

REPORT



18 May 2023



INTERNATIONAL WEBINAR SERIES ON MINOR TROPICAL FRUITS: 'ENHANCING GLOBAL CONSUMPTION AND TRADE OF RAMBUTAN'



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1.0. EXECUTIVE SUMMARY

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The global rambutan industry has experienced significant growth and development over the years. The Rambutan, a tropical fruit native to Southeast Asia, is currently produced in a number of nations all over the world. Rambutan production has expanded beyond its traditional cultivation regions, such as Indonesia, Thailand, Malaysia, and the Philippines. Other countries, including Vietnam, Sri Lanka, India, Australia, and parts of Central and South America, have also began cultivating rambutan to meet the rising demand. This geographical diversification has contributed to increased global production. Asia-Pacific remains the largest consumer market for rambutan, with countries like Indonesia, Thailand, and Malaysia having a strong cultural affinity for the fruit. However, there has been a noticeable surge in demand from North America, Europe, and other regions, fueled by changing dietary preferences, expanding international trade, and the availability of imported fruits in supermarkets and specialty stores.

In addition to growing export markets, other trends influencing the rambutan trade include rising e-commerce platforms, concerns on quality and safety, and sustainability concerns. As the global production and trade of rambutan continue to grow, there are increasing efforts to improve its cultivation and post-harvest practices to ensure that the fruit meets international quality standards. These trends are likely to continue in the future, creating new opportunities and challenges for rambutan producers and traders globally.

As part of TFNet's ongoing series of international webinars on minor tropical fruits, this third webinar delved into the various aspects of the rambutan industry especially in Asia, including production, consumption, trade, challenges, and future prospects. The webinar held on the 18th May 2023 was jointly organized with the Malaysian Department of Agriculture (DOA).

The aim of the webinar was to:

- a. To share information among stakeholders on the various initiatives to increase rambutan production and markets, including cultivar development, best farm practices, postharvest management, inputs for the food industry, research and development focus and policies to encourage its cultivation.
- b. Gauge the current scenario and deliberate on the potential of rambutan as another globally popular and traded fruit.

A total of 170 participants joined the webinar to engage in presentations and discussions which featured four international experts from three rambutan producing and importing countries, namely Indonesia, Malaysia and China.

Mr. Christopher Biai highlighted the rambutan industry in Malaysia, emphasizing its potential and favourable climatic conditions for production. He added that efforts are underway to develop disease-resistant and early-yielding rambutan varieties. Malaysia has 52 registered rambutan varieties at present. Under the current 12th Malaysia Plan, the cultivation area is anticipated to grow, as rambutan has been placed as one of the focus fruits for export. He also highlighted the fluctuation in market prices for the fruit, influenced by factors such as popularity and competition with other major tropical fruits.

Dr. Meiyin He discussed the market potential of rambutan in China, highlighting Thailand's dominance in rambutan trade. China is a net importer of rambutan, facing a trade deficit. Limited cultivation areas and consumer awareness pose challenges for rambutan development in China. Efforts are being made to address these challenges through preservation techniques and freshness extension methods.

Prof Dr. Sobir provided insights into rambutan production, consumption, and market in Indonesia. Rambutan is considered a major tropical fruit in Indonesia, but it faces competition from other fruits. Production has increased over the years, with Java Island accounting for the majority. Consumption has seen a declining trend among younger consumers. Rambutan exports from Indonesia have been decreasing, influenced by various factors.

Dr. Johari Sarip discussed the breeding and improvement of rambutan varieties in Malaysia. Two breeding strategies were adopted, including selecting seedlings from existing germplasm collections and breeding new clones through open pollination. Two promising new clones, Mutiara Merah and Mutiara Wangi, were developed and released in 2019.

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Overall, the discussions showcased the potential, challenges, and ongoing efforts in rambutan cultivation and market development in Malaysia, China, and Indonesia. The presentations offered insights into the cultivation techniques, post-harvest practices, and the current market scenario, while shedding light on the various government support and initiatives, which can be emulated by other countries. Though some countries such as China at present remain net importers for rambutan, this scenario may change given the dynamism of the market and influence of other factors such as strong government backing, as observed in other countries such as Malaysia and Thailand. Greater promotional efforts are a must to create awareness of the fruit especially among younger consumers. Strategies such as varietal improvement, market expansion, and addressing consumer preferences were proposed to further revitalize the rambutan industry.

The subsequent panel discussion revealed that while the development of rambutan remains slow compared to other minor fruits, there is great potential for the fruit considering future markets in Asia and the Middle East based on demographic factors and the anticipated increase in exports due to the diaspora or spread of Asians to other countries for work or migration. In addition, panelists concurred that ongoing efforts must be made to promote the consumption of rambutan as a healthy fruit alternative.

2.0. WEBINAR PRESENTATIONS

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2.1. Rambutan Cultivation and Market in Malaysia Mr. Christopher Biai, Department of Agriculture, Malaysia

Mr. Christopher Biai discussed the cultivation and market of rambutan in Malaysia. His presentation covered an overview of the rambutan industry in Malaysia, supply and demand, market analysis, and future prospects. He also shared nutritional facts about rambutan and the different varieties of the fruit grown in Malaysia. Mr. Christopher emphasized the potential of rambutan in Malaysia, highlighting the favorable climatic conditions for its production. Ongoing efforts are being made to develop new disease-resistant and early-yielding rambutan varieties. Currently, there are 52 registered rambutan varieties in Malaysia, with the top five varieties being Deli Baling (R193-red variety), Anak Sekolah (R191-red variety), Deli Cheng (R170-red variety), Oh Heok (R162-red variety), and Muar Gading (R156-yellow variety). In 2019, MARDI introduced two new varieties, Mutiara Merah (AG28) and Mutiara Wangi (GB44), which have received positive feedback for their commercial value. Under the 11th Malaysia Plan (2016-2020), the Department of Agriculture developed a 300-hectare area for rambutan cultivation through the Rambutan Cluster Development Project, involving 620 farmers. The project focused on rehabilitating existing farms, with only a small portion allocated for new plantations (10-15%). The current 12th Malaysia Plan (2021-2025) aims to increase the rambutan cultivation area, with hectarage expected to remain consistent in the coming years as more emphasis is given to rehabilitating existing areas. In 2021, the main production areas were Sarawak (5,521 hectares, producing 11,296 tonnes), followed by Johor (1,781.89 hectares, producing 9,182 tonnes), and Sabah (1,631 hectares, producing 5,071 tonnes). Regarding market prices, the farm price of the Anak Sekolah (R191 variety) rambutan in 2021 was RM2.90, with wholesale and retail prices at RM4.90 and RM7.80, respectively. In 2023, the farm price increased to RM3.45, while the wholesale and retail prices were RM4.75 and RM6.80, respectively. The decrease in wholesale price in 2022 can be attributed to the lower popularity of rambutan compared to durian, especially during the durian season. Mr. Christopher also provided an overview of rambutan utilization in 2021, with production reaching 55,627 tonnes/year and total consumption at 57,754 tonnes. The per capita consumption (PCC) was 1.6 kg/year, indicating sufficient domestic supply, and the self-sufficiency ratio (SSR) was 99.4%. Import dependency ratio stood at 3.8%, with rambutan being imported mainly from neighboring countries like Thailand. Singapore and Brunei were the major importing countries in 2021, with imports of approximately 1,798 tonnes and 650 kgs, respectively. Regarding exports, there was an increase in export volume in 2018 by 2,156 tonnes, followed by decreases in 2019 and 2020, and another increase to 1,799 tonnes in 2021 (more than half of the export volume in 2020). Malaysia has applied for the export of fresh rambutan to the USA since 2006, but negotiations are still ongoing due to the stringent phytosanitary requirements set by the US, with the service cooperation agreement under draft. Other issues and challenges persist in the export of rambutan. These include the lengthy processing time due to the distant market routes, difficulties in extending the shelf-life for export (currently limited to 10 days under 10 degrees Celsius), a shortage of labor and skilled workers, and inconsistent supply from farms. As the way forward, the following strategies were proposed. Firstly, through rehabilitating existing areas. Secondly, by expanding into new areas with new varieties, and thirdly by increasing production specifically for export with the ultimate aim of reducing import dependency.

2.2. Market Potential Analysis of Rambutan in China Dr. Meiyin He, South China Agricultural University, Guangzhou, China

Dr. Meivin begins by discussing the global origins and distribution of rambutan. She highlighted Thailand's dominance in rambutan trade as the leading exporter, accounting for approximately 8% of global production. Moving on to China, she notes that it is a net importer of rambutan, facing a perennial trade deficit. Rambutan cultivation in China is limited to specific regions such as Hainan and Yunnan, resulting in relatively small acreage. Despite the limited cultivation, China does engage in some level of export, with around 0.51 tonnes of rambutan exported in 2022 to countries like Russia (0.33 tonnes) and Macau (0.18 tonnes). Dr. Meivin provided data on China's major import markets and their rambutan share from 2017 to 2022. Vietnam was a significant importer, with 455.66 tonnes accounting for USD 319,221 in 2022, followed by Thailand with 468.42 tonnes amounting to USD 1,491,405 in the same year. Dr. Meiyin also mentions that Chinese rambutan is not well recognized in the market and is sold at a higher price compared to importing countries. Consumer awareness and knowledge about the fruit are lacking. Interestingly, she shares that on e-commerce platforms, domestically sold rambutan is priced notably higher (84 yuan/kg) than imports from Thailand (60 yuan/kg) and Vietnam (46 yuan/kg). In China, the main challenges in rambutan production include the lack of suitable cultivation areas and a limited market range, which restricts sales radius. However, efforts are being made to address these challenges through strategies like low-temperature preservation and the use of biological agents to extend the freshness of locally produced rambutan. In conclusion, rambutan development in China still has a long way to go and faces difficulty penetrating a market dominated by other popular tropical fruits among Chinese consumers.

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2.3. Status of production, consumption and market of Rambutan in Indonesia Prof Dr. Sobir, Center of Tropical Horticulture Studies, IPB University, Bogor Indonesia

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Prof Sobir discussed the production, consumption, and market of rambutan in Indonesia. He spoke on the origin and distribution of the rambutan, citing some wild relatives existing in Indonesia including Maritam (Nephelium mutabile), Kapulasan (N. ramboutan-ake), Sibau (N. junglandifolium), Kalamangis (N. uncinatum), Ridan (N. maingayi), and Ihau (Dimocarpus malesianus). Rambutan is considered a 'major' tropical fruit in Indonesia, although it faces competition from other fruits such as bananas, mangoes, papayas, salak, pineapple, and jackfruit. Over a period of twenty years (2002-2021), rambutan production in Indonesia has seen a threefold increase, moving from the eighth position in 2002 (296,103 tonnes/year) to the ninth position in 2021 (874,562 tonnes/year). Despite the increasing trend, production fluctuates from year to year, largely attributed to weather anomalies. Zooming into the production trend in the recent five years (2017-2021 data), annual production increased 1.5 folds. However, the yield per tree did not correlate with the number of harvested trees due to factors like disease and fruit drop. Rambutan production occurs throughout the year in Indonesia due to its geographical location near the equator. The Southern part of Indonesia experiences higher production during the first and fourth quarters, with flowering induced at the end of the dry season (August or September), resulting in peak production during the fourth quarter. The distribution of rambutan in Indonesia is concentrated in Java Island, accounting for 53% of production, followed by Sumatra (23%) and Kalimantan (9%), totaling 85% of the share. These areas are lowlands and have wet climates, similar to other producing countries like Malaysia, Thailand, and Vietnam. Java Island has a wide cultivation of rambutan by farmers, while in the other two locations, rambutan is naturally found near forests. Generally, in Indonesia, rambutan is typically grown in lowlands with wet climates, often in mix production systems where it is cultivated alongside durians and mangosteens. Rambutans are propagated through seedlings, resulting in high variation in terms of quality and appearance. Currently, 20 varieties of rambutan have been registered in Indonesia, with popular ones including Rapiah and Binjai. Consumption of rambutan in Indonesia has witnessed a declining trend in the last five years (2018-2022), attributed to the lack of recognition among younger consumers who prefer more practical fruits. Rambutan is also consumed in minimally processed forms such as juice, cocktails, and various snacks (kerepek rambutan and kerepek biji rambutan using vacuum-fry method). In terms of marketing, farmgate prices in Indonesia are lower than in Malaysia, with higher prices observed during certain months (April, May, June and July). Rambutans are primarily sold fresh in street stalls or through mobile vehicles, and rarely found in supermarkets. Rambutan exports from Indonesia have been decreasing steadily in the last decade. In 2022, the export volume was 695.4 tonnes (USD583,591). Export is influenced by factors such as domestic price, export price, exchange rates, previous year export volume, domestic production, and fruit quality.

2.4. Cultivar development and breeding of Rambutan in Malaysia Dr. Johari Sarip (Breeder/Fruit Consultant)

Dr. Johari presented the extensive work conducted in MARDI for the breeding and improvement of rambutan varieties in Malaysia. To kickstart his presentation, he highlighted the reproductive characteristics of the fruit, namely that its a heterozygous and cross-pollinated species, which results in a significant amount of genetic variability in seedling progenies. Early cultivation in Malaysia involved using seeds, but because of the long selection process, a few trees were chosen and registered as the R-series by the Malaysian Department of Agriculture (DOA). 62 clones are available at present in Malaysia. Despite the availability of many clones, the local rambutan industry was not experiencing a positive growth. As such, a need to arose to identify superior varieties to revitalize the industry in Malaysia. To achieve this, two breeding strategies were adopted. The first strategy involved screening and selecting rambutan seedlings from an existing germplasm collection. This process included 323 accessions (bud-sticks) from trees collected throughout Malaysia, grafted, and planted at the Kemaman genebank in 1985. The performance of these grafted plants was closely monitored, and qualitative (flavour and texture) and quantitative data (fruit size and weight) were recorded. The initial selection did not render favourable results as performance was still below par compared to commercial varieties. Consequently, a second strategy was implemented, focusing on breeding and selecting F1 progeny. The second strategy aimed to obtain, select, and characterize new rambutan clones developed through the open pollination method. Dr Johari pointed that this particular method is suitable for creating genetic variation in heterozygous fruit trees with single-seeded and sensitive flowers. He went on to expound the process whereby two maternal parents (R99 and R134) along with 16 other paternal parents were planted closely in an F1 breeding plot in 1981 to produce open-pollinated seeds. A total of 10,000 open-pollinated seeds were harvested from the maternal parents and germinated in the F1 plot in 1989. Out of these, 5,400 F1 progenies germinated, and 3,199 progenies survived for further assessment. During field observations, male plants were found to produce flowers earlier than hermaphrodite plants, but the ratio of female to hermaphrodite plants was 1:1. Dr. Johari showcased the variation in F1 fruits and explained the segregation of the F1 population in terms of colour, spintern lengths, with some exotic progenies identified (e.g., absence of spinterns, seedless fruits, fruiting on small branches). He also discussed the fruit maturity period, fruit size, and the number of fruits per panicle in F1 progenies. To eliminate undesirable progenies, four independent culling levels (ICLs) were conducted, resulting in the selection of 30 progenies. These progenies were then ranked using a selection index based on desirable traits divided into a plant category and fruit category. The selection index took into account the value of the traits and their economic importance. Dr. Johari presented the scores and corresponding weightages for selected traits. At the end of the selection process, 25 progenies had higher selection indexes compared to the maternal parents. However, further investigations, such as determining the percentage of pollen viability and conducting compatibility studies, were necessary. Additionally, the percentage of male and female flowers per inflorescence had to be determined. After the final assessment, four new clones were shortlisted, surpassing the R191 (standard check variety - Anak Sekolah also known as the Rong Rien in Thailand). The most promising progenies were GB-44, IE-20, EH-57, and AG-28. Following an eight-season localized stability test and reproductive system study, the AG-28 and GB-44 progenies were selected for release on July 29, 2019, as new rambutan clones named Mutiara Merah and Mutiara Wangi, respectively.

3.0. QUESTION AND ANSWER SESSION

Mr. Yacob Ahmad from TFNet was moderator for the Questions and Answers session and panel discussion. The questions fielded during the Q and A were those that were asked prior to the webinar and during the session.

To a question on leaf margin necrosis which is common in rambutan, the moderator responded

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that normally, it is due to water stress. There is also the possibility of potassium deficiency if it occurs on the lower leaves. To a question on the current trade of rambutan, moderator said that in addition to the points discussed in presentations by Dr Sobir of Indonesia and Mr. Christopher Biai from Malaysia it will be further discussed in the panel. Responding to a question on the selection of suitable varieties, Dr. Johari explained that in the Malaysian context, variety selection is based on the issues faced by the industry. He mentioned that agroclimatic and soil suitability are important considerations, including early or late fruiting varieties that would prolong the season availability of the fruit. This is in addition to other positive characteristics such as fruit quality, yield and taste.

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To a question on the possibility of incorporating rambutan trees in an agro-forestry environment, Dr. Sobir said that this is practiced in Indonesia where tropical fruits including good rambutan varieties are planted alongside forest trees, which can provide extra income for farmers. The farmers also need to operate as groups or cooperatives to sustain the initiative.

To a query on irrigation, moderator responded that irrigation is normally required in dry areas and especially during plant establishment.

Responding to a comment on postharvest technologies to improve shelf life, Mr. Christopher Biai related the trials conducted in Malaysia, adding that at ambient temperature the popular R191 can stay fresh for 4 days, while at 10 degrees centigrade, the fruits can last until 10 days. Freezing the fruits did not help as it caused the flesh to become soft and mushy. Dr. Sobir added that varieties like 'Rapiah' from Indonesia can last 6 days in ambient temperature because the spinterns are shorter and exorbitantly priced. Mr. Christopher also commented that canning is an option, however, utilization of the canning facility has to take into account the time when the fruit is not in season.

Before the panel discussion, the session moderator invited Sabine Altendorf from the FAO, to share information on the current efforts by the organization to include minor fruits such as rambutan as a mainstream fruit crop. Sabine began by saying that there is limited data on minor tropical fruits. However, recently a proposal to update the HS codes (harmonised system) for tropical fruits has been submitted to the World Customs Organisation, with support from many countries, including the US, and it is hoped that soon (2027) more minor fruits will have assigned codes. This will also depend on the trade quantum for the fruit types that has to be substantial. She added that while perishability is a main issue, low consumer awareness and less availability in distant markets are current obstacles to develop rambutan. More must be done to promote the fruit in terms of its health benefits. Sabine added that there is potential to develop rambutan considering the global access due to migration and demography, at the same time benefits of consuming the fruit should be highlighted and actively promoted.

Summarising the presentations, and introducing the panel discussion, the moderator reiterated that consumption and market seems to be an obstacle in developing the fruit. Yacob gives the examples of reduced consumption of the fruit in Indonesia in recent years, and the static production and demand in Malaysia. This situation is further exacerbated by the very poor demand of the fruit in China. However, looking at the positive side, there are also factors such as the diaspora of Asian communities who are familiar with the fruit and the potential for them to popularise it. In addition, rambutan is also competing with other more popular fruits such as

durian or pitaya, but, it has to be noted these fruits too were less developed maybe 25 years ago and it took some time for them to become popular. Using this example, the moderator suggested that it will also take some time for rambutan to be developed into a popular fruit.

4.0. PANEL DISCUSSION

The panel discussion was conducted through responses by the presenters on questions or comments posed by the moderator, on the state of rambutan development in their respective countries.

In his presentation, Dr. Sobir commented on the low demand for rambutan in Indonesia, which prompted a question on whether steps are taken to improve the situation. Dr. Sobir responded that the 2 main factors attributed to low consumption of the fruit are the lack of interest by younger consumers who prefer fruits that are more convenient to eat, referring to the skin of rambutan that needs to be peeled before being consumed. He added that production has also been erratic and low because of the lack of commercial farms because most of the rambutans are produced from mixed backyard cropping system. Dr. Sobir also reiterated that rambutan has been listed as a fruit to be developed in Indonesia and the 'Rapiah' variety which has a longer shelf life has been promoted including growing them commercially.

Moderator then directed a question to Mr. Christopher Biai of the Malaysian Department of Agriculture regarding the slow development in the consumption and market of the fruit in Malaysia. Mr. Christopher reminded that rambutan is listed as a fruit to be developed for the domestic and export market and the export program to the USA is still ongoing. The mock export trial to the USA has indicated some positive indications and forthcoming field audits from the US importers are expected to move this effort forward. Currently reducing the supply chain with the use of e-commerce by young consumers are some alternatives to market the fruit. Malaysia recently experienced a glut in production which has led to fruits being unsold and wasted. Even though processing through canning is an option, the seasonal nature of the fruit makes it unsustainable. Increasing domestic consumption and exports are the best options for Malaysia.

Responding to the moderator's comment on the very limited market in China, Dr. Mei Ying from Southern China Agricultural University, indicated that this is due to the preference for litchi which is more available and cheaper in price. Rambutan in China is produced in Hainan Island and are also very expensive. Therefore, currently, it is not a choice fruit for the Chinese market, and it would take time to promote and develop rambutan further.

Dr. Johari from Malaysia responded to the moderator's comment on whether the new varieties introduced by MARDI (Malaysian Agricultural Research and Development Institute) are already available and distributed to growers. He reminded that the new varieties are early fruiting varieties which will benefit growers. MARDI is also introducing the variety through matured grafting on older varieties to replace older varieties that are less productive and marketable. The new varieties GB44 and AG28 are also available for sale as grafted plants to farmers.

In his concluding remarks, moderator Yacob, mentioned that fruits in the same family such as litchis and longan have had the same issues with shelf life and postharvest management, which have been overcome through concerted research and development and aggressive marketing.

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These fruits have already been exported to Western, Middle Eastern countries and throughout Asia. Going by this experience, the same can be applied to rambutan.

While its development remains slow compared to other minor fruits, there is still big potential for rambutan considering future markets in Asia and the Middle East based on demographic factors and the anticipated increase in exports due to, the diaspora or spread of Asians to other countries for work or migration.

Consumer demand is complex and unpredictable, but with the production of clean, safe, nutrient heavy, plus with new consumer attractive cultivars and aggressive promotion, the popularity of rambutan can be enhanced. Indonesia and Malaysia have also included rambutan as one of the fruits to be developed in the coming years, along with other fruits such as durian and pitaya. As agreed by presenters, there must be continuous efforts to encourage consumption of rambutan as a healthy fruit in combination with other fruit types.

Moderator Yacob concluded that he hoped the webinar had been informative and useful in understanding the challenges in promoting rambutan as a popular choice fruit among consumers and to improve its marketability.

5. CLOSING REMARKS

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Overall, the discussions showcased the potential, challenges, and ongoing efforts in rambutan cultivation and market development in Malaysia, China, and Indonesia. The presentations offered insights into the cultivation techniques, post-harvest practices, and the current market scenario, while shedding light on the various government support and initiatives, which can be emulated by other countries. Though some countries such as China at present remain net importers for rambutan, this scenario may change given the dynamism of the market and influence of other factors such as strong government backing, as observed in other countries such as Malaysia and Thailand. Greater promotional efforts are a must to create awareness of the fruit especially among younger consumers. Strategies such as varietal improvement, market expansion, and addressing consumer preferences were proposed to further revitalize the rambutan industry.

6. APPENDICES

6.1. Program

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Date: 18 May 2023 (Thursday)

| Time | Content |
|----------------|--|
| 2.00 – 2.10 pm | Introduction |
| | Dorothy Chandrabalan (TFNet) |
| 2.10 – 3.30 pm | Presentations |
| | Dorothy Chandrabalan (TFNet) |
| | a. Mr. Christopher Biai |
| | Director, Crop Industry Development Division, |
| | Dept. of Agriculture |
| | Malaysia |
| | |
| | 'Rambutan cultivation and market in Malaysia' |
| | b. Dr. Meiyin He, |
| | Assoc Professor, College of Economics and Management, |
| | South China Agricultural University, Guangzhou, China |
| | |
| | 'Market potential analysis of Rambutan in China' |
| | c. Prof. Dr. Ridzwan Sobir, |
| | Center of Tropical Horticulture Studies, IPB University, |
| | Bogor, Indonesia |
| | |
| | 'Status of production, consumption and market of Rambutan in |
| | Indonesia' |
| | d. Dr. Johari Sarip |
| | Independent Consultant |
| | |
| | 'Cultivar development and breeding of Rambutan in Malaysia' |
| 3.30 – 4.00 pm | Q & A, Panel discussion |
| - | Moderator: Yacob Ahmad (TFNet) |
| All speakers | Challenges and opportunities in developing Rambutan for the global |
| • | market |

6.2. PHOTOS

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TFNet Acting CEO Dorothy Chandrabalan Introduces the webinar.



Mr. Christopher Biai, Director, Crop Industry Development Division, Dept. of Agriculture, Malaysia



Mr. Christopher Biai presenting 'Rambutan cultivation and market in Malaysia'



Dr. Meiyin He, Assoc Professor, College of Economics and Management, South China Agricultural University, Guangzhou, China

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Dr. Meiyin He presenting 'Market potential analysis of Rambutan in China'



Prof. Dr. Ridzwan Sobir presenting Center of Tropical Horticulture Studies, IPB University, Bogor, Indonesia



Prof. Dr. Ridzwan Sobir presenting 'Status of production, consumption and market of Rambutan in Indonesia'



Dr. Johari Sarip, Independent Consultant

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Dr. Johari Sarip presenting 'Cultivar development and breeding of Rambutan in Malaysia'



Mr. Yacob Ahmad, TFNet Advisor, chairning the panel discussion with the presenters.

6.2. POWERPOINT PRESENTATIONS



RAMBUTAN CULTIVATION AND MARKET IN MALAYSIA

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01 Overview of Rambutan Industry in Malaysia 02 Supply and Demand 03 Market Access





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Rambutan (*Nephelium lappaceum* L.) FAMILY SAPINDACEAE

- Closely related to several other edible tropical fruits including the lychee, longan and pulasan
- Non-climateric fruit only ripen while being attached to plant or vine. Once harvested, the ripening process stop
- 3. Flowering from March to July and June and November

Rambutan Cultivation And Market In Malaysia

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Overview of Rambutan Industry in Malaysia

Rambutan Cultivation And Market In Malavsia



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Rambutan Potential in Malaysia

suitable climate allows rambutan to thrive
hot and humid weather allows rambutan to yield twice a year

New variety that is resistant to diseases and early yielding

Rambutan Cultivation And Market In Malaysia







Main Production Area In 2021

Rambutan Cluster Development Project

0.14 M/ 0.031M

57.2

1.047

0.43 M/ 0.733 M/ 1.644 M/ 0.384 M, 0.096M 0.163M 0.36M 0.08M

45.87

11th Malaysia Plan (2016-2020)

Item

Hectarage (ha)

Cumulative Production (tonne)

Value (RM)/(USD)

| No. | State | Planted Hectarage (Ha) | Production (tonne) |
|-----|----------|---------------------------|--------------------|
| 1 | Sarawak | 5,521.50 | 11,296.90 |
| 2 | Johor | 1,781.89 | 9,182.74 |
| 3 | Sabah | 1,631.30 | 5,071.10 |
| 4 | Kedah | 1,618.56 | 6,624.89 |
| 5 | Kelantan | 1,113.73 | 6,925.87 |

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Supply and Demand





UTILIZATION OF RAMBUTAN IN 2021



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EXPORT REQUIREMENT

All types of treatment carried
out:

to meet the requirements
of the importing country
to exterminate pests

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Video on Rambutan Mock Trial Eksport to the USA





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| N. M. S. | 1 | able 4 China | 's major impo | ort markets and | share of rambutan in 2 | 2017-2022 | A. |
|----------|------|---------------------|-----------------|----------------------|-------------------------------|---------------------------------|----|
| * | Year | Trading partners | Amount (USD) | Quantity (tonnes) | Market share by amount (%) | Market share by quantity (%) | |
| | 2017 | Vietnam | 5544 | 1.00 | 100.00% | 100.00% | |
| | 2018 | Thailand | 3858145 | 1439.01 | 99.68% | 98.62% | |
| | | Vietnam | 12512 | 20.16 | 0.32% | 2.38% | |
| | 2019 | Thailand | 4345985 | 1653.05 | 96.24% | 88.50% | |
| | | Vietnam | 169976 | 214.76 | 3.76% | 11.50% | |
| | 2020 | Thailand | 1899733 | 756.47 | 97.14% | 91.82% | |
| | | Vietnam | 55845 | 67.36 | 2.86% | 8.18% | |
| | 2021 | Thailand | 1995789 | 758.03 | 97.43% | 91.78% | |
| | | Vietnam | 52546 | 67.90 | 2.57% | 8.22% | |
| | 2022 | Thailand | 1491405 | 468.42 | 82.37% | 50.69% | |
| | | Vietnam | 319221 | 455.66 | 17.63% | 49.31% | |

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Figure 4 Imposed Figure 4 Imposed The second seco

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N. M. 1 K h IV. Conclusion X In the light of the above analysis and after in-depth discussion, it is difficult for rambutan development to become the fruit of choice for Chinese consumers in the short term.



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Positioning Rambutan in Indonesia

| | production (ton/yr) major fru | it in Indonesia (2002) | pro | duction (ton/ | yr) major fruit in Ind | onesia (2021) |
|-----------|-------------------------------|------------------------|-----------|---------------|------------------------|------------------|
| Banana | | | Banana 📃 | | | 1 |
| Mango | | 3,746,962 Pir | neap ple | | | 8,673,793 |
| Jeruk | | | Mango | | | |
| Papaya | | | Orange | | | |
| Salak | | | Durian | | | |
| Pineapple | | | Papaya | | | |
| Jackfruit | | | Salaka | | | |
| tambutan | 296,103 | j: | Jackfruit | | | |
| Durian | | Rai | ambutan | 874,562 | | |
| Avocado | | A | Avocado | | | |
| | - 1,000,000 2,000,00 | 3,000,000 4,000,000 | 0 | 2,000,000 | 4,000,000 6,000,000 | 8,000,000 10,000 |

Rambutan production in Indonesia increase three folds in 20 years (2002-2021), however in term of rank slight down from no 8 to no 9





Rambutan production recent trend

| N, 240 N, 240 N, 240 N, 240 N, 240 N, 240 N, 240 N, 240 | annu | al produ | ction (to | n/year) | / | 14,444,000 - 14,444,000 - 4,444,000 - 4,444,000 - 4,444,000 - | no. har | vested t | ree | ~ | -• | | yield (i | g/tree) | _ | ^ |
|--|------|----------|-----------|---------|---|---|---------|----------|-----|---|----|-----|----------|---------|-------|---|
| | | | | | | - | | | | | | и – | | | | |

In last 5 years annual production increase 1.5 folds, and first three

annual bearing pattern started in 2018 until 2020. Number of harvested trees not resemble to annual production due to change in yield/tree



Rambutan production pattern production (ton)



Rambutan production trend

1,200,000 rambutan annual production (ton/year) of Indonesia



9 2010 2011 2012 2013 2014 2 7 2018 2019 Despite rambutan production in Indonesia increase in 20 years, production year on year data revealed fluctuation, indicated rambutan production in Indonesia following three annual bearing, slight change related to wheatear anomaly





Rambutan production distribution



Rambutan production distribution



rambutan production following province in Sumatera





Rambutan Released Varieties





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Most Popular Varieties

Rapiah, released in 1985, originates from Pasar Minggu, characterized by sparse and relative short hair, brix 20– 22% (already sweet prior to mature), dry, chewy, easy separated from seed and thick flesh, sheft life 6 days, fruit weight 25 – 30 gr/fruit.

Binjai, Released in 1985, originates from the Binjai region, with slightly rough and sparse fruit hair, 21-22% brick, the fruit flesh is dry, chewy, and easy separated, with a fruit weight of 40-45 gr/fruit.



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Rambutan Potential Varieties





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Rambutan Consumption Consumption (kg/capita/year) Banana 8.79 Oranges Papaya termelon Salaka Salaka Rambutan Apple Guava Avocado Durian Mango 1.59 (3.14%) Duku Others 0.00 2.00 4.00 6.00 8.00 10.00 Rambutan consumption (2021) rank no 6 after banana, Oranges, Papaya, Watermelon and Salaca \$

Rambutan Consumption most rambutan fruit consumed fresh



Rambutan Consumption Variation





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Rambutan Consumption Variation Fried



Rambutan Marketing

Rambutan Export



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Rambutan Export



Rambutan export tend to decrease in last 10 year. In 2022 United Arab Emirate, Saudi Arabia, Qatar, Uni Europe, Taiwan, Singapore, and USA, with volume of 695.4 ton equal to 583,591 US\$.

kg \$2.50 2.00 1.50 1.00 0.50 0.00 9 10 Price (\$/kg) Volome (kg) 🛛 💻 Value (\$) rambutan export highest volume in I quarter, however highest price in II quarter



Rambutan export from Indonesia determinate by several

- factor including: Domestic Price
- . Export Price
- Rupiah exchange rate
- . Previous year export volume .
- Domestic Production Fruit Quality







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Other Objectives
To characterise the Fr population
To develop Selection Index
To study reproductive system
To identify early season progeny

To obtain, select and characterise new

Genetic Variability Variatior

clones of rambutan developed through open pollinated method

Main Objective

Breeding and selection of F₁ progeny

Second strategy:





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year: 421 plants



| Inde | pendent Culli | ng Level (l |
|---------------|-------------------------------------|---------------------------|
| | 3,199 progenies (| 7 year-old) |
| | 1,270 🖡 | Levell |
| | 1,929 progenies (| 3 year-old) |
| | 889 🛉 | LevelII |
| _ | 1,040 progenies | 9 year-old) |
| | 593 🖊 | Level III |
| _ | 447 progenies (1 |) year-old) |
| | 417 👆 | LevelIV |
| | 30 selected pro | ogenies |
| | ŧ | |
| 井 | e best progenies w | ere identified |
| J. Sarlp. Bre | aling and varietal improvement of i | lambutan. Enhancing globe |
| 14 | | |
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Score 1: AR < 30 % Score 2: 30 % ≤ AR < 38 % Score 3: 38 % ≤ AR < 45 %

Score 4: AR ≥ 45 %

Aril Recovery (no. 8)

Score 1: TSS < 18 % Score 2: 18 % ≤ TSS < 20 % Score 3: 20 % ≤ TSS < 22 % Score 4: 22 % ≤ TSS

TSS % (no. 7)

Score 1: FS < 25 g Score 2: 25 g ≤ FS < 35 g Score 3: 35 g ≤ FS < 45 g Score 4: 45 g ≤ FS

Fruit Size (no. 5)

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| c. Spinterns colo |
|-------------------------------------|
| a. Form |
| |
| Fruit production ** |
| Aril aroma * |
| Aril recovery |
| Aril texture |
| |
| Detachable aril * |
| TSS % |
| Fruit size |
| Yield per plant (5 y |
| Characteristics |





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