Westrock Coffee Co.

WEST

Nasdaq; consumer nondurables; SIC 2080, Beverages; CIK 0001806347

D/E

on the D/E boundary of 124 graded peers in consumer nond...

rank 100 of 124; percentile 80.5; sampling error 3.8 points; lower is stronger



D/E, the sloth



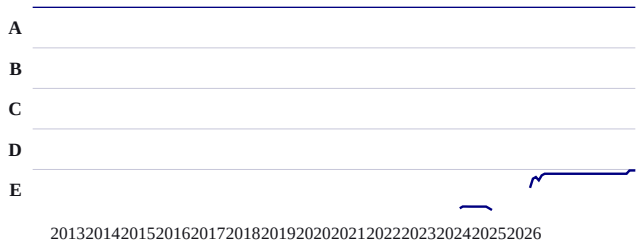
Scoreboard	
Profitability	D percentile 71.8
Solvency	E percentile 86.2
Growth and financing	B percentile 33.4
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Mar 10, 2026 233 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$9.67 2026-10-28; market equity $944.1M; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, stronger toward the top; facts filed by each date only.

Business, in the company's words

opening of Item 1 of the 10-K received Mar 10, 2026

Westrock Coffee Company, a Delaware corporation (the "Company," "Westrock," "we," "us," or "our"), is a leading integrated coffee, tea, flavors, extracts, and ingredients solutions provider in the United States, providing coffee sourcing, supply chain management, product development, roasting, packaging, and distribution services to the retail, food service and restaurant, convenience store and travel center, non-commercial account, consumer packaged goods ("CPG"), and hospitality industries around the world. Our mission is to build and efficiently operate the preeminent integrated coffee, tea, flavors, extracts, and ingredients solutions provider to the world's most iconic brands.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 71.8						
Gross profitability	12.8%	29.8%		84.6	144	2025-12-31
Return on invested capital	(10.4%)	5.6%		85.4	49	2025-12-31

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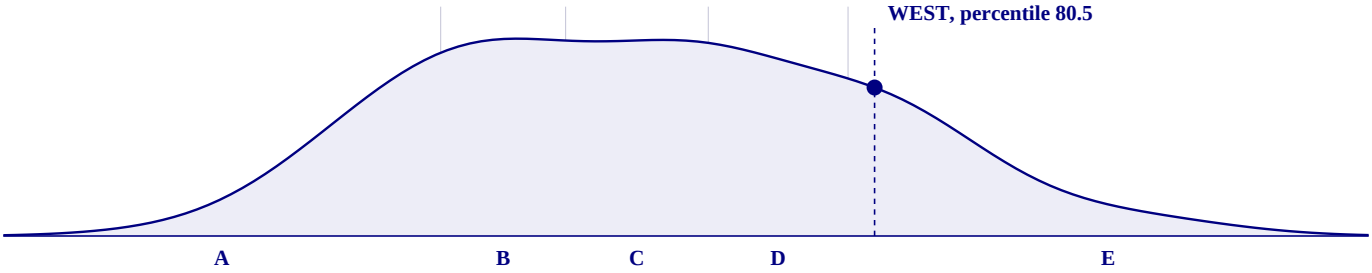
Accruals ratio	(6.3%)	(5.1%)	45.3	149	2025-12-31
Gross margin stability, five years	not computable	1.9 pts			
five annual gross margins are required; found 4					
Solvency, sleeve percentile 86.2					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	(1.84)	3.11	79.7	119	2025-12-31
Net debt to EBITDA	37.99x	2.54x	100.0	55	2025-12-31
Interest coverage	not computable	2.51x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.96x	1.81x	78.9	153	2025-12-31
Growth and financing, sleeve percentile 33.4					
Revenue growth, three-year compound	11.1%	0.2%	10.6	133	2025-12-31
Free cash flow growth, three-year compound	not computable	14.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	11.0%			
NOPAT must exceed $100,000					
Asset growth, three years	16.4%	0.2%	8.3	134	2025-12-31
Net share issuance, one year	2.8%	0.03%	81.4	103	2026-03-03

Among 124 peers

consumer nondurables; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
95	Capri Holdings Ltd. (CPRI)	76.4	D/E	
96	Acco Brands Corp. (ACCO)	77.2	D/E	
97	Conagra Brands Inc. (CAG)	78.0	D/E	
98	Barfresh Food Group Inc. (BRFH)	78.9	D/E	late filer, fortress balance sheet
99	Callaway Golf Co. (CALY)	79.7	D/E	
100	Westrock Coffee Co. (WEST)	80.5	D/E	
101	B&G Foods, Inc. (BGS)	81.3	D/E	
102	Primo Brands Corp. (PRMB)	82.1	D/E	
103	Unifi Inc. (UFI)	82.9	D/E	
104	Keurig Dr Pepper Inc. (KDP)	83.7	D/E	
105	Molson Coors Beverage Co. (TAP)	85.0	E	

What the price implies

at the 2026-10-28 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	60.3%	(0.2%)	92
Distance from 52-week high	(2.1%)	(23.8%)	90
EBIT to enterprise value	(3.4%)	3.7%	24
Free cash flow yield	(11.4%)	4.7%	13

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Book value to price	(0.03)	0.57	4
Sales to price	1.26	1.22	52
Composite equity issuance, five years	not computable	(16.3%)	
Relative strength against the sector, log excess return	0.38	(0.10)	92

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 3 of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	fail
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$38.2M
Operating cash flow, four quarters	$25.0M
Months of runway	not finite
Days since last periodic filing	84 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$2.7M

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	$150.8M	2025-12-31	2026-03-10	10-K	26-025932
2	assets	us-gaap:Assets	$1.2B	2025-12-31	2026-03-10	10-K	26-025932
3	operating income	us-gaap:OperatingIncomeLoss	-$45.5M	2025-12-31	2026-03-10	10-K	26-025932
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$97.1M	2025-12-31	2026-03-10	10-K	26-025932
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.7M	2025-12-31	2026-03-10	10-K	26-025932
6	total debt	us-gaap:LongTermDebt	$444.1M	2025-12-31	2026-03-10	10-K	26-025932
7	book equity	us-gaap:StockholdersEquity	-$1.9M	2025-12-31	2026-03-10	10-K	26-025932
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$49.9M	2025-12-31	2026-03-10	10-K	26-025932
9	total debt	us-gaap:LongTermDebt	$393.1M	2024-12-31	2025-03-12	10-K	25-002804
10	book equity	us-gaap:StockholdersEquity	$97.5M	2024-12-31	2026-03-10	10-K	26-025932
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$26.2M	2024-12-31	2026-03-10	10-K	26-025932
12	net income	us-gaap:NetIncomeLoss	-$90.4M	2025-12-31	2026-03-10	10-K	26-025932
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$19.0M	2025-12-31	2026-03-10	10-K	26-025932
14	assets	us-gaap:Assets	$1.1B	2024-12-31	2026-03-10	10-K	26-025932
15	current assets	us-gaap:AssetsCurrent	$396.4M	2025-12-31	2026-03-10	10-K	26-025932
16	current liabilities	us-gaap:LiabilitiesCurrent	$413.6M	2025-12-31	2026-03-10	10-K	26-025932
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$534.4M	2025-12-31	2026-03-10	10-K	26-025932
18	liabilities	us-gaap:Liabilities	$904.3M	2025-12-31	2026-03-10	10-K	26-025932
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$55.8M	2025-12-31	2026-03-10	10-K	26-025932
20	operating income	us-gaap:OperatingIncomeLoss	-$20.4M	2023-12-31	2026-03-10	10-K	26-025932
21	interest expense	us-gaap:InterestExpense	$29.2M	2023-12-31	2024-03-15	10-K	24-003417
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2025-12-31	2026-03-10	10-K	26-025932
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$850.7M	2024-12-31	2026-03-10	10-K	26-025932
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$864.7M	2023-12-31	2026-03-10	10-K	26-025932
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$867.9M	2022-12-31	2025-03-12	10-K	25-002804
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$88.8M	2025-12-31	2026-03-10	10-K	26-025932

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27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$13.2M	2024-12-31	2026-03-10	10-K	26-025932
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$159.6M	2024-12-31	2026-03-10	10-K	26-025932
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$64.1M	2023-12-31	2026-03-10	10-K	26-025932
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$164.6M	2023-12-31	2026-03-10	10-K	26-025932
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$56.6M	2022-12-31	2025-03-12	10-K	25-002804
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$63.3M	2022-12-31	2025-03-12	10-K	25-002804
33	current assets	us-gaap:AssetsCurrent	$333.6M	2024-12-31	2026-03-10	10-K	26-025932
34	current liabilities	us-gaap:LiabilitiesCurrent	$277.9M	2024-12-31	2026-03-10	10-K	26-025932
35	assets	us-gaap:Assets	$971.5M	2023-12-31	2026-03-10	10-K	26-025932
36	assets	us-gaap:Assets	$746.2M	2022-12-31	2025-03-12	10-K	25-002804
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	96,879,112	2026-03-03	2026-03-10	10-K	26-025932
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	94,227,795	2025-02-28	2025-03-12	10-K	25-002804

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