

Thailand: Coffee

■ Overview: Both production and consumption are trending upward

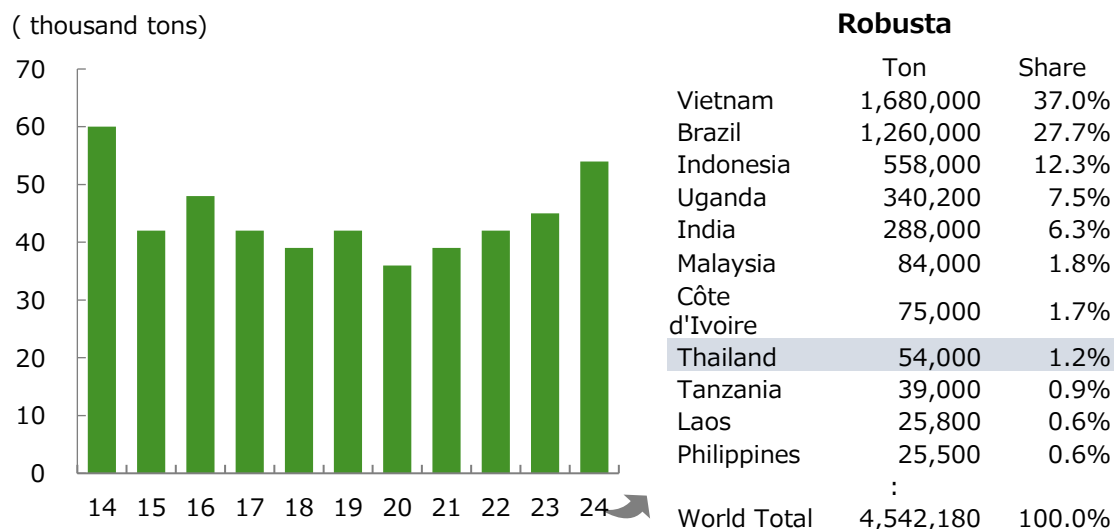
- Both coffee production and consumption in Thailand are currently on an upward trend. However, on a global scale, production and consumption remain relatively small.
- Due to limited domestic production, Thailand relies heavily on imports, primarily of green beans. The structure involves importing green 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

- Coffee production in Southeast Asia is dominated by the Robusta variety, and Thailand has no confirmed commercial-scale production of Arabica. 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 2024, production reached 54,000 tons, a 20% increase from the previous year. This marks the fourth consecutive year of year-over-year growth, reaching its highest level in a decade since 2014.
- 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. 2024 = October 2023 to September 2024

Figure 1: Coffee Production



(source : USDA data)

■ Imports

- With limited domestic production, imports focus primarily on green beans. In 2024, imports decreased by 16% to 61,500 tons, of which 60,000 tons were green beans. This accounts for 98% of the total.
- Although Japan's green coffee imports in 2024 represent less than 1% of the global total, they rank second only to Malaysia among major Southeast Asian countries (Figure 2).
- Looking at the proportion of green beans in total imports for 2024, Thailand ranks second only to Malaysia among major Southeast Asian countries (Figure 3).

Figure 2: Import Volume

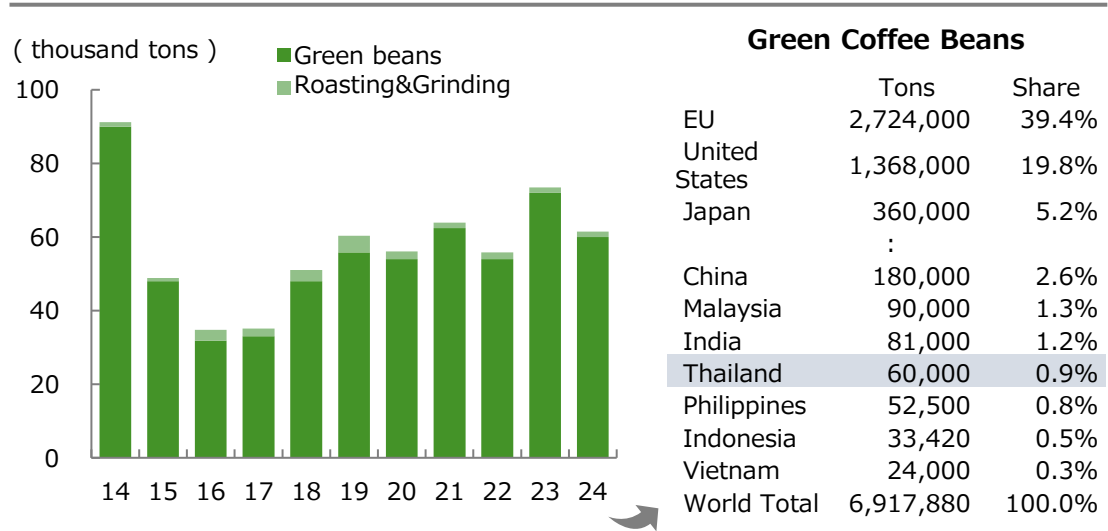


Figure 3: Import Volume by Category (2024)

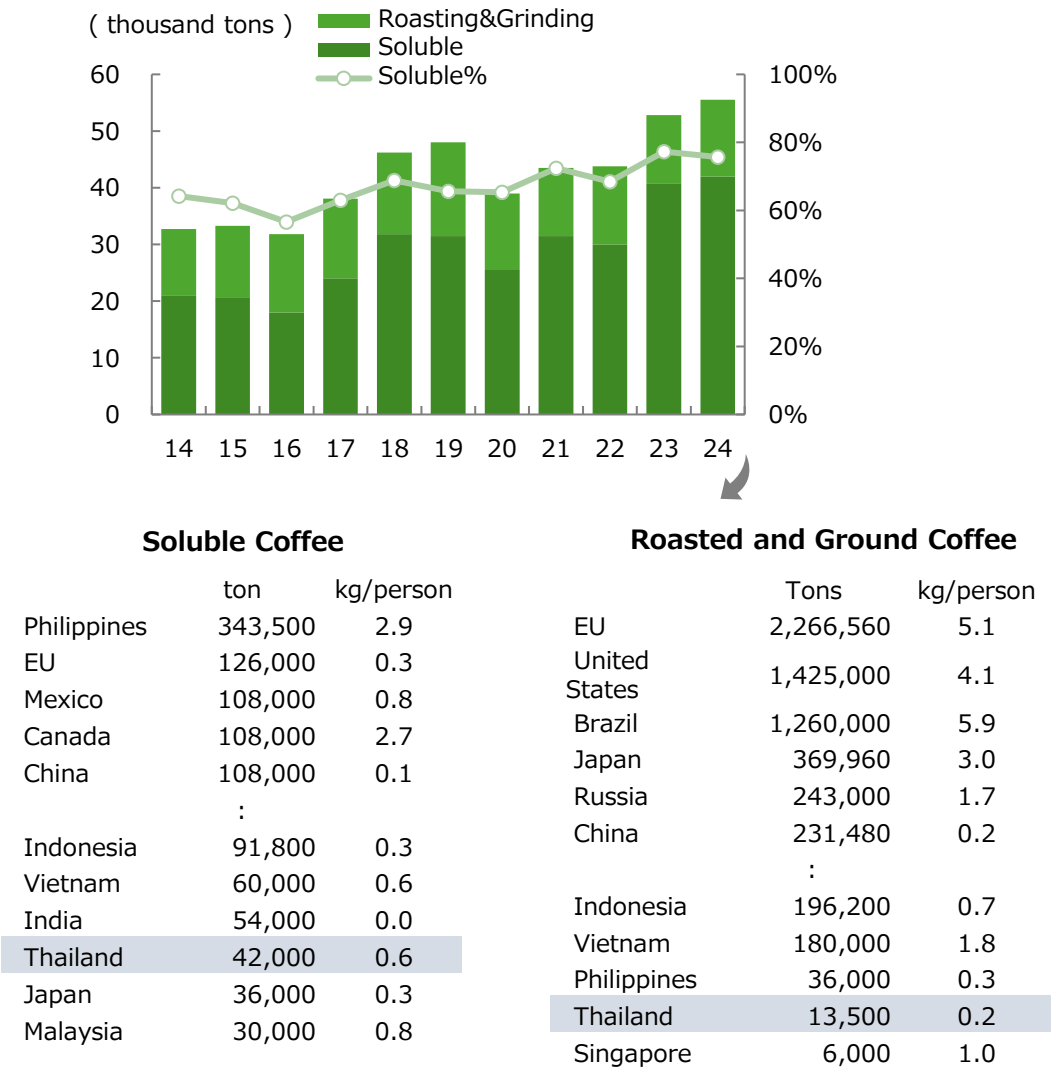
	Green Coffee	Roasted/Ground Beans	Soluble
Malaysia	100.0%	0.0%	0.0%
Thailand	97.6%	2.4%	0.0%
Philippines	60.0%	4.0%	36.0%
Indonesia	36.5%	1.3%	62.2%
Vietnam	14.9%	0.0%	85.1%

(source : USDA data)

■ Consumption

- Consumption has generally shown positive growth, except for a significant decline during the COVID-19 pandemic in 2020. Since the pandemic, consumption reached a record high in 2023 for the first time in four years since 2019. In 2024, consumption increased by 5% to 55,500 tons, continuing the trend of setting new records.
- The breakdown of 2024 consumption is 42,000 tons for soluble coffee and 13,500 tons for roasted and ground beans. Soluble coffee accounts for 76% of the total.
- Although consumption is trending upward, per capita consumption remains low. Particularly, per capita consumption of roasted and ground beans is at a low level (Figure 4).

Figure 4: Consumption Volume

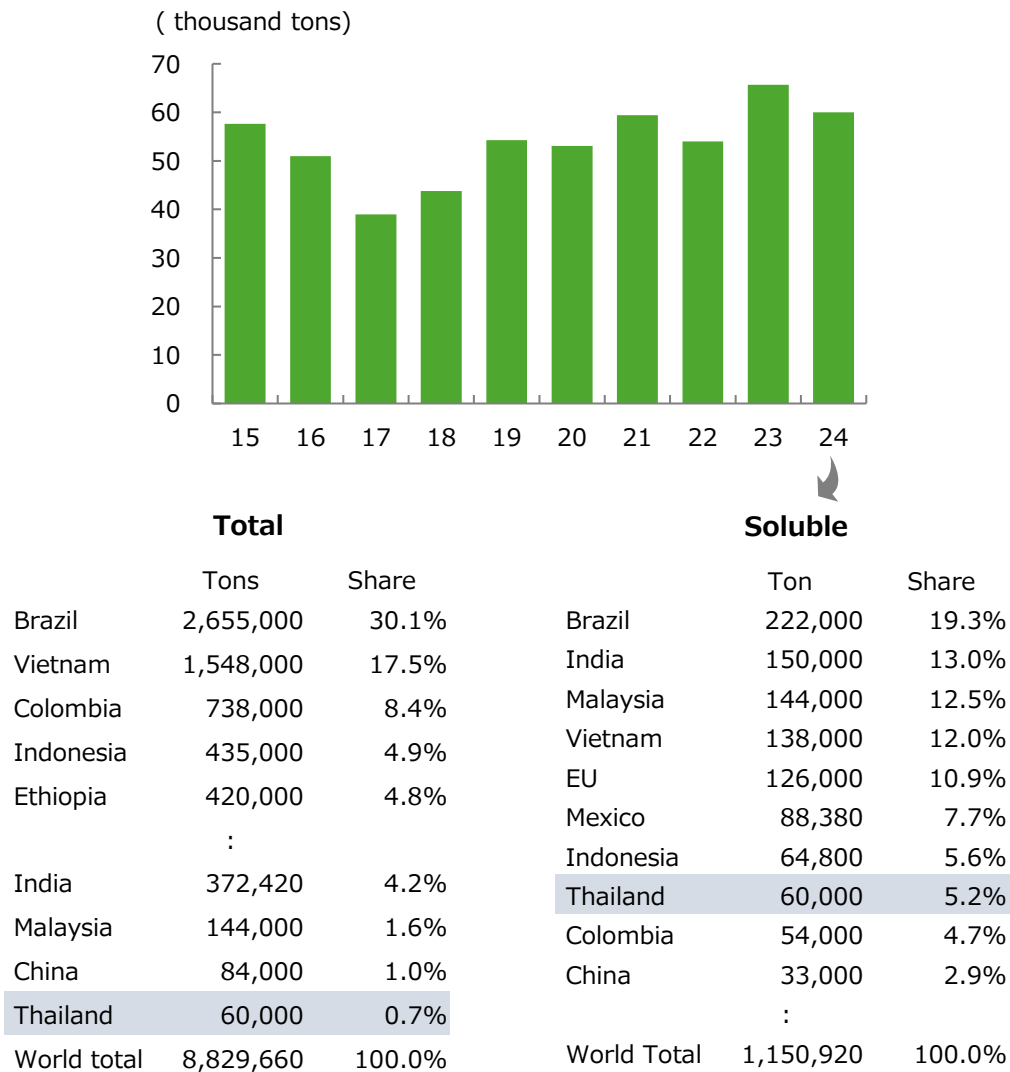


source : USDA and UN data)

■ Exports

- Statistically confirmed exports consist solely of soluble coffee; exports of green beans, roasted beans, and ground beans have not been confirmed. Soluble coffee exports in 2024 decreased by 9% to 60,000 tons. This accounts for 5% of the global total, ranking Japan 8th worldwide when including the EU. However, total coffee exports, including green beans, roasted beans, and ground beans, remain below 1% of the global total (Figure 5).

Figure 5: Export Volume



(source : SDA data)

(Ashu Research : August 2025)