

Why the king of fruits bowed to supply and demand?

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FOR generations, durian was simply what Malaysians ate when the season came around, a cheap roadside staple and a fixture of kampung childhoods long before anyone thought to export it.

Somewhere around 2018, that changed. Durian suddenly became an investment, a status symbol, and for a fortunate generation of growers, a pathway to extraordinary wealth.

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This week, that boom finally met its bust. Musang King, which traded at RM90 a kilogram barely a year ago, has been selling at orchards for as little as RM9. Many are calling it a “durian tsunami.” The headlines are familiar by now.

What is worth examining is why it happened, and what it tells us about the economics of a commodity that grew faster than anyone could sell it.

The golden years, in numbers

The boom had a clear origin: China’s insatiable appetite for premium durian, particularly Musang King, surged between 2015 and 2023. According to the Ministry of Agriculture and Food Security, Malaysia’s total durian export value climbed from RM570.8 million in 2020 to RM1.14 billion in 2022, then to a record RM1.51 billion in 2023.

Those figures persuaded growers across Pahang, Johor, Penang and beyond to convert agricultural land into durian orchards and chase the export Yuan. The working assumption, held with increasing confidence as the years went on, was that Chinese demand and the prices it supported would keep climbing indefinitely.

That assumption ran into two problems at once, one on the demand side and one on the supply side, and durian growers have spent the past two years discovering both the hard way.

Where demand shifted

Chinese consumers moved away from frozen pulp and frozen whole fruit toward fresh whole durian, a product that requires cold-chain logistics, rapid air freight and strict quality control that Malaysia was not yet equipped to deliver at scale.

Vietnam, sharing a land border with China, was. Its proximity cut transport costs and transit times dramatically compared with air freight from Malaysia, and its near year-round harvest cycle meant supply rarely ran dry.

These advantages turned into market share quickly once the paperwork caught up. Vietnam signed a phytosanitary protocol with China in July 2022 and had its first official consignment moving within two months.

Malaysia's own protocol for fresh durian exports did not arrive until June 2024, almost two years later, and the first shipment followed only in August, another two-month gap before fruit actually moved.

By the time Malaysia was ready to compete, Vietnam had already spent two years building the relationships that mattered, leaving little room for Malaysian fruit to displace them. China's import data tells the rest of that part of the story: by 2025, Vietnam accounted for roughly 98% of China's fresh durian imports by value, while Malaysia's share hovered at around 1.4%.

Demand cools, China diversifies

Demand softened further for reasons that have little to do with Vietnam. China's overall durian imports fell sharply in the first half of 2025 after Chinese customs tightened quality inspections following contamination scares, and the Malaysia Durian Exporters Association has pointed to a broader economic slowdown dampening Chinese appetite for premium fruit.

China has also begun growing a small volume of its own durian in Hainan, producing roughly 2,000 tons a year from plantations in Sanya and nearby districts. The volume is negligible against national consumption, but it signals Beijing's longer-term intent to diversify away from import dependence, a strategic posture that should concern any exporter overly reliant on a single buyer.

Malaysia's total export value reflected this turn, easing to RM1.18 billion in 2024 after the 2023 record.

The supply side nobody talks about

The demand story explains only half of the collapse. Encouraged by years of booming prices, Malaysia's durian growing area expanded enormously, with

industry estimates putting the increase at roughly fivefold over the past decade.

That expansion has now collided with simple biology: orchards across Pahang, Johor, Penang, Perak and Melaka happened to enter peak harvest within the same narrow window this year, producing what the Federal Agricultural Marketing Authority (FAMA) has called a 'glut' driven as much by synchronised timing as by any single market failure.

Compounding this, a meaningful share of the newer, export-grade fruit has failed to meet the strict requirements of the China and Singapore markets, leaving growers with no choice but to redirect it to domestic buyers.

When export-bound supply cannot find its intended market and domestic production peaks at the same moment, the fruit has only one place left to go: the local market, all at once.

A lesson in overreliance

Malaysia's domestic durian consumption, sizeable as it is, was never built to absorb that volume at anything close to export-era prices.

Basic economics dictated the outcome. When supply outpaced demand by this margin, prices do not adjust gently, they collapse, and that is precisely what has happened to Musang King and Black Thorn alike over recent weeks.

None of this means Malaysian durian has lost its appeal, nor that Musang King's reputation has been dented. What it exposes is a structural vulnerability that boom years tend to disguise.

An industry that scaled its growing area aggressively while remaining dependent on a single overseas buyer and a narrow harvest window was building in exposure on two fronts at once.

A shock could come from the demand side, in the form of a competitor capturing market share or a buyer tightening its borders. Or it could come from the supply side, in the form of nature simply delivering too much fruit at once, as it has this year. Either way, the structure left growers with little room to absorb the blow.

The Malaysia Durian Exporters Association has suggested that RM35 to RM40 per kilogram is a more sustainable long-run price for Musang King than the RM90 peaks of the boom years, given how much growing capacity has been added since. That is a more sober, and probably more durable, benchmark for an industry to plan around.

Good news for consumers

For consumers, at least, the adjustment has been a windfall. Premium durian that was once an occasional luxury is now within reach of ordinary households, and roadside vendors from Klang Valley to Sarawak have reported queues of buyers taking advantage of bag deals and steep discounts.

Whether this glut proves to be a temporary correction or the start of a more permanent repricing will depend on how quickly growing area, harvest timing and export access realign with what the market can actually absorb.

Until then, Malaysians have something rarer than a bargain: a fruit ordinary families could simply enjoy, no longer a luxury, no longer an investment, just durian season as it used to be.

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