

ความสามารถในการแข่งขันของการส่งออกทุเรียนไทยไปยังสาธารณรัฐประชาชนจีน กรณีศึกษาความร่วมมือกับกลุ่มอาลีบาบา

Thai Durian Export Competitiveness to the People's Republic of China Case
Study: Strategic Partnership with Alibaba Group

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บทคัดย่อ

การวิจัยครั้งนี้มีวัตถุประสงค์เพื่อ 1) วัดความสามารถในการแข่งขันของการส่งออกทุเรียนไทย 2) ศึกษาผลที่เกิดขึ้นหลังจากที่กระทรวงพาณิชย์ก่อตั้ง Thai Rice Flagship Store ร่วมกับอาลีบาบา และ 3) หาแนวทางการแข่งขันกับคู่แข่งรายอื่นในตลาดจีน โดยมีการคำนวณและวิเคราะห์ข้อมูลการส่งออกทุเรียนของประเทศไทยตั้งแต่ปี พ.ศ. 2551 – 2561 เพื่อนำมาวัดความสามารถในการแข่งขันด้วยดัชนีความได้เปรียบ โดยเปรียบเทียบที่ปรากฏและส่วนแบ่งทางการตลาด จากการวิจัยพบว่า 1) ทุเรียนไทยมีความได้เปรียบโดยเปรียบเทียบที่ปรากฏในตลาดจีนในปี พ.ศ. 2561 มีค่า 26.92 ซึ่งเพิ่มขึ้นจากปี พ.ศ. 2560 ร้อยละ 9.37 2) การก่อตั้ง Thai Rice Flagship Store ทุเรียนไทยมีอัตราการเจริญเติบโตของดัชนีความได้เปรียบโดยเปรียบเทียบสูงกว่าก่อนความร่วมมือ นอกจากนี้ยังมีปัจจัยสนับสนุนอื่น ได้แก่ การสนับสนุนของรัฐบาลภายใต้นโยบาย Thailand 4.0 การเจริญเติบโตของกลุ่มชนชั้นกลาง การขยายตัวของพาณิชย์อิเล็กทรอนิกส์ (E-commerce) และรสนิยมในการรับประทานผลไม้ไทยของชาวจีน 3) แต่เนื่องจากในปี 2562 จีนอนุญาตให้มาเลเซียสามารถนำเข้าทุเรียนสดแช่แข็งได้ ซึ่งมีนัยสำคัญว่าทุเรียนสดทั้งลูกของมาเลเซียที่แช่แข็งด้วยกรรมวิธีพิเศษสามารถส่งออกไปยังจีนได้อย่างเป็นทางการแล้ว จึงส่งผลให้ส่วนแบ่งการตลาดของทุเรียนไทยในจีนมีการเจริญเติบโตในอัตราที่ถดถอย โดยในปี พ.ศ. 2561 ส่วนแบ่งการตลาดของทุเรียนไทยมีร้อยละ 38.20 ซึ่งมีอัตราการเปลี่ยนแปลงจากปี พ.ศ. 2560 ร้อยละ -2.96 เนื่องด้วยสภาวะแวดล้อมทางการแข่งขันที่เปลี่ยนแปลงไป ฉะนั้น ไทยจำเป็นต้องพัฒนาศักยภาพในการผลิตและส่งออกทุเรียน โดยอาศัยความร่วมมือทั้งจากภาครัฐและเอกชนเพื่อคงไว้ซึ่งความสามารถในการแข่งขันกับคู่แข่งรายใหม่ในตลาดจีน

คำสำคัญ: ทุเรียน ส่งออก ความร่วมมือเชิงกลยุทธ์ ความได้เปรียบโดยเปรียบเทียบที่ปรากฏ ส่วนแบ่ง
การตลาด

Abstract

Considerable research has been conducted on the comparative advantage of Thai fresh durian exports post partnership with Alibaba in 2018, but a few papers have been focused on these periods of time. With this collaboration, how change in competitiveness? What is effect of agreement? The purpose of this paper is to conduct a thorough analysis of the Revealed Comparative Advantage (RCA) index and Market Share (MS) of Thai fresh durian to Chinese market from 2002 to 2018. The study reveals that Thailand has a comparative advantage in exporting fresh durian to China in 2018 (with score 26.92 and rate of change is 9.37 percent, compared with 2017) as a result of Thai rice flagship store formation, government supporting under Thailand 4.0 policy, the growing Chinese middle class, e-commerce and China's preference for Thai fruits. Although, Thailand also has a strong export competitiveness of fresh durian to China, however, the growth of Thai fresh durian market share in China is growing at a declining rate. Although the annual market share in 2018 reaches 38.20 but rate of change declines 2.96 from previous year. As China announced the permission to import Malaysian unshelled durians that are frozen by specific process in 2019. Thus, Malaysia had become a main competitor in Chinese market for Thai durian. Therefore, the paper highlights the solutions to develop production process and export for maintaining Thai durian competitiveness in changeable environment.

Keywords: Durian, Export, Strategic partnership, RCA, Market share

Introduction

Thailand has entered into a strategic partnership with Alibaba Group to accelerate the growth of the digital economy of Thailand and the Eastern Economic Corridor (EEC) under the strategy of Thailand 4.0 (Pornwasin, 2018). Thailand 4.0 aims to turn the economy of the Kingdom from one dependent on the output of existing products produced by others to one driven by innovation, research and development, imagination and the growth of higher technology and green industries (Languopin, 2018).

Under this collaboration, Thai government agencies and Alibaba's business units will work closely across a number of areas, including e-commerce, digital logistics, tourism and training. The partnership shows the strengthening of collaboration between the Alibaba Group

and the Thai government after a letter of intent was signed in 2016, a move that kicked off a series of joint efforts to strengthen Thai entrepreneurs' ability to gain access to new markets and take advantage of digital innovations.

As a consequence of strategic partnership, Alibaba and the Thai Commerce Ministry have opened the first official Thai rice flagship store at T-mall that is the world's largest brands and retailers third-party platform. In 2017, China imported food from 187 countries worth a combined US\$ 58.3 billion, up 25 percent from a year earlier. Chinese consumers favour healthy foods. They focus not only on price but also quality, such as natural ingredients and famous brands. Thai government is promoting Thai entrepreneurs seeking new world-class trade platforms to drive Thai exports. It also wants to upgrade Thai products to foreign customers and new e-marketplace providers (Arunmas, 2018). Therefore, Alibaba will help drive famous Thai fruit sales into China, such as durian. Alibaba and the Ministry will work together to drive Thai rice growth and other exports of agricultural products to create an area of strength in the Thai economy and position Thailand worldwide. Alibaba will also encourage Thai agricultural companies harness the power of Alibaba's unique insights into the Chinese consumer market.

T-mall buyers today mostly buy products from Europe and Japan while Thai brands are growing in popularity, especially in cosmetics, fresh fruits, sweets and latex bedding. In April 2018, at West Lake Intime Mall in Hangzhou, T-mall opened China's first offline integrated cross-border trade store called T-mall Global Selector to allow consumers to touch and feel imported products in the shop for online ordering.

Furthermore, T-mall Fresh, under T-mall, for selling food directly to consumers in China including fruit, vegetables, meat, fish, eggs and ice cream that is a B2C platform for merchants. T-mall Fresh sources of fresh food from 13 countries via a direct platform worldwide called the Win Chain. Thailand is T-mall Fresh's second-largest source market and plans to become the No.1 T-mall Fresh supplier in the future, overstepping Australia.

In 2017, the biggest online shopping campaign is about to take place on 11 November, during the 11.11 promotional campaign of T-mall. Known as Singles' Day, the founder of Alibaba turned the de facto holiday from an anti-Valentine Day for Chinese singletons back in 2009 into a multinational shopping festival (Kaur, 2017), more than 13 million products were sold, with the durian ranking among the top 10 best-sellers. T-mall seeks more frozen fruit to sell from Thailand. In addition, T-mall was promoting fresh Thai items in its online and offline Harvest Day offerings on September 20 (Leesa-nguansuk, 2018).

Most of China's durian supply comes from Thailand, which is already T-mall's biggest importer of fruit. Especially, Mon Thong (Golden Pillow) constitutes 80 per cent of the durian trade between China and Thailand. According to a statement issued by the company, the 80,000 Mon Thong durians were snapped up by Chinese consumers on Alibaba's T-mall platform within a minute of them going online after the Hangzhou-based e-commerce operator closed a US\$ 626 million, three-year deal with the government of Thailand on durian sales. In addition, the other most sold fruits in the T-mall top include mangosteen, passion fruit, longan and coconut (Hangzhou Online, 2018; South China Morning Post, 2018).

Hence, it is necessary to conduct a study to examine the competitiveness of Thai durian exports to China after signed the Memorandum of Understanding (MOU) with giant's Chinese shopping online company by showing the real situation, as well as to point out possible measures or make recommendations to stakeholders and policymakers to uplift this situation. This paper is structured as follows; first, objectives are defined. Then, the research methodology is presented, followed by the results of the study. The final section is conclusion and discussion.

Objectives

1. To measure the revealed competitive advantage (RCA) of Thai durian exports to the Chinese market.
2. To examine the effect of Thai rice flagship store to Thai durian exports.
3. To investigate the solution to compete with other competitors in the Chinese market.

Methodology

Revealed Comparative Advantage (RCA) index and Market share (MS) is used to analyze Thai fresh durian (Harmonized System code 081060) exports competitiveness advantage. With signed cooperation, the study intends to test the changing competence of Thai agricultural product exports in the context of economic development and changing situation. For calculation of the Revealed Comparative Advantage (RCA) index and Market share (MS), the export value in U.S. Dollars have been taken from the database of UN Comtrade database, the Ministry of Commerce, Thailand and China Customs Statistics Information Center over 2 periods; pre-cooperation 2002-2017 and post-cooperation in 2018.

In this study, the Revealed Comparative Advantage (RCA) index of country (i) for product (j) is measured by the product's share in the country's exports in association to its share in the world market, the Revealed Comparative Advantage (RCA) index is calculated as follows:

$$RCA_{ij} = (X_{ij}/X_{it}) / (X_{wj}/X_{wt})$$

Where:

X_{ij} = Total exports of durian (j) from Thailand to China.

X_{it} = Total exports from Thailand to China.

X_{wj} = Total imports of durian (j) of China.

X_{wt} = Total imports of China.

The criteria determining the Revealed Comparative Advantage (RCA) indices are as follows:

$RCA > 1$ means that Thailand has a comparative advantage in exporting durian (i) to China.

$RCA < 1$ means that Thailand has a comparative disadvantage in exporting durain (i) to China.

Although the indices of the Revealed Comparative Advantage (RCA) that mean that the country has a revealed comparative advantage in the product but it also has some limitations such as Benedictis & Tamberi (2002) presents the Revealed Comparative Advantage (RCA) index is not symmetric and has no fixed mean. Because of this limitation, Benedictis & Tamberi (2002); Suriya (2001); World Bank (2010) suggest using a variety of indices to measure competitiveness in exports to get a clearer competitiveness picture.

The previous study of Mandeng (1991) employs Market share (MS) as a second tool to calculate trade competitiveness. As this report focuses on the global marketplace, the export shares will be used as international competitiveness indicators. Market share (MS) is one indicator of actual or past measurements of competitiveness (Karnani, 1982; Spence & Karingi, 2011). In accordance with Mandeng, 1991; Suriya, 2001; Farris, et al., 2010, Market share (MS) is the proportion of the value of the goods (i) exported by the individual exporting country (th) entering the importing country (ch) as compared with the total value of the world goods (w) exported to that importing country (ch) that can be expressed by the ratio;

$$MSi_{(th-ch)} = Xi_{(th-ch)} / Xi_{(w-ch)}$$

Where:

$MS_{i(th-ch)}$ = Market share of durian (i) from Thailand in China market.

$X_{i(th-ch)}$ = Total value of exports of durian (i) from Thailand to China.

$X_{i(w-ch)}$ = Total value of imports of durian (i) from the world to China.

The criteria determining the Market share (%) is as follows (Noodaeng, 2017):

$MS = 20\%$ means that Thailand has a strong export competitiveness of durian (i) to China.

$10\% \leq MS < 20\%$ means that Thailand has a strong export competitiveness of durian (i) to China.

$5\% \leq MS < 10\%$ means that Thailand has a general export competitiveness of durian (i) to China.

$MS < 5\%$ or less means that Thailand has very weak export competitiveness of durian (i) to China.

Results

Table 1 and Figure 1 present that the Revealed Comparative Advantage (RCA) index scores of Thai fresh durian (Harmonized System code 081060) that exported to China have been fluctuating during the seventeen-year period. The first five years (during 2002-2006) of the RCA index scores of Thai fresh durian are 0.08, 3.33, 21.06, 38.26 and 44.60, respectively. These periods increase significantly and reached a peak at 44.60 in 2006. There was a significant decrease in the period of 2007-2013 from 44.60 in 2006 and has declined continuously to 18.86 in 2013. Then, the RCA index scores in 2014-2018 grew constantly from 21.22, 24.59, 24.86, 24.62 and 26.92. The average RCA index score of 2002-2017 is 24.91 and 2018 is 26.92 that shows rate of change among two periods increased to 8.08 percent. During the seventeen-year period, the average RCA index score is 25.03. This can be interpreted as indicating that the comparative advantage of Thai fresh durian over the Chinese market is very high.

Table 1 The annual RCA index of Thai fresh durian exports to China

Year	RCA of Thai Fresh Durian	Change (%)
2002	0.08	N/A
2003	3.33	3,996.62
2004	21.06	532.39
2005	38.26	81.70
2006	44.60	16.55
2007	35.31	-20.83
2008	36.25	2.69
2009	29.83	-17.73
2010	30.38	1.86
2011	23.64	-22.19
2012	21.67	-8.33
2013	18.86	-12.97
2014	21.22	12.50
2015	24.59	15.91
2016	24.86	1.08
2017	24.62	-0.98
2018	26.92	9.37

Source: Calculation from China Customs Statistics Information Center (2019), Ministry of Commerce (2020) and United Nations (2020)

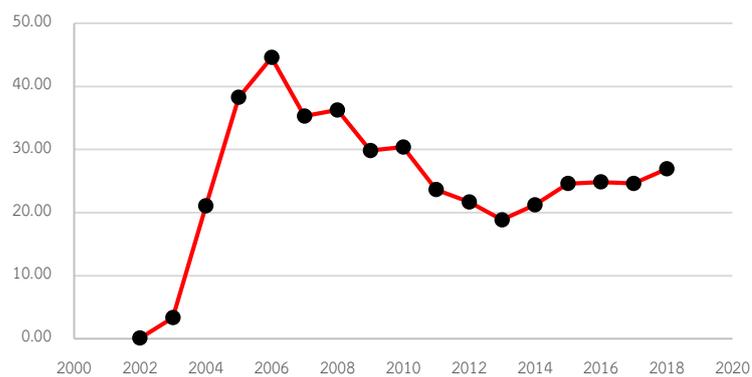
**Figure 1** RCA index of Thai fresh durian

Table 2 and Figure 2 demonstrate the market share of Thai fresh durian exports in Chinese market. The result indicates that the market share of durian in China has had a fluctuation upward trend, with a market share of 0.10 percent in 2002, reaching a peak at

66.03 percent in 2006, decreasing continuously from 54.80, 51.83, 47.81, 46.73, 35.59, 31.97 and 26.33 percent in 2007-2013, before improving slightly to 27.15 in 2014 and growing continuously in 2015-2018 with 34.66, 37.15, 39.37 and 38.20 percent of market share. The average market share percentage of 2002-2017 is 36.49 and 2018 is 38.20 that shows market share percentage among two periods increased to 4.69. During the seventeen-year period, the average market share percentage is 36.59 that reveals Thailand has a strong export competitiveness of durian to China. Through, there are significant competitors in the Chinese market, namely Malaysia (Noodaeng, 2017), which brings to the fluctuating market share. Furthermore, Hainan province of China succeeded in growing durian seedlings (The Straits Times, 2019). In respect to both the RCA Index scores and market share percentage, Thai fresh durian has been strong competitiveness, and has had a significant comparative advantage over the Chinese market. Thus, fresh durian from Thailand dominates China.

Table 2 The annual market share of Thai fresh durian exports to China

Year	Thai Fresh Durian (%)	Change (%)
2002	0.10	N/A
2003	4.58	4,585.88
2004	26.67	481.70
2005	53.09	99.09
2006	66.03	24.36
2007	54.80	-17.01
2008	51.83	-5.42
2009	47.81	-7.74
2010	46.73	-2.26
2011	35.59	-23.84
2012	31.97	-10.19
2013	26.33	-17.65
2014	27.15	3.15
2015	34.66	27.64
2016	37.15	7.19
2017	39.37	5.96
2018	38.20	-2.96

Source: Calculation from Ministry of Commerce (2020) and United Nations (2020)

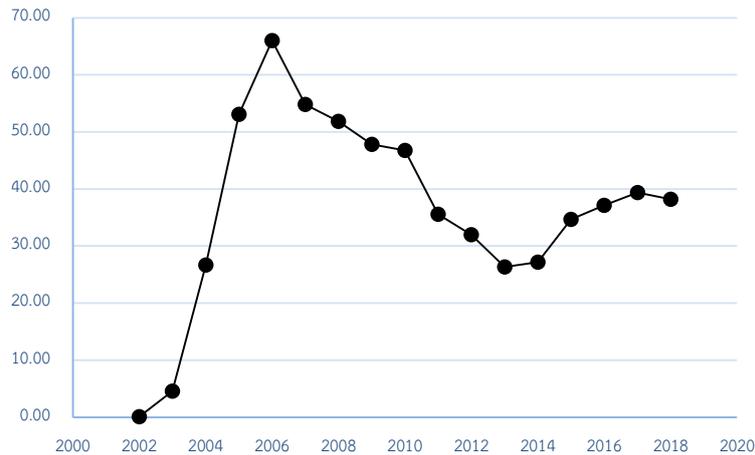


Figure 2 Market share of Thai fresh durian

Discussion

The rising comparative advantage of Thai fresh durian exports in China is caused by strategic partnership between Thai government with Alibaba Group. Alibaba founder did a live demonstration to show Thai business to an audience the power of its Alibaba platform. Chinese consumers snapped 80,000 Mon Thong durians on Alibaba's T-mall platform within a minute of going online (Tao, 2018). As a consequence of Thai fresh durian exports growth in 2018, the following main factors and their effects include unique people and cultural and development opportunities in Thailand's future policy 4.0, which allows Alibaba Thailand's long-term partner to turn the economy from industry-driven to technologically oriented. It provides for a new economic model after the economic phases of agriculture, light industry and advanced industry. With strong government supporting durian exports to China through Alibaba, is one way to foster Thailand 4.0 reach its goals.

China is the world's top fruit growers, yet its tropical fruit imports have been substantially increasing. Increasing affluence among the Chinese middle class has fueled demand for the exotic fruit. Also, the rising size of China's middle class is creating increasing demand for imported fruits like durian, avocados and cherries, bringing income to international fruit farmers (Sangkasem, Siribenchapruek, & Fufuengsin, 2019).

According to decreasing in the growth rate of market share, main barriers to exporting durian from Thailand to China are competitors and imported law. Due to durian is an ASEAN fruit for which each country can grow its own native varieties, while all the producing countries concentrate on the same market as China. This is quite risky for the future and there is

definitely anticipation of fiercer competition (Arunmas, 2018). In the past, Thailand was the only country that had been allowed to export fresh whole durians directly to mainland China, as a result of a 2003 trade agreement (Paulo & Wei, 2019). Until August 2019, Malaysia has signed a protocol on the export to China of whole durians. This will increase its export offerings beyond frozen pulp and purée, and will enable China to gain greater market share (Khor, 2019).

The Thai Government and related stakeholders urgently need to find measures to address these problems. The ways to strengthen and boost durian market share in the Chinese market are; at present the Mon Thong durian variety is at the top of the durian varieties imported into China (Jiang, 2019). The Thai government could market and promote other Durian varieties (Arunmas, 2018). These various durian varieties will compete with competitors.

Finally, the Department of International Trade Promotion (DITP) and the Ministry of Commerce could promote tropical fruit in the Chinese and global markets, as part of the policy of the Thai government to make the country a Fruit Metropolis and the kitchen of the world. They could arrange business matching events in every major city between Thai and Chinese entrepreneurs that will raise the status of Thai fruits in the Chinese market and gain the confidence of buyers. Then, Thai producers were urged to form networks in their provinces and sell their products through government channels.

Conclusion and Suggestions

This paper focuses on analyzing comparative advantages in durian export using revealed comparative advantage indices for Thailand to the Chinese market. The analysis was undertaken for fresh durian (Harmonized System code 081060). The results revealed that Thailand has a comparative advantage in exporting fresh durian to China from 2003 until 2018, especially, the RCA index score in 2008 is more than the average of 2002-2017 at 2.01. In 2018, its RCA index score grew 9.37 percent comparing 2017 that declining to -0.98. Moreover, Thailand also has a strong export competitiveness of fresh durian to China. In 2018, Thailand has market share in the Chinese market 38.20 percent although less than in 2017 that has 39.37 percent, in addition to that, the growth of market share in 2018 is growing at a declining rate, comparing 2017. Those statistics show Thailand has experience a reduction in the growth rate of Thai durian market share in China. Causes affecting inconstant market share and how

to improve market share of China in changeable business environment and technological expansion.

Suggestions

Future research could focus upon analyzing competitiveness changes for other Thai agricultural products in the Chinese market, as a shift may be taking place in export pattern under strategic partnership. Besides, further study of this issue could be conducted with other main trading partners of Thailand to understand the competitive position of Thailand in the world market.

Under the terms of the partnership between Thai government and Alibaba, Thai durians gains momentum in China. Alibaba aims to continue to drive overseas growth for Thailand's durian farmers and promote on its T-mall platform resulted in huge durians pre-sold to Chinese consumers. Online platform is new and efficient channel to respond consumer that Thai government should scale up Thaitrade.com and other Thai platforms. The creation of a large, national e-commerce platform will intensify competitiveness and help smaller businesses access a large pool of Thai and foreign consumers. In the future, Thailand may not rely on T-mall platform to expand the market but building own platform is one channel to promote, control and maintain quality of products. Moreover, Thai government should continue to boost Thailand's ability to service the Chinese market with other fresh produces such as mango, longan, aromatic coconut, mangosteen that are popularity as well.

New knowledge and the effects on society local and communities

Access to markets for imports of fresh fruit and vegetables into China is both a technological and a political issues. Maintaining good bilateral relations is critical for fast market access and is a difficult issue for exporters whose countries have a less than satisfactory relationship with the Chinese government to be remedied. The solutions to encourage Thai durian value in Chinese market are shown below.

Firstly, apart from strategic partnership with Alibaba, Thai government might encourage agricultural products through national e-commerce platform like Thaitrade.com and Thaitrade.com Sook (small order OK) to create more opportunities for Thai exports. Furthermore, looking for partnerships with renowned international e-commerce firms in the US, Europe, India, Africa, the Middle East, and high growth market as China, namely, JD.com, Suning.com, Yhd.com, Chunbo.com, Dmall.com, Fruitday.com, Freshfresh.com,

FreshMarket34580.com, Missfresh.com, Sfbest.com, Wochu.cn, Womai.com, and Yiguo.com (The Australian Trade and Investment Commission, 2018).

Secondly, under strategic partnership with Alibaba which will drive digital economy development in Thailand, concerning, first, providing e-commerce skills for small and medium-sized companies to acquire e-commerce knowledge and skills to start e-businesses and use the internet to grow their business online. Second, Thai digital talent training to develop and upgrade successful talent development strategies in Thailand. Lastly, creation of an official Thai rice flagship store at T-mall to drive the sale of popular Thai fruit like durian into China. Moreover, Thai government could drive the growth of Thai rice and other exports of agricultural products to build an area of strength in the Thai economy and position Thailand globally and help Thai agricultural businesses to harness the power of Alibaba's unique insights into the Chinese consumer market as well (Pornwasin, 2018).

Thirdly, Thai government could evaluate the duration of production and future management plan, as well as develop new measures to enhance the competence and competitiveness of the farmers. High-quality durian sorting process requires skilled employees with at least five years of experience who understand the entire process, from soil quality management and cultivation to harvesting and transportation (Bangkok Post, 2018).

Finally, In order to offer faster shipping before competitors do, Thai government and logistics service providers may remain up-to-date on logistical innovations (Janio Content Team, 2019). At first, sorting durians by quality, taking into account factors like shell color, weight and ripeness. They will arrive in China fully ripe and ready for consumption by shipping durians that are 70-80 percent mature (Bangkok Post, 2018). For this reason, distribution networks and management of the cold chain supply remain major obstacles to the expansion of foreign fresh fruit exports to China, particularly inland destinations in China.

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