

Durian Fruit Market Forecasts to 2032 – Global Analysis By Product Type (Musang King (Mao Shan Wang), Monthong (Golden Pillow), D24 (Sultan), Red Prawn, Black Thorn, Chanee and Other Product Types), Form (Whole Fresh Fruit, Frozen Pulp & Paste, Frozen Whole Durian, Processed Goods and Other Forms), Distribution Channel, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Durian Fruit Market is accounted for \$1.91 billion in 2025 and is expected to reach \$2.67 billion by 2032 growing at a CAGR of 4.9% during the forecast period. Durian is a tropical fruit native to Southeast Asia, recognized for its large size, spiky outer shell, and potent aroma. Renowned for its unique, custard-like texture and complex flavor profile, it combines sweet, savory, and nutty notes. While its pungent and polarizing aroma is a defining characteristic, the fruit is highly prized for its rich nutritional content, including healthy fats, vitamins, and minerals. Cultivated extensively across countries like Thailand, Malaysia, and Indonesia, durian is a significant agricultural product, consumed both fresh and in various processed forms. Its distinct qualities and high market value have made it a cornerstone of the regional economy and a culinary delicacy enjoyed by millions worldwide.

Market Dynamics:

Driver:

Growth of e-commerce and cross-border trade

E-commerce enables producers to bypass traditional distribution channels, offering direct access to international consumers. Enhanced logistics infrastructure and digital payment systems have facilitated smoother cross-border transactions, boosting global durian exports. Moreover, the increasing demand for exotic fruits in Western markets is encouraging suppliers to scale operations and improve packaging standards. This digital shift is also fostering brand visibility and consumer engagement across diverse geographies.

Restraint:

Seasonal availability and price volatility

Seasonal fluctuations often result in supply-demand imbalances, causing sharp price variations that affect both producers and retailers. Additionally, adverse weather events such as droughts or excessive rainfall can disrupt flowering cycles, reducing fruit quality and volume. These inconsistencies pose challenges for inventory planning and long-term contracts, especially in export markets. The perishability of durians further complicates logistics, increasing the risk of spoilage and financial losses.

Opportunity:

Development of value-added products

The market is witnessing a surge in innovation around durian-based derivatives such as freeze-dried snacks, pastries, ice creams, and ready-to-eat pulp. These value-added formats cater to urban consumers seeking convenience without compromising on flavor. Technological advancements in food processing and preservation are enabling longer shelf life and broader distribution. Additionally, manufacturers are exploring functional food applications by incorporating durian into health-oriented products, leveraging its nutritional profile. This diversification is opening new revenue streams and reducing dependence on fresh fruit sales.

Threat:

Pests, diseases with economic volatility and trade disputes

The lack of standardized phytosanitary protocols across regions complicates

international trade, often leading to shipment rejections. Furthermore, geopolitical tensions and tariff impositions can disrupt established supply chains, affecting market stability. Currency fluctuations and inflationary pressures also influence production costs and consumer affordability. These factors collectively pose significant risks to sustained market growth and profitability.

Covid-19 Impact:

The pandemic initially disrupted durian supply chains due to labor shortages, transport restrictions, and reduced market access. However, it also accelerated digital adoption, with producers turning to online platforms to maintain sales. Lockdowns increased consumer interest in home-delivered exotic fruits, driving demand for hygienically packaged durians. Exporters adapted by investing in cold chain logistics and contactless delivery models. While international trade faced hurdles, domestic consumption saw a notable uptick, especially in Southeast Asia.

The musang king (mao shan wang) segment is expected to be the largest during the forecast period

The musang king (mao shan wang) segment is expected to account for the largest market share during the forecast period propelled by its premium positioning and strong brand recognition make it highly sought-after in both domestic and international markets. Producers are expanding cultivation acreage and adopting grafting techniques to meet rising demand. The segment benefits from targeted marketing campaigns and strategic partnerships with luxury retailers. Additionally, Musang King's consistent quality and longer shelf life enhance its appeal for export-oriented businesses.

The business-to-consumer segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the business-to-consumer segment is predicted to witness the highest growth rate driven by the proliferation of online marketplaces and direct-to-consumer models. Consumers are increasingly purchasing durians through mobile apps and e-commerce platforms, attracted by convenience and promotional offers. Retailers are leveraging data analytics to personalize offerings and optimize inventory. Subscription-based delivery services and virtual tasting events are also gaining traction, enhancing customer loyalty.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to its favorable agro-climatic conditions and cultural affinity for durians. Countries like Malaysia, Thailand, and Indonesia are leading producers, supported by government initiatives and export incentives. The region's robust domestic demand, coupled with expanding trade routes to China and Singapore, reinforces its dominance. Investments in post-harvest technologies and certification programs are further enhancing product quality and global competitiveness.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR propelled by growing interest in exotic and functional foods. Health-conscious consumers are exploring durians for their antioxidant properties and unique taste profile. Importers are collaborating with Southeast Asian suppliers to ensure consistent supply and compliance with food safety standards. Retail chains and specialty stores are expanding their tropical fruit offerings, supported by targeted marketing and educational campaigns.

Key players in the market

Some of the key players in Durian Fruit Market include Bao Sheng Durian Farm, Chainoi Food Co., Ltd., Charoen Pokphand Group, Dole Asia Holdings, Durian Harvests, Freshmax Group, Fruitways, Green World Durian, Monthong Exporters Co. Ltd., PT Great Giant Pineapple, Sunshine International Co., Ltd., Tan Beng Huat Farm, Thai Agri Foods Public Co. Ltd., Tridge Inc., and DurianBB.

Key Developments:

In April 2025, CPF announced it will acquire Itochu's remaining 23.8% stake in C.P. Pokphand for about \$1.1 billion. This makes CPF the sole owner of C.P. Pokphand, giving CPF greater management flexibility and strategic control over the China/Vietnam agri-food operations.

In March 2025, Dole Asia Holdings announced a commercial collaboration with Givaudan to upcycle unripe/green bananas into a commercial green-banana powder ingredient. The partnership makes Givaudan the exclusive commercial collaborator for Dole's green banana powder in key European and American markets, enabling new ingredient uses in flavours and formulations.

In January 2025, Freshmax Group announced it will be acquired by Roc Partners. Roc Partners stated plans to invest for long-term growth while retaining Freshmax leadership. The transaction was positioned as a strategic investment to support Freshmax's growth, innovation and market expansion across Australasian fresh-produce operations.

Product Types Covered:

Musang King (Mao Shan Wang)

Monthong (Golden Pillow)

D24 (Sultan)

Red Prawn

Black Thorn

Chanee

Other Product Types

Forms Covered:

Whole Fresh Fruit

Frozen Pulp & Paste

Frozen Whole Durian

Processed Goods

Other Forms

Distribution Channels Covered:

Business-to-Business

Business-to-Consumer

Other Distribution Channels

End Users Covered:

Household Consumption

Food & Beverage

Cosmetics & Personal Care

Nutritional Supplements

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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