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Report Highlights:

Japan's MY 2022/23 cherry production recovered. FAS/Japan forecasts cherry production will further increase in MY 2023/24 due to favorable weather conditions. U.S. sweet cherry exports to Japan bounce back in MY 2023/24 buoyed by tariff elimination and recovered U.S. production. FAS/Japan expects Japan's nectarine production and imports to remain flat.

Cherries, Fresh

PS&D

Cherries (Sweet&Sour), Fresh Market Year Begins Japan	2021/2022		2022/2023		2023/2024	
	Apr 2021		Apr 2022		Apr 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	4260	4260	4200	4230	0	4200
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	11800	11800	14000	14500	0	15900
Non-Comm. Production (MT)	1300	1300	1500	1600	0	1700
Production (MT)	13100	13100	15500	16100	0	17600
Imports (MT)	6000	6000	1800	2363	0	4000
Total Supply (MT)	19100	19100	17300	18463	0	21600
Domestic Consumption (MT)	19100	19100	17300	18463	0	21600
Exports (MT)	0	0	0	0	0	0
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	19100	19100	17300	18463	0	21600

(HA) ,(1000 TREES) ,(MT)

Crop Area

In marketing year (April-March) 2022/23, Japan's fresh sweet cherry cultivation area remained flat. There is negligible production of tart cherry in Japan. Aging farmers and a lack of successors continue to constrain Japanese agriculture, including the cherry industry, which exhibits continuous gradual decline in the domestic production area. FAS/Tokyo estimates that the area harvested for cherries will shrink by 0.7 percent in MY 2023/24 compared to the previous MY.

Yamagata prefecture, located about 250 miles north of Tokyo, represents 66 percent of Japan's total cherry cultivation area. The following characteristics of Yamagata make it particularly suitable for cherry production: a large temperature difference between day and night, and little rainfall during Japan's June to July rainy season.

Production

In MY 2022/23, Japan increased cherry production by 22.9 percent to 16,100 metric tons (MT) compared to the previous MY. This production increase stems primarily from the recovery in Yamagata production, which represents 77 percent of the national production. Yamagata prefecture had a historically poor production in MY 2021/22 due to frost damage.

Despite several frost events again in March and April of 2023 in Yamagata, farmers were able to minimize the frost damage and successfully saved a significant number of fruit sets. Furthermore, Yamagata enjoyed favorable weather after the flowering in 2023. Post forecasts Japan's total cherry production to increase by additional 9.3 percent to 17,600 MT.

Consumption

Despite increased domestic cherry production, Japan's overall cherry consumption in MY 2022/23 decreased from the previous MY by 3.3 percent to 18,463 MT due to lower imports. For MY 2023/24 Post estimates Japan's cherry consumption will increase by 17 percent to 21,600 MT because Japan's domestic cherry production and cherry imports are both expected to increase compared to the previous MY.

In Japan, cherries are mostly consumed fresh and less than 10 percent are used for processing. Approximately 50 percent of domestically produced fresh cherries are sold directly for gifting purposes, followed by about 30 percent distribution via wholesale markets. Other distribution channels such as "Furusato Nozei"¹ and local farmers markets make up the remaining 20 percent.

Trade

Japan imports over 90 percent of fresh cherries from the United States, thus U.S. production and unit price of cherries shape Japan's import volume. In MY 2022/23, Japan's cherry imports decreased by 60 percent because of a drop in U.S. cherry exports. With the [recovery of U.S. sweet cherry production](#), Post estimates Japan's cherry imports will increase by 69.3 percent to 4,000 MT.

Japan's fresh cherry exports were minimal (3 MT) in MY 2022/23 because soft textured Japanese cherries do not withstand international transportation well. Post estimates Japan's cherry exports will remain negligible (less than 5 MT) in MY 2023/24.

Policy

The U.S.-Japan Trade Agreement (USJTA) came into force on January 1, 2020, and established a stepwise tariff reduction for U.S. sweet cherry exports to Japan (see [here](#) for more details). From April 1, 2023, Japan eliminated tariffs on U.S. sweet cherries.

On April 13, 2023, Japan lifted the [temporary phytosanitary measures for cherry import due to COVID-19-related travel restrictions](#) and conditions for U.S. market access for cherries returned to pre-pandemic requirements, which include an annual on-site audit of U.S. cherries.

¹ *Furusato-Nozei* (or "hometown tax" in Japanese) was initially introduced in 2007. Under this system, taxpayers can make donations to local municipalities and gain credits for income and residence tax in return. Local municipalities also send local produce to donors as "appreciation gifts." To attract *Furusato-Nozei* donations to cherry-producing regions, premium fresh cherries are a common gift for donors.

Peaches and Nectarines, Fresh

PS&D

Peaches & Nectarines, Fresh Market Year Begins Japan	2021/2022		2022/2023		2023/2024	
	Jan 2021		Jan 2022		Jan 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	9425	9425	9400	9410	0	9380
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	100700	100700	106800	109300	0	108400
Non-Comm. Production (MT)	7700	7700	8000	8700	0	8500
Production (MT)	108400	108400	114800	118000	0	116900
Imports (MT)	300	300	400	338	0	340
Total Supply (MT)	108700	108700	115200	118338	0	117240
Domestic Consumption (MT)	106800	106800	112900	115998	0	114440
Exports (MT)	1900	1900	2300	2340	0	2800
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	108700	108700	115200	118338	0	117240
(HA) ,(1000 TREES) ,(MT)						

Crop Area

In MY 2022/23, the areas harvested for peaches and nectarines were 9,310 ha and 100 ha, respectively. Adding these together, Japan's total cultivation area was 9,410 ha, down 0.2 percent compared to 9,425 ha in MY 2021/22. The leading two peach-producing prefectures, Yamanashi and Fukushima, represent 50 percent of the domestic cultivation area for peaches. Both prefectures are characterized by temperature and rainfall conditions particularly well suited for peach production (i.e., a greater temperature difference between day and night as well as longer hours of sunshine and low annual rainfall during the peach cultivation period). Nagano prefecture represents 65 percent of Japan's nectarine production area.

The production areas of both peaches and nectarines are continuously declining due the same labor challenges referenced in the cherry section above. Post estimates that areas harvested for peaches and nectarines will continue to marginally decrease in MY 2022/23 and MY 2023/24.

Production

Reflecting favorable weather throughout the growing season, Japan's peach production increased 8.9 percent from MY 2021/22 to MY 2022/23.

For MY 2023/24, several production sites report that peach fruits became slightly smaller due to high temperature and low precipitation in June. However, industry sources report the number of fruits per tree to be similar to MY 2022/23 conditions. Consequently, Post forecasts Japan's peach production will decrease slightly to 115,800 MT in MY 2023/24, down 1 percent compared to MY 2022/23.

Despite enhanced production due to favorable weather for nectarines, Post estimates Japan's MY 2023/24 nectarine production will remain flat compared to the previous MY at 1,100 MT as the

reduction in cultivation area will offset increased production.

Adding peach and nectarine production, Japan's total production of peaches and nectarines in MY 2023/24 is forecast to reach 116,900 MT, down 1 percent compared to 11,800 MT in MY 2022/23.

Consumption

In MY 2022/23, peach and nectarine consumption in Japan was 115,998 MT, an 8.6 percent increase compared to the 106,800 MT in MY 2021/22 due to increased domestic production.

Household consumption of peaches and nectarines is primary in Japan, and approximately 90 percent of peaches and nectarines are consumed fresh in Japan. The remainder is destined for processing.

In MY 2023/24, based on the estimated reduction of domestic peach production, Post forecasts Japan's peach and nectarine consumption to decline by 0.9 percent to 114,440 MT.

Trade

The United States does not currently have market access for fresh peaches, but peach market access to Japan was requested on February 4, 2022. U.S. nectarine exports to Japan represent 99 percent of Japan's nectarine imports. In MY 2022/23, Japan's nectarine imports remained steady at 338 MT, compared to 332 MT in the previous MY. In MY 2023/24, Post forecasts Japan's nectarine imports to stay flat at 340 MT due to a lack of consumer awareness for the fruit.

In MY 2022/23, Japan's peach exports increased 21.5 percent to 2,340MT, compared to 1,926 MT in MY 2021/22. The Ministry of Agriculture, Forestry and Fisheries of Japan (MAFF) designates fresh peaches as one of the strategically priority products to expand agricultural exports, mainly to Southeast Asia. Increased domestic peach production further supports increased peach exports. Despite a slight reduction in the domestic peach production in MY 2023/24, the depreciation of the Japanese yen enhances the affordability of Japanese peaches in Southeast Asia. Therefore, Post forecasts Japan's peach exports will grow another 19.7 percent to 2,800 MT in MY 2023/24.

Policy

On April 13, 2023, Japan lifted the [temporary phytosanitary measures for nectarine import due to COVID-19-related travel restrictions](#) and reinstated pre-pandemic requirements for U.S. nectarines (e.g., an annual on-site audit of U.S. nectarine orchards and mandatory pre-export methyl bromide fumigation).

On July 27, 2023, Japan revised the import protocol to allow co-fumigation of U.S. nectarines and plums.

The USJTA eliminated Japan's import tariffs on U.S. peaches and nectarines as of January 1, 2020 (see [here](#) for further details).

Attachments:

No Attachments