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World Market for Durian

RAP Market Information Bulletin No. 3

Production

Commercial production of durian is concentrated in Thailand, Malaysia, and Indonesia. The Philippines and other Southeast Asian nations also produce durian commercially, but at much smaller levels and mostly for domestic markets. Malaysia produced 180,715 metric tons (MTs) in 1991, up from 128,555 MTs in 1988. Thai production expanded nearly 50 percent between 1989 and 1992, going from 486,644 MTs to 720,990 MTs; Thai and Malaysian production appears to have expanded even further since 1991-1992. Durian production in Indonesia has varied widely over the last decade. Production decreased from 242,585 MTs in 1990 to 152,501 MTs in 1992, although preliminary 1993 figures show an increase of more than 50 percent from 1992 levels.

Availability of durian is affected by short harvest seasons, typically only two to three months, although smaller harvests are also reported during other months of the year. Thai and Malaysian production is highest between June and July, although exports are also reported during other months (mostly immediately preceding or following this period). Peak harvest in Indonesia is from October to February, although the high season in South Sumatra lasts from June to September.

Exports

Most official national trade statistics do not provide details on imports of durian. Therefore, world trade is estimated using export statistics of the three largest supplying countries: Malaysia (1991, fresh), Thailand (1993, fresh and frozen), and Indonesia (1993, fresh). Tables 1 and 2 itemize by importer the frozen and fresh exports of all three countries by volume and value, respectively. Fresh and frozen durian exports from these three suppliers in 1993 totaled \$43.5 million (f.o.b.), comprising \$36.6 million (53,869 MTs) of fresh product and \$6.9 million (2,559 MTs) of frozen product.

Malaysia is the largest exporter of fresh durian, with 1991 exports of 34,904 MTs. The vast majority (99.7 percent) of the country's exports that year went to Singapore; most remaining exports are sent to Brunei, Thailand, and the United States.

In 1993, Thailand exported 18,634 MTs of fresh durian and 2,559 MTs of frozen. Hong Kong was the destination of more than half of Thailand's fresh exports, followed by Malaysia, Taiwan, Canada, the United States, Singapore, and Indonesia. Almost all Thai frozen exports were shipped to the United States, Australia, and Canada.

Indonesian exports stood at only 331 MTs in 1993, down from 435 MTs in 1989 but up from 277 MTs in 1992. Singapore has remained Indonesia's largest export market, accounting for 98 percent of all exports in 1993. The only other nations importing more than 1 MT from Indonesia in 1993 were Taiwan and Brunei.

Markets

Asia

Singapore, Hong Kong, and Taiwan are the main importers of durian worldwide. These three countries account for 90 percent of total exports from Malaysia, Thailand, and Indonesia. When shipments among the three durian-exporting countries — Malaysia, Thailand, and Indonesia — are added to their combined exports to Singapore, Hong Kong, and Taiwan, nearly 99 percent of world trade in fresh durian is accounted for.

Singapore. Singapore is the largest import market for durian, accounting for 65 percent total exports of the top three supplying countries. Malaysia supplies most of total domestic demand. Singapore buys the vast majority of Malaysia's and Indonesia's durian exports, as well as significant quantities from Thailand.

Singapore is one of the few importing countries that reports durian in its official trade statistics. According to these statistics, Singapore imported 36,745 MTs (US\$30.6 million) of fresh durian in 1993 (Table 3), although actual imports are probably slightly higher because Singapore does not report imports from Indonesia. The majority of fresh durian entered during the periods February-March and June-August. Thai supply entered exclusively during the period May-July, primarily in June.

Hong Kong. Hong Kong is the second-largest import market for fresh durian in the world, accounting for 20 percent of the exports from the top three supplying countries. Official Hong Kong trade statistics show imports in 1993 totaling 16,810 MTs (HK\$201.0 million), down slightly from 17,417 MTs (HK\$201.0 million) in 1992 (Table 4). Almost all of Hong Kong's import demand is met by Thailand, which supplied 99.6 percent of imports in 1993. Most remaining supply entered from Malaysia.

Taiwan. Taiwan imported 3,275 MTs of fresh durian in 1993, mostly from Thailand but including small amounts from Indonesia and Malaysia. Single-layer cartons of durian from Thailand were spotted on Taiwanese street markets in January 1995.

North America

United States. The United States imports more durian, fresh and frozen, than any other non-Asian country. Imports in 1993 were estimated at 1,742 MTs, of which frozen durian accounted for more than 80 percent. Thailand supplied almost all of U.S. demand, although small amounts entered from Malaysia. Thai product retailed for US\$2.80 per pound in New York City's Chinatown in late 1994.

Canada. As with most non-Asian countries, demand in Canada is mainly limited to the Asian immigrant population. There has been very little cross-over appeal. Importers interviewed in late 1994 reported a preference for large individual fruit sections, small seeds, and yellow flesh.

Canada is the largest non-Asian market for fresh durian. Canadian imports were estimated at 600 MTs in 1993, 45 percent of them fresh and 55 percent frozen. Thailand supplied the vast majority of Canada's import demand, although small quantities of durian also entered from Malaysia. Toronto and Montreal wholesalers report wide price differences: between C\$4.40 per kilogram and C\$8.00 per kilogram. One Toronto-based importer reported selling IQF durian at C\$2.20 per kilogram. Most imports entered Canada during the summer months.

Europe

The European market for durian is small, totaling only 52 MTs of fresh durian and 81 MTs of frozen durian. Importers interviewed in late 1994 report only a small demand for durian by European consumers, mostly from countries with significant immigrant populations from Southeast Asia (France, the Netherlands, and the United Kingdom).

France is the largest European importer of fresh and frozen durian, with imports of 31 MTs and 37 MTs, respectively, in 1993. Thailand was the only reported supplier.

The **Netherlands** imported 27 MTs of durian in 1993, the majority of it frozen. Although Thailand is

the dominant supplier, Indonesia also provides small quantities of fresh product. Importer selling prices of Thai durian ranged from Hfl 11.00 to Hfl 17.25 per kilogram in 1994, according to the International Trade Centre's Market News Service reports (Table 5). Prices were lowest from May to August.

United Kingdom imports of fresh durian are estimated at only 8 MTs, more than 90 percent entering from Thailand, and the remainder from Malaysia. Importer selling prices ranged from £4.50 per kilogram to £8.00 per kilogram (mostly £6.00 to £7.00 per kilogram) in 1994.

Export Grades and Standards

Thai durian is typically exported four fruits per carton (cartons are 470 millimeters wide, 470 millimeters long, and 229 millimeters high). Although there are more than 300 varieties of durian, Monthong and Chanee durian from Thailand are most often found in import markets.

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