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DURIAN

Global Trade Overview 2023





Durian **Global Trade** **Overview 2023**

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NOTE ON METHODOLOGY

The following presents a brief assessment of recent developments in global trade in durians and forms part of FAO's efforts to monitor global tropical fruit markets. All data presented are provisional estimates based on currently available customs statistics. As such, these data are of indicative nature only and subject to being updated should revisions of officially reported data be released.

The analysis contained herein is based on data on trade quantities that were compiled from the UN Comtrade database and Trade Data Monitor Inc.; as well as secondary data and information from desk research. The findings incorporate revised data and information as available up to the end of September 2023.

FOREWORD

This report is prepared by the Team on Responsible Global Value Chains, Markets and Trade Division, Food and Agriculture Organization of the United Nations (FAO), Rome. The Team on Responsible Global Value Chains provides research and analyses on global value chains for agricultural commodities, and economic data and analyses on tropical fruits. Regular publications include market reviews, outlook appraisals and projections for bananas and tropical fruits. The Team also provides assistance to developing countries in designing and implementing national policies regarding responsible value chains in agriculture.

The report is available at the following FAO webpage: www.fao.org/economic/est/est-commodities/tropical-fruits

DEVELOPMENTS AT A GLANCE

- ▶ Global exports of durian have expanded more than ten-fold over the last decade, growing from approximately 80 000 tonnes in 2003 to around 870 000 tonnes in 2022.
- ▶ Strongly rising import demand from China has been the main driver of this expansion in trade.
- ▶ On average, more than 90 percent of global durian exports are supplied by Thailand, and some 3 percent each by Viet Nam and Malaysia.
- ▶ Small export quantities also originate in the Philippines and Indonesia.
- ▶ As the main importer of durian, China procures about 95 percent of global exports. Singapore receives around 3 percent.

Durian: a key tropical fruit commodity in South-South trade

Durian is an exceptionally high-value crop, and, being one of the most prolific fruits in Southeast Asia, the export market for durian has been experiencing vibrant growth over the last two decades. Latest available data indicate that globally traded quantities increased more than tenfold between 2003 and 2022, intermittently reaching a peak of 930 000 tonnes in 2021 (Fig. 1). Income growth and rapidly changing consumer preferences in importing countries – most importantly China – alongside substantial improvements in cold chain technologies and transit times have facilitated this expansion in trade.

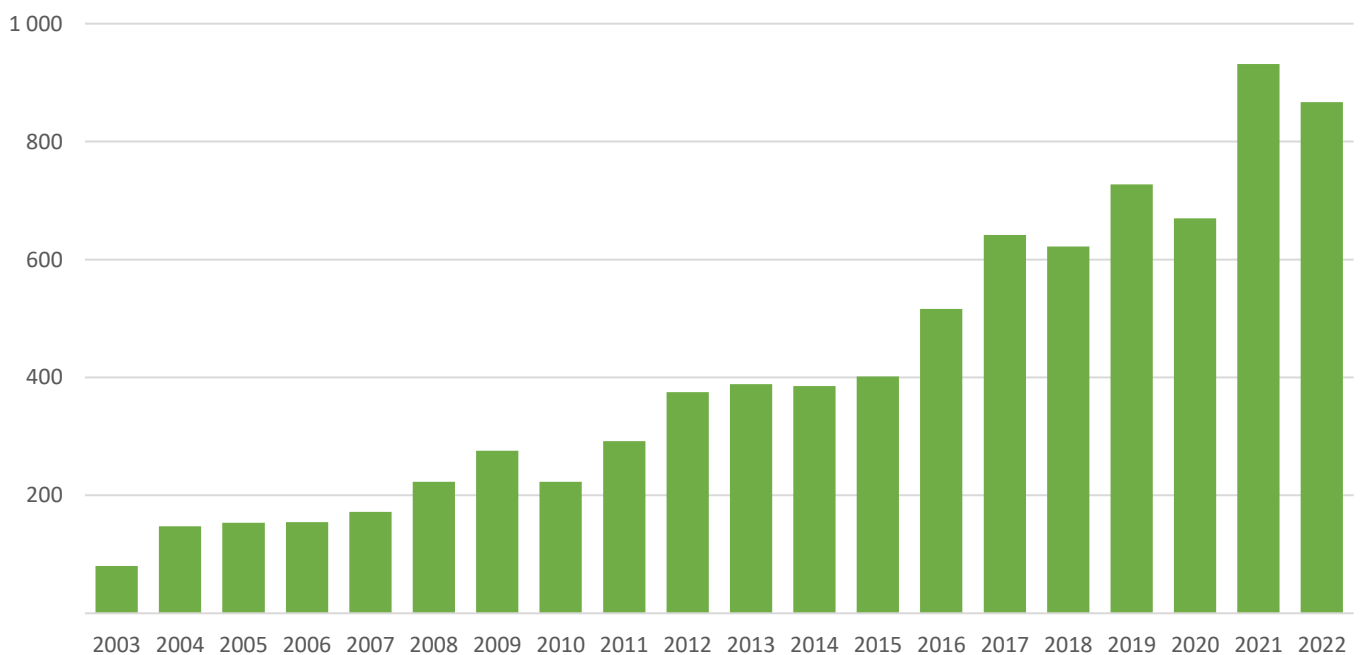
While no precise data on production are available, the key producing countries of durian are Thailand, Malaysia and Indonesia, with combined production amounting to an estimated 3 million tonnes per annum. Thailand by far ranks as the main exporter of durian, accounting for an average of 94 percent of world shipments over 2020–2022. The remainder of traded quantities is almost exclusively supplied by Viet

Nam and Malaysia, at some 3 percent share each. Supplies from Indonesia predominantly cater to the domestic market.

Trade developments in Asia and the Pacific Region

China, as the leading importer of durian, procured an estimated annual average of some 740 000 tonnes during 2020–2022, equivalent to some 95 percent of world imports. The vast majority of quantities received by China originates in Thailand, but in recent years, imports from Viet Nam have also increased. China sets strict requirements on imports of durian, and currently only permits imports from Thailand, Viet Nam, the Philippines and Malaysia. According to available industry information, for supplies qualifying for import into China, growers and packaging units must provide documented proof of meeting the required phytosanitary and quality standards, including records of pest control and product traceability, which makes it very difficult for new exporters to gain access to the Chinese market.

Figure 1. Durian: global aggregate export volumes, 2003–2022, thousand tonnes



Source: FAO.



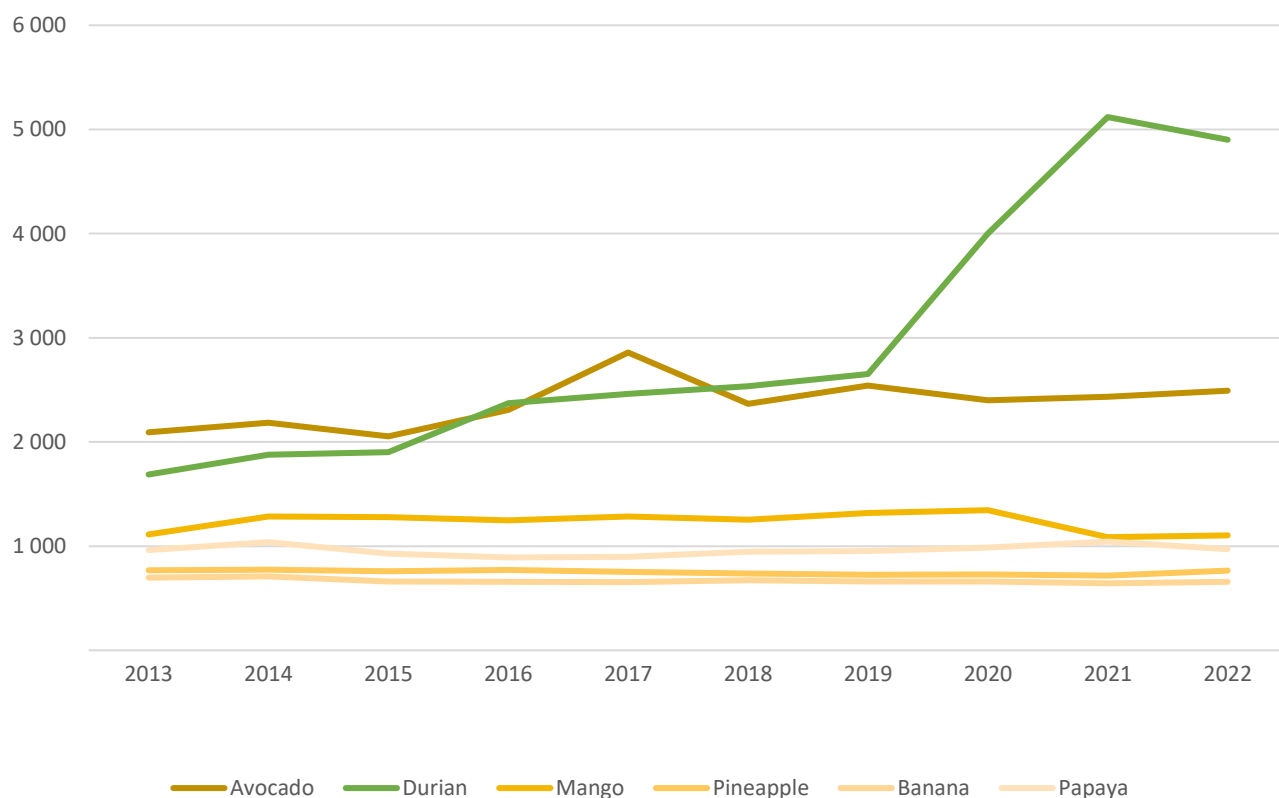
In response to rapidly expanding demand, indicative average trade unit values have increased steadily over the past ten years, with recorded annual averages reaching around USD 5 000 per tonne at the import level in 2021–2022, a multiple of the average unit values achieved by bananas and major tropical fruits (Fig. 2). Industry information conveys that durians are considered a unique delicacy in China that has been met with strongly growing consumer interest, with durians from Thailand enjoying popularity due to their sweetness and quality features. Growth in Chinese durian imports from Thailand has been further supported by the opening of a high-speed rail link between the Lao People's Democratic Republic and China in December 2021, which, as a transit link for exports from Thailand to China, has reduced transport times from several days/weeks for transport by truck or boat, to a mere 15 hours by train. This has enabled durians and other fresh produce from Thailand to reach the Chinese market within a much shorter transit time, thereby improving product freshness. Recent industry reports as well as preliminary data on monthly trade flows indicate that Chinese imports of

durians increased by some 60 percent during the first eight months of 2023.

Other Regions

In international markets, durians are still regarded as a novelty or niche product. The high perishability of fresh durians renders transport of fresh produce to distant markets difficult and means that import requirements relating to phytosanitary standards and product safety can often not be met. As such, the majority of durians sold globally are processed and packaged as frozen fruits, dried fruits, pastes and supplements. A lack of consumer awareness alongside high unit prices has posed further obstacles to a more expansive international marketplace. Overall, the fruit remains of relatively minor importance when compared to the export quantities of other tropical fruits, particularly bananas, pineapples, mangoes, and avocados (Fig. 3).

Figure 2. Durian: Indicative average import unit values, 2013–2022, USD per tonne



Source: FAO.

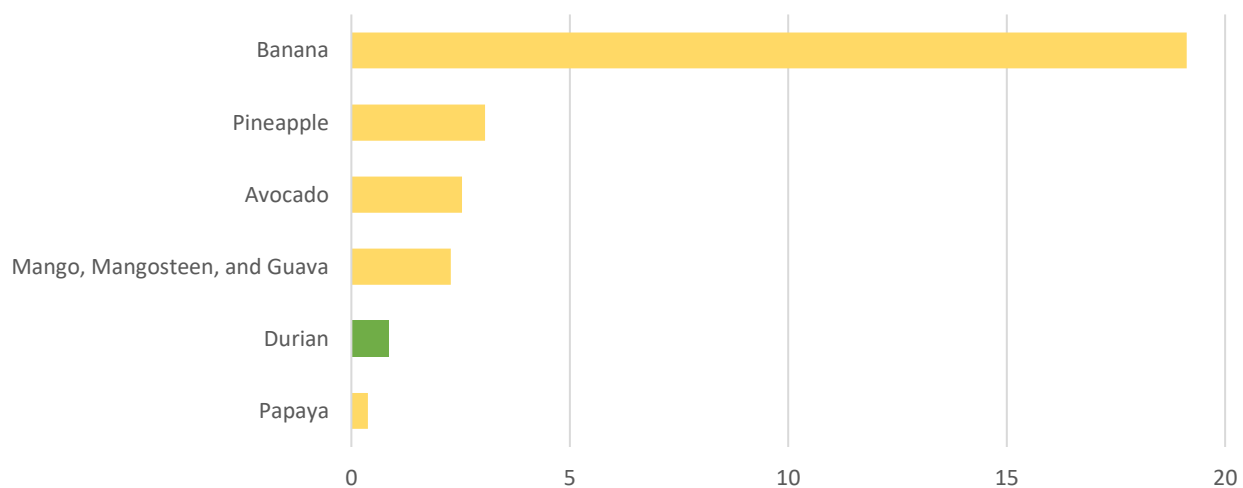


However, considering the exceptionally high average export unit values of durians, the fruit reached an average global trade value of approximately USD 3 billion per annum in 2020–2022, placing this commodity firmly ahead of fresh mangoes and pineapples (Fig. 4). Furthermore, testament to the fruit’s growing popularity also beyond Asia, exports of Thai fresh durians to the United States more than tripled over the past decade, reaching on average some 3 000 tonnes per year in 2020–2022, at an average annual value of approximately USD 10 million. Overall, the value of Thai durian exports stood at an average of USD 3.3 billion in 2021–2022, making the fruit the third largest agricultural export commodity for Thailand behind natural rubber and

rice, which generated average revenues of USD 3.9 billion and USD 3.7 billion in 2021–2022, respectively (FAOSTAT and TDM).

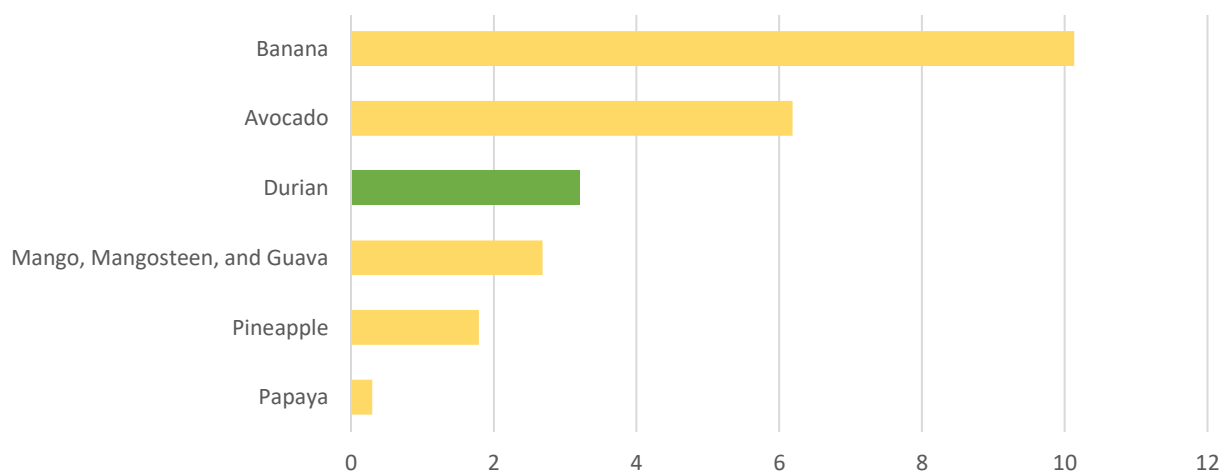
These figures suggest that trade in durians could offer ample commercial potential for exporters, including low-income countries, provided quality assurance, post-harvest handling and transportation of these highly perishable fruits can be managed efficiently and cost-effectively. In high-income markets such as the European Union and the United States of America, much of the market potential will be contingent on making these fruits more accessible to the consumer and strengthening consumer aware

Figure 3. Durian, banana, and major tropical fruits: annual export quantities, 2020–2022 average, million tonnes



Source: FAO.

Figure 4. Durian, banana, and major tropical fruits: annual nominal export value, 2020–2022 average, USD billion



Source: FAO.





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