

Westrock Coffee Co. (WEST)

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

[illegible]

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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.

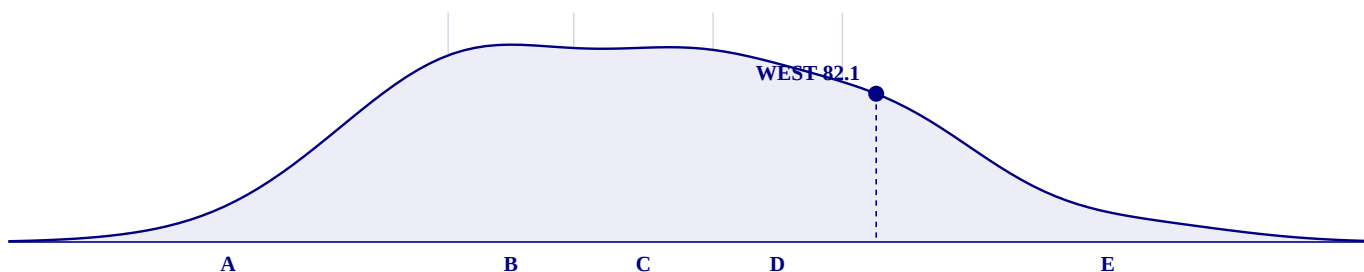
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 70.3						
Gross profitability		12.8%	29.8%	82.1	146	2025-12-31
Return on invested capital		(10.4%)	5.6%	85.4	49	2025-12-31
Accruals ratio		(6.3%)	(5.0%)	43.4	153	2025-12-31
Gross margin stability, five years		not computable	1.9 pts			five annual gross margins are required; found 4
Solvency, sleeve percentile 85.9						
Twelve-month failure probability		not computable	0.03%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		(1.84)	3.11	80.2	122	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	77.6	157	2025-12-31
Growth and financing, sleeve percentile 33.5						
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	10.7%			NOPAT must exceed \$100,000
Asset growth, three years		16.4%	0.5%	8.3	134	2025-12-31
Net share issuance, one year		2.8%	0.05%	81.6	104	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
97	Capri Holdings Ltd. (CPRI)	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	Primo Brands Corp. (PRMB)	80.5	D/E	
101	Keurig Dr Pepper Inc. (KDP)	81.3	D/E	
102	Westrock Coffee Co. (WEST) <	82.1	D/E	
103	B&G Foods, Inc. (BGS)	82.9	D/E	
104	Wolverine World Wide Inc. (WWW)	83.7	D/E	
105	Unifi Inc. (UFI)	84.6	E	
106	Molson Coors Beverage Co. (TAP)	85.8	E	
107	Molson Coors Beverage Co. (TAP-A)	85.8	E	

What the price implies

at the 2026-10-08 close; none 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	(15.8%)	(24.8%)	70
EBIT to enterprise value	(3.8%)	4.1%	22
Free cash flow yield	(13.5%)	4.8%	13
Book value to price	(0.04)	0.57	4
Sales to price	1.49	1.20	55
Composite equity issuance, five years	not computable	(16.3%)	
Relative strength against the sector, log excess return	0.38	(0.10)	92

Diagnostics

not in 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	64 (10-Q received Aug 6, 2026)

Sources

each row links to the 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	0001104659-26-025932
2	assets	us-gaap:Assets	\$1.2B	2025-12-31	2026-03-10	10-K	0001104659-26-025932
3	operating income	us-gaap:OperatingIncomeLoss	-\$45.5M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndIncomeLossFromEquityMethodInvestments	\$97.5M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$1.7M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
6	total debt	us-gaap:LongTermDebt	\$444.1M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
7	book equity	us-gaap:StockholdersEquity	-\$1.9M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$49.9M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
9	total debt	us-gaap:LongTermDebt	\$393.1M	2024-12-31	2025-03-12	10-K	0001558370-25-002804
10	book equity	us-gaap:StockholdersEquity	\$97.5M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$26.2M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
12	net income	us-gaap:NetIncomeLoss	-\$90.4M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$19.0M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
14	assets	us-gaap:Assets	\$1.1B	2024-12-31	2026-03-10	10-K	0001104659-26-025932
15	current assets	us-gaap:AssetsCurrent	\$396.4M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
16	current liabilities	us-gaap:LiabilitiesCurrent	\$413.6M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$534.4M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
18	liabilities	us-gaap:Liabilities	\$904.3M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$55.8M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
20	operating income	us-gaap:OperatingIncomeLoss	-\$20.4M	2023-12-31	2026-03-10	10-K	0001104659-26-025932
21	interest expense	us-gaap:InterestExpense	\$29.2M	2023-12-31	2024-03-15	10-K	0001558370-24-003417
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.2B	2025-12-31	2026-03-10	10-K	0001104659-26-025932
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$850.7M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$864.7M	2023-12-31	2026-03-10	10-K	0001104659-26-025932
25	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$867.9M	2022-12-31	2025-03-12	10-K	0001558370-25-002804
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$88.8M	2025-12-31	2026-03-10	10-K	0001104659-26-025932
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$13.2M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$159.6M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$64.1M	2023-12-31	2026-03-10	10-K	0001104659-26-025932
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$164.6M	2023-12-31	2026-03-10	10-K	0001104659-26-025932
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$56.6M	2022-12-31	2025-03-12	10-K	0001558370-25-002804
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$63.3M	2022-12-31	2025-03-12	10-K	0001558370-25-002804
33	current assets	us-gaap:AssetsCurrent	\$333.6M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
34	current liabilities	us-gaap:LiabilitiesCurrent	\$277.9M	2024-12-31	2026-03-10	10-K	0001104659-26-025932
35	assets	us-gaap:Assets	\$971.5M	2023-12-31	2026-03-10	10-K	0001104659-26-025932
36	assets	us-gaap:Assets	\$746.2M	2022-12-31	2025-03-12	10-K	0001558370-25-002804
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	96,879,112	2026-03-03	2026-03-10	10-K	0001104659-26-025932
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	94,227,795	2025-02-28	2025-03-12	10-K	0001558370-25-002804