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Report Name: Growing Wine Market- Opportunities for US Exporters

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Report Highlights:

Thailand's imported wine market is growing supported by strong tourism activity, premiumization trends, and the expansion of the hospitality sector. The report identifies recent trends and emerging opportunities following the 2024 elimination of import duties on wine. In 2025, Thailand imported $14 million worth of U.S. wines – a 25 percent increase compared to 2024.

Executive Summary

Thailand's alcoholic beverage market continued to expand in 2025, supported by strong tourism activity, a growing hospitality sector, and rising consumer demand for premium alcoholic beverages. The country's recent wine tax reforms including the elimination of import tariffs and reductions in excise taxes, have reshaped the competitive landscape for imported wines and created new opportunities for international suppliers.

Thailand's total wine imports increased 14 percent to $164 million in 2025 and have grown another 26 percent for the first five months of 2026 in comparison to the previous year, reflecting growing consumer interest in premium wine and expanding availability across retail and foodservice channels. With domestic wine production remaining limited, imported wines continue to dominate the market. France, Australia, Italy, the United States, and Chile remained the leading suppliers, while the United States emerged as one of the fastest-growing exporters. U.S. wine exports increased 25 percent to approximately $14 million in 2025, making the United States the fourth-largest wine supplier to Thailand.

Thailand is emerging as one of Southeast Asia's most attractive markets for premium imported wines. A growing wine culture, increasing demand for diverse wine selections, and continued investment in hospitality and tourism are supporting long-term market growth. These trends present promising opportunities for U.S. wineries, particularly those offering premium, differentiated, and regionally distinctive wines that align with evolving consumer preferences.

Section I. Thailand's Alcoholic Beverage Market Overview

Market Snapshot

Thailand's alcoholic beverage market continued to expand in 2025, supported by the recovery of international tourism, growth in the hospitality sector, and rising consumer demand for premium alcoholic beverages. According to Euromonitor, total alcoholic beverage consumption reached approximately 3.1 billion liters in 2025, continuing the upward trend observed since 2021.

Beer remained the largest alcoholic beverage category in Thailand, accounting for approximately 73 percent of total volume sales in 2025. Consumption remained largely unchanged at approximately 2.24 billion liters, reflecting the mature nature of the beer market. Despite limited volume growth, beer maintained its dominant position due to its affordability, broad distribution network, and popularity among both domestic consumers and tourists.

Spirits represented the second-largest category, with total consumption reaching approximately 741 million liters in 2025. While spirits remain deeply embedded in the local drinking culture, growth has been relatively stable as consumers increasingly diversify into beer, wine, and ready-to-drink products.

Wine remained a small but rapidly growing segment, with total consumption increasing from 30.5 million liters in 2024 to 32.0 million liters in 2025, reflecting growing consumer interest in premium alcoholic beverages, expanding wine offerings in hospitality venues, and the positive impact of Thailand's wine tariff elimination in 2024.

The ready-to-drink (RTD) category continued to gain popularity, particularly among younger consumers seeking convenience and lower-alcohol alternatives. RTD consumption increased from 45.3 million liters in 2024 to 48.5 million liters in 2025, making it one of the fastest-growing alcoholic beverage segments in the market.

Overall, Thailand's alcoholic beverage market remains heavily dominated by beer and spirits; however, wine and RTD products are experiencing stronger growth rates, supported by premiumization trends, evolving consumer preferences, and expanding tourism-related demand (Table 1).

Table 1. Thailand: Alcoholic Beverage Market Size by Category (2025)

Category	Volume (Million Liters)	Share (%)
Beer	2,243.60	73.1
Spirits	741.1	24.2
Ready-To-Drink (RTD)	48.5	1.6
Wine	32	1
Cider/Perry	1.8	0.1
Total	**3,066.80**	**100**

Source: Euromonitor

Market Drivers and Consumer Trends

<u>Key Drivers</u>

Thailand's alcoholic beverage market continued to benefit from strong international tourism activity and the expansion of the hospitality sector in 2025. International tourism remains a key driver of alcoholic beverage consumption in Thailand. According to the Tourism Authority of Thailand (TAT), international visitor arrivals reached 35.6 million in 2024 before moderating to 33 million in 2025. Despite the slight decline, visitor arrivals remained well above pre-pandemic levels and continued to support demand for alcoholic beverages, particularly in hotels, restaurants, bars, and tourism-oriented retail channels located in major destinations such as Bangkok, Phuket, Pattaya, and Chiang Mai.

The growth of premium dining establishments, upscale hotels, rooftop bars, and tourism-oriented foodservice outlets has further increased opportunities for imported wines. Industry sources indicate that Thailand's hospitality market is expected to continue expanding, supported by rising tourism expenditures and growing demand for premium dining experiences. In addition, urbanization and the expansion of middle- and upper-income consumer groups have contributed to greater interest in wine consumption, particularly among younger professionals seeking premium, international, and lifestyle-oriented beverage options. Wine consumption remains concentrated among urban consumers, expatriates, tourists, and affluent Thai households, but awareness and acceptance of wine continue to broaden.

Consumer Trends

Despite economic pressures and softer consumer spending, premiumization remains a key trend in Thailand's alcoholic beverage market. Consumers are increasingly willing to pay for higher-quality products and premium drinking experiences, particularly in wine, imported spirits, and specialty alcoholic beverages. The influence of global consumer trends, international travel, and social media has encouraged consumers, particularly younger urban professionals, to adopt aspirational lifestyles and seek premium products that reflect status, quality, and authenticity.

This trend is evident in recent product launches by major domestic beverage companies. In 2025, Boon Rawd Brewery introduced Leo Supreme, a premium beer targeting consumers seeking upgraded drinking experiences, while Thai Beverage entered the premium whisky segment with the launch of Prakaan, Thailand's first premium single malt whisky, available in Select Cask, Peated Malt, and Double Cask variants. These investments by leading beverage companies demonstrate growing confidence in Thailand's premium alcoholic beverage segment and reflect evolving consumer preferences for higher-value products.

Demand for imported alcoholic beverages has strengthened following Thailand's elimination of wine import tariffs in 2024. Wine consumption continues to grow in metropolitan and tourism-driven markets, where consumers are exposed to international cuisine, tourism, and hospitality experiences. Imported wines are increasingly viewed as premium lifestyle products associated with quality, sophistication, and social occasions. These trends create favorable opportunities for premium wine suppliers, including U.S. exporters, particularly in the on-trade, specialty retail, and hospitality sectors.

SECTION II. Wine Market Developments Following Tariff Elimination

Policy Changes and Market Impact

To stimulate economic activity and support the tourism sector, Thailand implemented significant reforms to its wine taxation regime effective February 23, 2024. The Thai government eliminated import tariffs on wine under Harmonized System (HS) 2204 and HS 2205, reducing import duties from 54-60 percent to zero percent. In addition, the government revised the excise tax structure by reducing the specific excise tax on grape wine from 1,500 baht (~$45) to 1,000 baht (~$30) per liter of pure alcohol and lowering the ad valorem tax rate on higher-priced wines. These measures were introduced to promote Thailand as a tourism destination, encourage spending by foreign and domestic visitors, and support the hospitality and foodservice sectors.

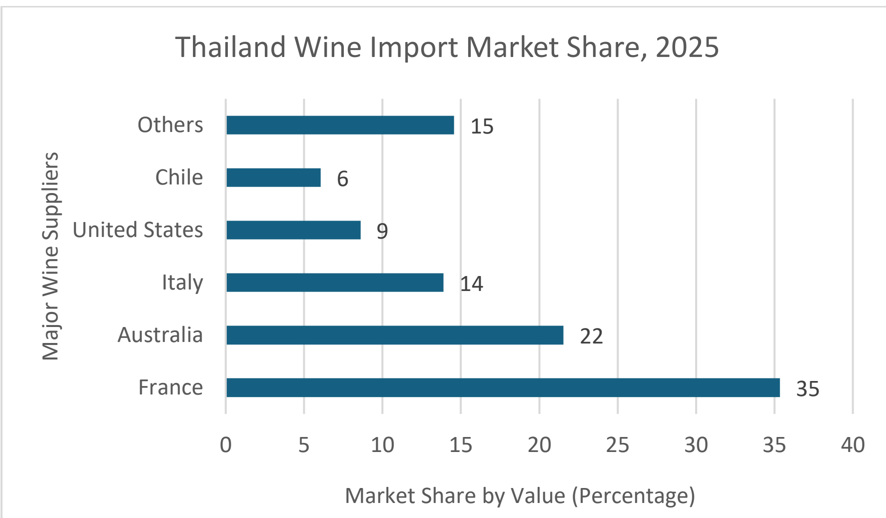
The policy changes have improved the competitiveness of imported wines by reducing the overall tax burden and lowering retail prices. As a result, importers, retailers, hotels, and restaurants have expanded their wine portfolios and increased the availability of imported wines across multiple price segments. Industry contacts report broader product selections in modern retail stores, specialty wine shops, restaurants, and hotels following the tariff elimination.

The more favorable import environment has also encouraged importers to introduce a wider range of premium and niche wines, including wines from emerging regions and New World suppliers. The policy changes, combined with growing consumer interest in premium alcoholic beverages, have contributed to increased wine imports and strengthened opportunities for exporting countries, including the United States, in Thailand's expanding wine market.

Imported Wine Market Share and Growth

Thailand's imported wine market has experienced strong growth in recent years, with total import value increasing from approximately $66 million in 2021 to $164 million in 2025, representing a compound annual growth rate (CAGR) of approximately 26 percent over the period. Imported wines account for the vast majority of wine consumed in Thailand due to limited domestic production, making import trends a key indicator of overall market development. Growth accelerated following Thailand's elimination of wine import tariffs and reduction of excise taxes since early 2024. In 2025, total wine imports reached $164 million, up 14 percent from $144 million in 2024.

Figure 1. Thailand: Market Share by Value of Wine Imports by Major Supplier, 2025



Source: Trade Data Monitor (TDM, LLC).

France strengthened its position as Thailand's leading wine supplier (Figure 1), with imports increasing by approximately 20 percent to $58 million in 2025. France's market share expanded from 34 percent in 2024 to 35 percent in 2025, reflecting continued strong demand for premium French wines in the hospitality, fine dining, and specialty retail sectors.

Australia remained the second-largest supplier, although imports declined by 8 percent to $35 million in 2025. Before Thailand eliminated wine import duties in 2024, Australia had enjoyed a significant competitive advantage through duty-free access under the Thailand-Australia Free Trade Agreement (TAFTA). The removal of import tariffs for all suppliers has reduced this preferential advantage and contributed to a more level playing field for competing wine-exporting countries. As a result, Australia's market share fell from 27 percent to 22 percent, continuing a gradual decline from its leading position in 2023. Despite the decrease, Australia remains a major supplier due to its well-established distribution networks, strong brand recognition, and broad portfolio of wines across multiple price segments.

Italy was the fastest-growing major supplier in 2025, with imports increasing by 38 percent to $23 million. Italy's market share rose from 12 percent in 2024 to 14 percent in 2025, supported by growing consumer interest in premium Italian wines and expanding availability in restaurants and modern retail outlets.

The United States ranked as Thailand's fourth-largest wine supplier in 2025. U.S. wine imports increased by 25 percent to $14 million, outpacing overall market growth and increasing market share from 8 percent in 2024 to 9 percent in 2025. The strong performance suggests that U.S. wines benefited from Thailand's elimination of wine import tariffs and growing demand for premium New World wines among consumers and hospitality operators.

Chile remained the fifth-largest supplier, with imports increasing by 18 percent from 2024 to approximately $10 million and market share rising modestly to 6 percent in 2025.

Overall, the data indicate that Thailand's imported wine market continues to shift toward premium wine-producing countries. France consolidated its leadership position, while Italy and the United States recorded the strongest growth among major suppliers. The increasing market share of U.S. wines highlights expanding opportunities for American exporters, particularly in premium hospitality, specialty retail, and tourism-driven consumption channels.

Section III. Competitive Landscape and U.S. Wine Positioning

Competitive Landscape

Thailand's imported wine market is characterized by competition among established Old World and New World wine-producing countries across premium, mainstream, and value segments. While France remained Thailand's leading wine supplier by value in 2025, Australia continued to dominate the market in volume terms, reflecting its broad portfolio of wines across multiple price points and strong distribution networks. Australia continues to perform strongly in both retail and foodservice channels, while Italy has gained market share through increasing consumer interest in premium Italian wines and Mediterranean cuisine.

France remains the dominant supplier in Thailand's premium wine segment despite ranking third by volume. French wines maintain a strong presence in luxury hotels, fine dining restaurants, and specialty wine retailers, supporting France's position as the leading supplier by import value. Similarly, Italy has strengthened its position as a fast-growing premium supplier, benefiting from expanding wine selections in hospitality and modern retail channels.

Chile remains a significant supplier in the value and mid-range segments, offering competitively priced wines that appeal to both retail consumers and foodservice operators. South Africa, New Zealand, Japan, and Spain maintain smaller but established positions in niche and premium categories, particularly through specialty importers and high-end hospitality outlets.

The United States ranked as Thailand's fourth-largest wine supplier by value in 2025 but only seventh by volume, indicating a higher average unit value than many competing suppliers. This positioning reflects the market's perception of American wines as premium products and highlights their appeal among consumers seeking differentiated wine experiences. California remains the primary source of U.S. wine exports and is increasingly recognized for producing wines that combine quality, consistency, and broad varietal selection.

U.S. wine imports increased approximately 25 percent in value to $14 million and 25 percent in volume to 1.1 million liters. This disparity between value and volume rankings suggests that U.S. wines are positioned primarily in premium and higher-priced market segments rather than volume-driven categories. California wines, in particular, continue to benefit from strong recognition among affluent consumers, expatriates, and hospitality operators seeking premium New World wines.

Recent regulatory and tax reforms have strengthened the competitive position of U.S. wines in Thailand's imported wine market. Combined with growing consumer demand for premium alcoholic beverages, strong tourism activity, and the expansion of hospitality and specialty retail channels, these developments have created favorable conditions for continued growth of U.S. wine exports.

U.S. Wine Positioning

Table 2. Thailand: Imported Wine Market Positioning by Major Supplier (2025)

Supplier	**Market Position**
Australia	Volume leader
France	Premium leader
Italy	Fast-growing premium supplier
Chile	Strong value segment
United States	Premium and New World positioning
Vietnam	Regional distribution and re-export hub
South Africa	Competitive mid-range supplier
New Zealand	Premium niche supplier
Japan	Specialty and premium segment
Spain	Food service and specialty retail presence

As shown in Table 2, the United States occupies a distinct position within Thailand's imported wine market, competing primarily on quality, innovation, and diversity rather than volume. While Australia leads the market in volume and France dominates the premium segment, U.S. wines have established a niche among consumers seeking contemporary wine styles, diverse varietals, and wines from internationally recognized regions.

Unlike many traditional suppliers that rely on established country-of-origin reputations, U.S. wines benefit from their ability to offer distinctive regional identities, innovative winemaking approaches, and strong brand stories. These attributes align well with evolving consumer preferences in Thailand, where wine purchasing decisions are increasingly influenced by lifestyle, authenticity, and experiential consumption.

Although competition remains intense, particularly from European suppliers in the premium segment and New World producers in value-oriented categories, recent growth in U.S. wine exports suggests increasing acceptance of American wines among importers, retailers, and consumers. The 25 percent increase in export value in 2025 indicates that U.S. suppliers are gaining traction in a market that increasingly values diversity, quality, and premium wine experiences.

Section IV. Outlook and Opportunities for U.S. Exporters

Market Outlook

Thailand's imported wine market is expected to continue growing through 2026, supported by strong tourism activity, premiumization trends, and the expansion of the hospitality sector. Although international tourist arrivals moderated in 2025 compared to 2024, tourism remains a key driver of wine consumption, particularly in hotels, restaurants, bars, and entertainment venues located in major destinations such as Bangkok, Phuket, Pattaya, Chiang Mai, and Koh Samui.

The continued expansion of premium hospitality establishments and wine-focused retail channels is expected to support demand for imported wines. According to the Thai Tourism Authority, Thailand's luxury hospitality sector continues to strengthen, with 62 hotels recognized by the MICHELIN Guide's Key Selection in 2025, while the MICHELIN Guide Thailand 2025 features 462 dining establishments, including 36 Michelin-starred restaurants. These premium venues represent important channels for imported wine sales and consumer exposure to international wine brands.

Opportunities for U.S. Wine

The continued evolution of Thailand's wine market presents opportunities for U.S. exporters to expand beyond traditional hospitality channels and reach a broader base of wine consumers. As importers seek to differentiate their portfolios in an increasingly competitive market, there is growing interest in premium California wines, boutique wineries, and distinctive varietals that offer alternatives to traditional European suppliers. Opportunities are particularly strong in the premium on-trade sector, where hotels, fine dining restaurants, wine bars, and curated wine programs continue to expand their selections to meet changing consumer preferences.

Additional growth potential exists through specialty wine retailers, modern trade channels, wine education initiatives, and consumer tasting events that help increase awareness of U.S. wine regions and styles. Importers and distributors are also increasingly seeking products with strong brand stories, sustainability credentials, and unique regional identities, areas where many U.S. wineries are well positioned to compete. As Thailand's wine culture continues to mature, U.S. exporters have opportunities to strengthen their presence by targeting consumers seeking premium, innovative, and experience-driven wine offerings.

Conclusion

Thailand's wine market continues to evolve as consumers become more receptive to premium imported wines and hospitality operators expand their wine offerings to meet changing preferences. The strong growth in wine imports and the 25 percent increase in U.S. wine imports in 2025 and the 19 percent growth year-over-year through May 2026 indicates growing recognition of American wines among importers, retailers, and consumers. As the market becomes increasingly competitive, opportunities for U.S. exporters are expected to be strongest in differentiated, premium, and value-added segments where quality, regional identity, and brand story play an important role in purchasing decisions. With a growing wine culture and expanding demand for diverse wine selections, Thailand is well positioned to remain an important growth market for U.S. wines in Southeast Asia.

Attachments:

No Attachments.