

Voluntary Report – Voluntary - Public Distribution

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Report Name: Pistachio Market Update 2025

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Prepared By: Ted Shibata and ATO Shanghai staff

Approved By: Alexander Blamberg

Report Highlights:

Demand for pistachios in China has been steadily increasing, driven by rising consumer awareness of their health benefits and the growing popularity of nuts as a snack. This trend has positioned China as one of the largest pistachio importers globally, with most imports coming from the United States and Iran. U.S. pistachios are particularly favored for their superior quality. Chinese consumers tend to prefer large, uniformly colored pistachios with a high split rate. Packaging and branding strongly influence purchasing decisions. Innovative product offerings, convenient packaging, and ongoing consumer education are key to enabling U.S. pistachios capture a larger share of the market.

Market Overview

China's Growing Tree Nut Consumption

China's tree nut consumption has grown by 5 percent annually steadily over the past 5 years. China's national yearly intake of 8 million metric tons (kernel equivalent) represents 15 percent of the global total according to data from the International Nut and Dried Fruit Council (INC). However, China's per-capita tree nut consumption in 2023 was only 0.56 kg, which is approximately one-fifth of the 2.6 kg consumed in the United States. By comparison, per capita tree nuts consumption is 2.7 kg in Australia, 1.6 kg in the EU, and 0.98 kg in South Korea.

While per capita nut consumption in China is comparatively low, changes in dietary patterns are anticipated to boost the country's nut intake. Consumers in the post-pandemic era are increasingly concerned about food nutrition and function. Tree nuts, which represent a healthy snack option, have recently become immensely popular among middle-class urban consumers. As a result, it is estimated that per capita tree nut consumption could reach 1 kg in 2030, almost double of 2023 consumption.

The most consumed tree nuts in China are walnuts, almonds, pistachios, macadamia and cashews, mostly as snack foods, baking ingredients and dairy alternatives in coffee shops, with a smaller portion consumed as cooking ingredients. Pistachios have emerged as one of most popular tree nuts for Chinese consumers, with annual demand reaching around 160,000 metric tons in 2024. China was the world's second-largest purchaser of pistachios in 2024, behind only the EU.

Supply of Pistachios in the China Market

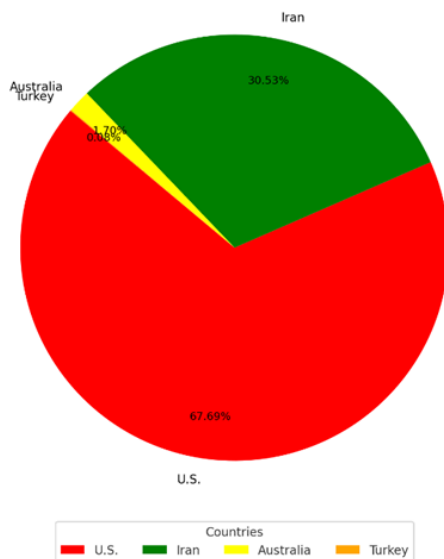
China has been a net importer of nuts for more than a decade due to the difficulty of growing popular varieties such as pecan, pistachios, and almonds, combined with the fast-growing tree nuts market. Except for walnuts and hazelnuts, demand for tree nuts exceeds supply in China.

In 2024, China imported 133,744 metric tons (MT) of pistachios in 2024 from four countries, making it the world's second largest pistachio importer. United States was the leading supplier with 90,675 MT representing 68 percent of China's total imports. Iran was the second largest exporter, with 40,721 MT accounting for a 31 percent of China's imports, followed by Australia (2,257 MT) and Turkey (91 MT). In 2024/25, China's demand for pistachios is expected to remain high. See FAS China [Tree Nuts Annual 2025 GAIN report](#) for more details.

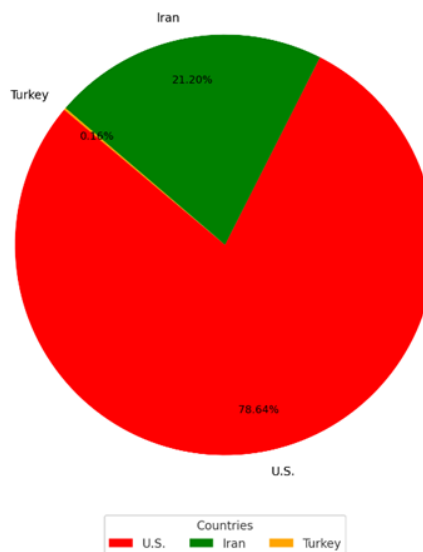
China Import of Pistachios in 2024 by Origin				
Unit: Metric tons				
Product	Origin	Variety: In-shell	Variety: Kernel	Quantity
Pistachio	USA	89,724	951	90,675
	Iran	40,464	257	40,721
	Australia	2,257	0	2,257
	Turkey	87	4	91
	Total	132,532	1,212	133,744

Source: China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-products (CFNA)

2024 In-shell Pistachio Imports into China



2024 Pistachio Kernel Imports into China



Source: China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-products (CFNA)

China is almost totally dependent on imports to meet demand. According to CFNA recent report in August 2025, the rate of self-sufficiency of pistachios from domestic production is close to zero percent while estimated consumption is between 90,000-110,000 metric tons. Xinjiang province is the primary domestic source of pistachios in China, accounting for approximately 95 percent of the country's production. In addition to Xinjiang, pistachios are also grown in Gansu, Shanxi, and Ningxia on a very small scale. CFNA estimates production of pistachios in Xinjiang at 300 metric tons in 2023 and 2024.

Consumption

In China, tree nuts are primarily consumed by middle- and upper-class individuals residing in first-tier cities and coastal regions of eastern China. According to a report on China tree nuts market from Kerry Group, 62 percent of consumers are women, while 53 percent are aged 34 and under, corresponding to Generation Z, who prioritize healthier lifestyles and personal happiness, 50 percent of Chinese consumers buy tree nuts at least once a week, spending more than 100 Chinese yuan (\$13.86) per purchase. Market research data collected during the 2025 Chinese New Year holiday show that tree nut gift boxes (selected by 46.3 percent of respondents) overtook gift boxes of tea (36.4 percent) and baijiu (a Chinese liquor, 34.4 percent) as the most popular gift box category.

Recent economic headwinds, however, have made Chinese consumers more price sensitive, which has in turn prompted food producers to reduce expenses to remain competitive. As a result, importers have become more cost-conscious when sourcing nuts from overseas suppliers.

As the nut sector continues to develop new methods of using nuts, industry insiders are optimistic about the rise in nut consumption in China, especially during the holiday season. The prices of various tree

nuts including pistachios are rising in second half of 2025 as the 2026 Chinese New Year holiday season approaches.

Currently, China's tree nut market is dominated by snack products, with the share of foods made from processed nuts being modest. However, nut butters, nut oils, nut powders, and nut beverages are increasingly integrated into the Chinese diet. Pistachios are one of the most favored tree nut ingredients in baking and catering business, widely recognized by Chinese consumers as a "super food" rich in protein, dietary fiber, antioxidant and low in calories and fat. Consumers are also attracted to the color of pistachios when used in products.

Following the popularity of Dubai Chocolate, products such as pistachio desserts, candy, coated pistachio kernels, etc. are continually developed and launched. Also, pistachios are increasingly used as bakery and pastry ingredients on bread, cakes, gelato, affogato, brioche, and ricotta toast. In recent USDA food service promotion programs, pistachios were also used in dinner entries such as pistachio-crusted crispy salmon and spicy chicken with fried American pistachios, gaining attention from local chefs and restaurant owners.

Competition Landscape

In China's pistachio market, both international and domestic brands play significant roles. Pistachios from the United States are well known for their roasted and flavored snack pistachios. Chinese snack companies such as Three Squirrels and Be & Cheery specialize in packaged pistachio snacks as part of broader nut assortments. Costco and Tianhong are also important distributors of pistachios in China market. The following companies lead the market based on the processing capacity and sales revenue in the first half of 2025:

1. **Three Squirrels** (Headquarters: Wuhu, Anhui Province): Founded in 2012, Three Squirrels is a well-known food brand listed on the Shenzhen Stock Exchange. Their products cover a full range of casual snacks such as nuts and dried fruits.
2. **Be & Cheery** (Headquarters: Hangzhou, Zhejiang Province): Established in 2003, they are a well-known food brand for nut sales, acquired by PepsiCo in 2020.
3. **Bestore** (Headquarters: Wuhan, Hubei Province): Founded in 2006, they are a listed company on the Shanghai Stock Exchange with over 2000 physical stores.
4. **Cha Cha** (Headquarters: Hefei, Anhui Province): Founded in 2001, Cha Cha is a listed company on the Shenzhen Stock Exchange, producing traditional roasted seeds and nuts.
5. **Wolong** (Headquarters: Qingdao, Shandong Province): Established in 2012, Wolong mainly produces a variety of dried nuts and dried fruits. Their "Daily Nuts" product launched in 2015 making them a pioneer for this category of mixed nuts products.
6. **Laiyifen** (Headquarters: Shanghai): Founded in 2000, Laiyifen is a large domestic retail chain for snack food with nearly 3,000 stores in more than 20 provinces and cities across the country.

7. **Hua Wei Heng** (Headquarters: Hangzhou, Zhejiang Province): Founded in 1992, they are a well-known brand in dried fruit and nut snack foods.
8. **Rainbow** (Headquarters: Hong Kong, China): Founded in 1958, Guangdong Nanxing Rainbow Nut Products Co., Ltd. specializes in importing, processing, and producing a variety of nut products with a high market share in pistachios and macadamia nuts.
9. **Ganyuan** (Headquarters: Pingxiang, Jiangxi Province): Established in 2006 and listed on the Shenzhen Stock Exchange, Ganyuan's main products include roasted seeds and high-end nuts such as cashews and macadamia nuts.
10. **Yao Sheng Ji** (Headquarters: Hangzhou Lin'an, Zhejiang Province): Founded in 1998, they are a grower, processor and roaster of a series of nuts and dried fruits products.

Key Growth Drivers for Pistachio Consumption

1. **Health & Wellness Trends:** Pistachio consumption is experiencing significant growth driven by several key trends. First, the health and wellness movement is a major factor, as pistachios are marketed as a nutrient-dense snack rich in protein, fiber, and antioxidants. This aligns with the increasing health consciousness among China's middle class and younger generations. Additionally, the demand for "clean-label" and low-sugar snacks has further boosted the popularity of pistachios.
2. **Premiumization:** Pistachios are positioned as a premium nut due to their higher price point and imported origins. The introduction of flavored and roasted varieties, such as honey-roasted, spicy, and wasabi, appeals to the adventurous tastes of younger consumers.
3. **Catering Business Innovation:** In China, approximately 70 percent of pistachios are distributed through the retail channel for snacking, and 30 percent is distributed to catering business. However, catering business innovation is increasingly playing a crucial role in the rising consumption of pistachios. Popular tea shops like Heytea and Naisnow Tea are incorporating pistachio paste into their milk teas, lattes, and desserts. Similarly, bakery chains and ice cream brands, including Häagen-Dazs, are using pistachio toppings and fillings in their products.
4. **E-commerce Expansion:** The expansion of e-commerce platforms such as Tmall, JD.com, and Pinduoduo has increased the accessibility of pistachios, particularly in lower-tier cities. This has made it easier for consumers to purchase pistachios online.
5. **Plant-based Diets:** Plant-based diets are becoming increasingly popular in China. Post estimates that China's plant-based food business has expanded at a 14 percent annual rate over the last 5 years, with its value reaching around \$10 billion in 2024. Furthermore, the number of enterprises producing plant-based foods and beverages is now over 8,000. As a result, consumption of tree nuts, especially pistachios which are known as a complete protein product, will have positive momentum for long term category growth.

Trade Shows and Conferences

Event Name	Organizer	Description	Date	Location
Food Exhibition for Nuts and Dried Fruits	China Nuts and Dried Fruits Association (CNSA)	Usually includes a one-day conference and a three-day exhibition. The 2025 CNSA event hosted over 2,000 exhibitors and professionals in tree nuts, dried fruits, snack foods, baking products, and plant-based foods business.	Mid-April	Hefei, Anhui Province
Annual China International Nut Conference	China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-products (CFNA)	Usually includes a two-day convention and a trade show running in parallel. The 2025 Conference was attended by more than 1,000 representatives from over 20 countries and regions with nearly 100 exhibitor booths.	First week of August	Normally organized in east China, where import and processing of tree nuts is primarily located.

USDA Cooperators engaged in almonds, pistachios, pecans, cranberries, blueberries, tart cherries, raisins, prunes, walnuts, peanuts, dry pea and lentils regularly send representatives to attend the above two events in coordination with USDA FAS.

Further Information

USDA's Foreign Agricultural Service (FAS) has the following offices in China.

Office of Agricultural Affairs (OAA) Tel: +86 10 8531 3600 Fax: +86 10 8531 3636 Email: AgBeijing@usda.gov	
Agricultural Trade Office (ATO) Beijing Tel: +86 10 8531 3950 Fax: +86 10 8531 3974 Email: ATOBeijing@usda.gov	Agricultural Trade Office (ATO) Shanghai Tel: +86 21 6279 8622 Email: ATOShanghai@usda.gov
Agricultural Trade Office (ATO) Guangzhou Tel: +86 20 3814 5000 Fax: +86 20 3814 5310 Email: ATOGuangzhou@usda.gov	Agricultural Trade Office (ATO) Shenyang Tel: +86 24 2335 5140 Email: shenyangATO@state.gov

Attachments:

No Attachments.