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).

(thousand tons) Robusta 70 Ton Share 1,680,000 37.0% Vietnam 60 Brazil 1,260,000 27.7% 12.3% Indonesia 558,000 50 Uganda 340,200 7.5% 288,000 India 6.3% 40 84,000 1.8% Malaysia Côte 30 75,000 1.7% d'Ivoire 54,000 20 Thailand 1.2% Tanzania 39,000 0.9% 10 Laos 25,800 0.6% 25,500 Philippines 0.6% 0 14 15 16 17 18 19 20 21 22 23 24 4,542,180 World Total 100.0%

Figure 1: Coffee Production

(source: USDA data)

^{*}Production year (Market Year) runs from October to September. 2024 = October 2023 to September 2024

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).

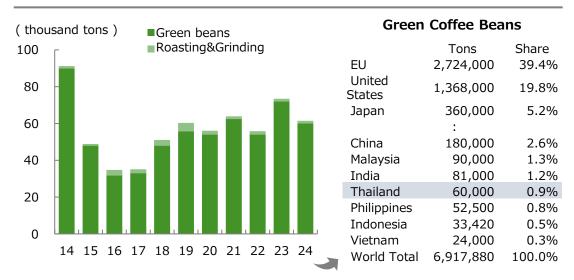


Figure 2: Import Volume

Figure 3: Import Volume by Category (2024)

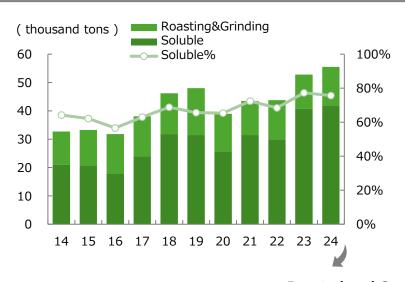
	Green Coffee	Roasted/Ground Beans	Soluble
Malaysia	100.0%	0.0%	0.0%
Thailand	97.6%	2.4%	0.0%
Philippines	60.0%	4.0%	36.0%
Indonesia	36.5%	1.3%	62.2%
Vietnam	14.9%	0.0%	85.1%

(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



Soluble Coffee

Roasted and Ground Coffee

	ton	kg/person		Tons	kg/person
Philippines	343,500	2.9	EU	2,266,560	5.1
EU	126,000	0.3	United	1,425,000	4.1
Mexico	108,000	0.8	States	, ,	
Canada	108,000	2.7	Brazil	1,260,000	5.9
China	108,000	0.1	Japan	369,960	3.0
Ciliid	:	0.1	Russia	243,000	1.7
Indonesia	91,800	0.3	China	231,480	0.2
Vietnam	60,000	0.6		:	
India	54,000	0.0	Indonesia	196,200	0.7
Thailand	42,000	0.6	Vietnam	180,000	1.8
Japan	36,000	0.3	Philippines	36,000	0.3
•	•		Thailand	13,500	0.2
Malaysia	30,000 0.8	8.0	Singapore	6,000	1.0

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).

(thousand tons) 70 60 50 40 30 20 10 0 15 16 17 18 19 20 21 22 23 24 Total Soluble

Figure 5: Export Volume

iotai				Soluble		
	Tons	Share		Ton	Share	
Brazil	2,655,000	30.1%	Brazil	222,000	19.3%	
Vietnam	1,548,000	17.5%	India	150,000	13.0%	
Colombia	738,000	8.4%	Malaysia	144,000	12.5%	
Indonesia	435,000	4.9%	Vietnam	138,000	12.0%	
Ethiopia	420,000	4.8%	EU	126,000	10.9%	
Есторіа	•	110 70	Mexico	88,380	7.7%	
	:		Indonesia	64,800	5.6%	
India	372,420	4.2%	Thailand	60,000	5.2%	
Malaysia	144,000	1.6%	Colombia	54,000	4.7%	
China	84,000	1.0%	China	33,000	2.9%	
Thailand	60,000	0.7%		:		
World total	8,829,660	100.0%	World Total	1,150,920	100.0%	

(source: SDA data)

(Ashu Research : August 2025)