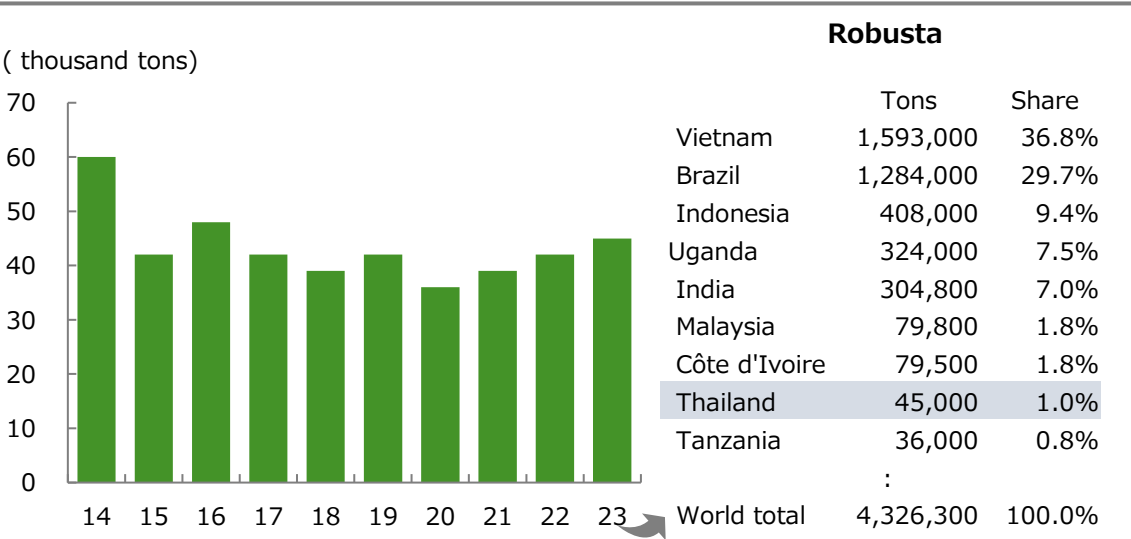


Thailand: Coffee

- Overview: Production is trending upward but remains small-scale
 - Thailand's coffee production is currently on an upward trend. However, on a global scale, it remains small-scale and highly dependent on imports.
 - Imports are primarily green beans. The structure involves importing green beans, processing them into soluble coffee, and then directing the finished product for domestic consumption or export. In this sense, Thailand's role as a processing hub is similar to Malaysia's.
- Production
 - Robusta is the dominant coffee variety in Southeast Asian production, and no commercial-scale Arabica production has been confirmed in Thailand. According to the U.S. Department of Agriculture (USDA), Thailand's coffee (Robusta) production stagnated in the late 2010s but began increasing after bottoming out in 2020. In 2023, production reached 45,000 tons, a 7% increase from the previous year. This marked the third consecutive year of growth and the highest level since 2016, a seven-year high.
 - Nevertheless, Thailand's production remains small on a global scale. Even when limited to Robusta, the primary variety grown in Southeast Asia, it accounts for only about 1% of the world total (Figure 1).

*Production year (Market Year) runs from October to September. 2023 = October 2022 to September 2023

Figure 1: Coffee Production



(source : USDA data)

■ Imports

- With limited domestic production, imports focus primarily on green beans. In 2023, imports increased by 32% to 73,500 tons, of which green beans accounted for 72,000 tons. This represents 98% of the total.
- Although Thailand's 2023 green coffee imports represent only about 1% of the global total, they rank second among major Southeast Asian countries after Malaysia (Figure 2).
- Looking at the proportion of green beans in total imports for 2023, Thailand ranks second only to Malaysia among major Southeast Asian countries (Figure 3).

Figure 2: Import Volume

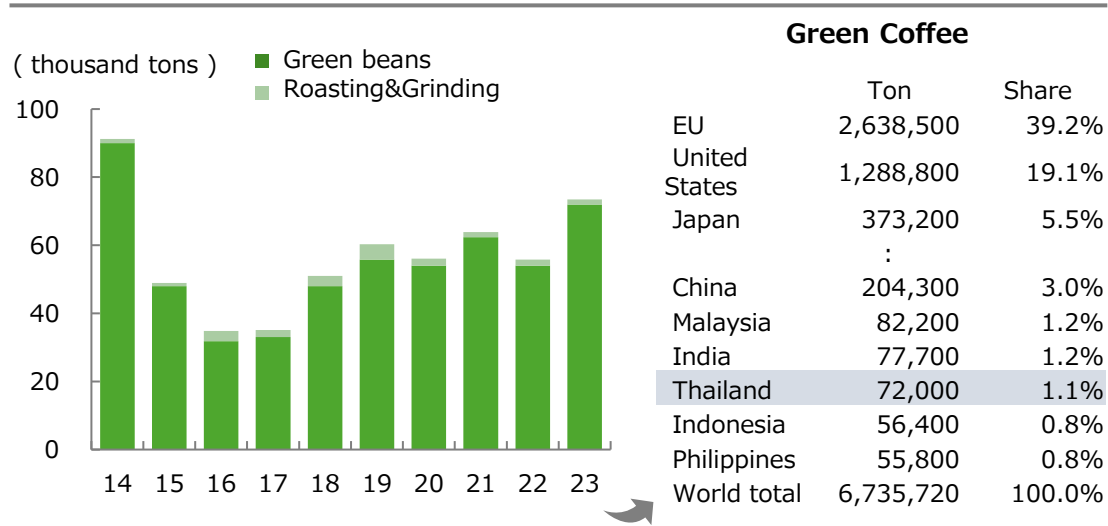


Figure 3: Import Volume by Category (2023)

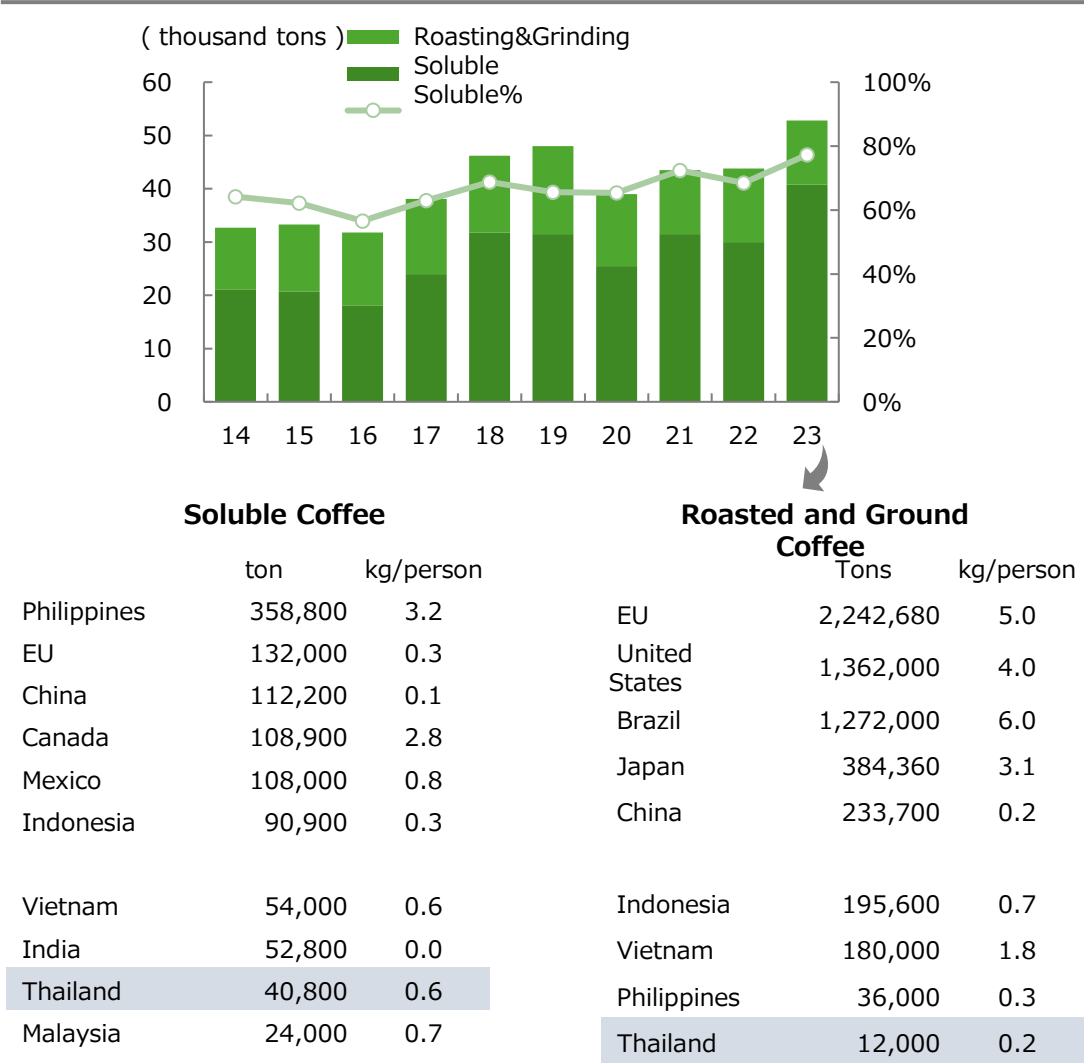
	Green Coffee Beans	Roasted/Ground Beans	Soluble
Malaysia	100.0%	0.0%	0.0%
Thailand	98.0%	2.0%	0.0%
China	62.1%	3.8%	34.1%
Vietnam	50.0%	25.0%	25.0%
Indonesia	48.0%	1.0%	51.0%
Philippines	15.7%	0.0%	84.3%

(source : USDA data)

■ Consumption

- Consumption has generally shown positive growth, except for a significant decline during the COVID-19 pandemic in 2020. In 2023, consumption reached 52,800 tons, a 21% increase, marking the highest level since 2019 and the highest in four years.
- The breakdown of 2023 consumption was 40,800 tons for soluble coffee and 12,000 tons for roasted and ground beans. Soluble coffee accounted for 77% of the total.
- Although consumption is trending upward, per capita consumption remains low. Particularly, per capita consumption of roasted and ground beans remains at a low level (Figure 4).

Figure 4: Consumption Volume

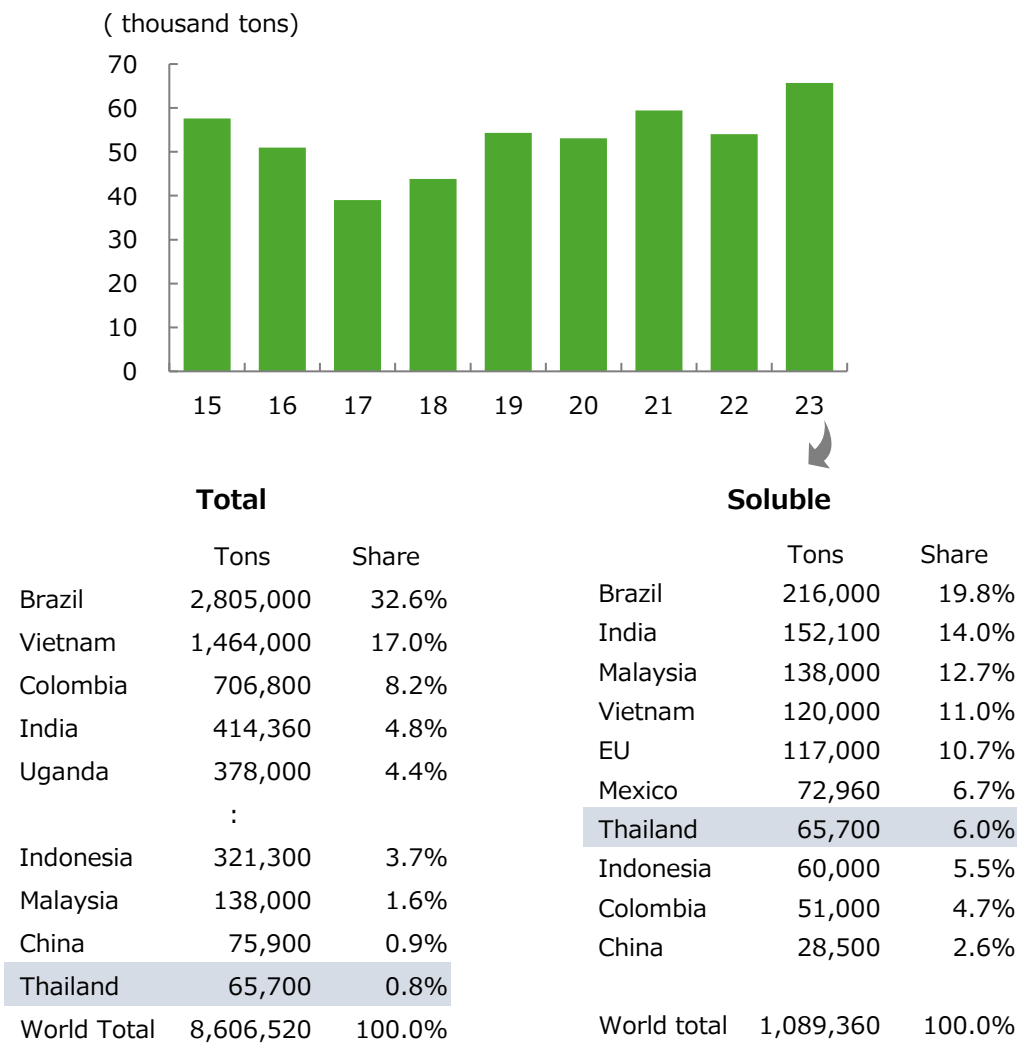


(source : USDA and UN data)

■ Exports

- Statistically confirmed exports consist solely of soluble coffee; exports of green beans, roasted beans, and ground beans are not recorded. Soluble coffee exports in 2023 increased by 22% to 65,700 tons. This accounts for 6% of the global total, ranking Japan 8th worldwide when including the EU. However, total coffee exports, including green beans and roasted/ground beans, remain below 1% of the global total (Figure 5).

Figure 5: Export Volume



(source : USDA data)

(Ashu Research : August 2025)