

From Orchard to Empire: The journey of Thailand's Durian



“Tradition alone will not secure tomorrow’s markets.”

Every year, as the monsoon rains nourish Thailand's orchards, a quiet economic force awakens. It is not rice or rubber, but it is durian. Once regarded as a niche fruit from tropical countries, durian is now gaining global popularity, propelling Thailand into the spotlight as the world's undisputed **“king of durian exports”**. However, behind the sweet aroma of success, challenges are growing. And as global demand soars, Thailand must navigate a more competitive and complex market landscape.

The Gem of Thai Agriculture

Durian is not just some fruit; it is an economic heavyweight especially during the peak season from April to June. **As illustrated in Chart 1**, durian export values consistently surge during these months, aligning with Thailand's main harvest and export period. In 2024, Thailand's durian exports generated a staggering 130 billion baht, following an already impressive 140 billion baht in 2023. Today, 75% of Thailand's durian harvest heads abroad, primarily to China, while only 25% is consumed domestically.

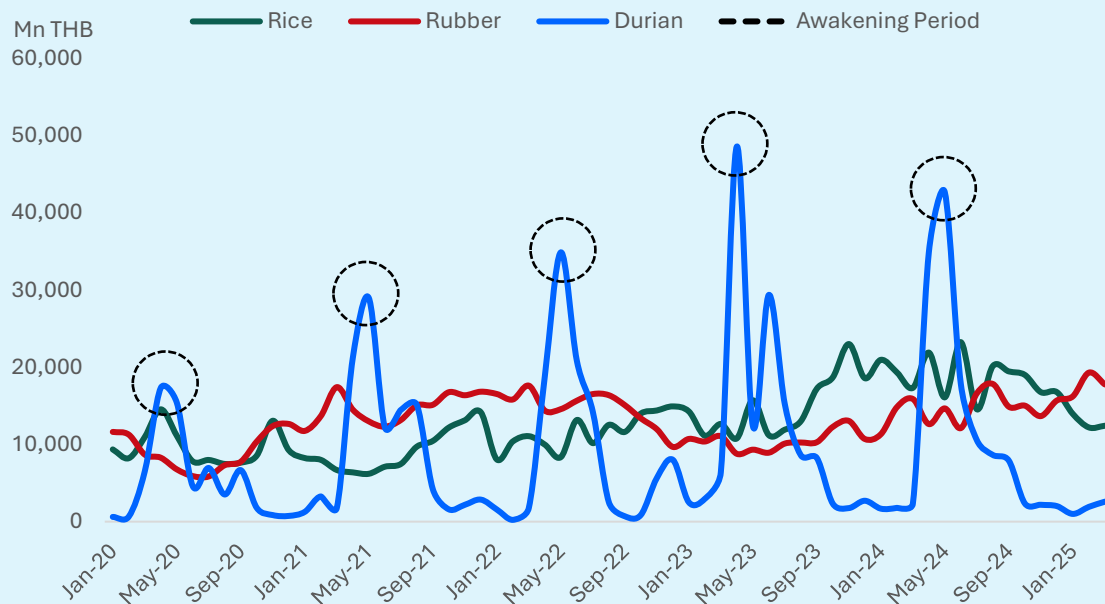
Thailand's dominance is clear. According to FAO data (Food and Agriculture Organization of the United Nations), the country accounts for approximately 94% of global durian exports volume in 2020-2022, far ahead of Vietnam and Malaysia. The main driver is China's appetite,

where consumers view Thai durians as a premium product which are sweet, aromatic, and a mark of refined taste and prosperity.

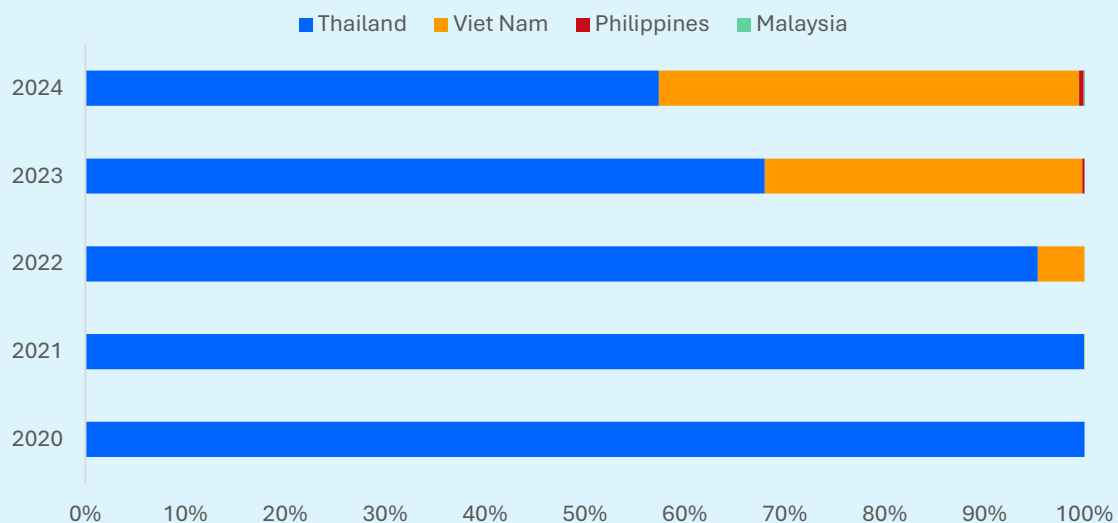
The Sweet Taste of Success Meets a Sour Reality

Thailand's dominance in the durian market is not without risk. Recent incidents, such as border closures and the detection of chemical residues like BY-2 dye in shipments, have rattled exporters and heightened scrutiny. China's import requirements are tightening, demanding stricter phytosanitary standards and full traceability from orchard to market.

Compounding the challenge, Thailand's once-unshaken grip on China's durian market is starting to slip. In 2021, nearly all of China's durian imports came from Thailand. But by 2023, Thailand's share had dropped to 68%, and by mid-2024, it fell further to just 57% **as illustrated in Chart 2**. Vietnam is catching up fast, helped by its year-round harvests, cheaper transport, and strong government support. At the same time, Malaysia is targeting the premium segment with its Musang King durian, which can now reach Beijing within 24 hours using cold-chain logistics. In a market where freshness, safety, and strong branding matter more than ever, Thailand can no longer rely on its old advantage, the competition is real and rising.

Chart 1: Economic force awakens as the monsoon rains (Durian export value)

Source: Bank of Thailand

Chart 2: Proportion of China's Fresh Durian Import Value

Source: Bank of Thailand

The Global Durian Boom beyond China

While China remains the heart of Thailand's durian exports, the fruit's appeal is expanding far beyond Asia. Once confined to Southeast Asian palates, durian is now crossing borders and mindsets. In the United States, United Kingdom, and Australia, it is showing up in fusion desserts, high-end grocers, and even as limited-edition flavors in global food chains. In Europe, where adventurous tastes and health awareness are on the rise, durian is slowly but surely carving out its niche, especially in markets like Germany and France.

Frozen Gold and Fresh Frontiers

A quiet shift is transforming how the world consumes durian. Frozen pulp and paste ideal for bakeries, beverages, and desserts that have grown in popularity thanks to their convenience and longer life. Still, for durian purists, nothing beats the real thing. Demand for fresh whole fruit remains strong. E-commerce and cold-chain logistics are changing the game. With better shipping technologies, Thailand's golden spikes can now reach global doorsteps fresher than ever, expanding the market without borders.

Thailand at a Crossroads: The Path to Stay Ahead

Thailand's advantage is not just its fertile land or famous cultivars, it's how the country responds to changing global expectations. To hold the crown, quality must be non-negotiable. That means rigorous inspections, full traceability, and sustainable farming practices that meet the highest international standards.

But quality alone is not enough. Innovation is key. As tastes evolve, so must the variety. While Monthong remains a bestseller, new hybrid cultivars and lesser-known Thai varieties offer fresh opportunities to stand out in a crowded market.

Equally vital is market diversification. Relying too heavily on one customer, no matter how large, exposes the sector to risk. Thailand must actively nurture new demand in the Middle East, North America, and Europe. Strategic marketing, cultural branding, and diplomatic trade outreach can open these doors.

Durian: More Than a Fruit

Durian has become more than just a fruit. It is a symbol of cultural identity and economic ambition. Across Southeast Asia, governments are increasingly using it as a soft power tool—linking it to tourism, cuisine, and national pride. Thailand, with its deep-rooted durian legacy, is poised to lead this trend.

While durian is beloved at home, it has also become a fierce battleground abroad. In 2024, Thailand exported over 3.76 billion USD worth of fresh durians, commanding nearly 90% of China's imported durian market. Yet the landscape is

shifting. Malaysia is carving out a premium niche with its Musang King variety, while China has begun cultivating its own durians in Hainan, aiming for self-reliance.

To stay ahead, Thailand must do more than protect its current share—it must expand the market itself. From orchard-based festivals to durian-themed travel experiences and chef-driven collaborations, there is untapped potential to grow not just exports, but global admiration.

Conclusion: Time to Harvest the Future

Thailand's durian story is one of natural abundance and global ambition. But in a world of rising competitors and shifting consumer tastes, tradition alone will not secure tomorrow's markets. The time has come to reimagine the strategy not just to defend the crown, but to grow the empire.

"Do not be so taken with your own size that you no longer see anyone else's shadow." Pride can obscure threats and narrow perspective. Confidence must be matched with clarity. To lead the next chapter of the durian economy, Thailand must stay vigilant, act decisively, and innovate boldly before today's shadows become tomorrow's storm.

With the right vision, Thailand's durian empire can not only weather the storm but shape the climate.

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