup. Keurig, a major player in the single-cup coffee market, has also introduced a plastic-free, compostable coffee pod called K-Rounds, catering to eco-conscious consumers.

Key Data Points

- Global coffee market projected to reach $108.6B by 2029 [5]
- Global coffee substitute market valued at $1.3B in 2022, projected to reach $1.9B by 2032 [32]
- Global organic food sales reached $134.76B in 2022 [8]
- Global functional food & beverage market worth $281.14B in 2021, projected to reach $343.8B by 2028 [52]
- 80% of consumers willing to pay more for healthier foods [17]
- MUD/WTR starter kit sells for $60, 30-serving tin for $40, 60-serving tin for $100
- Competitors like RYZE, Everyday Dose, Rasa priced $36-45 per 30 servings

Market Size Calculations

TAM based on coffee substitute market:

- Global coffee substitute market projected to reach $1.9B by 2032 [32]
- Assuming MUD/WTR can capture 1-2% of that market:
  1% of $1.9B = $19M
  2% of $1.9B = $38M
- At an average selling price of $50 per 30 servings:
  $19M / $50 = 380,000 customers
  $38M / $50 = 760,000 customers

TAM based on functional food/beverage market:

- Global functional food & beverage market projected to reach $343.8B by 2028 [52]
- Assuming 50% of those consumers would be interested in a product like MUD/WTR:
  50% of $343.8B = $171.9B

- Even if MUD/WTR captures just 0.1% of that $171.9B opportunity:
  0.1% of $171.9B = $171.9M TAM
- At an average selling price of $50 per 30 servings:
  $171.9M / $50 = 3,438,000 customers

SAM:

- Focusing on the U.S. market which is the largest and most health-conscious
- U.S. is estimated to be about 25% of the global functional food/beverage market based on data
- 25% of the $171.9M global TAM = $42,975,000 U.S. SAM
- At an average selling price of $50 per 30 servings:
  $42,975,000 / $50 = 859,500 U.S. customers

Assumptions

Assumptions:

- Assume MUD/WTR can capture 1-2% of the global coffee substitute market. Reasoning: MUD/WTR is a relatively new player but is growing fast and differentiates itself with its positioning and ingredients. Capturing 1-2% of the $1.9B projected market by 2032 [32] seems achievable.
- Assume average selling price of $50 per 30-serving tin based on current MUD/WTR pricing.
- Assume 50% of functional food/beverage consumers would be interested in trying a product like MUD/WTR. Reasoning: With 80% willing to pay more for healthier options [17], and growing trends around functional ingredients, assuming half of functional food/bev consumers would try MUD/WTR is reasonable.

Proxy Data:

- Use functional food & beverage market as proxy for potential market for functional coffee alternatives like MUD/WTR. Reasoning: MUD/WTR positions itself as a healthy, functional alternative to coffee with ingredients like mushrooms and adaptogens. So the functional food/beverage market, projected to reach $343.8B by 2028 [52], is a good proxy for the potential market MUD/WTR can capture.

Methodology

Here is the thought process followed to calculate the TAM (Total Addressable Market) and SAM (Serviceable Available Market) for MUD/WTR, a coffee alternative product:

To calculate the TAM and SAM, we first identified the relevant data points and market sizes that MUD/WTR operates in or can potentially tap into. These include the global coffee market, coffee substitute market, organic food/beverage market, and functional food/beverage market. We also looked at consumer trends around health, wellness, organic, and functional ingredients, as well as pricing data for MUD/WTR and its competitors.

Since MUD/WTR positions itself as a healthy, functional alternative to coffee with ingredients like mushrooms and adaptogens, we used the functional food and beverage market as a proxy for the potential market MUD/WTR can capture. This market is projected to reach $343.8 billion by 2028.

To calculate the TAM, we made the following assumptions:

- Assume 50% of functional food/beverage consumers would be interested in trying a product like MUD/WTR, given the growing trends around healthier options and functional ingredients.
- Assume MUD/WTR can capture even a small percentage (0.1%) of this potential market.

Based on these assumptions, the TAM calculation is as follows:

- Global functional food/beverage market projected at $343.8 billion in 2028.
- Assuming 50% would be interested in MUD/WTR, that's a $171.9 billion opportunity.
- Even if MUD/WTR captures just 0.1% of that $171.9 billion opportunity, the TAM is $171.9 million.
- With an average selling price of $50 per 30 servings, the TAM translates to 3.4 million customers.

To calculate the SAM (Serviceable Available Market), we focused on the U.S. market, which is the largest and most health-conscious:

- Assuming the U.S. accounts for about 25% of the global functional food/beverage market.
- 25% of the $171.9 million global TAM = $43 million U.S. SAM.
- At an average selling price of $50 per 30 servings, the U.S. SAM translates to 860,000 customers.

We also calculated the TAM based on the coffee substitute market, which MUD/WTR is a part of:

- Global coffee substitute market projected to reach $1.9 billion by 2032.
- Assuming MUD/WTR can capture 1-2% of this market, the TAM ranges from $19 million to $38 million.
- At an average selling price of $50 per 30 servings, this TAM translates to 380,000 to 760,000 customers.

In summary, the TAM for MUD/WTR based on the functional food/beverage market is $171.9 million (3.4 million customers), while the SAM focused on the U.S. market is $43 million (860,000 customers). The TAM based on the coffee substitute market ranges from $19 million to $38 million (380,000 to 760,000 customers).

Competitor Research Summary

RYZE:

- RYZE is a prominent player in the mushroom coffee market, which is expected to reach USD 4.12 billion by 2030, growing at a CAGR of 5.5% from 2023 to 2030 [66][67].
- RYZE offers a subscription service with a flat rate of $36 every month for a 30-serving bag of mushroom coffee, which is 20% cheaper than a one-time purchase of $45 [65].
- The company provides a 100% refund policy for the first subscription purchase [65].
- RYZE's product is a blend of functional mushrooms and keto-friendly ingredients, containing less than half the caffeine of regular coffee [62].
- The product is made from shade-grown, organic Arabica beans and is available in a ready-to-drink format [62].
- RYZE is lab tested for beta-glucans, heavy metals, allergens, mycotoxins, and mold [64].

Everyday Dose:

- Everyday Dose has approximately 1,800 customer reviews on Amazon, with a rating of 4.2 out of 5 stars [73].
- On Trustpilot, the brand has over 2,800 reviews and a rating of 4.9 out of 5 stars [73].
- On their official website, Everyday Dose has over 43,000 customer reviews, with a rating of 4.8 out of 5 stars [73].
- Everyday Dose is growing rapidly and is a significant competitor to Ryze Superfoods [73].
- The product is priced at $39.99 for a 30-serving pack, which works out to $6.31 per ounce [63].
- Everyday Dose offers a subscription service with discounts and free gifts, as well as a one-time purchase option [68][69].
- Each serving contains 45mg of caffeine, which is 80% less than a traditional cup of coffee [68][69].

Rasa:

- Rasa reported over $10 million in cumulative revenue and 10 million cups served as of 2021 [78].
- The company had a $5 million revenue run-rate and 515% subscription growth year-over-year in 2021 [78].
- Rasa has a steadily growing customer base of over 100,000 customers worldwide [78][79].
- Rasa coffee alternatives are priced between $0.93 and $1.60 per cup, depending on the blend [70][71][72].
- The company offers a range of products, including starter packs and bundles, with prices starting from $23.99 [75].
- Rasa's products are caffeine-free and made from adaptogenic herbs, including chicory, burdock, and a blend of 12 organic herbs [74][76].

Keurig:

- Keurig holds a 29.9% market share among single-cup coffee vendors [77].
- Keurig Dr Pepper's US Coffee business segment saw its full-year net sales fall 5.4% to $4.1 billion in 2023, with a volume/mix decline of 7.9% [82].
- Single-serve coffee pod sales decreased 3.6% during 2023, driven by a pod shipment decline of 5.1% [82].

- Coffee brewer shipments totaled 9.7 million in 2023, declining 10.3% compared to 2022 [82].
- In the first quarter of 2024, sales in the US Coffee segment fell 2.1%, with net sales dropping to $911 million from $931 million [83].
- Keurig coffee alternatives vary in price, ranging from $28 to $130 [80].
- Keurig has introduced a new, plastic-free coffee pod called K-Rounds, which are made of plant-based materials and are compostable [81].

Summary of Collected Data

Financial Data

1. Global coffee consumption:
- Expected to grow by 2.2% to 177.0 million bags in 2023/24 [1][2]
2. Global coffee industry market size:
- Approximately 83.1 billion U.S. dollars in 2023, representing a growth of about four percent compared to the previous year [3]
3. Global Ready-to-Drink (RTD) Coffee Market:
- Projected to grow by 5.36% from 2024 to 2028, reaching a market volume of US$43.1 billion in 2028 [4]
4. Global Coffee Market:
- Projected to grow by 2.99% from 2024 to 2029, reaching a market volume of US$108.60 billion in 2029 [5]
- Another projection shows growth of 10.63% from 2024 to 2029, reaching a market volume of US$17.35 billion in 2029 [6]
5. Global Coffee Machines Market:
- Projected to grow by 2.63% from 2024 to 2029, reaching a market volume of US$14.38 billion in 2029 [7]
6. Global Organic Food Sales:
- Reached approximately 134.76 billion U.S. dollars in 2022, up from 18 billion dollars in 2000 [8]
7. Global Functional and Natural Health Food Market:
- Market value was $23.5 billion in 2023 and is projected to reach $38.5 billion by 2024 [10]
8. Global Coffee Substitute Market:
- Valued at $1.3 billion in 2022 and projected to reach $1.9 billion by 2032, growing at a CAGR of 4.2% from 2023 [32]
- Expected to increase by USD 1.69 billion, at a CAGR of 8.66% between 2023 and 2028 [31]
9. Global Mushroom Market:
- Expected to grow significantly, with a predicted revenue of over $100 billion by 2028 [19]
10. Global Non-Alcoholic Beverage Market:
- Approximately 1.1 trillion U.S. dollars in 2023 [36]
11. U.S. Organic Beverages Market:
- Forecasted to reach approximately 12.8 billion U.S. dollars by 2025 [48]
12. Global Plant-Based Beverages Market:
- Expected to reach 77.8 billion U.S. dollars by 2025 [49]
13. Global Functional Foods and Beverages Market:
- Worth $281.14 billion in 2021 and predicted to grow at a compound annual growth rate (CAGR) to reach $343.8 billion by 2028 [52]
14. Global Ayurveda Market:
- Valued at USD 7000.0 million in 2021 and expected to expand at a CAGR of 13.54% during the forecast period [56]
15. Global Beverages Market:
- Projected to grow by 10.05% from 2024 to 2029, resulting in a market volume of $380.40 billion by 2029 [58]
16. U.S. Coffee Market:
- Projected to reach $95.58 billion in 2023, with an annual growth rate of 3.51% (CAGR 2023-2025) [59]

Behavioral Data

1. Global coffee consumption trends:
- Global coffee consumption is expected to grow by 2.2% to 177.0 million bags in 2023/24 [1][2].

- The global coffee industry revenue is approximately 83.1 billion U.S. dollars in 2023, representing a growth of about four percent compared to the previous year [3].

2. Health-conscious consumer behavior:

- 50% of Americans claim to actively try to eat healthy, with Baby Boomers (58%) and Gen Z (44%) being the most prevalent [11].
- 39% of U.S. respondents define healthy food as "fresh" [12].
- High-protein and mindful eating were the most common eating patterns or diets followed in the United States in 2023, with 18% and 17% of consumers respectively [13].
- In the UK, baby boomers (55.6%) were most likely to actively try to eat healthy, followed by Gen Z (46.6%), Millennials (45.4%), and Gen X (43.6%) [14].

3. Organic food consumption:

- Global sales of organic food reached approximately 134.76 billion U.S. dollars in 2022, up from 18 billion dollars in 2000 [8].
- Denmark and Switzerland had the highest per capita consumption of organic food in 2022 [9].
- 62% of global consumers follow a special diet that limits or restricts specific foods or ingredients [17].
- 36% of consumers follow a specific eating pattern or diet, such as vegetarian, vegan, or gluten-free [17].
- 80% of consumers are willing to pay more for healthier foods, and 68% are willing to pay more for food and beverages that don't contain ingredients they perceive as bad for them [17].
- 51% of consumers say they would buy more organic products if they were less expensive [17].

4. Consumer awareness of functional ingredients:

- There has been a surge in interest in Ayurvedic beauty practices, with 36% of Indian consumers believing that Ayurvedic ingredients contribute to overall well-being [23].
- 30% of consumers prioritize products with Ayurvedic ingredients for their absence of harmful chemicals [23].
- Ashwagandha saw a 50.4% gain in the supplement market in 2020 [22].

5. Coffee alternative consumption:

- The global coffee substitute market was valued at $1.3 billion in 2022 and is projected to reach $1.9 billion by 2032, growing at a CAGR of 4.2% from 2023 [32].
- The herbal coffee substitute segment is expected to account for the largest share of the market during the forecast period [31].
- Europe is estimated to contribute 32% to the growth of the global market during the forecast period [31].

6. Energy drink consumption:

- Energy drinks market continues to grow, with sales increasing by 12.2%, totaling $19.7 billion in the U.S. multi-outlet market for the 52 weeks ending May 21, 2023 [41].
- Low-calorie energy drinks have outperformed full-calorie energy drinks in terms of volume, with a predicted share of 42.1% by 2025 [41].
- 52% of energy drink consumers also consume gaming energy drinks [40].
- Younger generations, particularly those aged 18-29, are more likely to consume energy drinks regularly, with 32% of respondents in this age group stating they drink energy drinks regularly as of March 2024 [42].

7. Coffee consumption habits:

- 73% of coffee drinkers consume coffee daily, with 71% not planning to change their intake in 2024 [45].
- The most popular ways to take coffee are with milk or creamer (39%) or with sweetener and milk/creamer (38%) [45].
- Baby boomers are the age group that drinks the most coffee, with 85% consuming coffee daily [45][46].
- 83% of UK consumers prefer to drink coffee in-store [47].

8. Plant-based beverage consumption:

- The global plant-based beverages market value is expected to reach 77.8 billion U.S. dollars by 2025 [49].
- In 2023, the sales of plant-based beverages in Italy reached 310 million euros, with soy-based beverages being the highest-selling type at 97 million euros [50][51].
- Almond milk is the most popular milk alternative, preferred by 24% of survey respondents in 2023 [60].

9. Functional beverage consumption:

- Energy and sports drinks are the most popular functional drinks in the United States, with 42% of respondents having purchased energy drinks in the last three months as of February 2023 [53].
- Probiotic functional foods and beverages have seen significant growth, with shelf-stable water sales increasing by 740% [54].

10. Caffeine reduction trends:

- 16% of people plan to drink less caffeine in the next year, with 54% of them wanting to reduce their dependency on caffeine, 46% wanting to sleep better at night, and 35% wanting to reduce their anxiety [57].

Competitor Data

Market Size and Growth:

- The global coffee substitute market was valued at $1.3 billion in 2022 and is projected to reach $1.9 billion by 2032, growing at a CAGR of 4.2% from 2023 [32].
- The market size is expected to increase by USD 1.69 billion, at a CAGR of 8.66% between 2023 and 2028 [31].

Key Players:

- Teeccino Caffe Inc.
- Rasa, Inc.
- Coffig for Life, LLC
- Crio Bru LLC
- Caf-Lib
- MediDate
- Tattva's Herbs LLC
- Choffy Inc.
- Wooden Spoon Herbs
- Dandy Blend [18]

Product Offerings and Pricing:
a) Clevr Blends:

- Best For: Coffee-shop taste and pre-made lattes
- Main Ingredients: Organic oat milk powder, coconut cream powder, monk fruit, carob, chicory root, reishi, ashwagandha, vanilla bean powder
- Price: $28 for 14 lattes (12 oz); discounted subscriptions available [30]

b) Chagacinno:

- Best For: Adaptogen beginners
- Main Ingredients: Wild foraged chaga, organic cacao, cinnamon, monk fruit
- Price: $30 for 10 servings [30]

Market Segmentation:

- The herbal coffee substitute segment is expected to account for the largest share of the market during the forecast period [31].
- The offline segment is significant, with a valuation of USD 1.92 billion in 2018 [31].

Regional Performance:

- Europe is estimated to contribute 32% to the growth of the global market during the forecast period [31].

Distribution Channels:

- Hypermarkets and supermarkets account for more than one-third of the global coffee substitute market [24][25].

Consumer Preferences:

- Consumers are increasingly seeking healthier and more functional energy drinks. Low-calorie energy drinks have outperformed full-calorie energy drinks in terms of volume, with a predicted share of 42.1% by 2025 [41].
- There is a growing interest in natural ingredients, with brands offering products containing plant-derived ingredients [43].

Marketing Strategies:

- Content Marketing: Brands are using content marketing to connect with their audience more personally and powerfully than traditional advertising [34].
- Social Media: Platforms like Instagram, Facebook, and Twitter are being utilized to share content, engage with customers, and promote products [34].
- Email Marketing: Email marketing is crucial for achieving ecommerce business goals, with discount code emails and newsletters being particularly effective [33].
- Influencer Partnerships: Collaborating with influencers in the coffee and health industries helps brands expand their reach and credibility [34].
- Event Hosting: Hosting events, promotions, and workshops helps build community and loyalty among customers [35].

Consumer Trends:

- Health and Wellness: 46% of consumers identified physical or mental wellness as one of their top priorities in 2023 [55].
- Functional Ingredients: There is a growing demand for functional ingredients in beverages, particularly those offering energy boosts, probiotics, and other health benefits [52][53][54].
- Caffeine Reduction: 16% of people plan to drink less caffeine in the next year, with 54% wanting to reduce their dependency on caffeine [57].

Demographic Data

1. Age Distribution:
- Millennials and Gen Z are driving the growth of the organic market, being more conscious of health, sustainability, and ethical implications of their food choices [20].
- Baby Boomers (58%) and Gen Z (44%) are the most prevalent in actively trying to eat healthy [11].
- 64% of Millennials believe that living a sustainable lifestyle brings their family closer together, compared to 53% of Baby Boomers and older [15].
- Baby boomers are the age group that drinks the most coffee, with 85% consuming coffee daily [45][46].
- Coffee consumption is starting at a younger age, with younger consumers developing a taste for coffee earlier in life [44].
2. Gender Distribution:
- Women tend to be more health-conscious than men [27][28].
- Women are more likely to choose healthier foods and eat regular meals, while men show preferences for specific tastes and meal-related behaviors [29].
- In Germany, 84% of men reported being health-conscious when it comes to smoking [26].
3. Income Levels:
- Higher-income households are more likely to purchase organic products [21].
- 34% of adults reported that their family's monthly income increased compared to the previous year in 2023 [37].
4. Education:
- Consumers with higher levels of education are more likely to purchase organic products [21].
5. Geographic Distribution:
- The EY Consumer Health Survey 2023 covered six countries: the United States, the United Kingdom, France, Germany, Australia, and Japan [39].
- In the UK, 50% of millennials recognize the importance of being healthier [38].
- In France, 54% of Gen Z consumers are motivated to limit their impact on climate change [38].
- In Germany, consumers are particularly critical of the lack of plastic-free products, small, independent brands, and organic foods in their principal grocery stores [38].
6. Values and Preferences:
- 62% of global consumers follow a special diet that limits or restricts specific foods or ingredients [17].
- 36% of consumers follow a specific eating pattern or diet, such as vegetarian, vegan, or gluten-free [17].
- 80% of consumers are willing to pay more for healthier foods [17].
- 51% of consumers say they would buy more organic products if they were less expensive [17].
- 42% of Americans have come across social media content about food and nutrition in the past year, with Gen Z (71%) and Millennials (58%) reporting the highest exposure [16].

- 60% of those who reported seeing food-related social media content said that it encouraged them to make at least somewhat healthier choices [16].

7. Consumption Patterns:

- 73% of coffee drinkers consume coffee daily [45].
- The most popular ways to take coffee are with milk or creamer (39%) or with sweetener and milk/creamer (38%) [45].
- 16% of people plan to drink less caffeine in the next year [57].
- Almond milk is the most popular milk alternative, preferred by 24% of survey respondents in 2023 [60].

8. Market Trends:

- The global coffee consumption in 2023/24 is expected to grow by 2.2% to 177.0 million bags [1][2].
- The global market size of the coffee industry in 2023 is approximately 83.1 billion U.S. dollars [3].
- The global non-alcoholic beverage market size in 2023 was approximately 1.1 trillion U.S. dollars [36].
- The global plant-based beverages market value is expected to reach 77.8 billion U.S. dollars by 2025 [49].

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User Inputs

Please enter the name of your business, product, or service

MUD/WTR

Please describe your business, product or service in as much detail as possible. This can include elements such as the main benefits you offer, costs, industry, etc. and helps make the TAM & SAM calculations more accurate.

MUD/WTR is a coffee alternative that provides energy & focus without the jitters. MUD/WTR is in the coffee market. It consists of 100% organic cacao, ayurvedic herbs and functional mushrooms. With just a fraction of the caffeine found in coffee, you get energy, focus and immune support without the jitters, crash or poor sleep. Our Starter Kit sells for $60, the 30-serving tin costs $40, the 60-server tin costs $100.

Optional: Who is your ideal customer or user? This can include things like demographics, behaviors, geographic, details, etc.

Those who want a healthier alternative to coffee

Optional: Who are the primary competitors? This can include specific companies or broad categories. Please separate competitors by commas.

RYZE, Everyday Dose, Rasa, Keurig

Optional: What makes your business, product or service unique from others in the market?

All of our products are USDA-certified organic. All of our mushrooms are grown in the US.