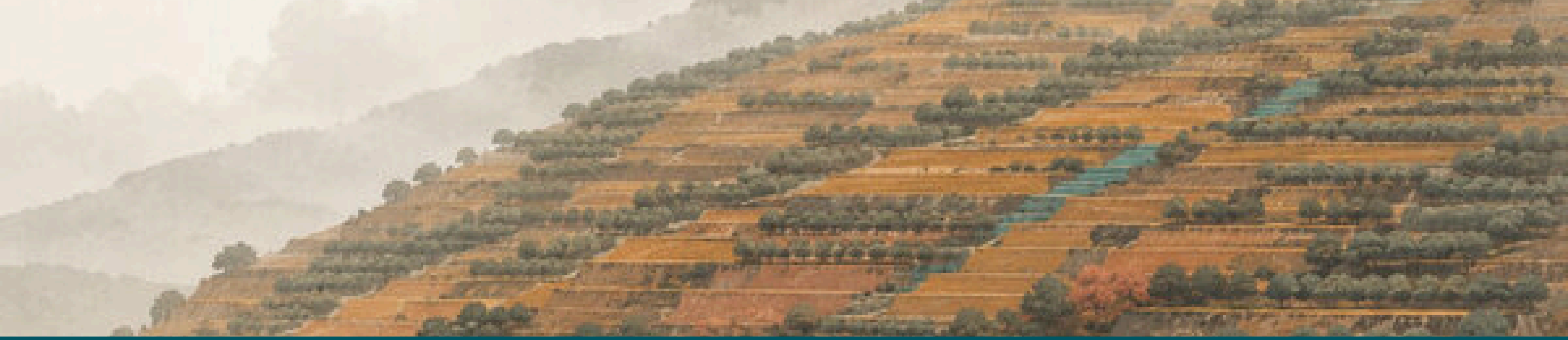


Thailand Tea & Coffee: Beneath the Canopy

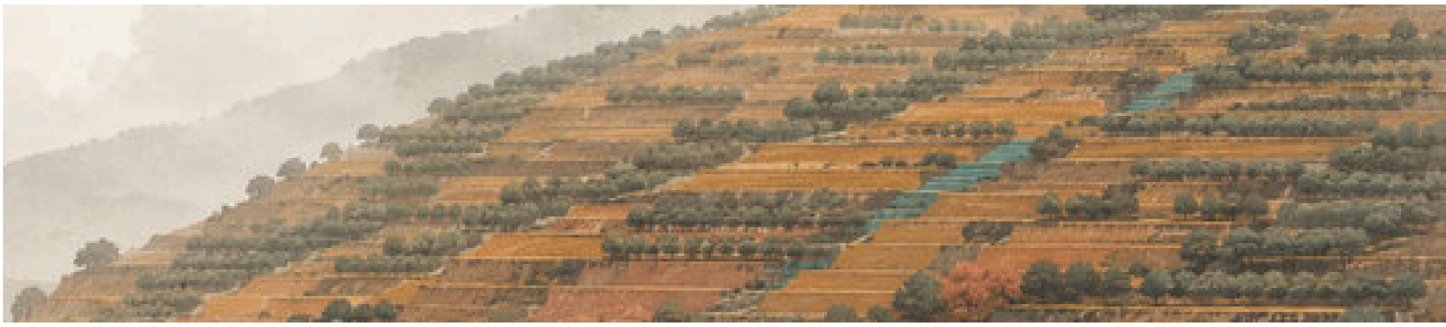
Thailand · Tea & Coffee

SECTOR SPOTLIGHT

First Edition | May 2026

English Edition (also available in Russian and Chinese)

Brandmine



SECTOR SPOTLIGHT

Thailand Tea & Coffee: Beneath the Canopy

Tan Passakornnatee's Green Factory — 2,000 square metres scheduled to open in November 2011 — was submerged for two weeks by the Ayutthaya floods. He rebuilt it, converted the disaster perimeter into a learning center, and listed on the SET three years later. No database recorded what he survived before Ichitan became Thailand's largest RTD tea brand.

QUICK FACTS

Market Size	Thai coffee market ~฿85B THB annually (~$2.4B USD) • RTD tea growing 8–12% per year • highland arabica production exceeds 90,000 tonnes
Unique Advantage	700km supply chain: highland farms to Bangkok franchise empires • Chiang Rai's 60% of national arabica unindexed in any English-language source
Biggest Challenge	State-chain canopy: Café Amazon (~4,900 outlets), Inthanin (Bangchak), Café Phunthai (PTG) crowd out founder brands from every market-share database
Timing Factor	Succession gap at Black Canyon (Pravit, early 60s, no named heir) closes within 5–7 years • 24–36 month pre-institutionalization window

> *"We didn't want the farmers to supply us — we wanted them to own with us. That changed everything about how we run the company."*
>
> **John M. Darch**, Co-founder, Doi Chaang Coffee
>
> *Beyond Fair Trade, 2014*

MARKETS: Thailand

SECTORS: Tea & Coffee

GEOGRAPHIC CONTEXT

Thailand tea & coffee: the 700km supply chain

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Three stages, 700 kilometres: highland farms in Chiang Rai feed Bangkok brands that have built eight-country export franchises.

Thailand's artisan tea-coffee sector runs a 700-kilometre supply chain from Chiang Rai province near the Myanmar border south to Bangkok's franchise empires. Doi Chaang Coffee's 1,400-metre Akha-farmed arabica plots in Chiang Rai anchor the northern production node. Chiang Rai holds an estimated 60% of Thailand's national arabica output, virtually none of it documented in English. Hillkoff's Chiang Mai roastery and sourcing operation (900 farming households, eight northern provinces) occupies the supply chain's middle tier. The Bangkok node — Ichitan Group's Ayutthaya cold-aseptic plant (north of the city), Black Canyon's 280-outlet franchise empire, and ChaTraMue's Yaowarat origin — represents the consumption, branding, and export end. No English-language market-share report documents the chain from highland farm to Bangkok counter.

* * *

SECTOR NARRATIVE

In November 2011, a brand-new 2,000-square-metre cold aseptic filling line — scheduled to open in one month — disappeared under the Ayutthaya flood waters. Tan Passakornnatee, who had spent fifteen years building his way out of personal bankruptcy after the 1997 Asian Financial Crisis and then founding Ichitan from scratch, stood at the edge of his submerged factory and made a decision. He rebuilt it. He converted the disaster perimeter into an environmental learning center he named Tanland, and opened it to school groups from across Ayutthaya province. In April 2014, Ichitan listed on the Stock Exchange of Thailand. Within twelve months, it was Thailand's largest ready-to-drink tea brand — in a category that had not meaningfully existed four years earlier.

No market intelligence database recorded what Tan survived before that listing ceremony. And that is Thailand's tea and coffee problem in miniature: the founders who built this sector are systematically invisible to the analysts who cover it.

What the databases miss

Three overlapping barriers make Thailand's founder-owned tea and coffee cohort invisible to institutional capital.

The first is state-chain canopy. Café Amazon — operated by PTT Oil and Retail Business — runs approximately 4,900 outlets across Southeast Asia, making it one of the region's largest coffee chains by location count. Inthanin, owned by Bangchak petroleum, runs roughly 700 outlets. Café Phunthai, backed by PTG Energy, is targeting 5,000 outlets by 2028. These are petrol-station amenity plays by state-linked energy companies, and they command every aggregate market-share report. When analysts cover "Thai coffee," they see the state chains. The founder-owned cohort disappears into the footnotes.

The second barrier is revenue opacity. Eight of the ten most viable founder-owned brands are privately held, unlisted, and documented only in Thai-language corporate registries. No English-language investor disclosure, no DBD audit transparency equivalent to SEC filings, no sell-side coverage beyond analysts at the one listed company, Ichitan. Revenue estimates require triangulating outlet counts, production tonnage, and import filings. No public database has done this work.

The third barrier is geographic fragmentation. Production is concentrated in three northern provinces — Chiang Rai, Chiang Mai, and Nan — at 1,200 to 1,400 metres altitude, 700 kilometres from Bangkok. Arabica and oolong farms near the Myanmar border supply specialty roasters in Chiang Mai and industrial cold-fill lines in Ayutthaya. Brand headquarters and consumer retail are 700 kilometres south, in Bangkok's Yaowarat Chinatown or the Thonglor and Ekamai specialty clusters. The supply chain is real, documented in trade statistics, and traceable through farm cooperatives to franchise contracts. It has never been mapped in an English-language intelligence product.

The survivors

The founders who built this sector through its hardest moments left a different kind of record — one that requires specific documentation to find.

Ichitan — Tan Passakornnatee's story begins not in 2011 but in 1997. The Asian Financial Crisis destroyed his real-estate portfolio — an estimated ฿100M THB or more in personal debt, by subsequent accounts. He sold almost everything he owned and spent two years clearing it. Then, after a conversation about an American flat-price buffet model he'd observed while traveling, he launched Oishi Buffet in Bangkok in 1999. The restaurant grew into Oishi Group, which he later sold to ThaiBev. The exit was not a wind-down — it was a reposition. Tan had observed that Thailand's packaged beverages market, dominated by carbonated drinks and energy drinks, had no meaningful RTD tea presence at industrial scale. Ichitan Group, founded in 2010, was built specifically for that gap. The Green Factory in Ayutthaya was a cold aseptic filling line designed to produce tea at the volume required for nationwide distribution in a category that did not yet exist.

The 2011 flood was the second crisis in fourteen years. The Ayutthaya floods were Thailand's worst in seventy years, affecting 65 provinces and causing an estimated ฿185B THB in industrial damage. Tan's brand-new factory absorbed two weeks of floodwater before it had produced a single unit. The Green Factory reconstruction took two years, during which Tan converted the disaster perimeter into Tanland — an environmental education center he opened to school groups from across Ayutthaya province. The reframe was precise: a factory that floods had closed became a factory that learned from floods and opened a classroom. Ichitan listed on the SET in April 2014. Within twelve months it was Thailand's largest RTD tea brand. In August 2014 — four months after the IPO — Ichitan executed a joint venture in Indonesia with Mitsubishi Corporation and PT Sigmantara. A Philippines distribution partnership with Rebisco followed in August 2022. Tan holds approximately 27.74% of the company as of 2024. He built a category that did not exist, inside a flood, and turned it into a two-country export architecture in eight years.

As a listed company, Ichitan also carries the governance scrutiny the private brands escape — visible precisely because the Thai-language record is dense around it. Form 56-1 filings trace revenue from ฿5.25B THB in 2021 to ฿8.59B in 2024, with RTD green-tea market share rising to 34% by 2024; the company set a ฿9.5B target for 2025. That paper trail also records the friction: the SEC opened a civil enforcement action against Tan's spouse, Ing Passakornnatee, and two others for insider dealing in ICHI shares, and the group dissolved a subsidiary, Ichitan Power, effective November 2024. None of this appears in the English-language coverage — which is the point. Listing buys transparency, and transparency surfaces both the growth and the governance events; the eight privately held brands disclose neither.

Hillkoff — The crisis that tested Hillkoff came from commodity markets, not natural disaster. In 2001, a global collapse in coffee prices drove the company — then a small Chiang Mai roaster founded by Theera Taksa-udom — into financial crisis. Theera made a decision that is now the cleanest documented succession in Thailand's founder-owned coffee sector: he gave his daughter Naruemon his last roaster and his last bags of beans, and stepped back. She was a lecturer at Payap University. She quit.

Naruemon traveled to Bangkok alone and rebuilt the customer base from nothing, rebranding the company as Hillkoff along the way. Recovery took five years. What she built after that is what a database would eventually find, if it looked: 1,000 tonnes of green coffee processed per year; sourcing relationships with 900 farming households across eight northern provinces; a 2017 gold medal at the India International Drinks Challenge; a 2024 Thai National Good Governance Award for circular economy practices.

The model Naruemon built around the crisis is worth understanding as a system. Hillkoff sources directly from smallholder farmers in Chiang Rai, Chiang Mai, and six other northern provinces, bypassing commodity markets through direct-trade relationships that invest yield premiums back into farm certification and community development. That architecture is what earned the governance award — and it is also what made the COFFOGENIC sub-brand viable. Hillkoff registered COFFOGENIC across eight countries through the WIPO IP Management Clinic, protecting a premium positioning that could not have been built from a commodity purchasing desk.

The transition from Theera to Naruemon happened in 2001. It is the sector's only fully confirmed, complete generational handoff. Hillkoff has been a second-generation company for twenty-three years. The distance from her father's last roasters to an eight-country trademark is exactly that long — and it runs through a Bangkok bus ticket and five years of rebuilding from zero.

Doi Chaang — On January 23, 2014, Wicha Promyong died of a heart attack near Doi Chaang village. He was 63 years old. The cooperative he had spent a decade building — converting an opium-growing Akha hill-tribe community at 1,400 metres altitude in Chiang Rai into one of Thailand's most recognized specialty coffee origins — had no succession plan, no named heir, no written transition document.

Wicha was the business head of three Thai principals; operational leadership did not vanish with him. Panachai Phisailert — the former Doi Chaang village headman who had run the production side — stepped up as managing director of Doi Chaang Coffee Original, and the marketing principal, Pitsanuchai Kaewpichai, stayed on. The Thai-language record shows the strain in the numbers: the holding subsidiary's revenue, ฿44.9M THB in 2014, fell to ฿4.5M by 2016 in the years after Wicha's death. What did not fail was the structure beneath it.

Doi Chaang has now operated for more than twelve years without its founder. The governance model Wicha and Canadian co-founder John M. Darch built together has held: 50% of the Vancouver distribution entity is owned by Akha farmer cooperative members, 100% of green-bean proceeds are retained by the farming community, and Wicha's 30%-of-proceeds reinvestment commitment was absorbed by the Doi Chaang Foundation. The coffee has placed in the top 1% of global coffees reviewed by Coffee Review in assessments documented since 2014, a standing confirmed in the platform's own coverage of the cooperative. Distribution continues through the UK via DR Wakefield. The "Beyond Fair Trade" framing Darch and Wicha used was precise: in standard fair-trade arrangements, farmers receive a price premium on green beans. In Doi Chaang's model, farmers own half the distribution entity and retain 100% of the margin on their own crop. The distinction matters because it determines what happens when the founder dies. In a premium-price model, the value lives in the buyer's willingness to pay it. In an ownership model, the value lives in the equity structure — and equity structures outlast individuals.

What Doi Chaang proves, structurally, is that a founder-less continuation is possible when the governance model outlasts the founder's presence. Wicha built something that did not require him to keep building it. That is a different credential than institutional backing or franchise architecture — and it is one that no standard market-share report has measured or indexed.

The broader cohort

Beyond these three, a documented cohort extends the sector's depth.

ChaTraMue, founded by a Chaozhou immigrant family in a Bangkok tea house during WWII air-raid warnings, now runs its retail business through the third generation — Praonarinth Ruangritthidet, known as "Praew," who founded the operating company Thipthari in 2021 to carry the brand her grandfather started in 1945 and her father, Ditthapong Ruangritthidet, built into a packaged-tea manufacturer. The group's three subsidiaries reported combined revenue of roughly ฿5.8B THB in fiscal 2024 — Thipthari ฿1.83B, the export arm Cha Thai International ฿3.5B, and the original Siam FB Products ฿470M — with 20–30% annual growth sustained across five consecutive years. It operates 40 or more outlets in Malaysia and has established retail presence in the UK, US, and Philippines. The succession itself is the rare clean one: third-generation control is named, documented, and operational. What is undocumented is whether a fourth generation is being prepared behind it.

Black Canyon was acquired by Pravit Chitnarapong in 1993, when the chain had only four or five outlets and he was leaving a career selling IBM software — he financed the deal by pawning his vehicle and borrowing from friends. He has since built it into more than 280 outlets across eight countries: Singapore, Malaysia, Indonesia, Myanmar, Cambodia, Laos, the UAE, and the Philippines. Pravit is in his early sixties. No successor has been publicly named. The company's international architecture is the sector's most extensive documented export footprint. What happens at the succession event — acquisition, management buyout, or family continuation — will determine whether that footprint is leveraged or fragmented.

Akha Ama Coffee, founded by Lee Ayu Chuepa, has earned BBC and Wall Street Journal profiles for its hill-tribe cooperative model in Chiang Mai's Nimman neighbourhood. Lee Ayu, an Akha community member from the same highland belt as Doi Chaang, built a direct-to-consumer brand in the city that made his community's origin visible to international coffee buyers. Sub-threshold for institutional engagement by revenue, its founder narrative is among the most internationally visible in the cohort — and its geographic story is the 700-kilometre supply chain told from a single producer's perspective.

Two specialty-sector anchors hold the Bangkok end: Roots/Kinnest (Varatt Vichit-Vadakan), which executed a COVID-era pivot to 100% Thai-sourced beans across its café and roastery network; and Ristr8to/Roast8ry (Arnon Thitiprasert), whose founder won the 2017 World Latte Art Championship and whose flagship defines Bangkok's specialty coffee scene. Together they represent the demand-side anchor of the same supply chain that begins in Doi Mae Salong — when Bangkok's specialty cafés source Thai-grown beans, they close a loop that runs 700 kilometres north to the highland cooperatives that no English-language database has indexed or measured.

The cohort is heterogeneous in scale and maturity. Ichitan is a listed company with confirmed institutional partnerships across two export markets. ChaTraMue is a century-old family structure with a proven Malaysian franchise network. Black Canyon is an operationally mature international chain with no publicly named successor. Akha Ama, Roots, and Ristr8to are specialty-segment operations with high international media visibility but without institutional ownership architecture. This range means there is no single entry point. What exists instead is seven distinct stories with different risk profiles, different time horizons, and different investment engagement formats.

The window

The succession and export evidence across this cohort converge on the same conclusion.

The succession signal is specific. ChaTraMue's third generation runs the retail business through a named, documented operating company, with the fourth generation not yet visible behind it. Hillkoff completed its handoff in 2001 — twenty-three years of post-founder operation, the cohort's only fully documented clean succession. Doi Chaang has operated twelve years without a founder and remains financially viable. Black Canyon has a founder approaching his mid-sixties with no named heir. These are not generic aging-founder observations. They are documented states with different risk profiles, in a single sector, maturing on different timelines.

The succession states have different investor implications. Hillkoff under Naruemon is a stable platform — the succession event is twenty-three years in the past, governance is clear, and the direct-trade architecture is scalable. ChaTraMue is a dynasty with an active third-generation operator and proven international franchise architecture, but whether a fourth generation is being prepared is the question that needs resolution before family governance becomes investable. Black Canyon is the sector's clearest inflection: if a named successor emerges, the window to negotiate minority equity at pre-institutionalization terms closes immediately. If none emerges, the risk shifts to instability.

The export signal is concrete. Black Canyon operates in eight countries. ChaTraMue has 40 or more Malaysian outlets plus UK, US, and Philippines retail. Ichitan executed an Indonesia joint venture in August 2014 and a Philippines partnership with Rebisco in August 2022. Doi Chaang distributes in Canada and the UK. The infrastructure for cross-border distribution exists across multiple brands. It was built before any English-language intelligence platform documented it.

An investor with Southeast Asian consumer-packaged-goods focus and sub-institutional to mid-market equity or joint-venture appetite who engages within the next twenty-four months will be positioned to access minority stakes, OEM-to-brand partnerships, or franchise co-development rights in heritage brands at pre-institutionalization valuations — before the succession gap at Black Canyon either resolves, closing the entry window, or destabilizes the brand and eliminates the opportunity.

Hiding in plain sight

The 700-kilometre supply chain that no database has mapped was built by specific people making specific decisions under pressure. Tan Passakornnatee rebuilt his factory inside a flood and converted the disaster line into a classroom. Naruemon Taksa-udom took her father's last roasters to Bangkok and spent five years rebuilding what the commodity markets had destroyed. Wicha Promyong built a governance model that has now outlasted him for twelve years.

The crises that forced these founders to innovate are the same credentials that no market-share report has indexed. And the cohort that survived is already exporting across eight countries.

These brands have been here all along. Hiding in plain sight.

KEY TAKEAWAY

The crises that forced these founders to innovate are the same credentials no database has indexed — and the cohort that survived is already exporting across eight countries.

* * *

SECTOR TIMELINE

What the crises kept making

From ChaTraMue's 1945 wartime Yaowarat founding and Wicha Promyong's 1988 Chiang Rai opium-to-arabica conversion through the 1997 Asian Financial Crisis, the 2001 global coffee-price collapse, the 2011 Ayutthaya floods that submerged the Green Factory, and the 2014 Ichitan IPO — a 700-kilometre supply chain built through seventy years of founder-survived crises.

Setup Catalyst Struggle Crisis Breakthrough Triumph

SETUP 1945

ChaTraMue founded in wartime Bangkok

During WWII air-raid warnings, a Chaozhou immigrant family opens a tea house in Bangkok's Yaowarat district. The shop that becomes ChaTraMue — Thailand's Thai Tea standard — is founded under blackout conditions. Three generations later the brand runs 40+ Malaysian outlets.

CATALYST 1988

Wicha Promyong begins Doi Chaang conversion

Wicha Promyong begins working with Akha hill-tribe farmers in Chiang Rai province to replace opium cultivation with arabica coffee. The altitude is 1,400 metres. The distance to Bangkok is 700 kilometres. No investor has mapped this supply chain yet.

SETUP 1993

Pravit acquires Black Canyon's franchise rights

After a career as an IBM software reseller, Pravit Chitnarapong acquires Black Canyon's franchise rights when the chain has only four or five outlets — financing the deal by pawning his vehicle and borrowing from friends. It will grow to 280+ outlets across eight countries, becoming the cohort's most internationally distributed brand. Its founder has no publicly named successor.

CRISIS 1997

Asian Financial Crisis destroys Tan's portfolio

The baht collapse destroys Tan Passakornnatee's real-estate holdings — an estimated ฿100M THB or more in personal debt. He sells almost everything he owns. The crisis that empties his balance sheet will, eventually, produce Ichitan. No database records this as a credential.

BREAKTHROUGH 1999

Tan launches Oishi Buffet

After two years clearing personal debt, Tan launches Oishi Buffet in Bangkok following a conversation about American flat-price restaurant models. The restaurant grows into Oishi Group. He later exits. The exits fund Ichitan.

CRISIS 2001

Global coffee collapse drives Hillkoff to crisis

A collapse in global coffee prices drives Theera Taksa-udom's small Chiang Mai roaster into financial crisis. Theera hands his daughter Naruemon his last roaster and his last beans and steps back. She quits her lecturer position at Payap University and travels to Bangkok to rebuild from zero.

BREAKTHROUGH 2006

Hillkoff five-year recovery complete

Five years after the 2001 collapse, Hillkoff stabilises under Naruemon's leadership. The rebranding holds. The Bangkok customer base she rebuilt from scratch is now the foundation of a 1,000-tonnes-per-year sourcing operation across 900 farming households in eight northern provinces.

CATALYST 2010

Ichitan Group founded

Tan Passakornnatee founds Ichitan Group in Bangkok after selling his stake in Oishi Group to ThaiBev. He builds a 2,000-square-metre cold aseptic filling line in Ayutthaya — the Green Factory — scheduled to begin operations in late 2011. The RTD tea category in Thailand does not yet meaningfully exist.

CRISIS 2011

Ayutthaya floods submerge the Green Factory

Thailand's worst flooding in 70 years submerges Ichitan's brand-new Green Factory one month before its scheduled opening. Tan rebuilds. He converts the disaster perimeter into Tanland, an environmental education center that accepts school groups. The gesture reframes what happened: a factory that floods closed becomes a factory that learned from floods and opened a classroom.

CRISIS 2014-01

Wicha Promyong dies at 63

On January 23, Wicha Promyong dies of a heart attack near Doi Chaang village. He is 63 years old. He leaves no written succession plan, though his two co-founders carry on operations. Its governance model — 50% of the Canadian entity owned by Akha farmers, 100% of green-bean proceeds retained in the village — will prove more durable than any document.

TRIUMPH 2014-04

Ichitan IPO on the SET

Ichitan lists on the Stock Exchange of Thailand in April 2014 — three years after the Green Factory flooded, two and a half years after rebuilding began. Within twelve months, Ichitan is Thailand's largest RTD tea brand by market share. The category it dominates is one it largely created.

TRIUMPH 2014-08

Ichitan Indonesia joint venture

Ichitan executes a joint venture in Indonesia with Mitsubishi Corporation and PT Sigmantara Adi Perkasa — the cohort's first documented institutional cross-border partnership. The export infrastructure Tan has built since the flood is now operating across borders.

TRIUMPH 2017

Hillkoff IIDC gold; Arnon wins WLAC

Hillkoff wins a gold medal at the India International Drinks Challenge — the first external validation of the circular economy model Naruemon built after the 2001 crisis. In the same year, Arnon Thitiprasert of Ristr8to wins the World Latte Art Championship, anchoring Bangkok's specialty scene internationally.

TRIUMPH 2022

Ichitan Philippines partnership with Rebisco

Ichitan partners with Rebisco in the Philippines — the cohort's second confirmed cross-border institutional deal and proof that Tan's distribution model is now replicable. Black Canyon is simultaneously operating in eight countries. The sector's export architecture has been built. No English-language market-share report has documented it.

TRIUMPH 2026

The succession window opens

Black Canyon's succession gap remains unresolved. ChaTraMue's third generation (Praonarinth Ruangritthidet) runs the retail business, with no fourth generation yet visible. Doi Chaang has operated twelve years without its founder. Hillkoff completed its handoff in 2001. The 24–36 month pre-institutionalization window is open. It will not stay open.

About this research

This report draws on 73 verified sources across 2 languages — primary documents, founder interviews, and trade press. Every figure and claim is cross-validated against independent references.

Full methodology at brandmine.ai.

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