

World Market for
DURIAN



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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 were 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

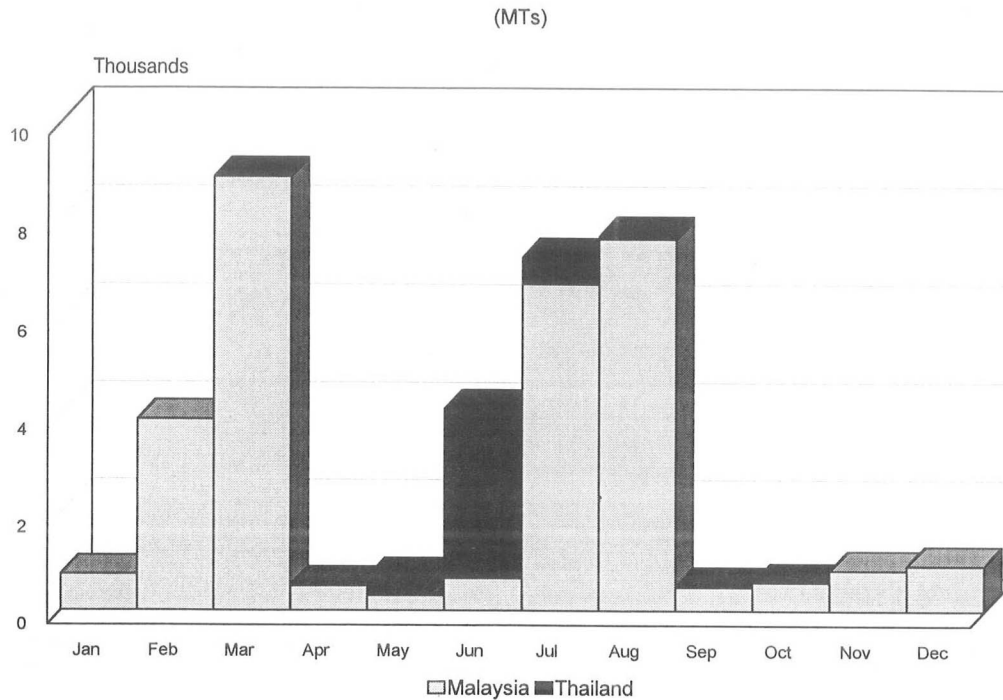
Asia

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 (see Figure 1).

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 were 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.

Figure 1: Singapore Monthly Imports of Durian, 1993



Source: Singapore External Trade Statistics

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 3,270 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 of durian entered the United States 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 individually quick frozen 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 product and 81 MTs of frozen. Importers interviewed in late 1994 reported 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, 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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Table 1: Durian Exports of Thailand, Indonesia, and Malaysia, by Importer, 1993 (kg)					
Exporter Importer	Thailand		Indonesia	Malaysia (1991)	Total
	Frozen	Fresh	Fresh	Fresh	Fresh
Australia	566,597	6,968		5,520	12,488
Austria		72		3,170	3,242
Bahrain		225			225
Belgium				1,500	1,500
Brazil		650			650
Brunei		14,251	1,098	34,210	49,559
Canada	339,222	260,330		380	260,710
China		44,000			44,000
Denmark	108				0
Ethiopia		900			900
France	37,310	30,512			30,512
Germany	7,790	1,323	619	1,000	2,942
Hong Kong		10,057,070		5,720	10,062,790
India		1,760			1,760
Indonesia		128,695			128,695
Italy				3,390	3,390
Japan	17,865	59,500	425	1,180	61,105
Kampuchea		7,621			7,621
Laos		1,250			1,250
Malaysia		4,387,107	160		4,387,267
Malta		1,400			1,400
Netherlands	25,222	1,288	459		1,747
New Zealand	1,632				0
Pakistan		800			800
Philippines		1,000			1,000
Saudi Arabia				840	840
Singapore		133,144	324,156	34,806,530	35,263,830
Spain	326				0
Sweden	9,919				0
Switzerland		3,902			3,902
Taiwan	37,470	3,270,469	3,888	570	3,274,927
Thailand				20,220	20,220
UAE	217		512		512
UK		7,048		720	7,768
USA	1,515,502	207,650		18,690	226,340
Other		12,440			12,440
Total	2,559,180	18,634,407	331,317	34,903,640	53,869,364

Source: Government trade statistics

Table 2: Durian Exports of Thailand, Indonesia, and Malaysia, 1993, by Importer (US\$, f.o.b. value)

Exporter Importer	Thailand		Indonesia	Malaysia (1991)	Total Fresh
	Frozen	Fresh	Fresh	Fresh	
Australia	1,463,971	13,455		3,222	16,677
Austria		93		2,467	2,560
Bahrain		163			163
Belgium				584	584
Brazil		1,331			1,331
Brunei		8,698	2,034	22,353	33,085
Canada	733,608	259,008		2,760	261,768
China		31,027			31,027
Denmark	1,079				0
Ethiopia		1,337			1,337
France	244,741	34,055			34,055
Germany	57,330	951	681	1,445	3,076
Hong Kong		7,241,041		3,534	7,244,575
India		2,901			2,901
Indonesia		166,899			166,899
Italy				2,638	2,638
Japan	88,514	159,307	1,405	930	161,642
Kampuchea		7,116			7,116
Laos		527			527
Malaysia		2,419,193	187		2,419,380
Malta		1,076			1,076
Netherlands	176,338	2,341	595		2,936
New Zealand	16,821				0
Pakistan		1,185			1,185
Philippines		495			495
Saudi Arabia				654	654
Singapore		472,920	258,972	21,202,245	21,934,137
Spain	2,494				0
Sweden	36,367				0
Switzerland		3,899			3,899
Taiwan	88,473	3,707,542	8,848	1,730	3,718,120
Thailand				6,776	6,776
UAE	1,873		978		978
UK		13,977		1,678	15,655
USA	3,986,034	417,052		140,556	557,608
Other		14,540			14,540
Total	6,897,644	14,982,131	273,700	21,393,571	36,649,401

Source: Government trade statistics

Table 3: Singapore Monthly Imports of Fresh Durian from Malaysia and Thailand, 1993 (MT,S\$)

Month	Malaysia		Thailand		Total	
	MT	S\$000	MT	S\$000	MT	S\$000
Jan	745	1,414			745	1,414
Feb	3,933	6,293			3,933	6,293
Mar	8,885	11,970	1	10	8,886	11,980
Apr	506	678	11	46	517	724
May	310	442	384	441	694	883
Jun	663	837	3,493	3,754	4,156	4,591
Jul	6,713	8,976	543	557	7,256	9,533
Aug	7,638	9,527	57	46	7,695	9,573
Sep	490	668	12	9	502	677
Oct	584	743	1	1	585	744
Nov	839	1,466			839	1,466
Dec	937	1,676			937	1,676
Total	32,243	44,690	4,502	4,864	36,745	49,554

Source: Government of Singapore

Table 4: Hong Kong Imports of Fresh Durian (MT, HK\$)

Supplier	Volume (MT)		Value (HK\$)	
	1992	1993	1992	1993
Thailand	17,390	16,752	200,837	200,518
Malaysia	21	54	131	389
Singapore	3		24	
Australia	3	1	140	20
China		3		102
Total	17,417	16,810	201,132	201,029

Source: Official Hong Kong Trade Statistics

Table 5: European Importer Selling Prices for Fresh Durian, 1994 (per kg in currency of importing country)

Importer	Austria	Denmark	Netherlands	UK	Switzerland	Sweden
Exporter	Thailand	Thailand	Thailand	Thailand	Thailand	Indonesia
Jan 13	130.00		16.75	6.90		
Jan 19			17.25	6.65		
Jan 26	130.00		17.25	6.60		
Feb 3	130.00		15.50	6.65		
Feb 9	130.00		16.00	6.00		
Feb 17	130.00		17.00			
Mar 3	131.00		15.50	5.00		
Mar 10	131.00		15.50	6.00		
Mar 16	131.00					
Mar 23			15.50	5.00		
Mar 31	131.00		17.00	4.50		
Apr 13	130.00		15.50	4.50		
Apr 20	130.00		13.50			
Apr 27						
May 5			13.50			
May 11	130.00		13.50			
May 18						
May 25			12.50			
June 1			11.25			
June 6			11.00			
June 15	130.00		11.00		9.75	
June 22			11.00	5.00		
Jul 7			11.50			
Jul 14						
Jul 28			12.50			50.00
Aug 3				8.00		
Aug 10						
Aug 17			12.50			
Aug 24			12.25			
Aug 31			12.25	5.00		
Sep 7			12.00	6.00		
Sep 14				6.60		
Sep 22				7.35		
Sep 28				6.65		
Oct 5				6.65		
Oct 13				6.83		
Oct 20				7.00		
Nov 3				6.60		
Nov 11		90.00		6.60		
Nov 17				6.60		
Nov 24				6.60		
Nov 29				6.60		
Dec 8				6.60		
Dec 15				6.60		

Source: ITC/MNS, Geneva



Durian for sale on the Chinatown market in New York City

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