

ขอเชิญเข้าร่วมสัมมนาหัวข้อ

ผลไม้ **HEAVY WEIGHTS** & **RISING STARS** ของไทยในจีน

ภายใต้สถานการณ์ใหม่ยุค COVID - 19



2021 & Beyond

Fruit Import of China	China Largest Market for Thai Fruits	Logistic Decides the Fortune	The New Game
increased by 31% in 2021 to \$13.5 bil	Opulent 1H Shaking 2H	New Modes: Lao-China Railway	GDP p.c. of China > \$12500
Top 5 fruits Durian, Cherry, Banana, Mangosteen, & Longan	Covid 19: Omicron to Deltacron ZCP (Zero Covid Policy)	New Routes: New Border Check Points	Integration of Supply Chain From Orchard to Table Channel Deepening
Top 5 Exporters Thailand, Chile, Vietnam, Philippines, & New Zealand	Future for 2022 and beyond?	How Would They Help?	More Competition from ASEAN Neighbors

Embrace Opportunities and Address Challenges
Heavy Weights. & Rising Stars

Agenda

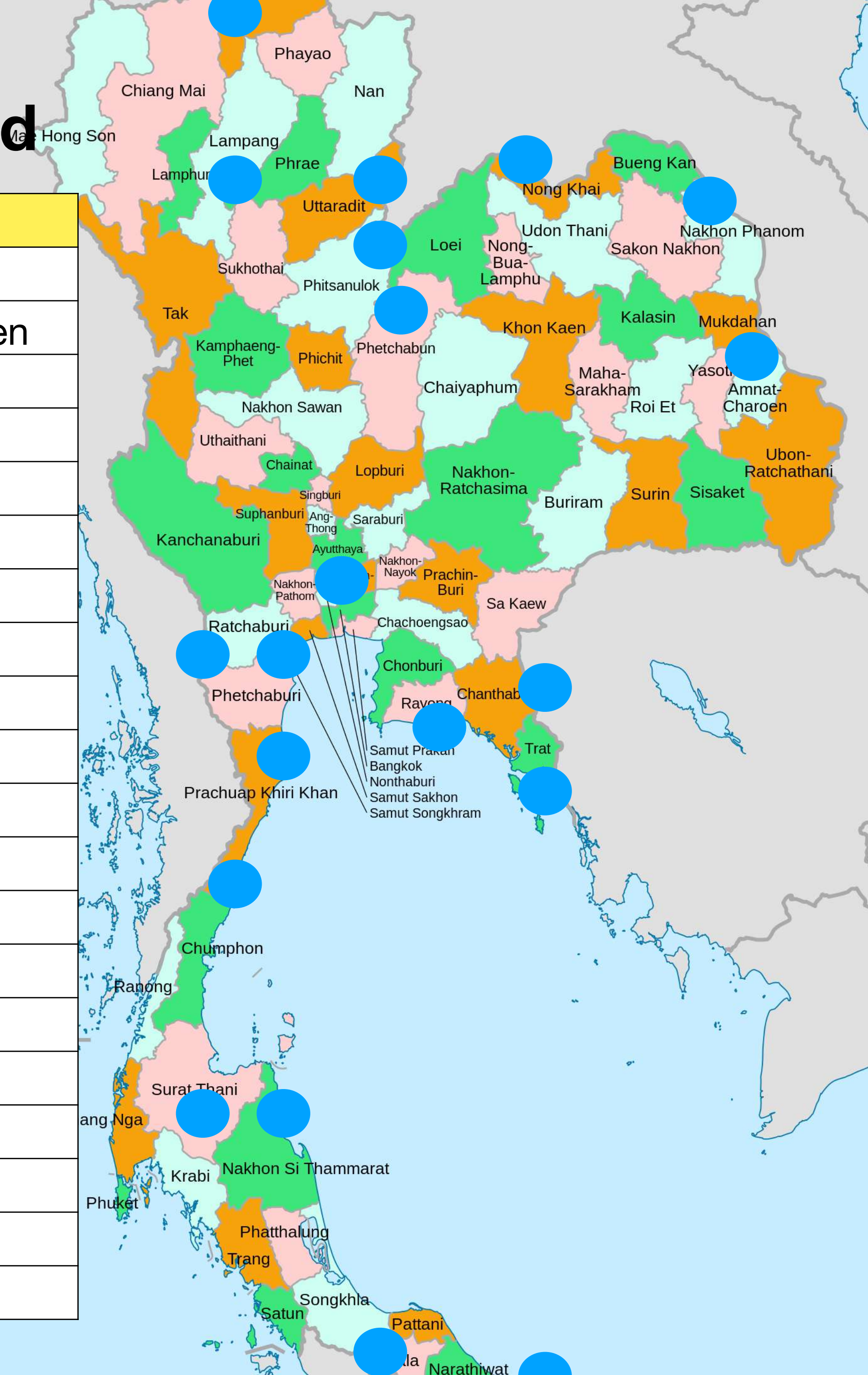
1	Our Journey	From Data to Insight		
2	Our Story	A	Heavy Weights & Rising Stars	
		B	The New Game	Life Style & Segment
				Intensified Competitions
				Supply Chain Integration
				Logistics & ZCP
C	Market Observations: Durian			
3	Our Suggestions	SWOT & Strategies		

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1	Our Journey	From Data to Insight		
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1. From Data to Insight: Interview & Focused Group in 20 provinces of Thailand








20 Provinces	Time	Topics
Bangkok	Dec 14-Feb 15	Back Ground Information
Chanthaburi	Mar 10-11	Durian, Longan, Long Korn, Rambutan, Mangosteen
Chiang Rai	Dec 17	Focused Group
Chumphon	Aug	Coconut, Durian, Mango, Mangosteen
Lamphun	Apr 29	Longan
Mukdahan	Dec 17	Focused Group
Nakhonphanom	Dec 17	Focused Group
Nakornsritammarat	Jun 21-25	Coconut, Mango, Mangosteen, Pomelo
Narathiwat	Mar 23-4	Longkong
Nongkhai	Dec 17	Focused Group
Phetchabun	Mar 30-31	Mango, Tamarind
Phitsanulok	Mar 29	Mango
Prachuap	Mar 3-4	Coconut, Jackfruit, Pineapple,
Ratchaburi	Mar 2	Rose Apple
Rayong	Mar 12-13	Durian, Jackfruit, Mango
Samut Songkhram	Mar 1	Pomelo, Coconut
Surat Thani	Jun 21-25	Banana,,Coconut, Mango, Rambutan
Trat	Mar 8-9	Durian
Uttaradit	Apr1	Durian
Yala	Mar 25	Longkong, Mongo



Stakeholders Represented & Fruits Covered in 87 In-depth Interviews

Stakeholders		Interviews Representing
government officials	G	36
farmers	F	29
collectors	C	23
processors	P	21
exporters	E	15
logistic providers	L	4
Researcher	R	7

Fruits		Interviews Covering
Banana		9
Coconut		21
Durian		50
Jackfruit		14
Long Kong		19
Longan		16

Fruits		Interviews Covering
Mango		15
Mangosteen		30
Pineapple		19
Pomelo		12
Rambutan		15
Rose apple		11
Tamarind		7

87 interviews



Samut Songkhram:



ส้มโอ



มะพร้าวอ่อน



Ratchaburi



มะพร้าวอ่อน



ชมพู่



Prachuap



สับปะรด



ขนุน



ตราด



ทุเรียน



ทุเรียน



Chanthaburi



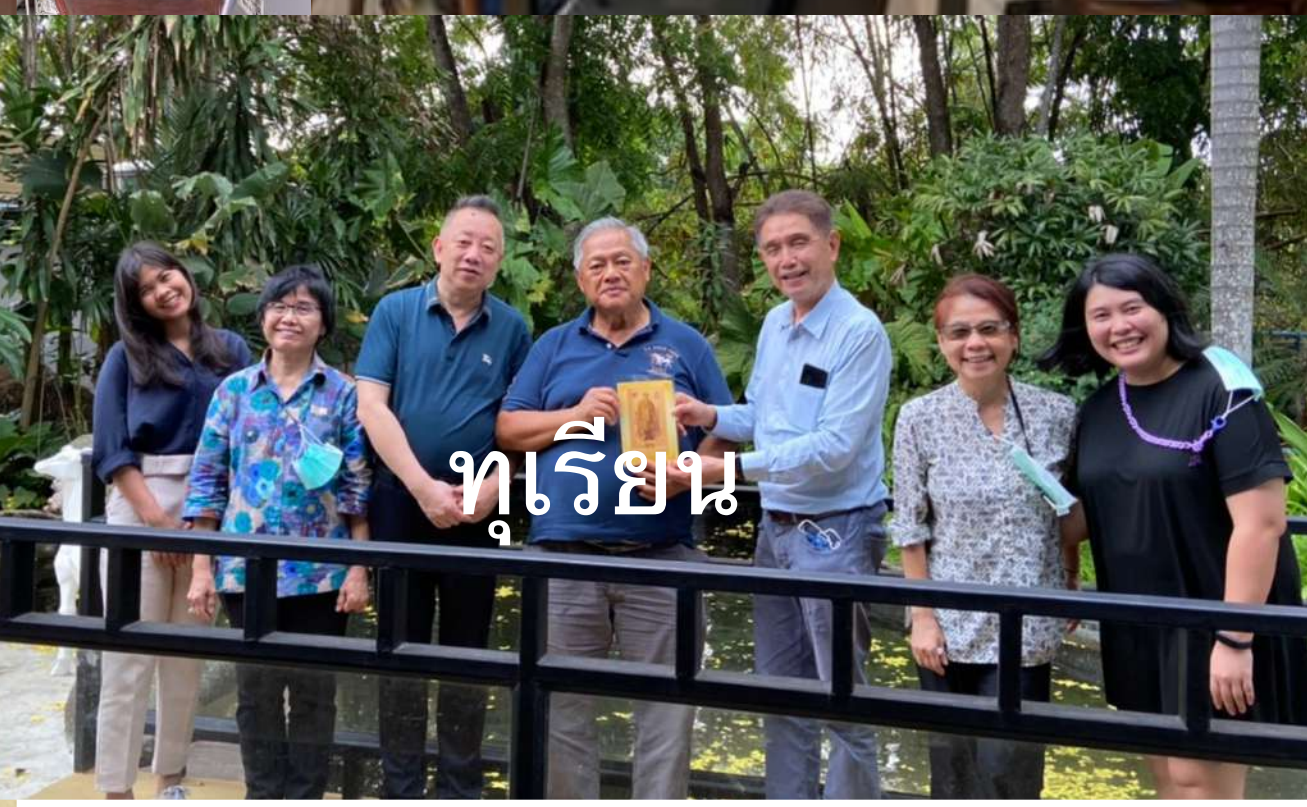
ทุเรียน



มังคุด



Rayong



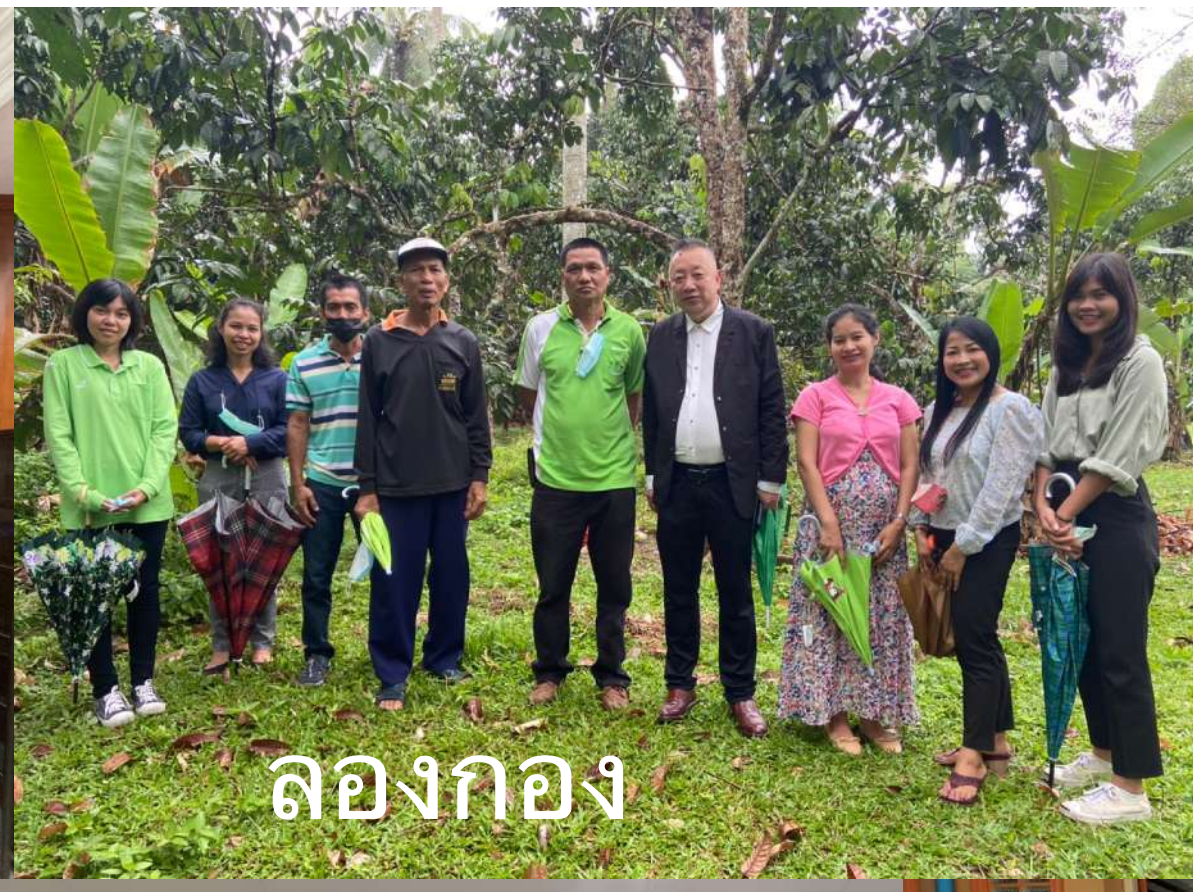
ทุเรียน



ขนุน



Narathiwat



ลองกอง



ทุเรียน



Yala



ทุเรียน



ลองกอง



Phitsanulok



มะม่วง



มะม่วง



Phetchabun



มะขาม



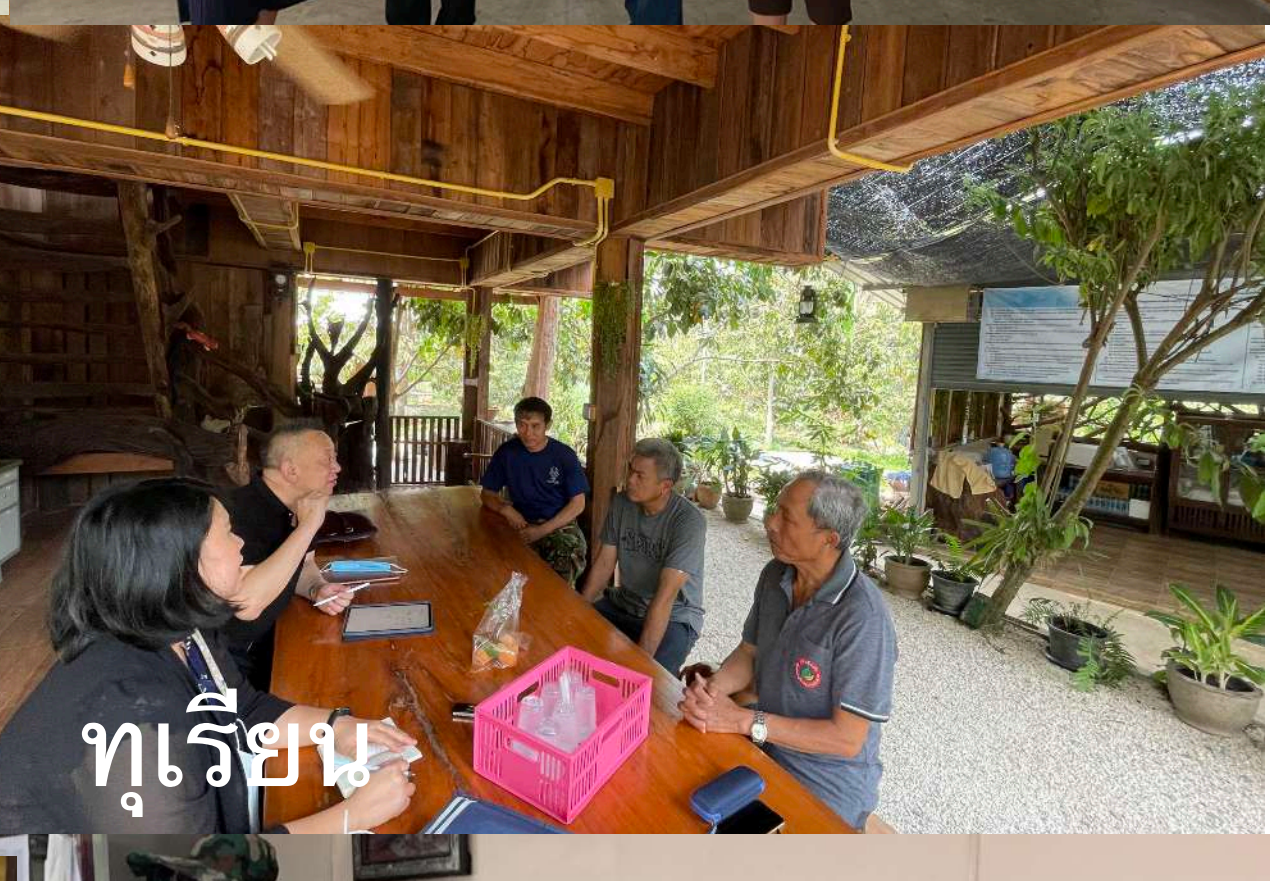
มะขาม



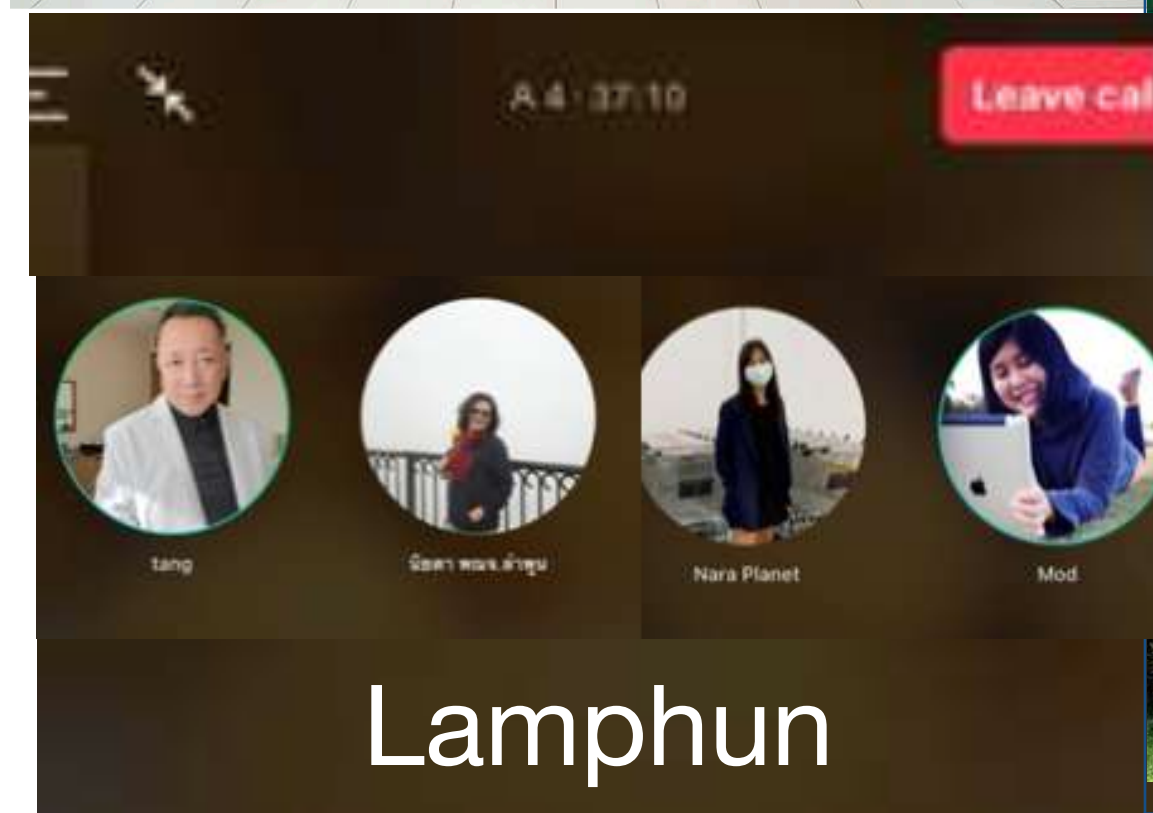
Uttaradit



ทุเรียน



ทุเรียน



Lamphun



ลำไย



ลำไย

สพจ. เชียงราย

Min Tang

สพจ. หนองคาย

theera zhang

Veerawat

Pisanu Rienmahasarn

บจก. ไอซีแอลอินเตอร์เนช...

Jhomphong Tomongk...

DOA/kriangkai supatosa

Galaxy A52s 5G

DOA Umaporn

Galaxy Note20 Ultra 5G

Kanyaporn Plan

เกียรติกำจร อินตานิ (กร...

Orrasa PIMCAS

Aisaree PA

DOAE_Nattachai

โกมินทร์ จันทราภรณ์

jarinya sripratoom

สพจ. มุกดาหาร

載屏

Supattra Lert...

Sorawanpou

Sorawanpou

Panyapiwat Institute o...

DELL

DELL

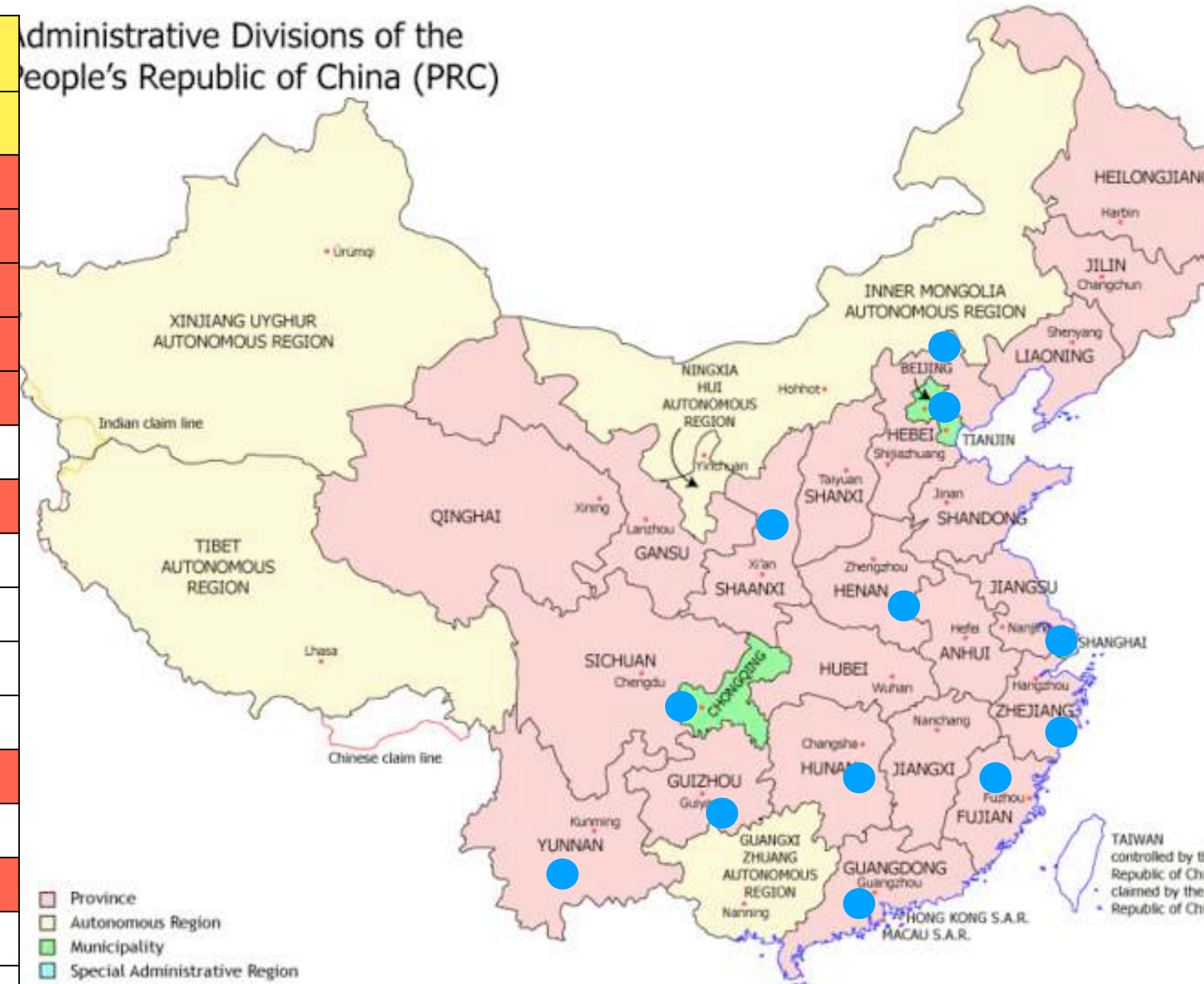
Worapat (KNIT)

Worapat (KNIT)

1. From Data to Insight: Interview & Focused Group in China Covering 12 Provincial Units

Code	Year	Location	Supply Chain Engagement						
			R&D	Farm	Collection	Import	Whole Sale	Retail Online	Retail Offline
A1	2001	Guangdong							
A2	2010	Beijing							
A3	1992	Henan							
A4	2007	Chongqing							
A5	1999	Shanghai							
A6	2016	Fujian							
A7	1997	Hunan							
A8	2020	Shanghai							
A9	2015	Guangdong							
A10	2014	Shannxi							
A11	2014	Fujian							
B1	1997	Zhejiang							
B2	2017	Zhejiang							
B3	2014	Beijing							
B4	2007	Chongqing							
B5	2001	Shanghai							
B6	2018	Guizhou							
B7	1990	Shanghai							
B8	2012	Beijing							
B9	1986	Guangdong							
B10	2019	Hebei							
B11	2018	Zhejiang							
C1	2002	Yunnan							

Year in business ranging from 1986 to 2020



Located in 12 provincial units.

National e-commerce companies (A2, B2)
 Regional focus: A10 for NW, B10 for NE,
 B4/B6/C1 for SW, A6 /A11 for E,
 A3/A7 for Central

录制中



tang



河北小宝哥商贸-刘宝峰



叶臣-张少荣



上海农富--王燕霞Kelly



泰国农业促进厅-翁汉钦



天猫-张婉仪



Gett春莉



金果源-刘刚



上海万果会胡春阳



万果会万果联杨博宇



首杨水果向东



每日优鲜-李爱明



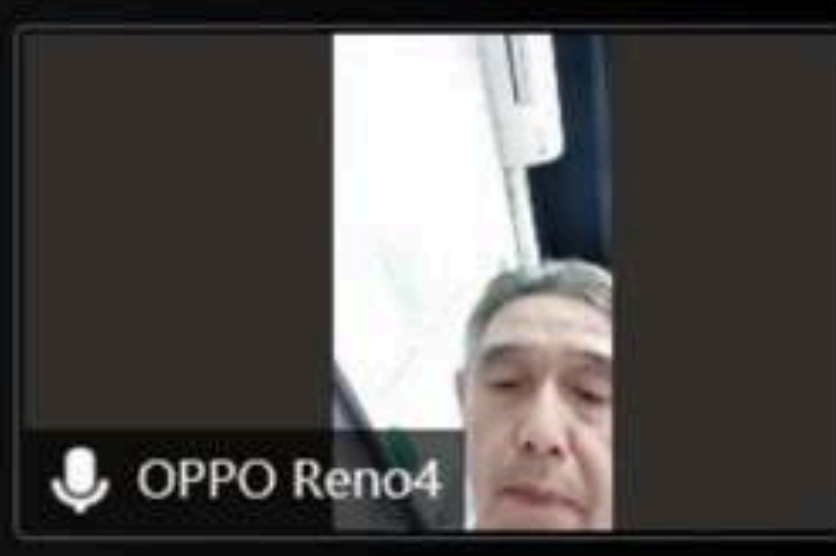
果然丰啊银



中国泰国商会郑芳子



涂建军



OPPO Reno4

1. From Data to Insight: Key Sources of Secondary Information

Source	URL	Note
Thai Customs	https://www.customs.go.th	Thailand Fruit trade data
DOAE	https://opendata.doae.go.th/site/index	Thailand production data
Talaad Thai	https://talaadthai.com	Thailand Fruit Price
Jiang Nan 江南批发市场	http://www.jnmarket.net	China Fruit Price
Produce Report 国际果蔬报道	https://guojiguoshu.com	China Fruit Import News
FreshPlaza: 全球果蔬网	https://www.freshplaza.cn	China Fruit Import News
China Fruit Portal 中国水果门户	https://www.chinafruitportal.com	China Fruit Import News
Asia Fruit 亚洲水果	https://asiafruitchina.net	China Fruit Import News
Taobao/Tmall	https://s.taobao.com https://detail.tmall.com	China E-commerce Platform
JD	https://item.jd.com	China E-commerce Platform
PingDuoDuo	https://www.pinduoduo.com	China E-commerce Platform
Suning	https://product.suning.com	China E-commerce Platform

1. From Data to Insight: Construction of Database

NVIVO

fruity (NVivo R1)(1).nvp (Edited)

Project | NCapture | Files | Dataset | Classifications | Bibliography | Notes | Codebook

Name | BKAB | PCIC | PCFA | PCCA | CTAA

CTAA | CTAR | CTCA | CTDL | CTDM | CTFD | CTMA | CTTD | RYAA | RYCA | RYFC | RYTF | TRAA | TRCA | TRFR | TRIK

40: Chanthaburi: Provincial Agricultural Affairs

Back ground "Implement the policies of the ministry
Durian, Mangosteen, Rambutan, Long Kong are reported to
Other fruits of interest include Kluai khai and Longan"

Kluai khai "Planting area 10,000 rai, used to be 30,000
Price 90B/kg (normally 40-60B/kg for export, 8-12B for domestic)"

Longan "300,000 rai, output 190,000 tons (used to be 400,000 tons)
(normally 1,900 kg/rai)
Longan 70% for export, 30% for processing "

Export "Durian (71%), Mangosteen (64%), Rambutan (8%)
& Myanmar) Kluai khai (40%), "

1 item selected

Data > Files > interview Thailand > East > CTAA



NVIVO

fruity (NVivo R1)(1).nvp (Edited)

新浪 ·

中华日报

Asia Fruit 亚洲水果

Bangkok Post

China Fruit Portal 中国水果门户

food2China

fresh plaza 全球果蔬网

Kasettumkin

Nations

146 Produce Report 国际果蔬

Sohu

xin jing bao

> policy paper China

> policy paper Thailand

> Reference

Research paper

File Classifications

Externals

Home

Edit

Import

Create

Explore

Share

Modules



Memo



Code



Document



Case



Case Classification



File Classification



Static Set

Name

- 18 吨山竹首次经东兴口岸...
- 2017China FVF 主宾国菲...
- 2017 北京国际果蔬展：带...
- 2018 年印尼水果出口大增...
- 2018 泰国新鲜水果出口量...
- 2019 年南方热带水果产量...
- 2019 年台湾水果进出口各...
- 2019 进口水果准入增加 1...
- 2020 巴基斯坦芒果出口超预...
- 2020 年 10 种水果获得输...
- 2021 年南非柑橘产量乐观...
- 2021 年榴莲进口创新高，...
- 2021 年水果进口再破记录...
- 8 月后国内芒果价格持续...
- Thai Fruits Enter Chinese...
- “树上熟”概念趋热，渐成...
- “秘鲁焰芒”甜蜜上架 都乐...
- 三亚椰子卖到 12 元

cooperation o...

competition

4p

CTCA

18 吨山竹首次经东兴口岸入境，价格预计月底开始回落

18吨山竹首次经东兴口岸入境，价格预计月
2021年5月17日 • Sunsa

2021 5月16日，广西防城港东兴口岸首次进
中转后运抵东兴口岸，随后转运至重庆销售
二桥通道，4月29日起开放进口泰国水果。

目前国内的进口山竹主要来自泰国和印尼，
家。今年泰国水果大丰收，总产量预计高达

Produce Report 国际果蔬

Sohu

xin jing bao

- > policy paper China
- > policy paper Thailand
- > Reference

Research paper

File Classifications

Externals

ORGANIZE

Coding

Codes

Cases

Notes

Sets

EXPLORE

Queries

Visualizations

Project

NCapture

Files

Dataset

Classifications

Bibliography

Notes

Codebook

- Name ^
- > competition
- cooperation oppotunity
- > data source
- ✓ Fruit
 - banana
 - > coconut
 - ✓ Durian
 - 4p
 - competition
 - insight
 - market
 - production
 - technocal
 - jackfruit
 - Long Kong
 - > Longan
 - > Mango
 - > Mangosteen
 - Palm Date
 - Pineapple

厄瓜多尔芒果 BKAB PCIC PCFA PCCA

4p

Summary **Reference**

[Files\interview Thailand\](#)
4 references coded, 24.9%

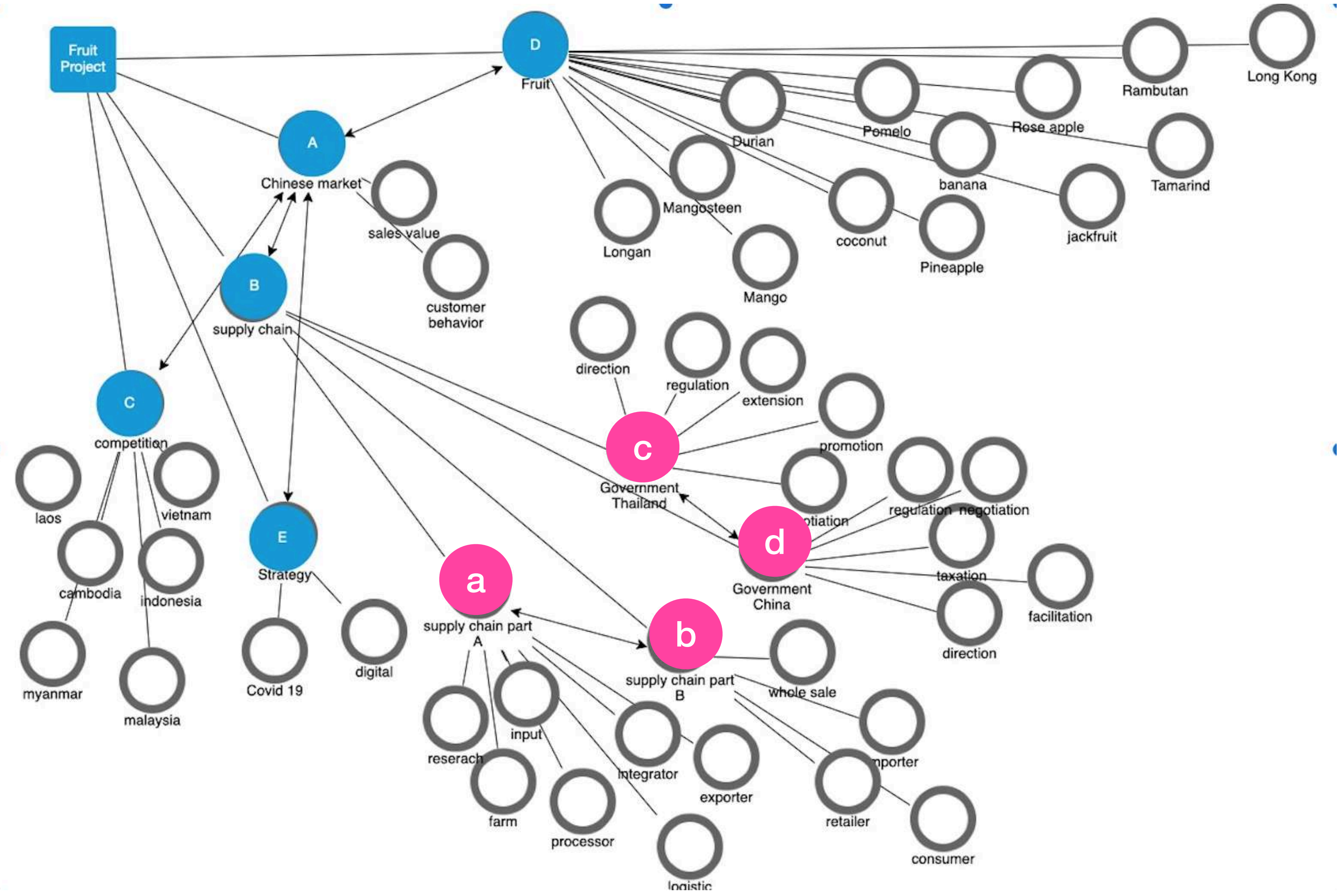
Channel พันธุ์หมอนทอง
Facebook 30% Tops+Collector 70%
Partnership in freeze factory and may sell to ex

พันธุ์หมอนทอง

A1	S	2.5-3.4 kg	800B	235-320B/
A2	M	3.5-4.4 kg	1000B	227-286 B/
A3	L	4.5-5.4kg	1200B	222-267B/
B1	Box 2-3	9.5-10kg	1700B	170-179B/
B2	Box 5-7	17-18kg	2700B	150-159B/

Code Visualization

A	Chinese Market
B	Supply Chain
C	Competition
D	Fruits
E	Strategy



1. From Data to Insight: Report Structure

Structure of the Final Report	
Ch 1	Introduction: Framework & Methodology
Ch 2	Overall Market of Thai Fruits in China
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Ch 4	Source & Market of Selected Thai Fruits
Ch 5/6	Conclusion: The Demand Driven Strategy
Appendix	

Supply Chain of Thai Fruit in China

Components of Supply Chain

R&D	Input For Production	Farming	Collection	Processing	Export	Cross Border Logistics	Importing/ Distribution	Whole sale	Retail/ Delivery/ Support	Consuming
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Government Regulation & Support of Thailand	Government Regulation & Support of China
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Mechanism of Supply Chain

What	Who	How	Observation
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Map of Information on Supply Chain

A	Supply Chain Part 1	I	R&D
		II	Input for Production
		III	Farming
		IV	Collection
		V	Processing
		VI	Export

Export Process

Logistics Mode

Logistics Route

Import Process

General vs. Cross Border Trade

Designated ports

Reg. Orchard

Reg. Packing House

TAS GAP GMP

SPS

Tariff & VAT

Market Access

Protocol

B	Supply Chain Part 2	I	Cross Border Logistics
		II	Importing
		III	Wholesale
		IV	Retail
		V	Consuming

C	Governmen of Thailand	I	Direction
		II	Regulation
		III	Extension
		IV	Promotion
		V	Negotiation

D	Governmen of China	I	Direction
		II	Regulation
		III	Taxation
		IV	Facilitation
		V	Negotiation

A-I	R&D	Input for Production	Farming	Collection	Processing	Export
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	Mechanism	Observations from Field Survey
What	Breeding program for disease tolerant cultivars with good quality and high yield Research on production and management for high quality and stable yield	New cultivars of durian, rambutan, mango, and tamarind have been released For example, Chanthaburi 1-10 (durian)
Who	Horticultural Research Institute (HRI) and Provincial Agricultural R&D Centers under Department of Agriculture (DOA , MOAC). ARDA, TRF, NSTDA, TISTR, Universities, Private companies, and Farmers Learning Centres in every district under Department of Agricultural Extension (DOAE)	Visible activities of Learning Centers Need to be more responsive to market demand Need to be integrated with the innovation of farmers
How	Research with government & private funding Farmers develop own cultivars & practices R&D and learning centers promote new varieties and transfer new technology	Need to follow up the adoption of new cultivars with continuous iteration

General Trade vs. Cross Border Trade

Differences	General Trade	Cross Border Trade
Nature	<p>Conducted by a registered importer In the form of international trade Involving multilevel channels Regulated by general rules of international trade</p>	<p>Conducted by an cross border trade operator In the name of personal use Assisted by a third party agent for Customs clearance Regulated by special rules</p>
Taxation & Cost	<p>Tariff, VAT and Consumption Tax (if relevant) Importer takes risk and would charge a premium Profit margin for various level of channels</p>	<p>No tariff, VAT and Consumption Tax are charged at 70% of the normal level Operator prepares product based on order, less risk Lower profit margin for extra level of channels</p>
Process	<p>Importer buys the product, which is distributed through whole seller and retailers after the customs clearance, (including quarantine), before purchased by the customer</p>	<p>Customer orders the product on cross border platform, the operator prepares the product, in some cases stored in the bonded warehouse in the importing country, a third party agent assists in customs clearance (including quarantine), before the customer takes delivery</p>
Limitation	<p>Unlimited scope in both online offline channels Unlimited amount of purchase</p>	<p>Limited only on-line cross border platform Purchase <¥5000 per transaction <¥26000 per person per year Limited to 1436 items in tariff list (2022)*</p>

* Source: http://www.gov.cn/xinwen/2018-12/01/content_5344980.htm <http://www.ctils.com/articles/4603>

C-V	Direction	Regulation	Extension	Promotion	Negotiation
	Mecahnism			Observations from Field Survey	
What	FTA with China Fruit market access and Sanitary and Phytosanitary (SPS) requirement			More checkpoints for Thai Fruits by land transportation were opened to deal with the problems of traffic jam during the Covid 19 pandemic, due to effective communication between Thailand and China There is grievance of Thai exporters for the recent practice of CCIC, a Chinese company registered in Thailand to conduct pre inspection for Thai fruits entering China. The issue may be resolved by negotiation between ACFS with its counterpart in China	
Who	Department for Trade Negotiation (DTN , MOC) National Bureau of Agricultural Commodity Food Standards (ACFS) Under MOAC				
How	<u>DTN</u> negotiates on FTA Agreement <u>ACFS</u> negotiates with GACC (General Administration of Customs China) on market access and SPS requirement leading to related protocols				

Market Access & Protocols

Permitted List	<p>22 Fruits: fresh/chilled/frozen (-18C) 31 Fruits: Dried as processed, Canned & Juice under food safety regulation</p>
Market Access	<p>Outside 22 fruits, need to apply market access, takes about 2 years JTCSPS set up 2004, meet every 2 years</p>
Protocol 1 & 2	<p>Protocol 1 (2004): 5 fruits information on GAP, GMP Protocol 2 (2015): Rose apple added Now mango, durian, longan, lychee and mangosteen, Rose apple, Banana, Pineapple, Coconut, Jackfruit</p>
Protocol on land transportation through third country	<p>R9 (2009), R3A (2011) From 2020 onwards, any route 4 border checkpoints in China: Mohan, Youyi Guan, Dongxing, Pingxiang 5 border checkpoints in Thailand: Mukdahan, Nakhon Phanom, Nong Khai, Chiang Khong, Chanthaburi Improved arrangement for “seal” to identify origin of Thailand</p>

D-II	Direction	Regulation	Taxation	Facilitation	Negotiation
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	Mecahnism	Observations
What	Market access and SPS requirement	<p>国家市场监督管理总局 <u>SAMR</u> set up 2018 (State Administration for Market Regulation) took over the functions of:</p> <p>1) 国家工商总局 <u>SAIC</u> (State Administration for Industry and Commerce)</p> <p>2) 国家质检总局 <u>AQSIQ</u> (General Administration of Quality Supervision, Inspection and Quarantine)</p> <p>海关总署 <u>GACC</u> (General Administration of Customs of China) Took over from AQSIQ the functions of Quality Supervision, Inspection and Quarantine</p>
Who	GACC and SAMR	
How	<p>Market Aceso: The permission list for fruits import Registered orchard & packing house with GAP or GMP</p> <p>Designated port for fruit import (123 July 2021)</p>	

D-III	Direction	Regulation	Taxation	Facilitation	Negotiation
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	Mechanism	Observations
What	Tariff & VAT	<p>Some Thai exporters consider VAT of China as a NTB as Thailand exempts VAT on import of agricultural products</p> <p>Some Thai exporters complained about different VAT in different provinces in China. This might be explained by different transportation cost in CIF, or different value of cost in CIF as claimed by the shipper which are the base to calculate VAT</p> <p>Cross border e-commerce is popular But there is a quota of ¥5000 per purchase And ¥26000 per person per year (2019)</p>
Who	<p>GACC (General Administration of Customs China)</p>	
How	<p>Customs Duty: 0% for Fruits from ASEAN Under the CAFTA</p> <p>VAT for Imported Fruit: 13%, 2017: 11%, 2018: 10%, 2019: 9% VAT = (CIF+Tariff) x VAT rate</p> <p>VAT for cross border e-commerce 70% of VAT of General Trade</p>	

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Source & Market of Selected Thai Fruits

A	Heavy Weight	I	Durian
		II	Mangosteen
		III	Longan
B	Rising Star	I	Mango
		II	Aromatic Coconut
		III	Pomelo

i. Source in Thailand	
a	Variety
b	Production
c	Cost & Price
d	Export
e	Observation

ii. Market in China	
a	Market
b	Competition
c	4P Mix
d	Consumer Insights
e	Observation

Agenda


1	Our Journey	From Data to Insight		
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Orchard of Tropical Fruits in the World: Thai Fruits with Geographic Indication












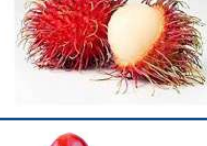












Products with a specific geographical origin, possessing qualities/reputation due to that origin

Thailand: 21 kinds of fruits or processed fruits, with 62 varieties, in 25 provinces

Fruit (21)	Variety with GI (62)	Thai Name	Province (25)	Picture
Banana	Kamphaeng Phet Banana	กล้วยไข่กำแพงเพชร	Kamphaeng Phet	
	Phitsanulok Bang Krathum Dried Banana	กล้วยตากบางกระทุ่ม พิษณุโลก	Phitsanulok	
	Chumphon Ladyfinger Banana	กล้วยเล็บมือนางชุมพร	Chumphon	
	Gluay Hin Bannang Sata	กล้วยหินบันนังสตา	Yala	
	Hom Thong Pa Thum Banana	กล้วยหอมทองปทุม	Pathum Thani	
Champedak	Satun Champedak	จำปาดะสตูล	Satun	
Coconut	Ratchaburi Aromatic Coconut	มะพร้าวน้ำหอมราชบุรี	Ratchaburi	
	Banphaeo Aromatic Coconut	มะพร้าวน้ำหอมบ้านแพ้ว	Samut Sakhon	
	Thap Sakae Coconut	มะพร้าวทับสะแก	Prachuap	
	Bang Khla Aromatic Coconut	มะพร้าวน้ำหอมบางคล้า	Chachoengsao	
	Koh Phangan Coconut	มะพร้าวเกาะพะงัน	Surat Thani	

Permitted Ones in China: The Permission List of Thai Fruits

No.	Name	Chinese	Thai	Picture	No.	Name	Chinese	Thai	Illustration
1	Banana	香蕉	กล้วย		12	Orange	橙	ส้ม	
2	Carambola	杨桃	มะเฟือง		13	Papaya	番木瓜	มะละกอ	
3	Coconut	椰子	มะพร้าว		14	Passion fruit	西番莲(百香果)	เสาวรส	
4	Durian	榴莲	ทุเรียน		15	Pineapple	菠萝	สับปะรด	
5	Guava	番石榴	ฝรั่ง		16	Pomelo	柚	ส้มโอ	
6	Jackfruit	菠萝蜜	ขนุน		17	Rambutan	红毛丹	เงาะ	
7	Lychee	荔枝	ลิ้นจี่		18	Rose apple	莲雾	ชมพู่สด	
8	Long kong	椰色果	ลองกอง		19	Sapodilla	人心果	ละมุด	
9	Longan	龙眼	ลำไย		20	Sugar apple	番荔枝	น้อยหน่า	
10	Mango	芒果	มะม่วง		21	Tamarind	罗望子	มะขาม	
11	Mangosteen	山竹	มังคุด		22	Tangerine	柑橘	ส้มจีน	

Source: GACC 2021 Dec 28:

Export of Thai Fruits to China (Value)

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021			
		Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	share%
ทุเรียน	Durian	13,179	79.4	1	26,341	99.9	1	47,798	81.5	1	98,332	105.7	1	70.6
ลำไย	Longan	4,406	-16.1	2	9,696	120	3	12,661	31	2	18,024	42	2	12.9
มังคุด	Mangosteen	3,261	62.1	3	11,752	260.4	2	11,576	-1.5	3	15,966	37.9	3	11.5
มะพร้าวอ่อน	Coconut Y	1,313	58.9	4	1,891	44.1	4	2,554	35.1	4	5,131	100.9	4	3.7
ส้มโอ	Pomelo	319	2.1	6	244	-23.5	7	314	28.5	6	860	173.9	5	0.6
ขนุนสด	Jackfruit	308	22.4	7	353	14.4	6	338	-4.3	5	288	-14.6	6	0.2
กล้วยสด	Banana	520	52.8	5	486	-6.4	5	262	-46.2	7	216	-17.4	7	0.2
สับปะรด	Pineapple	233	104.0	8	226	-2.6	8	128	-43.6	9	207	61.9	8	0.1
มะม่วง	Mango	144	-1.7	9	172	19.1	9	205	19.2	8	91	-55.8	9	0.1
มะขาม	Tamarind	112	221.0	10	61	-45.7	10	42	-30.7	10	56	31.3	10	0.0
เงาะ	Rambutan	0.5	-72.6	13	44	7,906	11	14	-68.6	11	17	21.9	11	0.0
ลิ้นจี่	Lychees	19	-81.7	11	21	11.5	12	7	-67.5	12	13	96.5	12	0.0
ชมพู่สด	Rose apple	0.9	-73.3	12	1.3	43.0	13	0.4	-72.8	13	0.6	55.9	13	0.0
ลองกอง	Long kong	0.4	-69.2	14	0.2	-57	14	0.0	-100	14	0.5	-	14	0.0
	Total	23,816			51,289			75,899			139,203			100.0

Export of Thai Fruits to China (Volume)

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021		
		Ton	△%	Rank	Ton	△%	Rank	Ton	△%	Rank	Ton	△%	Rank
กล้วยสด	Banana	26,655	11.2	8	18,182	-31.8	12	11,119	-38.8	8	8,349	-24.9	13
มะพร้าวอ่อน	Coconut Y	54,063	47.2	6	96,700	78.9	5	122,689	26.9	1	226,621	84.7	4
ทุเรียน	Durian	199,986	47.4	5	375,333	87.7	4	444,411	18.4	3	779,880	75.5	5
ขนุนสด	Jackfruit	21,850	25.7	7	23,601	8.0	7	21,090	-10.6	5	18,252	-13.5	11
ลำไย	Longan	133,191	-16.3	10	281,320	111.2	3	343,304	22.0	2	476,025	38.7	7
ลองกอง	Longkong	27	-57.1	11	2	-92.2	14	0	-100	14	23	-	1
ลิ้นจี่	Lychees	1,176	-70.8	12	1,093	-7.1	8	457	-58.2	11	350	-23.3	12
มะม่วง	Mango	8,914	87.0	3	12,024	34.9	6	10,028	-16.6	6	4,941	-50.7	14
มังคุด	Mangosteen	80,816	54.8	4	290,735	259.8	2	217,938	-25.0	7	231,689	6.3	10
สับปะรด	Pineapple	14,790	112.1	2	13,696	-7.4	9	8,307	-39.3	9	10,430	25.6	9
ส้มโอ	Pomelo	9,795	3.8	9	7,075	-27.8	11	7,533	6.5	4	25,153	233.9	2
เงาะ	Rambutan	1	-98.5	14	1,390	99,769	1	248	-82.1	13	355	43.0	6
ชมพูสด	Rose apple	26.0	-85.5	13	16.9	-35.0	13	5.2	-69.5	12	11.0	113.6	3
มะขาม	Tamarind	5,492	178.4	1	4,065	-26.0	10	2,139	-47.4	10	2,794	30.6	8

Source: Custom of Thailand

China's Share in Thai Fruits Export to the World (Volume)

รายการผลไม้ 14	Fruits 14	2018		2019		2020		2021	
		World (ton)	%	World (ton)	%	World (ton)	%	World (ton)	%
กล้วยสด	Banana	28,557	93	18,607	98	11,587	96	8,530	98
มะพร้าวอ่อน	Coconut Y	84,439	64	131,355	74	152,831	80	260,871	87
ทุเรียน	Durian	486,435	41	655,395	57	620,893	72	875,097	72
ขนุนสด	Jackfruit	44,972	49	45,319	52	49,006	43	35,850	51
ลองกอง	Long kong	1,447	1.8	1,408	0.1	1,712	0.0	1,452	1.6
ลำไย	Longan	551,454	24	583,297	48	464,824	74	633,131	75
ลิ้นจี่	Lychees	2,207	53	1,338	82	1,184	39	877	40
มะม่วง	Mango	63,199	14	58,509	21	87,260	11	113,806	4
มังคุด	Mangosteen	177,406	46	409,028	71	291,951	75	256,266	90
สับปะรด	Pineapple	17,517	84	15,468	89	9,581	87	12,085	86
ส้มโอ	Pomelo	26,412	37	23,922	30	20,307	37	30,599	82
เงาะ	Rambutan	7,983	0.02	15,912	8.74	11,796	2.11	11,828	3.00
ชมพู่มะนาว	Rose apple	570	4.6	432	3.9	654	0.8	1,767	0.6
มะขาม	Tamarind	30,557	18	25,130	16	25,554	8	24,198	12

Observations: Heavy Weights

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021			
		Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	share%
ทุเรียน	Durian	13,179	79.4	1	26,341	99.9	1	47,798	81.5	1	98,332	105.7	1	70.6
ลำไย	Longan	4,406	-16.1	2	9,696	120	3	12,661	31	2	18,024	42	2	12.9
มังคุด	Mangosteen	3,261	62.1	3	11,752	260.4	2	11,576	-1.5	3	15,966	37.9	3	11.5
	Heavy Weight													95.0
	Total	23,816			51,289			75,899			139,203			100.0

The top 3 fruits: Durian Longan and Mangosteen account for 95% of the value of Thai fruit export to China in 2021

Observations: Rising Stars

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021		
		Ton	△%	Rank	Ton	△%	Rank	Ton	△%	Rank	Ton	△%	Rank
มะพร้าวอ่อน	Coconut Y	54,063	47.2	6	96,700	78.9	5	122,689	26.9	1	226,621	84.7	4
มะม่วง	Mango	8,914	87.0	3	12,024	34.9	6	10,028	-16.6	6	4,941	-50.7	14
ส้มโอ	Pomelo	9,795	3.8	9	7,075	-27.8	11	7,533	6.5	4	25,153	233.9	2

Young Coconut and Pomelo saw rapid growth in recent years
 Export volume to China of Young Coconut increased from
 Around 50,000 tons in 2018 to around 250,000 tons in 2021

Export volume to China of Pomelo more than doubled in 2021
 Increased from around 10,000 tons in 2018 to around 25,000 tons in 2021

Export of Mango did not do well in 2021
 Judging from the quality of Nam Dokmai and its good performance in Japan & Korea
 It is a potential rising star in comparison with other Thai fruits

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021			
		Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	share%
ทุเรียน	Durian	13,179	79.4	1	26,341	99.9	1	47,798	81.5	1	98,332	105.7	1	70.6
ลำไย	Longan	4,406	-16.1	2	9,696	120	3	12,661	31	2	18,024	42	2	12.9
มังคุด	Mangosteen	3,261	62.1	3	11,752	260.4	2	11,576	-1.5	3	15,966	37.9	3	11.5
มะพร้าวอ่อน	Coconut Y	1,313	58.9	4	1,891	44.1	4	2,554	35.1	4	5,131	100.9	4	3.7
ส้มโอ	Pomelo	319	2.1	6	244	-23.5	7	314	28.5	6	860	173.9	5	0.6
มะม่วง	Mango	144	-1.7	9	172	19.1	9	205	19.2	8	91	-55.8	9	0.1
	6 Fruits													99.4
	Total	23,816			51,289			75,899			139,203			100.0

รายการผลไม้ 14	Fruits 14	2018		2019		2020		2021	
		World (ton)	%	World (ton)	%	World (ton)	%	World (ton)	%
มะพร้าวอ่อน	Coconut Y	84,439	64	131,355	74	152,831	80	260,871	87
ทุเรียน	Durian	486,435	41	655,395	57	620,893	72	875,097	72
ลำไย	Longan	551,454	24	583,297	48	464,824	74	633,131	75
มะม่วง	Mango	63,199	14	58,509	21	87,260	11	113,806	4
มังคุด	Mangosteen	177,406	46	409,028	71	291,951	75	256,266	90
ส้มโอ	Pomelo	26,412	37	23,922	30	20,307	37	30,599	82

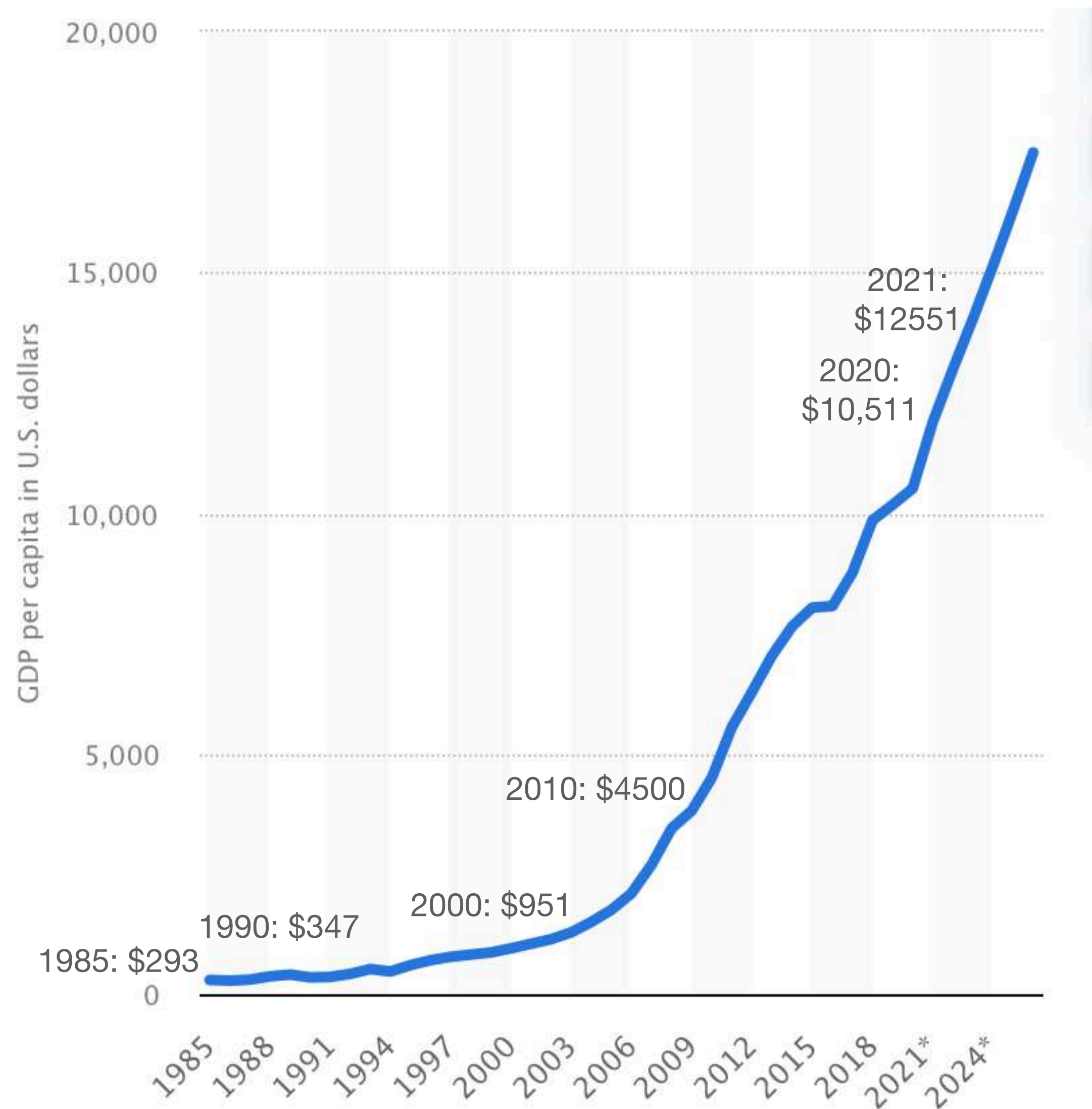
The 6 fruits of Heavy Weight & Rising Star account for 99.4% of the value of Thai fruit export to China in 2021

China is also the dominant market of Thailand for Durian (72%), Mangosteen (90%), Longan (75%), Young Coconut (87%) and Pomelo (82%)

Agenda

1	Our Journey	From Data to Insight		
2	Our Story	A	Heavy Weights & Rising Stars	
		B	The New Game	Life Style & Segment
				Intensified Competitions
				Supply Chain Integration
				Logistics & ZCP
C	Market Observations: Durian			
3	Our Suggestions	SWOT & Strategies		

B1: Life Style & Segment



<https://www.statista.com/statistics/263775/gross-domestic-product-gdp-per-capita-in-china/>

Urban Disposable Income 2020: ¥/person/year		Rural Disposable Income 2020: ¥/person/year	
Top 20%	91,683	Top 20%	36,049
High Mid 20%	52,907	High Mid 20%	19,732
Mid 20%	37,876	Mid 20%	13,984
Lower mid 20%	26,784	Lower mid 20%	9,754
Bottom 20%	15,549	Bottom 20%	4,263

Statistical Yearbook of China 2020. <https://www.allhot.net/finance/157247>

Disposable Income 2021 Average	2021 Average Urban	2021 Average Rural
¥35,128	¥47,412	¥18,931

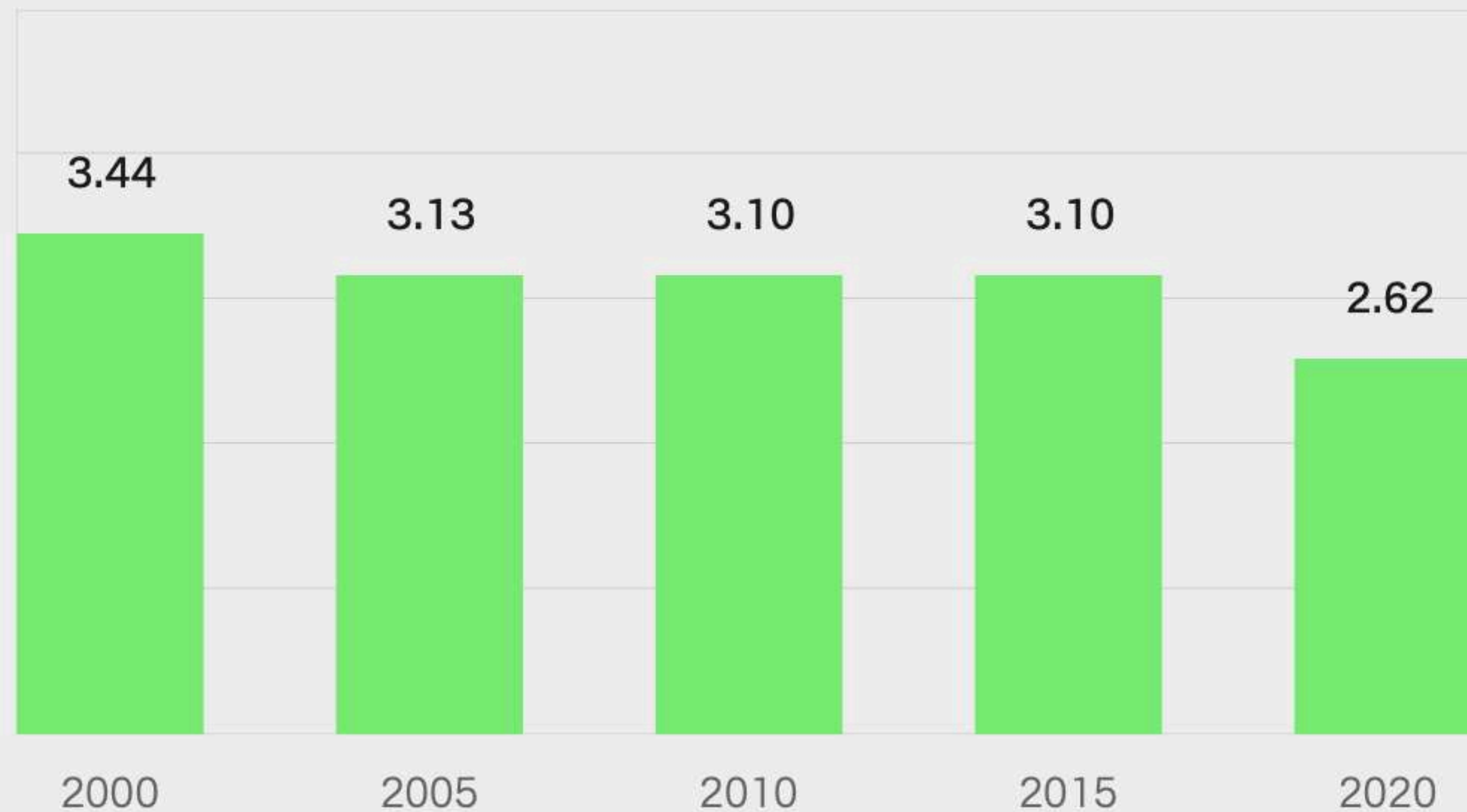
Permanent Urban Population 2021	Rural Population 2021
64.72%	35.28%

http://www.stats.gov.cn/tjsj/sjjd/202201/t20220118_1826538.html

Nuclear Family & Aging Society

Average People per Family in China

中国家庭户均人数 (人)

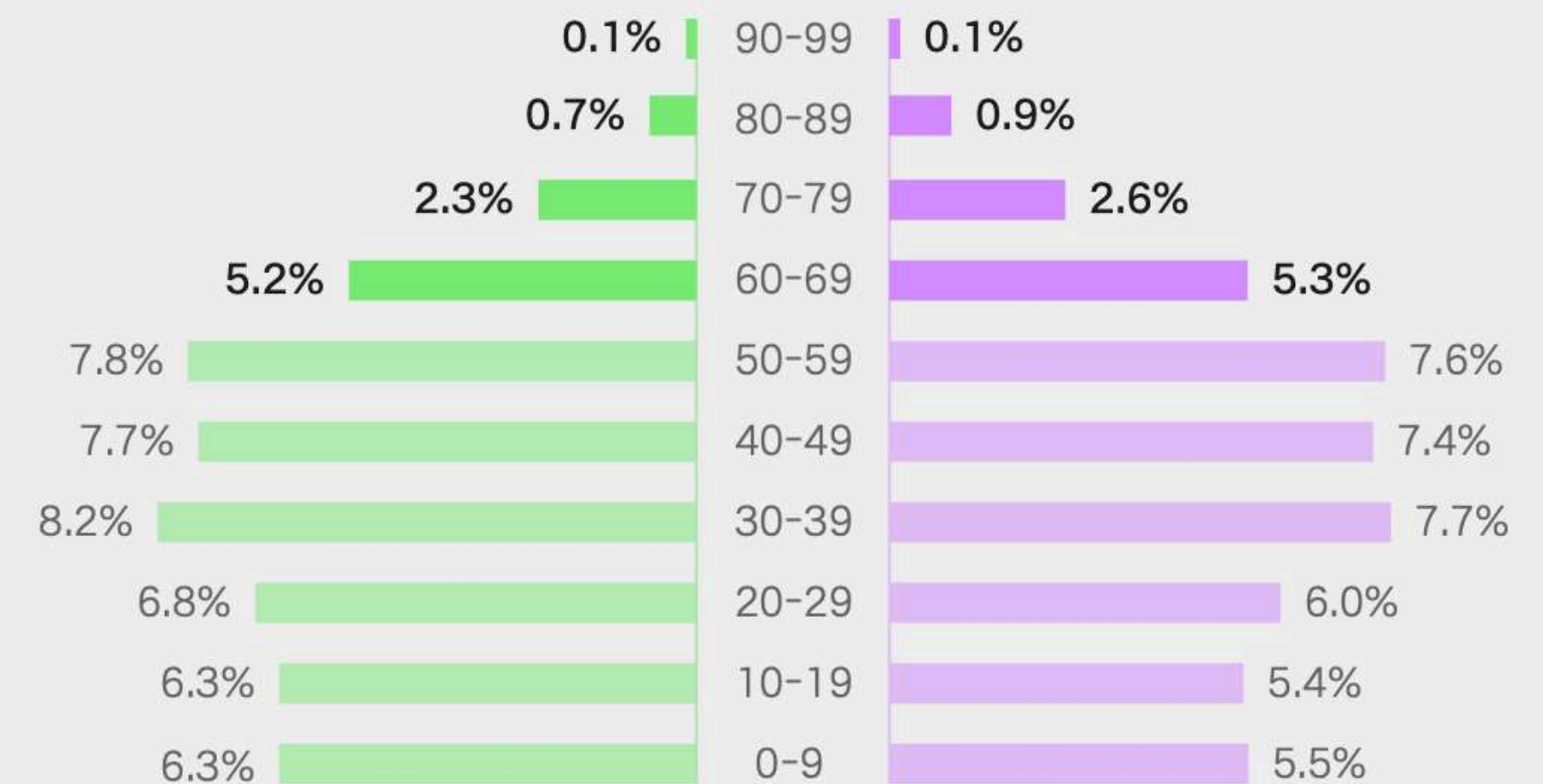


<http://download.people.com.cn/jingji/thireteen16405740281.pdf>

Share of Population by Age Group 2020

人口年龄分布图

男性 女性



① 图中为2020年数据

资料来源: 国家统计局人口普查数据, PopulationPyramid.net; 罗兰贝格分析

<http://download.people.com.cn/jingji/thireteen16405740281.pdf>

New Life Style

Driver		New Behaviour	Marketing Implication
Higher Income	1	Broader perspective and more choices	Manage competition
	2	Buy larger quantity	Capture bigger market
	3	Buy higher quality	Manage quality, Marketing message
	4	Demand for convenience	Packaging and delivery speed
	5	Demand for service	Onsite/online service, after sale service
	6	Exotic & authentic	New variety, GI
	7	Self realization & emotion	Brand story & social value
Online Offline Merging	8	Easy access	Wider & deep reach of channels
	9	Substitute of oversea trip	Capture bigger market
	10	Bigger role of tech savvy young people	Technology & message for young people
	11	Embrace celebrity	Social media promotion
	12	Produce and search for information	Content management & user involvement
	13	Shrewd buyer	Value
	14	Group buying in community	Utilizing the new channels
Health Concern	15	Longing for Acceptance in social network	Opinion leader in the target circle
	16	Nutrition & function	Product development & promotion message
	17	Organic & safety	Certificate & traceability
	18	Low sugar	Low sugar contents in processed fruits
Social Demographic	19	Light meal	Freshly squeezed juice & frozen fruit flesh
	20	Nuclear family	Small portion of fruits for small family
	21	Aging society	Health functions for aged people

Market Size & Segment

Family Income 2020. ¥ 直		% of population		% of family		Segment	Market Size		
		2000	2020	2020	2030 E				
High Income	wealthy (>345,000)	1	<1	10	3	20	8	Connoisseur	The customers of Thai fruits are estimated to include half of the middle class according to the definition of NSB of China:
Mid-High Income	mass wealthy (230,000-345,000)	1	<1	5	3	31	26	Frequent User	
	affluent (160,000-230,000)	1	<1	29	23	29	30		
Mid-Low Income	well-off (85,000-160,000)	3	1	45	48	15	23	New Entry	Which is about 200 mil people (15% of population) 70 mil families
	neo well-off (55,000-85,000)	6	4	7	12	3	6		
Low Income	subsistence (<55,000)	88	94	4	10	1	7	Future Potential	

注：因为四舍五入，数字可能有差异。
资料来源：麦肯锡全球研究院 (MGI) 洞察中国宏观模型；麦肯锡全球研究院分析

https://www.ndrc.gov.cn/fggz/jyysr/jysrsbxf/202109/t20210924_1297381.html?code=&state=123

Segment	Family Income ¥/Year	Estimated Size mil	Typical Behaviour	Marketing Focus
New Entry	55,000-160,000	108	Start trial of Thai fruits following words of mouth recommendation, or after experiencing Thai fruits in oversea travel	Wider & deep reach of channels Create awareness and exposure especially in offline point of sales. Nurture their consumption habits
Frequent user	160,001-345000	71	Purchase at least 2 times per month during the fruit season Demand for convenience Shop for value: comparison competing brands.	Manage competition in value Packaging and delivery speed Content management & user involvement to provide sufficient information
Connoisseur	>345,001	20	Happy to pay a premium for quality & safety Look for speciality, exoticness and authenticity Higher-end shopping mall and specialized online store	Manage quality, Marketing message New variety, GI Certificate and brands in developed markets.

B2: Intensified Competitions: Permission List For Selected Countries

	Thailand	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Taiwan	Vietnam
1	Banana						F&F		
2	Carambola								
3	Coconut								
4	Durian (F&F)				Frozen				
5	Guava								
6	Jackfruit								
7	Litchi								
8	Long kong								
9	Longan								
10	Mango						F&F		
11	Mangosteen								
12	Orange								
13	Papaya								
14	Passion fruit								
15	Pineapple						F&F		
16	Pomelo								
17	Rambutan								
18	Rose apple								
19	Sapodilla								
20	Sugar apple								
21	Tamarind								
22	Tangerine								

Major Current & Potential Competitors

Fro: Frozen, **FF:** Fresh & Frozen

	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Taiwan	Vietnam
<u>Current</u> In the Permission List of China	Banana Mango	Banana Longan Mangosteen	Banana Passion fruit Pomelo Tangerine	Coconut Durian (Fro) Litchi Longan Mangosteen Papaya Pineapple Rambutan	Banana Litchi Longan Mango Mangosteen Rambutan	Banana(FF) Coconut Mango(FF) Papaya Pineapple(FF)	Banana Carambola Coconut Guava Mango Orange Papaya Pomelo Tangerine	Banana Jackfruit Litchi Longan Mango Mangosteen Rambutan
<u>Potential</u> Possible entry in the Permission List of China	Longan Durian Coconut	Pineapple Mango Durian	Durian Longan Jackfruit	Jackfruit	-	Mangosteen Durian	Rose apple* Sugar apple*	Durian Pineapple Pomelo Rose apple Sugar apple

The details of competition of the six fruits are discussed in Chapter 4

*Temporary Stopped in 2021

B3: Supply Chain Integration

Code	Year	Location	Supply Chain Engagement						
			R&D	Farm	Collection	Import	Whole Sale	Retail Online	Retail Offline
A1	2001	Guangdong							
A2	2010	Beijing							
A3	1992	Henan							
A4	2007	Chongqing							
A5	1999	Shanghai							
A6	2016	Fujian							
A7	1997	Hunan							
A8	2020	Shanghai							
A9	2015	Guangdong							
A10	2014	Shannxi							
A11	2014	Fujian							
B1	1997	Zhejiang							
B2	2017	Zhejiang							
B3	2014	Beijing							
B4	2007	Chongqing							
B5	2001	Shanghai							
B6	2018	Guizhou							
B7	1990	Shanghai							
B8	2012	Beijing							
B9	1986	Guangdong							
B10	2019	Hebei							
B11	2018	Zhejiang							
C1	2002	Yunnan							

Integration	The Future of Supply Chain of Fruit
Information	Quick feedback from Consumer demand to Production & Packaging
Initiation	Initiate reactions in response (or in advance) With supporting SMEs, research units, & farms
Intercoonection	Seamless linkage in Different steps
Inspection	Set up and implement standard & trace back system
Investment	Reach economy of scale through channel deepening

Pagoda Durian annual purchase ¥700 mil

Channel Deepening

Ranks of Annual Disposable Income 2021

¥/person/year

Administrative Divisions of the People's Republic of China (PRC)



1	Shanghai
2	Beijing
3	Zhejiang
4	Jiangsu
5	Tianjin
6	Guangdong
7	Fujian
8	Shandong
9	Liaoning
10	Inner Mongolia
11	Chongqing
12	Hunan
13	Anhui
14	Hebei
15	Jiangxi
16	Hainan
17	Hebei
18	Sichuan
19	Shanxi
20	Ningxia
21	Jilin
22	Shanxi
23	Heilongjiang
24	Henan
25	Guangxi
26	Xinjiang
27	Qinghai
28	Yunnan
29	Tibet
30	Guizhou
31	Gansu



Deepening in to Third Tiers and Beyond

First Tier 4	Beijing, Shanghai, Guangzhou, Shenzhen
Second Tier 31	Tianjin、Shijiazhuang、Taiyuan、Huhehaote、Shenyang、Dalian、Changchun、Haerbin、Nanjing、Hangzhou、Ningbo、Hefei、Fuzhou、Xiamen、Nanchang、Jinan、Qindao、Zhengzhou、Wuhan、Changsha、Nanning、Haikou、Chongqing、Chengdu、Guiyang、Kunming、Xian、Lanzhou、Xining、Yinchuan、Urumqi
Third Tier 35	Tangshan、Qinhuangdao、Baotou、Dandong、Jinzhou、Jilin、Mudanjiang、Wuxi、Xuzhou、Yangzhou、Wenzhou、Jinhua、Benbu、Anqing、Quanzhou、Jiujiang、Ganzhou、Yantai、Jining、luoyang、Pingdingshan、Yichang、Xiangyang、Yueyang、Changde、Shaoguan、Zhanjiang、Huizhou、Guilin、Beihai、Sanya、Luzhou、Nancong、Zhunyi、Dali

First Tier	4
Neo First Tier	15
Second Tier	30
Third Tier	70
Forth Tier	90
Fifth Tier	128
Total	337

2021 Ranking of Cities Criteria	
Business Concentration 0.19	Big Brand 0.32 Core Business District CBD 0.34 Commercial Facility 0.34
Connectivity 0.22	Transportation Infrastructure 0.32 Linkage 0.28 Logistic 0.24 Business Centrality 0.16
Activeness 0.20	Consumption Activeness 0.39 Social Activeness 0.28 Nightlife Activeness 0.33
Life Style 0.16	Leisure Facilities 0.47 Leisure Consumptions 0.25 Leisure Richness 0.28
Future Potential 0.23	Innovation 0.22 Talent 0.29 Purchase Power 0.17 City Scale 0.32

70 cities in classification by National Statistics Bureau
http://www.gov.cn/shuju/2021-07/15/content_5625105.htm

337 cities in 2021 at prefecture-level in China are divided into 5 tiers by datayicai.com
<https://baike.baidu.com/item/中国城市新分级名单/12702007>
<https://zhuanlan.zhihu.com/p/351440019>

Emerging Integration in China and Thailand



Orchard of Houjiu 洪九 in Thailand



Chain Store of of Pagoda 百果园 in China



Supermarket of Lotus Plus in China

水果业态连锁品牌开创者

百果园
20th
二十芳华·致敬平凡

- 200+ 全球水果基地
- 5000+ 门店
- 100+ 城市覆盖
- 8000万+ 会员信赖
- 26个 配送仓库

招牌 A级 B级 C级

看得见的差异
针对水果存在巨大差异，百果园建立起水果果品标准体系，量化成严格的选品标准体系

看得见的好吃
四度一味一安全的品控标准
好吃是检验水果的重要标准

看得见的安心
五大标准体系 全程监控品质
历经200多项农残检测，检测的果子会获得可追溯性的体检报告

B4: Logistics & ZCP: Context of Covid-19 Pandemic

Context	Impacts
Negative Supply-side	Shut down of planting & processing operation, Disruption of logistic: less container higher freight, slow border pass through Decreasing number of foreign labor
Negative Demand-side	Regression to basic & functional consumption Inconvenient for Chinese importer visiting Thailand
Positive Supply-side	Digital transformation: Smart Farm & Smart Logistic Demand driven supply chain with Big Data and AI
Positive Demand-side	Expansion of online & direct to home sales Opportunity from expectation and behavior of “new consumers” Less international travel increases the demand for imported goods

B4: Logistics & ZCP: Zero Covid Policy in China

Area	Related Policy	Impact
Logistic Breakdown	<p>RNA test for Covid 19 at the port for driver, truck & package Disinfection with spray</p> <p>Dongxing port closed from Dec 21 2021 -Jan 10 2022 Pingxiang Port reopened on Jan 4 2022 In response to traffic jam in Dongxing</p>	<p>Traffic jam due to slow pass through (Around 100 containers/day, While peak season will be 1,000) Waiting time increase from 15 min to several hours)</p>
Rejection of Contaminated Fruit	<p>Transportation firm with contamination is prohibited from entry for 10-15 days at 1st incidence. No entry if there is contamination for the 2nd time</p>	<p>Only a few contamination cases reported in retail outlet (Jiangxi, Guizhou, Zhejiang)</p> <p>No rejection of Thai fruits at the port, no prohibition against Thai packing house or trucks, due to Covid 19</p>

Zero Covid Policy) in China: Solution

Area	Solution	
	Negotiation with China	Management in Thailand
Logistic Breakdown	<p>Speed up the preparation for receiving Thai Fruit through Lao-China railway</p> <p>Speed up the Customs procedure (24 hour service, sampling)</p>	<p>Infrastructure (new bridge, warehouse) For Thai fruits through Lao-China railway To 354 containers/day</p>
Rejection of Contaminated Fruit	<p>No rejection of fruits from all packing houses or truck firm specific</p> <p>Definition of contamination: Dead vs. life virus</p>	<p>GMP/GAP plus with requirement about Covid 19: disinfection & vaccination In line with the Chinese requirement</p> <p>Test of Covid 19 on fruits</p>

B4: Logistics & ZCP: Logistic Mode & Route

Land	<p>R9: Mukdahan-Lao-Vietnam-Youyiguan: 1090 km 18h53m</p> <p>R3A: Chiang Khong-Lao-Mohan: 247 km 5h34m (another 10 h to Kunming) (Bangkok-Chiang Khong-Lao-Mohan-Kunming 1863km 1day)</p> <p>R12: Nakhon Phanom-Lao-Vietnam-Youyiguan: 823 km 14h46m (Bangkok-Nakhon Phanom-Lao-Vietnam-Youyiguan-Nanning 1383 km))</p> <p>Nakhon Phanom-Lao-Vietnam-Dongxing: 884 km 16h25m</p>
Rail	<p>Cold storage train through Pingxiang rail</p> <p>Kunming to Vientiane line, through Mohen rail, in operation in Dec 3 2021 runs at 160km/hour, 1 day trip in Cold Storage Train, cost 30-50% less highway</p>
Sea/River	<p>Sea: Lat Krabang 4-5 day to Guangzhou 4-6 hours to Jiangnan Market Lat Krabang 7 day to Shanghai, Ningbo, Waigaoqiao 3 hours to Shanghai City</p> <p>Land 2-3 days, ship 7 days, Normally by land cost 2 time by sea, Now cost increased by 3 times due to Covid 19</p> <p>Mekong River: 5-6 days (navigation only 1/2 year)</p>
Air	<p>Chartered plane one day on air, 5 days from tree to table Normally by air cost 7 times by land</p>

Laos-China Railway

Part of six international economic corridors under China's Belt and Road Initiative (BRI)



Lane Xang bullet train at the Vientiane Railway



Dec 3 2021	Start Operation
Dec 4 2021	First Cold Storage 33 containers
Jan 29 2022	First Thai rice arrived Mohan
Mar 2022	Thai Fruits to China*
Time & Cost	Vientiane to Boten 3 hours Vientiane to Chongqing 3 days, 4 times faster than sea Cost 30%-50% less than highway

<https://finance.sina.com.cn/money/future/agri/2022-02-07/doc-ikyamrmz9405798>
<https://m.guojiguoshu.com/article/7152>

Tznews Mar 14, 2022

New International Land-Sea Trade Corridor

<p>New Areas In China</p>	<p>Guangxi, Yunnan, Guizhou, Sichuan, Chongqing, Gansu, Qinghai, Xinjiang, Shannxi</p>
<p>Land</p>	<p>Link Chongqing with Mohan directly China-Laos railway Bangkok-Kunming highway China Railway Express in Chongqing & Lanzhou</p>
<p>Sea</p>	<p>Laem Chabang-Beihai/Fangchenggang Laem Chabang- Hong kong/Shenzhen/Guangzhou</p>

NDRC 2019 General Plan for New Western Land-Sea Corridor

<https://www.ndrc.gov.cn/fggz/zcssfz/zcgh/201908/W020190910670754538276.pdf>

NDRC 2021 Implementation of Plan for New Western Land-Sea Corridor in 14th FYP

https://www.ndrc.gov.cn/xwdt/tzgg/202109/t20210902_1295953.html?code=&state=123



Protocol on land transportation through third country

R9 (2009), R3A (2011) 2020, any route, 2021 designated ports:
10 border checkpoints in China: Mohan 磨憨, Youyi Guan 友谊关, Dongxing 东兴, Pingxiang rail 凭祥铁路, Longbang 龙邦, Shuikou 水口, Hekou, 河口 Hekou rail 河口铁路, Tianbao 天保, Mohan rail 磨憨铁路
6 border checkpoints in Thailand: Chiang Khong 清孔, Mukdahan 穆达汉, Nakhon Phanom 那空帕农, Bueng Kan 布恩坎, Nong Khai 廊开, Banpuggard (Chanthaburi) 班帕格

R3A: Mohan

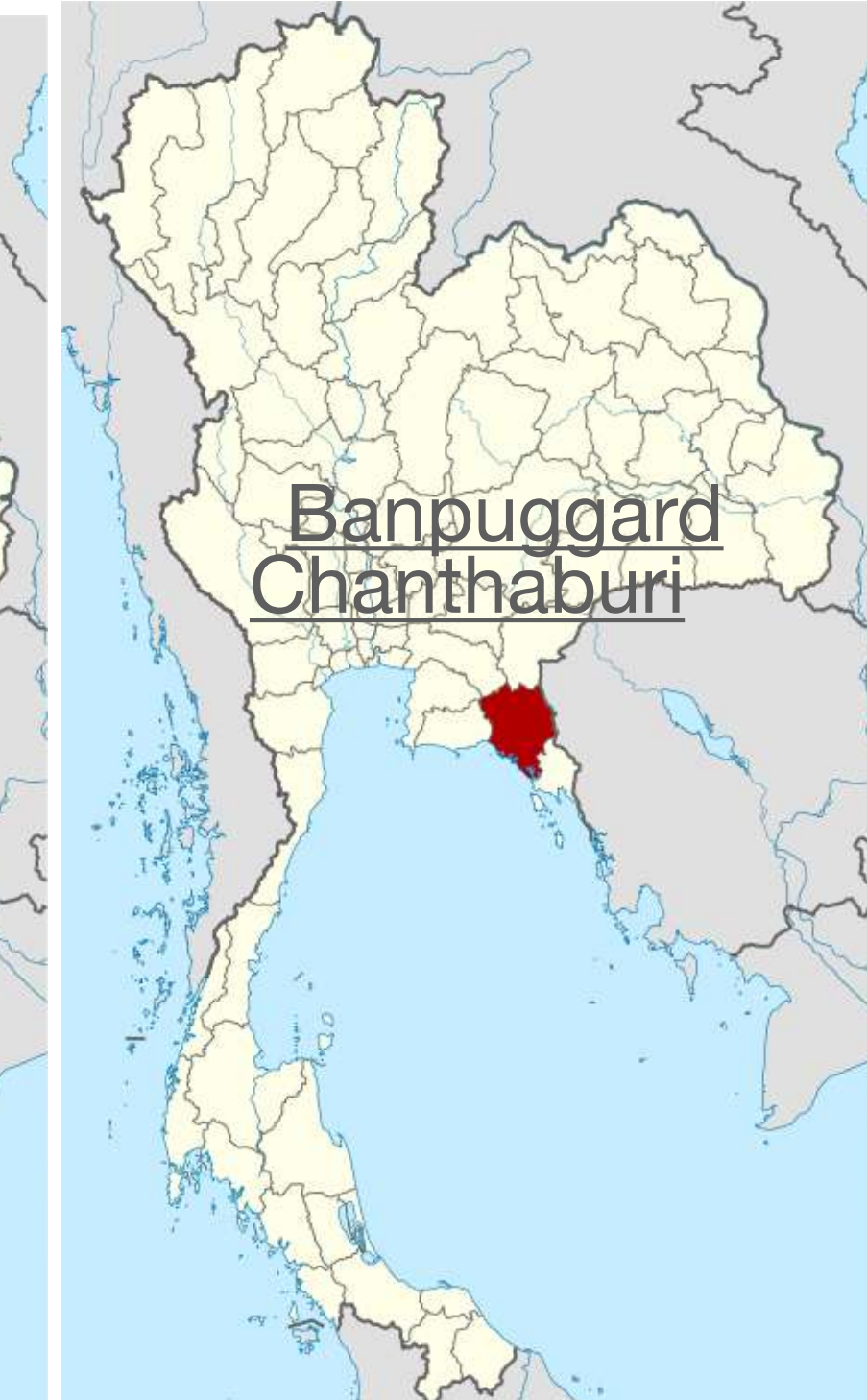
R9: Youyiguan

R12: Youyiguan
New: Dongxing

-

rail: Mohan

-



	Guangxi 3			Yunnan (1)	
2020	Land <u>Youyiguan</u> (Congzuo) Quốc tế Hữu Nghị Lạng Sơn 諒山省友谊口岸	Rail/Land <u>Pingxiang</u> (Congzuo) Đồng Đăng Lạng Sơn 諒山省同登	Land <u>Dongxing</u> (Fangchenggang) Móng Cái 广宁省芒街	Land: <u>Mohan</u> (Xishaungbanna) Boten Luang Namtha 琅南塔省磨丁	
	Guangxi 2			Yunnan (4)	
2021	Land: <u>Longbang</u> (Baise) Cửa khẩu Trà Lĩnh 高平省茶岭	Land: <u>Shuikou</u> (Congzuo) Cửa khẩu Tà Lùng 高平省驮隆	Land/Rail <u>Hekou</u> (Honghe) Thành phố Lào Cai 老街省老街	Land <u>Tianbao</u> (Wenshan) Cửa khẩu Thanh Thủy 河江省清水河	Rail <u>Mohan</u> (Xishaungbanna) Boten Luang Namtha 琅南塔省磨丁



Agenda

1	Our Journey	From Data to Insight		
2	Our Story	A	Heavy Weights & Rising Stars	
		B	The New Game	Life Style & Segment
				Intensified Competitions
				Supply Chain Integration
				Logistics & ZCP
C	Market Observations: Durian			
3	Our Suggestions	SWOT & Strategies		

C1: Market Observations-Durian: Export to China

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021			
		Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	Mil B	△%	V Rank	share%
ทุเรียน	Durian	13,179	79.4	1	26,341	99.9	1	47,798	81.5	1	98,332	105.7	1	70.6

รายการผลไม้ 14	Fruits 14	2018			2019			2020			2021		
		Ton	△%	Rank	Ton	△%	Rank	Ton	△%	Rank	Ton	△%	Rank
ทุเรียน	Durian	199,986	47.4	5	375,333	87.7	4	444,411	18.4	3	779,880	75.5	5

Market Trend	Despite of Covid 19, Durian export to China reached 779,800 tons and 98,322 mil Baht in 2021, the highest level in history
	The success in 2021 is attributed to rising demand in China through channel deepening And strict control “unripe durian” by Thai government
	The growth rate, about 80% to 100% per year for value in the past 4 years is impressive The lower growth rate shows the price premium every year
	The growth in the past shows the market acceptance and potential to absorb the extra capacity The uncertainty lies on disruption by ZCP, quality control of Thailand, and competition
	Given the Covid 19 situation in China at the 1Q of 2022, we predict an contraction in 2022 (-10% in value), but remain optimistic in 2-3 years (+20%) and 5 years (+30%)

Thai Durian Export To China 1000 ton	
2020	575*
2021	822**

MOC data

* Produce Report 27/4/21

**China Fruit Portal 8/2/22

C1: Market Observations-Durian: Production

Fruits	Total Planting Area (1000 rai)			Output (1000 ton)			Output/rai (kg/rai)			Farm Gate Price (Baht)		
	2019	2020	2021	2019	2020	2021	2019	2020	2021	2019	2020	2021
Durian	967	1,147	1,192	743	785	957	1,551.37	1,569.88	1,525.14	89.90	100.26	111.49

ภูมิภาค	สัดส่วนผลผลิต (%)		สายพันธุ์ ทุเรียน	สัดส่วนผลผลิต (%)	
	2021	2020		2021	2020
South	42.80	43.18	หมอนทอง	87.81	86.61
East	49.02	48.81	ชะนี	4.76	5.47
North	4.62	4.77	กระดุม	1.33	1.55
West	1.56	2.35	ก้านยาว	0.86	0.56
North East	1.97	0.89	พวงมณี	0.24	0.14
Central	0.03	0.01	อื่นๆ	5.01	5.66
All %	100.00	100.00	All %	100.00	100.00

Thai Durian Output 1000 ton	
2020	1,109
2021	1,289

*Produce Report 18/1/22




Output Trend	The production is highly responsive to price signal with about 3 year time lag. The large export to China and higher price bided up by Chinese importers stimulated increase in planting area since 2018. The planting area increased by about 4% in 2021 to 1.2 mil rai. These new trees will increase the supply in the near future which brings about the concern of the sustainability of the high price.
Output Structure	The East (e.g. Chanthaburi) and South (e.g. Chumphon) region accounted for 49% and 43% of output in 2021, หมอนทอง continues to dominate the market (nearly 90% of the output) because of its commercial viability, followed by ชะนี (about 5%). พวงมณี and ก้านยาว etc. also gained popularity in Chinese market.

C1: Market Observations-Durian: Competition in China




Thailand	Malaysia	Vietnam	Cambodia	Laos	Phillipines	Indonesia
Both Fresh & Frozen are allowed	Frozen Only	Negotiation Completed Enters via cross border trade or Thailand	Under Negotiation Enters via Thailand	Under Negotiation Enters via Thailand	Under Negotiation Frozen enters Via Thailand/ Malaysia (2020)	Under Negotiation
Market >99% >1 mil rai > 1 mil ton MonThong (90%) Mar-Oct	Market<1% 0.4 mil ton Musang King <0.1 mil ton Higher price Ripe on Tree Jun-Jan	0.6 mil ton 70% export MonThong & Ri6 Lower price Apr-July Oct-Mar	4500 ton Kampot Speciality May-July	Chinese Investor 18750-31250 rai Paksong Speciality Apr-Sep	0.08 mil ton DES 806 & DES 916 Aug-Nov	1.2 mil ton Not active in export Lai, Medan, Petruk Oct-Feb

More than 600 local varieties according to ศูนย์วิจัยพืชสวนจันทบุรี
 6 groups and 174 varieties are identified in สารานุกรมสำหรับเยาวชนไทย เล่มที่ 28
 234 varieties are presented in <https://www.yearofthedurian.com>
 Following varieties have been well received in Chinese market




A-I Durian Source in Thailand	
a	Variety
b	Production
c	Price
d	Export
e	Observation

	พันธุ์ทุเรียน	ลักษณะเด่น	Illustration
1	หมอนทอง MonThong 金枕头	เป็นพันธุ์ที่มาจากเมล็ดพันธุ์กำปัน ปัจจุบันเป็นพันธุ์ที่ได้รับความนิยมบริโภคสูง มีการปลูกมากที่สุด และเป็นพันธุ์ที่มีการส่งออกมากที่สุดด้วย ลักษณะผลมีขนาดใหญ่ ทรงผลยาว ก้นผลแหลม ใหญ่ผลกว้าง เห็นพูชัดเจน เปลือกบาง เนื้อไม่หนา สีเหลืองเข้ม รสหวานมัน กลิ่นแรง น้ำหนักประมาณ 2-4.5 กิโลกรัม	
2	ชะนี Chanee 青尼	เป็นพันธุ์ที่นิยมปลูกมาก่อน สามารถทนโรคได้ดีกว่าหมอนทอง ผลรูปทรงกระบอกหรือทรงไข่ ปลายแหลม ขนาดผลปานกลาง กลางผลป่อง พูเด่นชัด ร่องพูไม่ลึก เนื้อละเอียด เหนียว เนื้อไม่หนา รสหวานมัน กลิ่นแรง	
3	กระดุม Kradum Thong 甲仑	ลักษณะผลเล็ก ผลค่อนข้างกลม ด้านหัวและท้ายผลค่อนข้างป้าน ก้นผลบวมเล็กน้อย หนามสั้นและถี่ ขั้วค่อนข้างเล็กและสั้น พูเต็ม ร่องพูเล็ก เนื้อละเอียด อ่อนนุ่ม สีเหลืองอ่อน เนื้อบาง รสหวาน ไม่ค่อยมัน และเมล็ดใหญ่ น้ำหนักประมาณ 1 กิโลกรัม	









A-I Durian Source in Thailand	
a	Variety
b	Production
c	Price
d	Export
e	Observation

	พันธุ์ทุเรียน	ลักษณะเด่น	Illustration
4	ก้านยาว GanYao 干尧	พันธุ์ทุเรียนที่มีชื่อเสียงมากของจังหวัดนนทบุรี ราคาสูงมาก (บางส่วนขายได้นับหมื่นบาทต่อผล) สำหรับก้านยาวเป็นพันธุ์ที่กลายมาจากเมล็ดของพันธุ์ทองสุต ผลขนาดปานกลาง หนามเล็ก ถี่ สั้น ก้านยาวกว่าทุเรียนพันธุ์อื่นๆ เนื้อละเอียด สีเหลืองปานกลาง รสหวานมัน และเมล็ดใหญ่	
5	พวงมณี Puang Manee 托曼尼	ลักษณะผลทรงกลมรี ผลขนาดเล็ก หนามผลมีขนาดปานกลาง แหวมสั้น เนื้อละเอียด สีเหลืองเข้มหรือ สีเหลือง อมส้มเล็กน้อย รสชาติหวานมัน เมล็ดเล็ก และเปลือกบาง น้ำหนักผลประมาณ 0.8-1.5 กิโลกรัม	
6	หลงลับแล Long Lap Lae 珑榴莲	ทุเรียนที่มีชื่อเสียงคู่กับหลินลับแล มีถิ่นกำเนิดในอำเภอลับแล จังหวัดอุตรดิตถ์ เป็นพันธุ์ที่ปลูกจากเมล็ด ลักษณะผลกลมเหมือนไข่ ผลขนาดเล็ก หนามเล็ก ฐานผลไม่เว้า ก้านผลใหญ่ เปลือกผลสีเขียวอมเหลือง พูเต็ม เนื้อหนา สีเหลืองอ่อน รสหวานมัน เนื้อเหนียวละเอียด กลิ่นอ่อน เมล็ดลีบเป็นส่วนใหญ่ น้ำหนักผลประมาณ 0.5-3.5 กิโลกรัม	

A-I Durian Source in Thailand	
a	Variety
b	Production
c	Price
d	Export
e	Observation

	พันธุ์ทุเรียน	ลักษณะเด่น	Illustration
7	หลินลับแล Lin Lap Lae 琳榴蓮	ทุเรียนที่มีชื่อเสียงขึ้นมาพร้อมกับหลงลับแล เป็นพันธุ์ที่ปลูกจากเมล็ดเช่นเดียวกัน ลักษณะผลขนาดเล็ก หนาม โคนแหลม เปลือกสีเขียวอมเหลือง เนื้อละเอียด เหนียว สีเหลืองอ่อน รสหวานมัน มีกลิ่นอ่อนมาก เมล็ดลีบเป็นส่วนใหญ่ น้ำหนักผล ประมาณ 1.0-1.8 กิโลกรัม	
8	จันทบุรี 1 Chanthaburi 1 山大五里1	ทุเรียนลูกผสมระหว่างแม่พันธุ์ชะนีกับพ่อพันธุ์หมอนทอง ลักษณะของผลค่อนข้างกลม พูเต็ม หนามเล็ก ถี่ สั้น เนื้อไม่หนา มาก สีเหลืองสม่ำเสมอ รสชาติหวานมัน เนื้อละเอียด กลิ่นอ่อน เมล็ดลีบเป็นส่วนใหญ่ น้ำหนักผล 2.6-3.6 กิโลกรัม	
9	นวลจันทร์ Nuanthongchan 诺通赞	เป็นพันธุ์ที่เกษตรกรคัดเลือกพันธุ์กันเองภายในสวนและขยายกิ่งพันธุ์ออกไปอย่างกว้างขวาง เข้าใจว่าเป็นทุเรียนลูกผสมระหว่างพวกมณีและหมอนทอง มีลักษณะผลโต รูปทรงสวย เนื้อหนา เม็ดเล็ก เนื้อสีเหลืองอ่อน รสหวานมัน กลิ่นไม่แรง เมล็ดลีบและเม็ดเต็มปะปนกัน	





8 GI for Durian in Thailand: Potential Candidates for Chinese Market

A-I Durian Source in Thailand					
a	Variety	Uttaradit	Uttaradit Long Lab Lae Durian ทุเรียนหลงลับแลอุตรดิตถ์	Round or oval shape, Small size, creamy sweet in taste with blighted seed	
		Uttaradit	Uttaradit Lin Lab Lae Durian ทุเรียนหลินลับแลอุตรดิตถ์	Cylinder shape, creamy sweet in taste, with blighted seed	
b	Production	Nonthaburi	Nont Durian ทุเรียนนนท์	many varieties with their own uniqueness include Kan Yao, Mon Thong and Kradum Thong. delicious taste, fatty sweet, fragrant	
		Nonthaburi	Durian Pa La-U ทุเรียนป่าละอู	Mon Thong and Cha Nee varieties. Dry and fine pulp, soft smell and creamy sweet.	
c	Price	Prachin Buri	Durian Prachin ทุเรียนปราจีน	Kan Yao, Mon Thong, Cha Nee, Kradum Thong and other indigenous varieties	
		Sisaket	Sisaket Volcanic Area Durian ทุเรียนภูเขาไฟศรีสะเกษ	Mon Thong, Cha Nee and Kan Yao varieties, Creamy sweet in taste, fine and dry pulp	
e	Observation	Phangnga	Phangnga Salika Durian ทุเรียนสาธิตกาพังงา	Fragrant but not pungent blighted seed and sweet in taste	
		Ranong	Naiwong Ranong Durian ทุเรียนไฉวงระนอง	Mon Thong variety, sweet, fatty and crisp, fragrant but not strong	

A-I Durian Market in China	
a	Market
b	Competition
c	4P Mix
d	Consumer Insights
e	Observation

Image	Product	Origin/Supplier	Price
	猫山王速冻榴莲一级果 2-2.5斤 Frozen Musang King Grade A 1-1.25kg	Malaysia 果然馆 Guo Ran Guan Suning	¥174/kg
	托曼尼 4-5斤 Puang Manee 2-2.5kg	Thailand 1号鲜客(FRESHMAN) Suning	¥115.6/kg
	金枕头榴莲 4.5-5.5斤 MonThong 2.25-2.75 kg	Thailand 创晟果蔬 Chuang Sheng Guo Shu JD	¥83.2/kg
	猫山王榴莲 冻带壳榴莲 2.2斤-2.6斤 Frozen Musang King 1.1-1.3kg	Malaysia 马猫 Ma Mao JD	¥167.7/kg

A-I Durian Market in China	
a	Market
b	Competition
c	4P Mix
d	Consumer Insights
e	Observation

Image	Product	Origin/Supplier	Price
	冷冻金枕头榴莲肉 Frozen MonThong Meat	Thailand 榴芒一刻 Liu Mang Yi Ke TMall	¥393.2/kg
	泰国金枕榴莲4-5斤 MonThong 2-2.5 kg	Thailand 绿丰山 Lv Feng Shan TMall	¥115.2/kg
	A级泰国金枕头榴莲肉 有核2斤直播 Frozen MonThong Meat with Stone 1kg lifestream	Thailand 鲜陌百 Xian Mo Bai PingDuoDuo	¥39.9/kg
	泰国金枕头榴莲 5-6斤 MonThong 2.5-3 kg	Thailand 渭源百香园 PingDuoDuo	¥34.2/kg

A-I Durian Market in China	
a	Market
b	Competition
c	4P Mix
d	Consumer Insights
e	Observation



外皮颜色不是唯一能判断生熟的方法
以下方法教您辨别榴莲的成熟度

1. 捏尖刺
选2根相邻的大刺，用手捏住刺尖端，如果用力就可以让它们彼此靠近则成熟，反之较生。记得戴手套小心扎手

4. 看裂口
看下榴莲底部是否裂开并冒出一股榴莲香，有则成熟，反之较生

2. 摇一摇
摇晃下榴莲听听有没有咚咚的声音，如果里面果肉松动，则是成熟，反之较生。

5. 戳一戳
用筷子戳一戳榴莲，如果外皮像泄气轮胎一样弹性变软也是成熟的表现之一

3. 气味
闻下榴莲底部尖尖那里是否有较重气味，生的榴莲是一股青草味，熟的榴莲是一股浓厚的榴莲味。

有问题可以咨询客服
切勿生开榴莲
自行生开不赔付

Method for detecting ripeness

开榴莲的技巧
榴莲的正确打开方式

1

步骤一：准备小刀
仔细观察榴莲上端会发现上面有几条线裂开再去打开

2

步骤二：插入小刀
用尖刀沿着线乡下扎注意别太大力 2cm左右然后沿线切开

3

步骤三：用手掰
用手抓住切开的壳稍用力一掰就开了

4

步骤四：剥榴莲
小心的将果肉取出食用完剩余的可放入冰箱冷藏

Method to open a durian

自制榴莲果泥

榴莲千层蛋糕

Serving ideas

A-I Durian Market in China	
a	Market
b	Competition
c	4P Mix
d	Consumer Insights
e	Observation

Positive Key Words
香糯 Tender
润滑 Smooth
甜而不膩 Agreeable sweetness
肉多 Fleshy
核小 Small stone
果味香浓 Strong flavour
果肉饱满 Plump flesh
树上熟 Ripe on tree
急冻锁鲜 Rapid freeze for freshness
冰淇淋口感 Like icecream

Negative Feedback
Little meat
Unripe (Si Bao 死包: would not ripe)
Rotten
Big Stone



A-I Durian Market in China			
a	Market	Product	Besides the dominating MonThong, the Chinese consumers also seek other varieties especially Chanee, GanYao, and Puang Manee Frozen durian meat (for controllable quality & convenience) and the related concept of “ripe on tree” gains popularity, pioneered by Musang King the stronger competitor in the high end segment. Small size is popular for nuclear families
b	Competition	Price	The price of the frozen Musang King was around ¥160-¥170/kg compared with ¥80-¥115/kg for MonThong and Puang Manee during the time surveyed. MonThong from Vietnam claimed to be of Thai origin is a strong competitor in the lower end segment, where the price may reach ¥35-¥40/kg in some platform or outlet.
c	4P Mix		
d	Consumer Insights	Consumer Insights	From analysis the promotion message and feedback by customers, the positive key words for category durian include “Tender & Smooth” “Like icecream”, “Fleshy & “Small stone”, “Plump flesh” and “Ripe on tree”. The most frequent complaints are: “Unripe” or “Si Bao (死包)” a situation when the fruit will not ripe under any situations, “Rotten”, “Little meat” and “Big stone”.
e	Observation		

Agenda

1	Our Journey	From Data to Insight		
2	Our Story	A	Heavy Weights & Rising Stars	
		B	The New Game	Life Style & Segment
				Intensified Competitions
				Supply Chain Integration
				Logistics & ZCP
C	Market Observations: Durian			
3	Our Suggestions	SWOT & Strategies		

C. SWOT Matrix & Strategic Objective

<p style="text-align: center;">SWOT Matrix Of Thai Fruits</p>	<p style="text-align: center;">Strength</p> <p>S1: Abundant resources of fruit and R&D capabilities for new varieties S2: Established reputation, scale & channels S3: Government direction, regulation, extension, promotion & negotiation S4: Entrepreneurial farmers and other stakeholders</p>	<p style="text-align: center;">Weakness</p> <p>W1: Stable and high quality supply W2: Understanding of Chinese market W3: Innovation in processing and packaging W4: Efficient system for fruit collection and distribution</p>
<p style="text-align: center;">Opportunity</p> <p>O1: Changing need and behavior of Chinese customers O2: Emerging integration of supply chain in Thailand & China O3: New logistic capability by air and train via Laos O4: Digital technology in production and marketing</p>	<p style="text-align: center;">SO Strategies:</p> <p>$(S1 + S3 + S4) + O1 = Ob1$: Develop new varieties, & novel product $(S3 + S4) + (O2 + O4) = Ob2$ Embrace supply chain integration $S3 + O3 = Ob3$ Urgent government action on logistic $(S2 + S3 + S4) + (O1 + O2 + O4) = Ob4$ Brand building for new consumers</p>	<p style="text-align: center;">WO Strategies:</p> <p>$(O2 + O4) - (W1 + W2 + W3 + W4) = Ob9$ Integration & digital technology for quality, shared customer information, innovation and efficiency</p>
<p style="text-align: center;">Threat</p> <p>T1: Shocks of Covid 19 impacting market demand, cost, logistic, and labor supply T2: Lack of sustainability due to oversupply and price fluctuation T3: Competition form neighboring ASEAN suppliers T4: Malign practice in production & collection undermining the quality & reputation</p>	<p style="text-align: center;">ST Strategies:</p> <p>$(S3 + S4) - T1 = Ob5$ Cooperation to mitigate the shack $(S3 + S4) - T2 = Ob6$ Enhance sustainability on demand & supply $(S1 + S2 + S3 + S4) - T3 = Ob7$ Enhance advantage with innovation & scale $S3 - T4 = Ob8$ Regulation to protect statkeholders</p>	<p style="text-align: center;">WT Strategies:</p> <p>$T1 + (W1 + W2 + W3 + W4) = Ob10$ Deal with shock with extra QA, understanding of Chinese regulations & innovation in production & distribution $T3 + (W1 + W2 + W3 + W4) = Ob11$ Winning in competition with world class quality, knowledge of Chinese market, & innovation in in production & distribution</p>

Roadmap & Milestone

Fruit	2021 (mil B)	2022 (mil B)	2024 (mil B)	2026 (mil B)
Durian	98,332	88,499	127,438	215,371
Longan	18,024	16,222	23,359	33,637
Mangosteen	15,966	14,369	20,692	29,796
Coconut Y	5,131	4,618	7,804	15,296
Pomelo	860	774	1,115	1,605
Mango	91	82	118	199
Total	138,404	124,564	180,526	295,905