



China's Durian Market Revolution: From Novelty to Mass Phenomenon

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Durian's Dramatic Rise

\$6.99B

Import Value

Grew 4.1% year-on-year in 2024

1.56M

Tonnes Imported

Volume increased 9.4% year-on-year

#1

Import Ranking

Overtook cherries by value in 2019

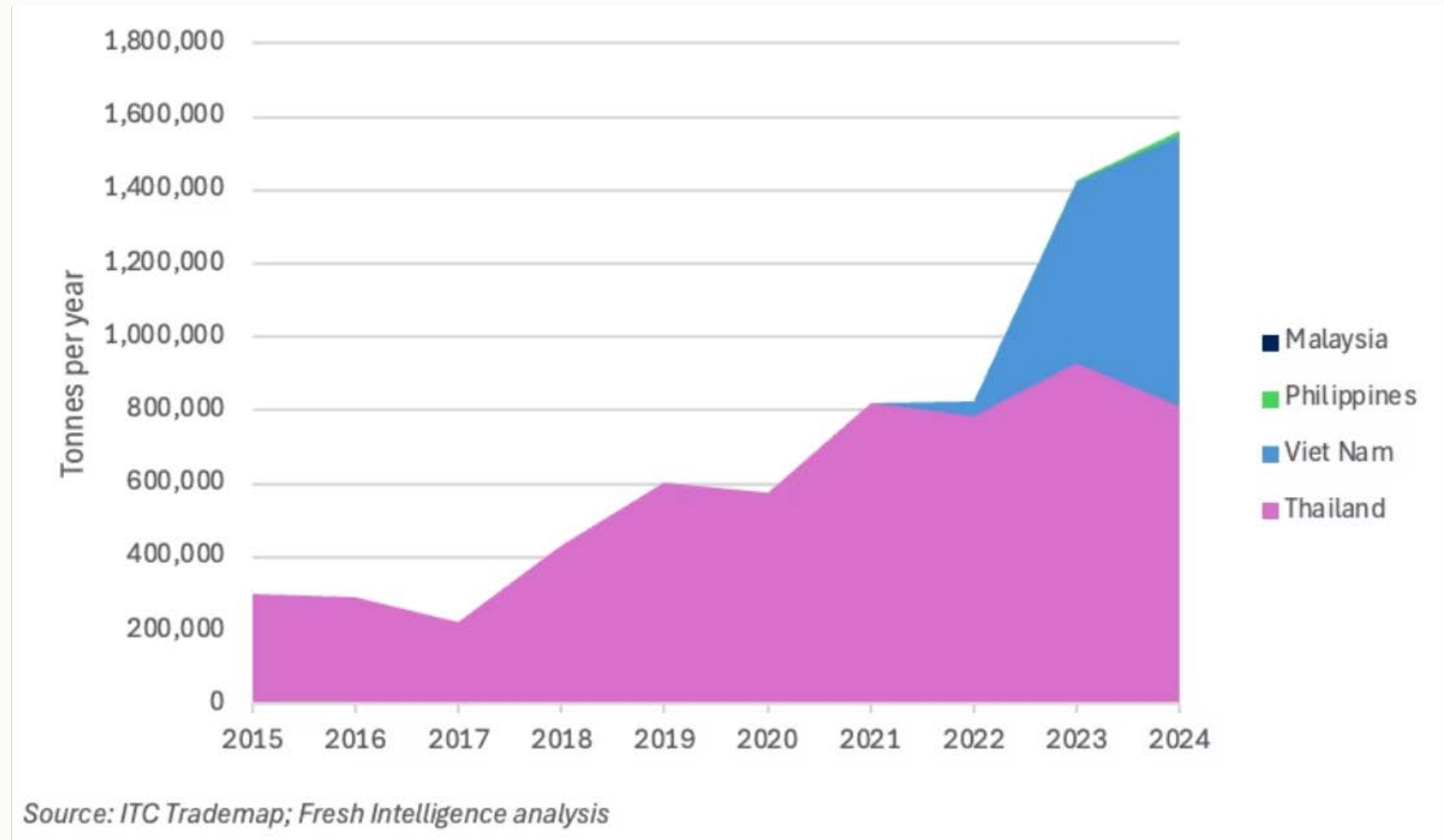
Durian has achieved a historic milestone. It now ranks second in import volume.

China - Fresh Fruit Imports 2020 - 2024

Product	2020	2021	2022	2023	2024	1 yr chg	5 yr CAGR	2024 share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
Bananas	1,763,863	1,863,625	1,810,695	1,768,226	1,686,773	-5%	-1%	26.6%
Durians	575,901	821,589	824,855	1,425,914	1,560,389	9%	28%	24.6%
Cherries	210,702	313,661	366,937	347,479	451,000	30%	21%	7.1%
Longons	346,805	469,020	382,573	344,411	381,757	11%	2%	6.0%
Mangoes & mangosteens	379,173	263,476	291,109	253,298	292,644	16%	-6%	4.6%
Dragon fruit	618,371	587,655	567,854	341,562	231,356	-32%	-22%	3.6%
Pineapples	208,447	197,883	208,184	213,735	230,249	8%	3%	3.6%
Watermelons	97,442	55,811	68,411	73,607	216,191	194%	22%	3.4%
Oranges	297,411	248,512	209,716	214,666	162,375	-24%	-14%	2.6%
Kiwifruit	116,864	120,968	117,782	118,336	150,144	27%	6%	2.4%
Grapes	250,483	194,603	180,597	166,704	109,064	-35%	-19%	1.7%
Plums	66,455	64,945	103,514	89,610	109,006	22%	13%	1.7%
Apples	75,748	67,985	95,461	82,409	97,558	18%	7%	1.5%
Grapefruit	79341	124174	107255	75858	91862	21%	4%	1.4%
Mandarins	47874	65456	51771	67177	46009	-32%	-1%	0.7%
Other	219,961	297,406	402,913	291,615	533,054	83%	25%	8.4%
Imports	5,354,841	5,756,770	5,789,627	5,874,607	6,349,431	8%	4%	100.0%

Source: Directorate General of Commercial Intelligence and Statistics, ITC Trademap; Fresh Intelligence analysis

A Decade of Transformation: China's Durian Trade (2015-2024)

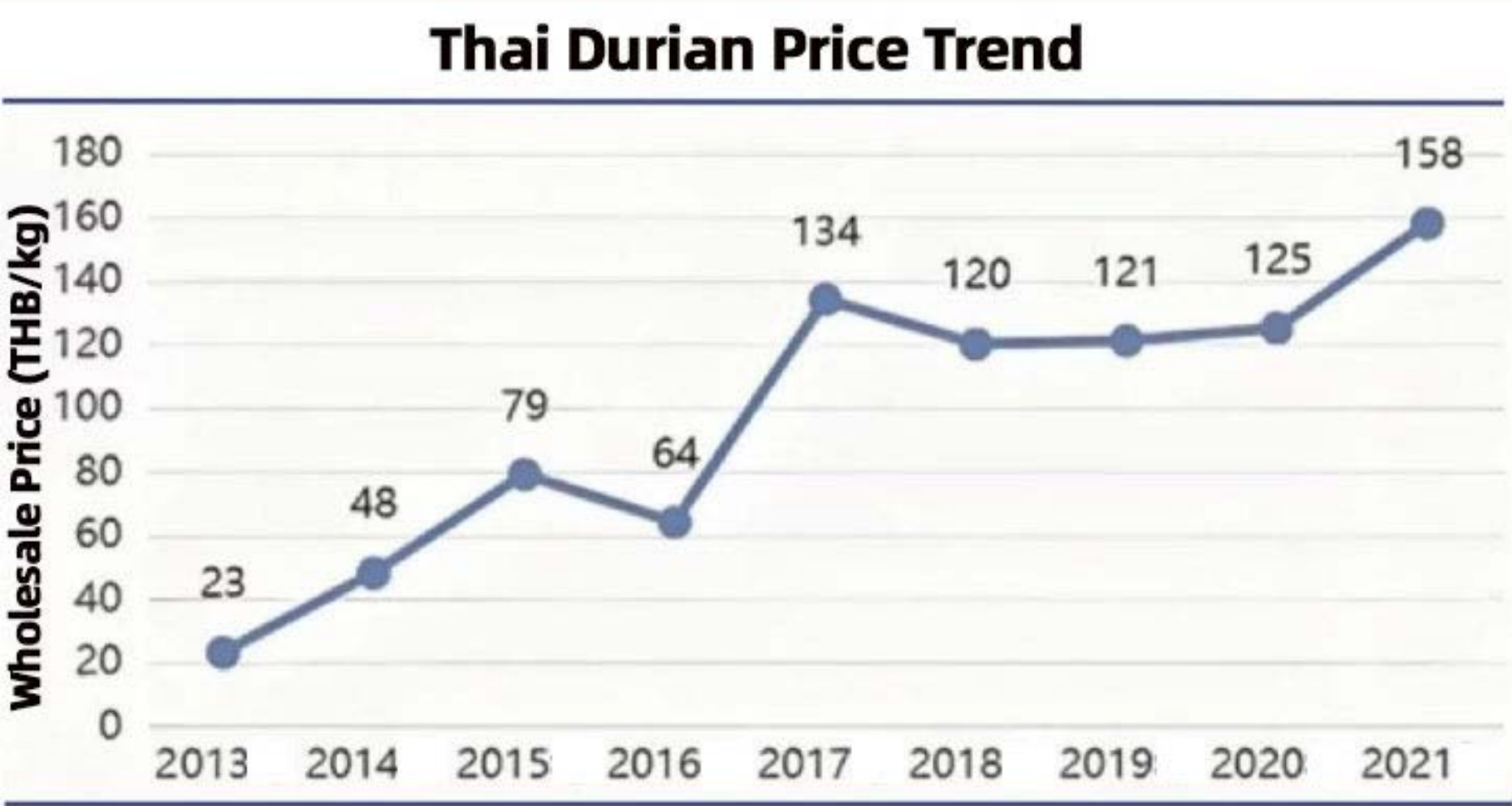


SEA Nations Gain Access in China's Durian Rush

Country	2022	2023	2024	2024 share
	Tonnes	Tonnes	Tonnes	
Thailand	783,976	928,920	809,827	51.9%
Vietnam	40,879	493,223	736,753	47.2%
Philippines		3,770	13,457	0.9%
Malaysia			351	



Price Trends of Thai Durian in China



Souce: Global Intelligence



China's Domestic Gambit

Hainan Breakthrough

2023: 50 tonnes (93.33 ha)

2024: 250 tonnes (266.67 ha)

Price Premium: 80 RMB/kg
higher than imports

Yunnan expansion is already
underway



Advantages

- "Tree-ripened" quality
- Freshness premium
- Lower transport costs

Challenges

- Thick rinds (low yield)
- Immature orchards
- Higher consumer prices

Food Safety Crisis: The BY2 Scandal

1

Dec 2024

First BY2 contamination detected in Thai durians

2

Jan 10, 2025

Mandatory 100% testing ordered for all imports

3

Jan 11, 2025

First shipment rejected at Nanning border crossing

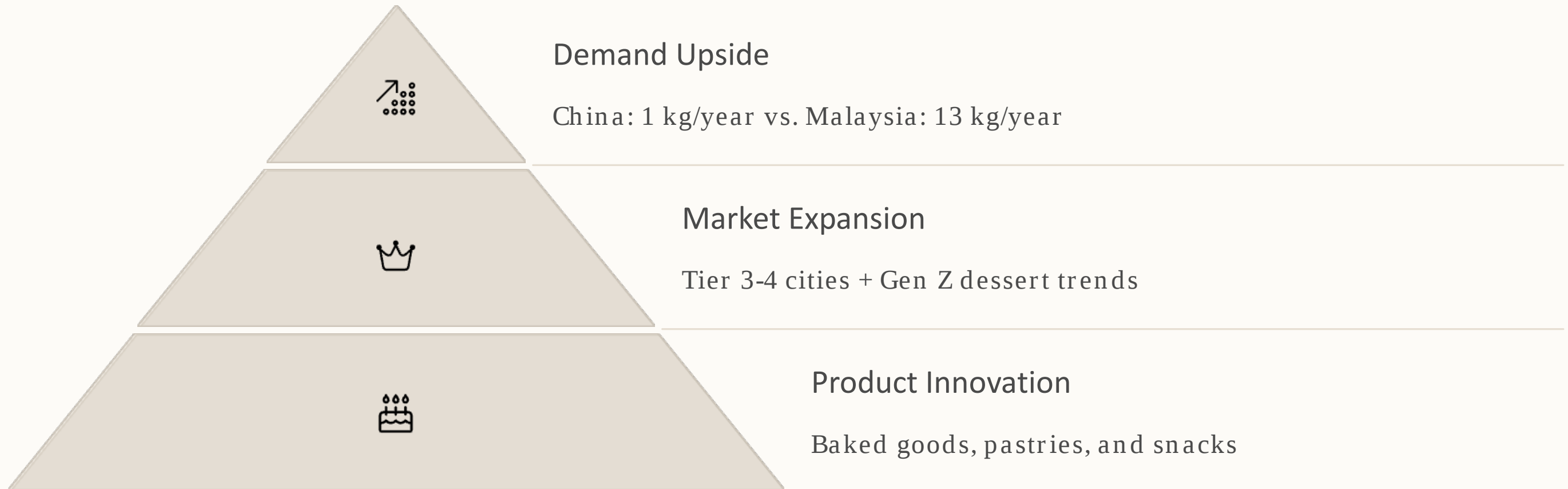
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Jan 20, 2025

Six Thai laboratories certified for pre-export testing



Future Opportunities



Key Takeaways



Market Transformation



Enhanced Accessibility



Value-added products

Thank you!

