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**Report Highlights:**

China's peach and nectarine production is forecast to fall 3 percent year-on-year to 17 MMT in MY 2025/26, driven by drought in the northwest and a spring cold snap in the north. Cherry production is anticipated to rise 6 percent to 900,000 MT on acreage expansion and improved management. Fruit consumption remains subdued due to economic challenges. Cherry imports from Chile are expected to remain strong owing to competitive prices and increased supplies, while U.S. cherry exports will likely decline further due to retaliatory tariffs imposed by the Chinese government.

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## **Production**

### *Peaches/Nectarines*

Post estimates China's peach/nectarine production to decline by 3 percent from the previous year to 17 million metric tons (MMT) in marketing year (MY) 2025/26 (January-December). A persistent drought will reduce Shanxi and Shaanxi regional output, while a cold snap in April, which even caused trees to die, will slightly lower Shandong's peach production this year. Similarly, reduced planting areas in Shanghai and Jiangsu due to rising labor costs will cause a slight decline in total production in 2025 in the Yangtze River Delta. Meanwhile, peach production in southern China, including Anhui, Hubei, and Sichuan should remain stable. Consumer demand for high-quality fruit is driving up the overall quality of peaches and nectarine from last year.

Peach and nectarine acreage in China has generally declined over the past few years. In key production regions like Shandong and Hebei, certain farmers of conventional peaches have shifted to more profitable crops, notably cherries. In more developed Eastern China, peach planted area has significantly declined by 50 percent over the past decade because of rising labor costs. An aging agricultural labor force is also contributing to the shrinking peach planting area. In some cases, fruit farmers are too old to handle the demanding work, leading to land abandonment or conversion to less tiring crops like corn. However, Yunnan peach production is increasing quickly on strong market demand. Thanks to its unique diversity of climate patterns, Yunnan peaches can ripen early in April or late in November-December, perfectly filling gaps in the nation's traditional peach supply season, which runs from May to October.

Changes in consumer preferences are encouraging farmers to plant new varieties. There is a general trend, especially in northern China, towards planting more early-ripening varieties and using greenhouses to produce nectarines to improve income. In northern China, there has been a notable shift away from traditional soft peaches due to difficulties in transportation and storage, moving to more robust, crispy varieties. Farmers in Northeast and Eastern China have increased the cultivation of yellow peaches and nectarines. Specialty fruits, such as donut nectarines and yellow-flesh peaches, can generate higher market returns. The newly emerged red-flesh nectarines and white-flesh donut nectarines have become a hotspot. With varieties adjustment and adoption of new planting technologies, such as greenhouses, the supply season of peaches and nectarines has extended, ranging from late March to early December, with peak harvests occurring in July, August, and September. The market has seen an increasing enrichment of varieties. Although the share of specialty varieties is expanding, most peaches and nectarines remain conventional varieties, as specialty varieties normally require particular attention and higher investment.

The biggest challenge facing Chinese peach industry remains the shortage of laborers and an aging labor force. With limited mechanization, peach farming is labor-intensive for tasks like bagging and fruit-picking, and very few young people are willing to farm. A Shandong farmer told Post that they work long hours to bag over 3,000 peaches a day. Most farmers are in their 60s or 70s. Labor costs are high, especially in developed eastern China regions. For example, the labor cost in Shandong has reached 20 RMB an hour in 2025. Labor costs reportedly account for 25 percent of total peach production costs in 2025, compared to 18 percent in 2020. In addition, pest issues (e.g., fruit fly) and lack of irrigation systems have affected peach production in northern China, according to fruit farmers in Shandong.

### *Cherries*

Post estimates China's cherry production to increase by 6 percent on a yearly basis to reach 900,000 MT in MY 2025/26 (April-March) due to expanded acreage and improved crop management. Despite unfavorable weather patterns like persistent drought in northwest and colder spring temperatures in northern China, notably Shandong province, the nation's total cherry production is expected to continue rising, especially under protected horticulture systems, typically greenhouses. Fruit quality has also improved, driven by increased investment and enhanced farming techniques. Cherries are considered a high-value fruit, and growing cherries remains more profitable than most other fruits.

While cherry planting area remains stable in traditional production regions such as Shandong and Dalian, acreage has expanded in provinces like southwest Sichuan and northwest Xinjiang. Despite less desirable growing conditions, these regions have seen an increase in cherry cultivation, primarily in greenhouses. Reduced inputs costs, notably land and labor costs, and the ability to distribute to local markets are considered advantages. Modern greenhouses like those in Dalian precisely control temperature, humidity, and sunlight, allowing for counter-seasonal cultivation by manipulating dormancy. Therefore, these climate-controlled greenhouses enable cherries to ripen in February. The less sophisticated greenhouses regulate the temperature through opening or closing the vents, which can also significantly move up the maturity period. Both types of greenhouses can produce beautiful large cherries that command higher prices. Managing greenhouses, however, is more challenging than open-field cultivation, with completely different approaches to water management, pruning, and flower/fruit management. The adoption of greenhouse cultivation has effectively extended the Chinese cherry season, ranging from February to early July.

The share of cherry production grown in greenhouses is increasing quickly, but most cherries are still planted in open fields. The investment in building a greenhouse can be substantial. A Dalian cherry farmer told Post that the cost of building a greenhouse without a cooling and heating system covering an area of 8 mu (~1.3 acres) is estimated at over 1.1 million RMB (~\$150,000) and it takes around 5 years to recover the investment. In addition, fruit handlers indicate that greenhouse cherries are fragile and difficult to store due to techniques used to intervene in their growth cycle. Growers often use extreme methods to maximize yield and size, pushing trees to their physiological limits. Greenhouse cherries prioritize size over taste. In other words, greenhouse cherries taste less sweet than open field cherries, though some greenhouses, especially those operated by large companies, do produce sweet cherries due to enhanced

management and investment (e.g., organic fertilization). Because direct rain exposure can easily lead to fruit cracking and undesirable color, rain shelters are commonly used in open-field cherry cultivation.

Main cherry varieties planted in greenhouses are Meizao, while the share of Russian No. 8 and Summit is increasing. Farmers of open field cherries like to plant Meizao, Russian No. 8, Brooks, Kordia, Lapins, and Rainer. There is a strong desire among farmers to upgrade cherry varieties. In fact, new varieties are constantly being introduced. For example, in Sichuan, local breeders have developed 3 new varieties (i.e., Shuzaomei, Shuzimei, and Shuguimei), featuring early-ripening, long shelf life, or high productivity. Newer varieties like Rocket and Linglongcui have emerged in the market, but the volume remains small.

Production costs, including labor and fertilizer, are significant and rising. Similar to peaches, there is a growing shortage of agricultural laborers, especially during the period of harvesting. Lack of suitable equipment for sorting and grading leads to heavy reliance on manual labor, which is expensive and makes quality control difficult. Imported equipment, such as for water-cooling processing, is unsuitable for greenhouse cherries that are more fragile than field cherries.

## **Price**

### *Peaches/Nectarines*

Ample supplies and undesirable varieties continue to keep conventional peach/nectarine prices weak. Despite reduced production this year, prices remain unchanged or have even declined from the previous year. In contrast, the price of specialty peaches/nectarines, such as donut nectarines and yellow peaches, is significantly higher. Greenhouse nectarines, harvested in early April, show varying prices, ranging from 20 RMB to over 30 RMB per kilo at wholesale markets in Hebei and Shandong, as observed by Post during crop tours. Early ripening peaches in open-field, available in late May, were priced at 10-20 RMB (~\$1.4 - \$2.8) per kilo from various origins. Overall, peach and nectarine sales are moving slowly, subdued by economic headwinds. Fruit farmers avoid selling peaches and nectarines to wholesalers who normally offer low prices and are strict on quality requirements.

The price differentiation between high-quality and ordinary fruits will become more pronounced in the future. High-quality and specialty fruits are expected to see continued price growth, while prices for oversupplied common fruits may decline.

### *Cherries*

Cherry prices have declined over the past few years due to increased supplies. In addition, the concentrated maturity period of the main domestic cultivars, such as Meizao, leads to a strong market supply and decreased retail prices. An oversupply of Chilean cherries during MY 2024/25 caused prices to drop sharply, which also suppressed domestic cherry prices, especially greenhouse cherries. For example, a Dalian greenhouse cherry grower told Post that his Meizao cherries were sold to traders at 70 RMB (~\$10) per kilo, down 15 percent from the previous year. Chilean cherry prices are expected to further decline in MY 2025/26, fueled by anticipated

supply increases. In general, large-size and high-quality cherries can still capture good prices, while smaller cherries sell at discount prices.

U.S. cherry prices are expected to increase due to higher tariffs. The additional tariffs which also significantly increase VAT make the wholesale price very high, potentially over 50 percent increase from the previous year, according to importers who are hesitant to import large volumes due to this price barrier.

## **Consumption**

### *General Fruit Consumption Trends*

The current economic situation has impacted fruit consumption, making consumers more price sensitive. Consumers are emphasizing money-for-value, indicating a focus on cost-effectiveness alongside quality and variety. Consequently, lower-priced fruit consumption has replaced some high-end fruit consumption. Most fruits are consumed fresh, but consumption of processed fruits is growing, driven by innovative product forms like sliced fruit, fruit tea, and dried fruit snacks.

### *Peaches/Nectarines*

Consumption of peaches and nectarines is shrinking. However, consumers are keen to try new peach/nectarine varieties. Chinese consumers, especially in southern China, prefer sweet and juicy peaches and nectarines with rich aroma. While some prefer crisp, almost all consumers prefer refreshingly sweet fruits over sour ones and large fruit. Consumers prefer specialty varieties such as donut nectarines, yellow nectarines, and yellow peaches, and their market share is increasing.

### *Cherries*

Cherry consumption is growing quickly due to increased global and domestic supplies, extended supply season, and improved quality. Chinese consumers have always shown high interest in fresh cherries. Consumers have growing demands for cherry quality, with a strong preference to large size, dark color, firm flesh, and high brix level. Cherries are becoming a “common fruit” and imported cherries have penetrated to lower-tier cities, thanks to the development of e-commerce and strengthened cold chain infrastructure. Premium cherries, including those from the U.S. Northwest, are particularly popular among middle- and upper-class consumers. Demand for cherries during the Lunar New Year in China is becoming inelastic.

## **Trade**

### *Imports*

China is expected to import more cherries from Chile in MY 2025/26 (April-March). Chilean cherries dominate the Chinese market because of large volume and timing coinciding with the Chinese New Year. The two countries have a bilateral free trade agreement (FTA) that allows Chilean fruits to enter the Chinese market duty free. High profit margins in previous years have

driven Chile to export more than 90 percent of its cherries to China. In MY 2024/25, China's imports of Chilean cherries soared by 44 percent on a yearly basis because of dramatically increased supplies. China also imports limited quantities of high quality but expensive cherries from New Zealand.

Despite a bumper harvest in Washington state and reputation of premium quality, China's imports of the U.S. cherries are likely to fall in MY 2025/26, hampered by retaliatory tariffs imposed by the Chinese Government on U.S. cherries. Importers remain cautious about placing orders and promoting U.S. cherries. China also imports small quantities of late season cherries from Canada. Past attempts to import from other northern hemisphere countries, such as Turkey and Uzbekistan, stalled because of quality issues. Spain recently gained market access for cherries, but they have a limited supply available to export outside of the EU.

Post projects China's peach and nectarine imports to gain moderately in MY 2025/26 (January-December), primarily driven by high-end market demand for counter-seasonal peaches from Chile, China's largest supplier. Peach imports from Australia have yet to recover following improvement of bilateral trade relations. Compared to domestic production, peach and nectarine imports remain quite low. The country's peach and nectarine imports occur mainly in January-April, with volume peaking in March. China imports very limited quantities of peaches and nectarines from Northern Hemisphere countries because domestic supplies are abundant.

### *Exports*

Post expects China's peach and nectarine exports to continue increasing in MY 2025/26. Chinese exporters are actively facilitating peach and nectarine exports to destinations including Russia, Southeast Asia, and Central Asia. Traders report that Shandong's exports of hard variety peaches to Russia increased by 30 percent year-on-year in MY 2024/25.

China's greenhouse cherry exports remain minimal due to limited supplies and domestic consumption. There is, however, potential for exports to Southeast Asia and Russia in the future as production continues to increase.

### **Policy**

On July 23, 2024, the General Administration of Customs (GACC) published the phytosanitary requirements granting market access for imports of fresh nectarines, plums, and apricots from Uzbekistan. China has previously granted access to Uzbekistan cherries.

On April 22, 2025, GACC announced the phytosanitary requirements for fresh cherries from Spain. Media has reported that Spain exported nearly 40,000 MT of cherries to the world in 2024, mostly to EU and UK markets. Spain gained market access for its fresh peaches to enter the China market a few years ago.

China's Government announced additional retaliatory tariffs against U.S. stone fruit since March 2025, in addition to China's retaliatory Section 232 tariff and Section 301 tariff, which can be excluded, that were put in place during the first Trump administration. The total cumulated

tariffs facing U.S. stone fruit are 45 percent (see latest GAIN report [CH2025-0111](#)). The following table provides a detailed comparison between the United States and other trading partners regarding tariffs and value-added-tax (VAT) which increases significantly as tariffs increase.

**Table 1. Import Tariff and VAT on Stone Fruit with Major Trading Partners in 2025**

Trade partner	Tariff (%)		VAT (%)
	Peaches/Nectarines (HS code 080930)	Cherries (HS code 080929)	
Country/Region with FTA			
Chile	0	0	9
Australia	0	0	9
New Zealand	No market access	0	9
Taiwan	Peaches-0 Nectarines-No market access	No market access	9
Pakistan	No market access	0	9
Country/Region with no FTA			
United States	Nectarine 45 (as of May 14, 2025)* Peaches-No market access	45 (as of May 14, 2025)*	9
Canada	No market access	10	9
Argentina	No market access	10	9
Spain	Peaches-10 Nectarines-No market access	10	9
Turkey	No market access	10	9
Uzbekistan	10	10	9
Kyrgyzstan	No market access	10	9
Tajikistan	No market access	10	9
Kazakhstan	Peach-10	No market access	9
Hungary	No market access	10	9

Source: China Customs

Note: \*Actual rate (including MFN, Section 232, Fentanyl, and temporary reciprocal) if Section 301 tariffs are exempted.

## Marketing

### *Cherries*

Historically, Chinese consumers considered cherries a luxury item reserved for the privileged few. Limited availability of imports led to prohibitive prices. More recently, increasing domestic and imported supplies have made cherries accessible to most consumers. Within the last decade, a Chinese slogan, which roughly translates to “Cherry Freedom,” has come to symbolize affordable and sufficient supplies of cherries for consumers in every demographic. Because of the seasonal nature of cherries, the level to which Chinese consumers enjoy this freedom could be different in January versus July.

Generally, consumers in China prioritize sweetness, firmness, size, appearance, and packaging. Popular imported varieties include Bing, Kordia, Lapins, Regina and Santana. Demand is increasing for domestic varieties (e.g., Meizao, Russia No. 8), including newly developed cultivars such as Linglongcui and Huojian. Domestic cherries continue to face cold chain and logistic challenges, which impact freshness and shelf life.

Marketing channels are rapidly evolving. Digital platforms remain central, with live-streaming and discount promotions driving strong online traffic for major e-commerce sites, such as JD.com, Tmall, Douyin, and Pinduoduo, while smaller platforms like Kuaishou, and Pupu are also gaining ground. Meanwhile, small and mid-sized farmers, who produce limited volumes of premium-quality fruit, often rely on word-of-mouth and promotion through Dongfangzhenxuan, Xiaohongshu (Little Red Book), and WeChat Video. Offline retailers are focusing on differentiation through premium offerings and curated experiences, with high-end outlets like Ole, Sam’s Club, Hema, Pagoda, and City Super serving as key channels for premium fruits. Production-origin branding is gaining momentum as consumers place growing importance on food safety and quality assurance. New sales models such as group purchases and private-sector gift cards-especially in first-tier cities like Shanghai-are helping drive high-value cherry sales in community and corporate settings.

Wholesale distribution continues to play a critical role, major wholesale markets for imported cherries include Shanghai Huizhan, Guangzhou Jiangnan, Beijing Xinfadi, Zhejiang Jiaxing, and regional markets for domestic cherries in Jinan, Dalian, and Shenyang.

### *Peaches & Nectarines*

China is both a leading producer and an active importer of peaches and nectarines. Consumer preferences vary by region, with juicy, sweet varieties-such as honey peaches from Wuxi, Xiangyang, Pingu, and Anhui-and crisp nectarines from Dangshan are particularly favored. Specialty types like yellow-flesh and donut-shaped nectarines are also gaining popularity. Imported peaches and nectarines from Chile and Australia enjoy moderate success, largely influenced by pricing and branding efforts. Meanwhile, online platforms and community group-purchases are becoming increasingly important sales channels, often supported by sampling and promotional discounts in wholesale markets.



**Table 2. China: Peaches/Nectarines Production, Supply, and Distribution**

Peaches & Nectarines, Fresh	2023/2024		2024/2025		2025/2026	
Market Begin Year	Jan 2023		Jan 2024		Jan 2025	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	840,000	840,000	830,000	830,000	0	820,000
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	17,500,000	17,500,000	17,600,000	17,600,000	0	17,000,000
Non-Comm. Production	0	0	0	0	0	0
Production	17,500,000	17,500,000	17600000	17600000	0	17,000,000
Imports	42,500	42,500	54,000	54,000	0	61,000
Total Supply	17,542,500	17,542,500	17,654,000	17,654,000	0	17,061,000
Domestic Consumption	17,482,500	17,482,500	17,579,000	17,576,000	0	16,975,000
Exports	60,000	60,000	75,000	78,000	0	86,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	17,542,500	17,542,500	17,654,000	17,654,000	0	17,061,000
For Processing	0	0	0	0	0	0

Unit: hectare, metric ton

**Table 3. China: Cherries Production, Supply, and Distribution**

Cherries (Sweet&Sour), Fresh	2023/2024		2024/2025		2025/2026	
Market Begin Year	Apr 2023		Apr 2024		Apr 2025	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	193,000	185,000	199,000	199,000	0	205,000
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	800,000	760,000	850,000	850,000	0	900,000
Non-Comm. Production	0	0	0	0	0	0
Production	800,000	760,000	850,000	850,000	0	900,000
Imports	388,000	388,000	415,000	552,500	0	600,000
Total Supply	1,188,000	1,148,000	1,265,000	1,402,500	0	1,500,000
Domestic Consumption	1,187,970	1,147,970	1,264,800	1,401,300	0	1,498,000
Exports	30	30	200	1,200	0	2,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	118,8000	114,8000	1,265,000	140,2500	0	150,0000
For Processing	0	0	0	0	0	0

Unit: hectare, metric ton

**Attachments:**

No Attachments