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By

Italian Trade Agency
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WINE INDUSTRY REPORT

Bangkok, September 2025

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Wine in Thailand

Wine in Thailand

Overview

n 2024, total wine sales in Thailand **rose by 6%** to more than 30 million litres, following the government's decision to **temporarily lower excise taxes on alcohol and nightlife venues**. Import duties on wine were waived, while grape and sparkling wine taxes were reduced from 10% and THB1,500 per litre to 5% and THB1,000 per litre. Taxes on nightclubs, pubs, and bars were also halved. These measures lowered prices, supported tourism, and encouraged consumers to return to on-trade channels, giving imported wines a notable boost. **Sparkling wine** was the best performing category, with total volume sales increasing by 13% to 1.8 million litres, following . Total volume sales are projected to grow at a CAGR of 3% over the forecast period, reaching 36 million litres.

Imported wines from **France, Australia, and Italy** benefited most in 2024, as reduced prices reinforced their reputation for quality and status. **Still red wine** remained the dominant category, with volume sales rising by 6% to 23 million litres, supported by affordability, familiarity, and broad distribution. Although **off-trade remained the primary channel, on-trade sales recorded stronger growth**, reflecting both the tax reductions and consumer migration from higher-priced spirits.

A wider health and wellness trend also influenced demand. **Organic and natural wines, as well as non-alcoholic options**, continued to attract attention from health-conscious consumers seeking balance and sophistication. While debates over health claims persist, moderate wine consumption is increasingly associated with lifestyle benefits. Sustainability concerns likewise shaped preferences, with growing interest in **environmentally friendly packaging and organically grown grapes.** Together, these factors highlight the evolving nature of the Thai wine market, where traditional demand for still red wines now coexists with innovation in sparkling and niche categories.

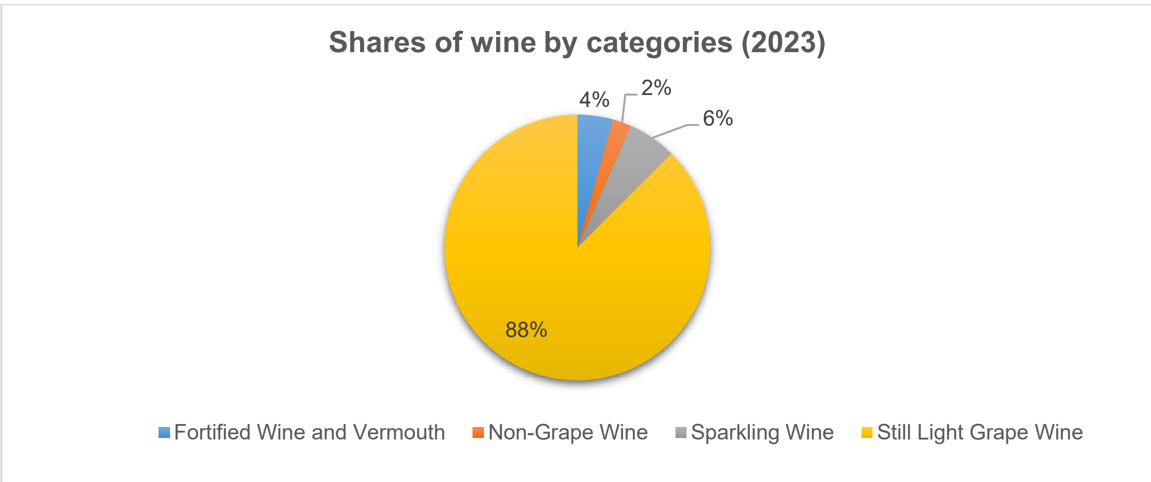
Table 1 Market size of wine in Thailand

million litres, USD, %

Category	Data Type	Market Value (USD)				Growth rate (%)		
		2022	2023	2024	*2025 (p)*	2023/22	2024/23	*2025/24 (p)*
Wine	Total Volume (litres)	26.1	28.7	30.4	*31.9*	10.0	6.1	*5.0*
	Retail Value RSP (USD)	1,032.2	1,207.0	1,344.2	*1,512.7*	16.9	11.4	*12.5*

Source: Euromonitor

Figure 1 shares of wine by categories 2024



Source: Euromonitor

Brand shares (2024)

1. Mont Clair – Siam Winery Co Ltd (24.4%)
2. Jacob's Creek – Pernod Ricard Groupe (8.8%)
3. Penfolds – Treasury Wine Estates Ltd (7.5%)
4. Hardys – Accolade Wines Ltd (5.8%)
5. Monsoon Valley – Siam Winery Co Ltd (2.4%)
6. Château de Loei – CPK Plantation Co Ltd (1.5%)
7. Wine & Spirit Trading Wine – Wine & Spirit Trading Co Ltd (0.9%)
8. Lindeman's – Treasury Wine Estates Ltd (0.8%)
9. Khao Yai – PB Valley Khao Yai Winery (0.7%)
10. Martini Bianco – Bacardi & Co Ltd (0.7%)

Prospect and opportunities

Rising incomes and urban interest drive wine demand.

Wine sales in Thailand are **forecast to grow by 5% in 2025**, with a CAGR of 3% over the coming years, supported by **rising disposable incomes and growing interest in wine**, particularly among younger, urban middle-class consumers. Traditionally a beer-drinking nation, Thailand is witnessing a shift in preferences, reflected in the spread of wine bars, restaurants, and specialist retailers. Wine is valued not only for taste but also for its association with luxury and social status, with imported varieties from established producing countries expected to see strong growth.

On-trade sales are projected to expand faster than off-trade, benefiting from food-and-wine pairing experiences, though competition from craft beer, spirits, and cider will intensify. Still red wine will remain dominant, but still white wine is set to be the most dynamic, with double-digit growth anticipated as consumers explore new varieties. Demand for **imported-still white** wines is particularly poised to increase.

Moderate wine consumption offers growth potential over other alcohols.

Growing health and wellness awareness in Thailand is influencing wine demand. **Moderate wine consumption is linked to potential benefits such as reduced heart disease risk**, improved blood flow, and antioxidant effects, though these claims remain contested. Still, its association with a balanced lifestyle attracts health-conscious consumers, encouraging them to choose wine over other alcoholic drinks. This trend also supports rising demand for low-alcohol and non-alcoholic options.

Rising demand for organic and sustainably packaged wines.

Sustainability concerns are shaping Thai wine demand, with more consumers seeking **organic wines free from chemical treatments**. Global warming is driving interest in eco-friendly packaging, such as recyclable paper bottles, which reduce carbon emissions and shipping costs. These solutions make wine more appealing to environmentally conscious producers and consumers alike.

Regulation of Import

In Thailand, the importation of wine is primarily governed by the **Excise Act B.E. 2560 (2017).** This legislation outlines the regulations, tax structures, and compliance requirements for importing and selling alcoholic beverages, including wine. Meanwhile, the **Customs Tariff Decree 2022 (No. 7)** play roles in regulate the import duties for wine.

Excise Department

The Excise Department, under the Ministry of Finance, oversees excise tax collection on goods and services to mitigate social costs like health and environmental impacts. Its vision emphasizes leadership in tax collection, while its mission focuses on efficiency, transparency, and sustainable development, serving various stakeholders, including importer and exporter, applicants for license of liquor, tobacco and playing card, in compliance with the Excise Act A.D. 2017.

References: Excise Act B.E. 2560 (2017), Customs Tariff Decree 2022 (No. 7), The handbook 'Duties and Rights of Excise Taxpayers according to the Excise Act A.D. 2017

Tax

- Customs Tariff

HS Code 2204 : Wine of fresh grapes, including fortified wines; grape must other than that of heading 20.09

Ceiling Rate	60%
General Rate (Section 12)	0%

HS Code 22041000 : Champagne
HS Code 22041000090 : Sparkling wines; other sparkling wines; other wines; grape musts whose fermentation has been prevented or stopped with the addition of alcohol (mistelle)
HS Code 22042111000 : Other wines in containers with a capacity of less than or equal to 2 liters with an actual alcoholic strength greater than 15% vol.
HS Code 22042121000 : Other wines in containers of less than or equal to 2 liters with actual alcoholic strength less than or equal to 15% vol.
HS Code 22042122000 : Other wines in containers with a capacity of less than or equal to 2 liters with an actual alcoholic strength greater than 15% vol.
HS Code 22042911000 : Other wines in containers with a capacity of more than 2 liters with an actual alcoholic strength of less than 15% vol.

HS Code 2205 : Vermouth and other wine of fresh grapes flavoured with plants or aromatic substances.

Ceiling Rate	60%
General Rate (Section 12)	0%

- Excise tax : (Excise duty calculation system)
- Other taxes : taxes for other entities

- Ministry of Interior:	10% of Excise duties
- Thai Health Promotion Foundation:	2% of Excise Duty
- Technology Promotion Association:	1.5% of Excise Duties
- Sports Authority of Thailand:	2% of Excise Duty
- Elderly Fund:	2% of Excise Taxes

- VAT 7%

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Global Trade Flows

Export

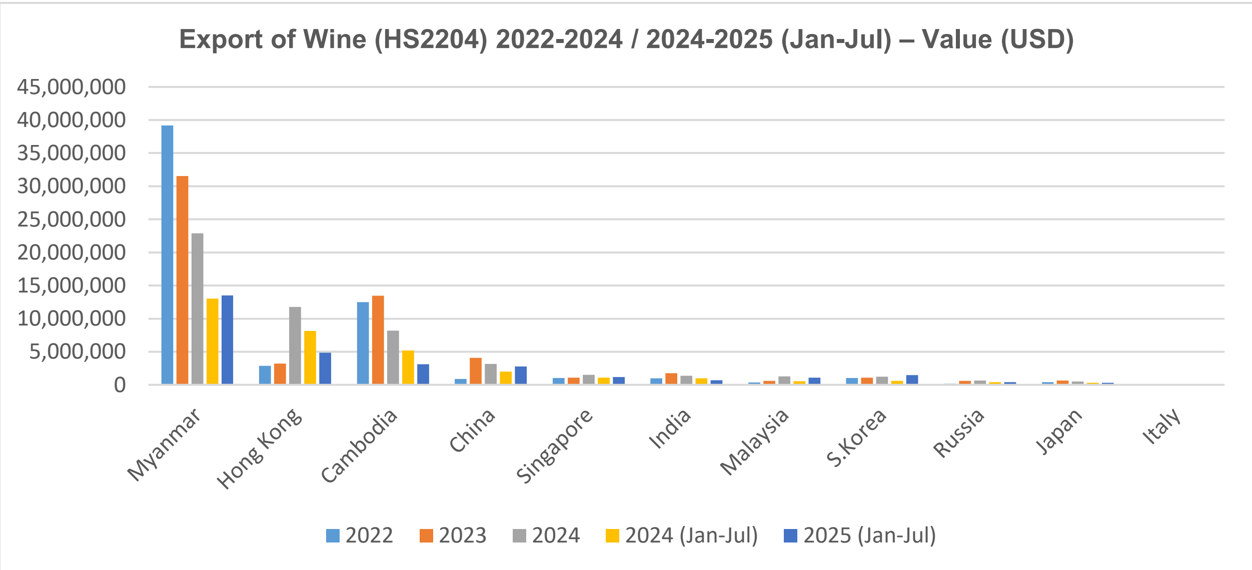
Table 2 Export of Wine 2022-2024 / 2024-2025 (Jan-July) – Value (USD) / Tariff heading: HS2204

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jul)	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)
1	Myanmar	39,171,210	31,556,565	22,899,625	13,003,234	13,486,173	49.7	40.8	41.8	-19.4	-27.4	3.7
2	Hong Kong	2,867,565	3,196,898	11,775,727	8,139,031	4,856,610	5.0	21.0	15.1	11.5	268.3	-40.3
3	Cambodia	12,490,362	13,455,393	8,182,056	5,188,930	3,104,850	21.2	14.6	9.6	7.7	-39.2	-40.2
4	China	868,729	4,060,271	3,183,728	2,000,857	2,765,447	6.4	5.7	8.6	367.4	-21.6	38.2
5	Singapore	1,044,498	1,069,678	1,501,457	1,059,563	1,169,866	1.7	2.7	3.6	2.4	40.4	10.4
6	India	976,999	1,750,551	1,356,541	963,534	701,924	2.8	2.4	2.2	79.2	-22.5	-27.2
7	Malaysia	364,623	587,119	1,271,443	541,878	1,094,515	0.9	2.3	3.4	61.0	116.6	102.0
8	S.Korea	1,052,097	1,075,042	1,244,424	602,774	1,454,197	1.7	2.2	4.5	2.2	15.8	141.3
9	Russia	154,710	596,033	631,348	409,247	420,364	0.9	1.1	1.3	285.3	5.9	2.7
10	Japan	406,537	628,991	490,955	297,205	301,903	1.0	0.9	0.9	54.7	-21.9	1.6
47	Italy	25,174	36,389	20,347	6,167	47,691	0.1	0.04	0.1	44.5	-44.1	673.3
World		**69,239,527**	**63,438,210**	**56,131,243**	**34,410,233**	**32,230,921**	**100**	**100**	**100**	**-8.4**	**-11.5**	**-6.3**

Source: Thailand Ministry of Commerce

Figure 2 Export of Wine 2022-2024 / 2024-2025 (Jan-July) – Value (USD) / Tariff heading: HS2204



Source: Thailand Ministry of Commerce

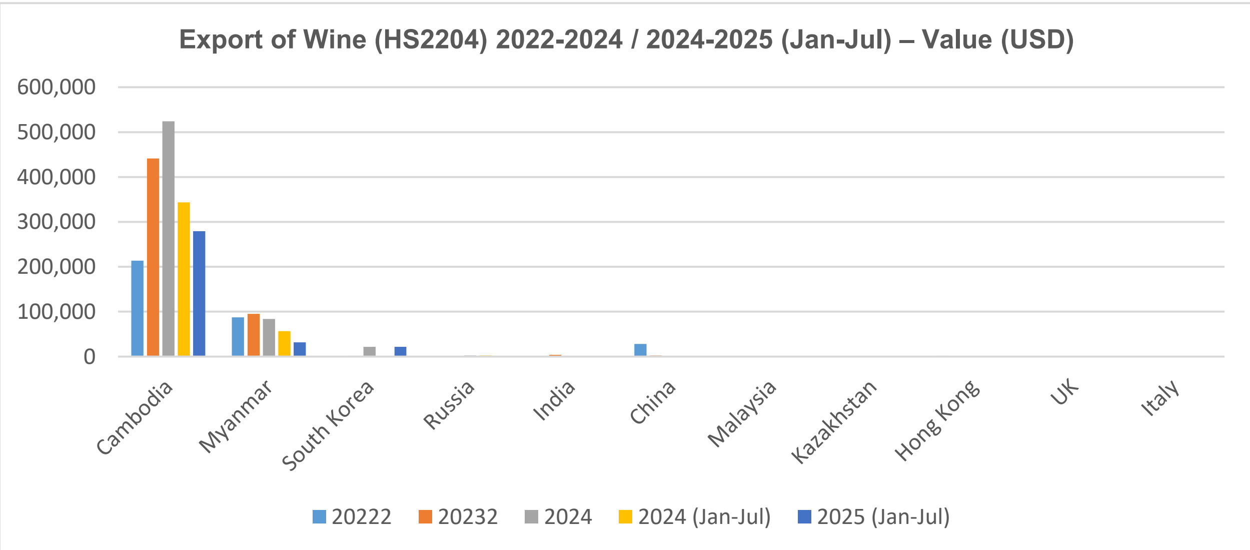
Table 3 Export of Vermouth and other wine of fresh grapes 2022-2024 / 2024-2025 (Jan-Jul) – Value (USD) / Tariff heading: HS2205

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jul)	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)
1	Cambodia	441,182	524,195	292,279	279,638	21,934	82.2	79.1	28.2	18.8	-44.2	-92.2
2	Myanmar	95,262	83,889	39,914	31,793	17,134	13.2	10.8	22.1	-11.9	-52.4	-46.1
3	S.Korea	1,751	21,420	21,517	21,517	0	3.4	5.8	0.0	1123.3	0.5	-100.0
4	Laos	1,327	106	14,636	0	37,271	0.0	4.0	48.0	-92.0	13707.5	100.0
5	Hong Kong	96	389	597	0	814	0.1	0.2	1.0	305.2	53.5	100.0
6	Malaysia	737	491	574	338	514	0.1	0.2	0.7	-33.4	16.9	52.1
7	Sweden	195	35	67	67	0	0.0	0.0	0.0	-82.1	91.4	-100.0
8	Singapore	350	94	11	11	0	0.0	0.0	0.0	-73.1	-88.3	-100.0
9	UAE	123	0	11	0	0	0.0	0.0	0.0	-100.0	100.0	0.00
10	Australia	416	126	0	0	0	0.0	0.0	0.0	-69.7	-100.0	0.00
17	Italy	49	179	0	0	0	0.0	0.00	0.0	265.3	-100.0	0.00
World		556,406	637,549	369,608	333,375	77,667	100	100	100	14.6	-42.0	-76.7

Source: Thailand Ministry of Commerce

Figure 3 Export of Vermouth and other wine of fresh grapes 2022-2024 / 2024-2025 (Jan-Jul) – Value (USD) / Tariff heading: HS2205



Source: Thailand Ministry of Commerce

Import

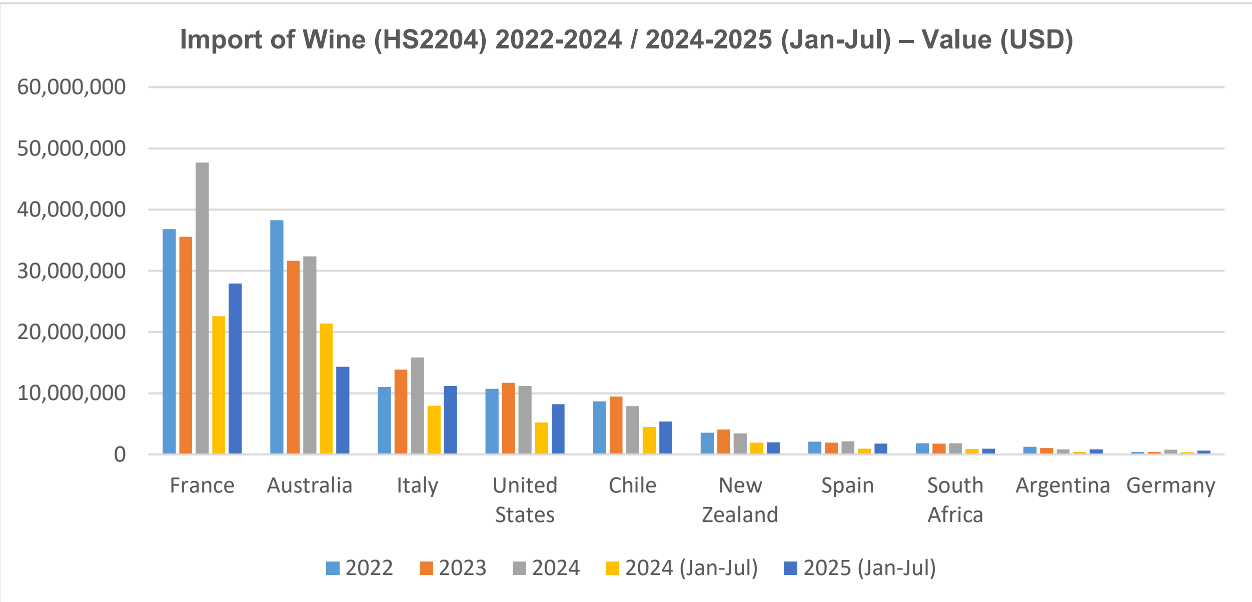
Table 4 Import of Wine 2022-2024 / 2024-2025 (Jan-Jul) – Value (USD) / Tariff heading: HS2204

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jul)	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)
1	France	36,800,809	35,551,364	47,676,557	22,558,322	27,904,336	31.5	37.9	37.6	-3.4	34.1	23.7
2	Australia	38,281,291	31,642,018	32,353,723	21,403,809	14,304,388	28.0	25.7	19.3	-17.3	2.2	-33.2
3	Italy	11,047,957	13,828,824	15,862,046	7,948,363	11,189,311	12.3	12.6	15.1	25.2	14.7	40.8
4	United States	10,689,854	11,690,860	11,184,220	5,202,548	8,188,098	10.4	8.9	11.0	9.4	-4.3	57.4
5	Chile	8,683,772	9,484,590	7,866,928	4,466,085	5,361,620	8.4	6.3	7.2	9.2	-17.1	20.1
6	New Zealand	3,540,737	4,048,256	3,459,487	1,937,339	2,003,239	3.6	2.8	2.7	14.3	-14.5	3.4
7	Spain	2,106,698	1,925,027	2,137,460	960,163	1,752,542	1.7	1.7	2.4	-8.6	11.0	82.5
8	South Africa	1,813,824	1,768,717	1,836,546	861,801	923,009	1.6	1.5	1.2	-2.5	3.8	7.1
9	Argentina	1,254,130	1,037,059	810,652	423,695	830,408	0.9	0.6	1.1	-17.3	-21.8	96.0
10	Germany	423,603	435,338	768,679	372,046	646,354	0.4	0.6	0.9	2.8	76.6	73.7
World		**115,659,013**	**112,835,347**	**125,715,175**	**67,011,429**	**74,176,616**	**100**	**100**	**100**	**-2.4**	**11.4**	**10.7**

Source: Thailand Ministry of Commerce

Figure 4 Import of Wine 2022-2024 / 2024-2025 (Jan-Jul) – Value (USD) / Tariff heading: HS2204



Source: Thailand Ministry of Commerce

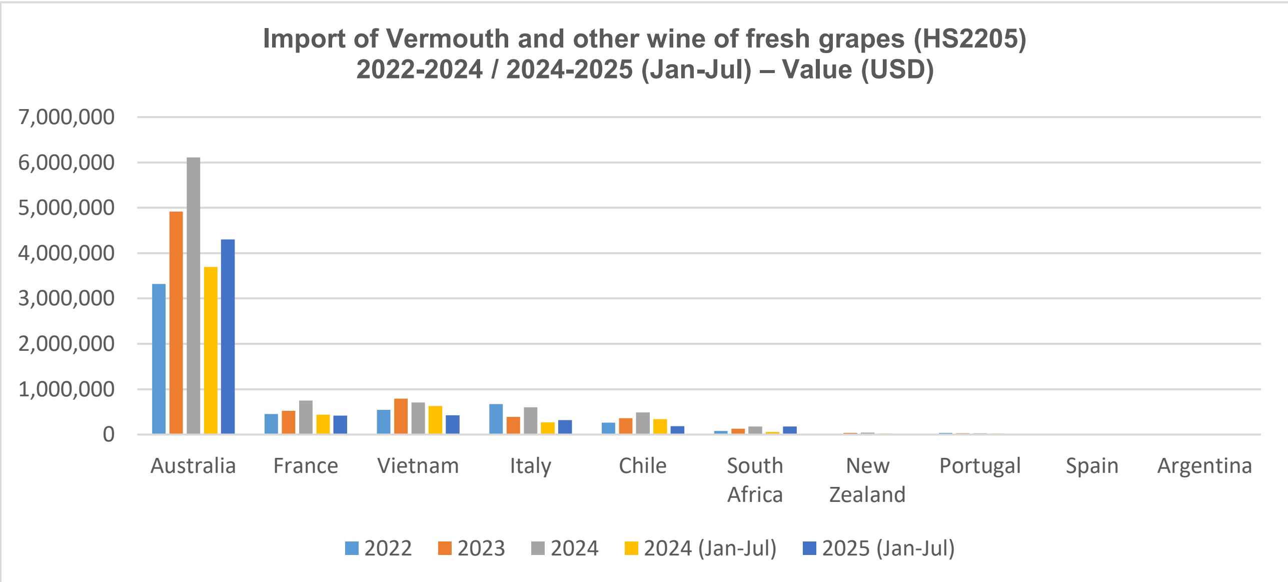
Table 5 Import of Vermouth and other wine of fresh grapes 2022-2024 / 2024-2025 (Jan-Jul) – Value (USD) / Tariff heading: HS2205

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jul)	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)	2023	2024	2025 (Jan-Jul)
1	Australia	3,322,690	4,913,088	6,111,600	3,691,383	4,305,572	68.3	68.5	73.4	47.9	24.4	16.6
2	France	454,021	526,685	749,151	437,995	420,101	7.3	8.4	7.2	16.0	42.2	-4.1
3	Vietnam	544,229	793,248	705,930	626,938	424,566	11.0	7.9	7.2	45.8	-11.0	-32.3
4	Italy	672,722	387,129	598,741	269,959	318,820	5.4	6.7	5.4	-42.5	54.7	18.1
5	Chile	261,813	359,441	488,098	342,198	187,630	5.0	5.5	3.2	37.3	35.8	-45.2
6	South Africa	81,048	126,793	177,549	60,183	179,531	1.8	2.0	3.1	56.4	40.0	198.3
7	New Zealand	14,829	39,070	44,220	19,123	15,323	0.5	0.5	0.3	163.5	13.2	-19.9
8	Portugal	35,745	32,410	26,234	19,271	87	0.5	0.3	0.0	-9.3	-19.1	-99.5
9	Spain	7,282	10,109	6,482	2,821	6,446	0.1	0.1	0.1	38.8	-35.9	128.5
10	Argentina	9,617	0	3,750	0	0	0.0	0.0	0.0	-100.0	100.0	0.0
World		**5,404,601**	**7,190,377**	**8,917,105**	**5,472,064**	**5,868,944**	**100**	**100**	**100**	**33.0**	**24.0**	**7.3**

Source: Thailand Ministry of Commerce

Figure 5 Import of Vermouth and other wine of fresh grapes 2022-2024 / 2024-2025 (Jan-Jul) – Value (USD) / Tariff heading: HS2205



Source: Thailand Ministry of Commerce

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Distribution Channels

In 2024, Thailand's **off-trade wine volume sales** are dominated by store-based retailing, accounted for 100%. Store visits enable customers to explore and select wines tailored to their needs.

Supermarkets and hypermarkets (e.g., Big C, Tesco Lotus) are the primary distribution channels for wine and is expected to maintain dominance due to rapid expansion in urban and rural areas, convenience of shopping, wide range of product offerings, promotions and discounts, and informative staff enhancing customer experience.

Table 6 Retail Channels for Wine Off-trade Volume 2024

Retail Channels for Wine Off-trade Volume 2023	
Retail Channel	**Shares (%)**
Retail Offline	**100.0**
Grocery Retailers	100.0
Convenience Retailers	9.5
Supermarkets	36.3
Hypermarkets	28.6
Food/drink/tobacco specialists	24.3
Small Local Grocers	2.0
	1.3
Total	**100.0**

Source: Euromonitor

Meanwhile, **on-trade remains a significant distribution channel for all wine products,** particularly in high-end restaurants and bars. Therefore, restaurants are enhancing dining experiences beyond simple menus and ambiance in which wine is a significant component of this experience for examples chefs and winemakers collaborate to create pairings that enhance flavors of dishes and wines.

There is an **increasing number of wine bars, restaurants, and specialty stores** offering diverse selections from around the world with **heightened competition** among retailers and distributors. In this case, wine will face also an increasing competition from other up-and-coming alcoholic beverages, such as craft beer, craft spirits and cider/perry.

Online platforms also provide educational resources and reviews, helping consumers make informed choices about their wine purchases. However, there are restrictions on online alcohol sales in Thailand.

References

- Wine in Thailand 2025, Euromonitor
- Bangkok Post
- Excise Act B.E. 2560 (2017)
- Customs Tariff Decree 2022 (No. 7)
- Thailand Ministry of Commerce (MOC)

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