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Report Highlights:

Japan's fresh cherry production for the 2025/26 marketing year (MY) is projected to be 12,500 tons. This forecast is a result of production losses caused by high temperatures during the pollination period in the country's largest cherry-producing region. While this represents an 8.7 percent increase compared to the previous year's historically poor harvest, it is expected to be a low yield year with a 25 percent decrease from the average production year. Due to the poor domestic production, demand for U.S. cherries is expected to remain strong for the 2025/26 MY, continuing the trend from the previous year. For peach production in Japan, the absolute number of fruits is anticipated to be equivalent to the previous year; however, the total production volume by weight is forecasted to decrease by approximately 10 percent because of high temperatures and low rainfall during the critical fruit growing period.

Cherries

Cherries (Sweet&Sour), Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	4200	4200	4160	4110	0	4000
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)	15700	15700	10400	10000	0	11000
Non-Comm. Production (MT)	1600	1600	4300	1500	0	1500
Production (MT)	17300	17300	14700	11500	0	12500
Imports (MT)	3700	3734	5900	4754	0	4300
Total Supply (MT)	21000	21034	20600	16254	0	16800
Domestic Consumption (MT)	21000	21034	20600	16254	0	16800
Exports (MT)	0	0	0	0	0	0
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	21000	21034	20600	16254	0	16800
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

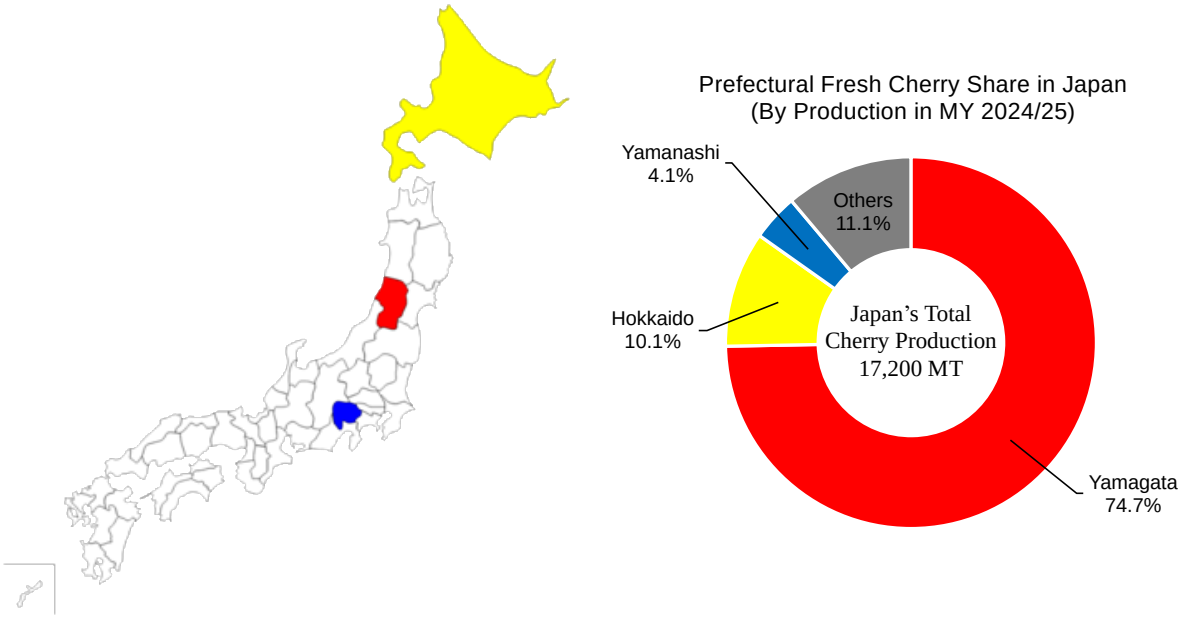
Planted Area

Located approximately 250 miles north of Tokyo, Yamagata prefecture accounts for 76 percent of Japan's fresh cherry production, followed by Hokkaido and Yamanashi prefectures at 10 percent and 4 percent, respectively (Figure 1). The main cherry varieties grown in Japan are *Sato Nishiki* (around 75 percent) and *Beni Shuho* (around 16 percent), both of which are yellow variety cherries. Although *Sato Nishiki* is the most recognized variety in Japan, its soft skin poses quality control challenges during harvesting and transportation. Furthermore, cultivating only this variety leads to a concentrated harvest period from mid- to late-June, increasing the labor burden during this limited picking window. The *Beni Shuho* variety was developed to counter said issues, since it has a firmer skin and higher transport durability compared to the *Sato Nishiki* cherry. As a late-ripening variety, it also helps to stagger the harvest periods, leading to a gradual increase in transplanting from *Sato Nishiki* to the *Beni Shuho* variety. The *Yamagata Beni Oh*, which is a relatively new cherry variety with harvest timing that is between *Sato Nishiki* and *Beni Shuho*, has also been introduced to further distribute the labor load during the busy picking season.

While these varietal shifts have enabled producers to better manage their labor requirements and improving productivity, cherry production and Japanese agriculture as a whole continue to face the difficult issues of an aging workforce and a lack of successors. The number of cherry farmers in Yamagata prefecture, the largest cherry production area, continues to decline. In addition, the rising cost of materials is accelerating the rate at which farmers are leaving the profession. The June cherry harvest season coincides with Japan’s rainy season, potentially risking the fruit skin cracking if it gets wet just before harvesting. As a countermeasure, Japanese cherries are primarily grown under rain-proof shelters that resemble greenhouses. The costs of constructing and maintaining these shelters are a major financial burden on farmers. Although the number of farmers is decreasing, the Yamagata prefectural government has reported that cherry orchard consolidation is progressing slowly, resulting in the increasing average

farm size per farmer. However, the rate of decline in total planted area is outpacing the speed at which existing farmers are expanding their farm plots. As a result, FAS/Tokyo projects that the planted area for Japanese fresh cherries will continue to decrease in the 2025/26 marketing year (MY: January-December), reaching 4,000 hectares (ha). This represents a 2.7 percent decrease from the previous year's 4,110 ha.

Figure 1 - Japan's Major Cherry Growing Areas by Prefecture for MY 2024/25



Source: Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF)

Crop Production

Yamagata prefecture's climate has historically been ideal for growing sweet cherries, with large temperature differences between the day and night. The prefecture currently accounts for more than 76 percent of domestic fresh cherry production. However, recent changes in climate patterns has cast a shadow on the prefecture's cherry growing advantage. In the 2024/25 MY, high temperatures throughout the growing season led to a reduced fruit set, in addition to harvest times overlapping for key varieties. Consequently, there was a labor shortage during harvesting, resulting in significant losses because all the fruit could not be picked at the ideal time. Due to the reduced output in the important growing area of Yamagata, Japan's total cherry production was historically low at 11,500 metric tons (MT).

For the 2025/26 MY, Yamagata's cherry production was affected by low temperatures and strong winds during the flowering season, which hindered honeybee pollination and resulted in a significant drop in the fruit set rate. While production is estimated to be an increase from the historically poor harvest of the 2024/25 MY, it is still forecasted 25 percent lower than Yamagata's annual average of 12,750 MT, with Yamagata's production projected at 9,500 MT in 2025/26/MY. As a result, FAS/Tokyo forecasts Japan's fresh cherry production to be 12,500 MT. Although this is an 8.7 percent increase from the previous year, it represents a nearly 28 percent decrease compared to two years ago, indicating that Japan's cherry production for the 2025/26 MY is again at an extremely low level.

Sour cherries are not commercially produced in Japan.

Consumption

Fresh cherries are predominately consumed in Japan, both for imported and domestically produced fruit. Non-standard cherries are processed into products such as syrups or jams and is estimated to be no more than about 10 percent of production.

Fresh cherries have a long history as a symbolic fruit of early summer and in peak season are often sold near the entrances of retail stores to attract consumers. In addition to general consumer consumption, fresh cherries in Japan are also regarded as a premium summer gift. However, this gifting custom is shrinking, particularly among the younger generation, as both the volume and value of spending on summer gifts have been trending downward. Conversely, a significant consumption channel for domestic cherries is the "*Furusato Nozei*" (hometown tax) system.
The *Furusato Nozei* system was introduced in 2007 and has gained widespread popularity after a legal revision in 2015. Under this system, taxpayers can receive income and residential tax deductions by donating to local municipalities. In return, the municipalities offer local products as "thank you gifts" to the donors. Among such gifts, "premium" fresh cherries are a popular item. However, due to the significant decrease in domestic cherry production in both the 2024/25 MY and 2025/26 MY, the supply has been insufficient to meet the demand for these gifts, leading many municipalities to announce shortages of this item.

In the 2024/25 MY, the total consumption of fresh cherries in Japan was 16,254 MT, a 22.4 percent decrease from the previous year, despite an increase in imports partially offsetting the decline in domestic production. For the 2025/26 MY, domestic production of fresh cherries is predicted to increase slightly but remain well below the average production year. Although imports are expected to be robust, they are projected to decrease slightly compared to the high volume of the 2024/25 MY. Therefore, FAS/Tokyo forecasts fresh cherry consumption in the 2025/26 MY to be 16,800 MT, a three percent increase year-on-year.

Trade

In the 2024/25 MY, Japan imported 4,754 MT of cherries, with 4,427 MT (93 percent) coming from the United States (Table 1). Due to the historical dominance of the U.S. as a major cherry exporter, imported cherries are commonly referred to as "American cherries" in Japan. Japanese consumers tend to seek low prices for imported fruits, including American cherries. In recent years, with a decrease in household disposable income and a rising Engel's coefficient, Japanese consumers have become more price sensitive. The weakening yen has also reduced the competitiveness of imported fruits relative to domestic produce. U.S. cherries are one of the few fruits that are in season in the Japanese market in May, and as such, they tend to be allotted ample shelf space in retail stores. However, during this period, cherries must compete with year-round fruits like bananas and kiwis. These fruits are often sold in small units, such as a single fruit or a small bunch, tending to result in a lower shelf price. Therefore, U.S. cherries need to be price-competitive against these alternatives, and retailers often put price pressure on distributors. In years with ample U.S. production, the fruit quality tends to be high with lower pricing, which is closely linked to success in the Japanese market.

For the 2025/26 MY, a bumper crop of U.S. northwest cherries created a favorable environment for importers for both quality and price, leading to increased imports to Japan during the latter half of the

season between late June to early August. However, this has not been enough to fully compensate for the reduced exports resulting from a decline in the California cherry exports to Japan. Therefore, FAS/Tokyo predicts a 10.5 percent decrease (4,300 MT) in imports of U.S. cherries for the 2025/26 MY.

Japan's fresh cherry exports are negligible at approximately 1 MT.

Table 1 - Japan’s Fresh Cherry Imports by Country

	Quantity (MT)				
Country/Year	MY 2020/21	MY 2021/22	MY 2022/23	MY 2023/24	MY 2024/25
World	4,262	5,826	2,369	3,734	4,754
United States	3,931	5,493	1,984	3,375	4,427
Chile	126	143	189	155	200
New Zealand	63	47	87	109	80
Australia	46	36	45	60	30
Canada	96	107	65	35	18

Source: Ministry of Finance

Policy

Under the U.S.-Japan Trade Agreement (USJTA), the import tariffs on U.S. fresh cherries (HS code: 0809.29) for export to Japan have been eliminated.

Peaches and Nectarines

Peaches & Nectarines, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2023		Jan 2024		Jan 2025	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	9380	0	9350	9310	0	9215
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)	103000	103000	102300	103600	0	93500
Non-Comm. Production (MT)	7600	7600	7700	7200	0	7500
Production (MT)	110600	110600	110000	110800	0	101000
Imports (MT)	300	246	300	266	0	250
Total Supply (MT)	110900	110846	110300	111066	0	101250
Domestic Consumption (MT)	108700	108691	108200	108752	0	99450
Exports (MT)	2200	2155	2100	2314	0	1800
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	110900	110846	110300	111066	0	101250
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Planted Area

Due to their relative adaptability to various climates, peaches are cultivated in all of Japan’s prefectures except for Okinawa. However, the top five prefectures are Yamanashi (29 percent), Fukushima (27 percent), Nagano (10 percent), Yamagata (9 percent), and Wakayama (5 percent), which collectively account for 80 percent of Japan's peach production. These cooler regions experience fewer pest and disease outbreaks, and larger temperature variations between day and night that result in higher quality peaches. The peach cultivation area has been decreasing since its peak of 21,600 ha in 1967, reaching 9,190 ha for the 2024/25 MY. The primary reasons for this decline are the aging of farmers, the aging of trees, and the conversion of orchards into residential land due to urbanization. Although the absolute area is much smaller, Japan's nectarine cultivation area has also decreased to 120 ha in the 2024/25 MY for similar reasons. As this trend is expected to continue for both peaches and nectarines, FAS/Tokyo estimates that the total harvested area for peaches and nectarines in Japan will continue to decline gradually in the 2025/26 MY, reaching 9,215 ha (9,100 ha for peaches and 115 ha for nectarines).

Production

While one might expect that a decrease in total planted area would be offset by an increase in yield per unit area to maintain total production volume. In actuality, the yield per hectare for peaches has also been decreasing annually. Although there are yearly fluctuations, the yield per hectare has fallen from approximately 15 tons in 2005 to around 11-12 tons in recent years. The reason for this is not clearly defined, but it is presumed that as aging farmers continue to cultivate labor-intensive peaches they are shifting their strategy towards producing a smaller number of high-quality, high-priced fruits by dedicating more care to each tree and fruit.

The impact of climate change is also affecting peach cultivation in Japan. Farmers are struggling with the risk of a cold snap and frost after an early bloom, which is a consequence of warmer winters. Additionally, higher summer temperatures pose the risk of causing sunburn on the fruit as well as

inhibiting fruit growth and expansion due to dryness. In the 2024/25 MY, despite a slight decrease in the planted area, the yield per hectare saw a small increase within an annual fluctuation, resulting in total peach and nectarine production of 110,800 MT, which was roughly on par with the previous MY. In contrast, for the 2025/26 MY, July high temperatures and low rainfall in the main production areas has resulted smaller average fruit size. Consequently, while the number of harvested fruits is projected to be similar to the previous year, the average weight of the fruit is expected to be about 10 percent less. As a result, FAS/Tokyo forecasts the total production of peaches and nectarines in Japan for the 2025/26 MY to decrease by 8.9 percent to 101,000 MT (99,900 MT for peaches and 1,100 MT for nectarines).

Consumption

According to the Ministry of Agriculture, Forestry and Fisheries, approximately 90 percent of peaches and nectarines are consumed fresh, with almost all off-spec fruits designated for processing. The peach season in Japan runs from late June to early September, peaking in July and August, with white peaches accounting for about 90 percent of consumption and yellow peaches accounting for the remaining 10 percent. Households are the primary consumers, although the general consumption of fruit is decreasing, especially among the younger generation. Furthermore, the low-yield, high-price peach strategy previously discussed has led to a steady increase in the unit price of fresh fruits, including peaches and nectarines, which is further accelerating the decline in fruit consumption, especially among the younger generation.

Domestic consumption of peaches and nectarines in the 2024/25 MY was 108,752 MT, which was comparable with the previous MY due to stable production. In contrast, FAS/Tokyo predicts that the consumption of peaches and nectarines for the 2025/26 MY will decrease by 8.6 percent to 99,450 tons due to a decline in domestic production.

Trade

The Government of Japan has a goal to export 1.4 trillion Japanese yen worth of fresh agricultural products, including peaches, by 2030 (for details, refer to the 2021 GAIN report "Japan Releases Details on Agricultural Export Expansion Plan"). Japanese peach producers are keen to enter overseas markets because of declining domestic consumption combined with a favorable export environment created by high prices in overseas markets and the weak yen. In the 2024/25 MY, Japan increased its peach exports by 159 tons from the previous year, reaching 2,314 tons. The main export destinations are Hong Kong and Taiwan (Table 2). However, for the 2025/26 MY, export volume is anticipated to decrease due to the decline in domestic production. FAS/Tokyo forecasts a 22 percent decrease from the previous MY to 1,800 tons.

Table 2 - Japan's Fresh Peach Exports by Country

	Quantity (MT)				
Country/Year	MY 2020/21	MY 2021/22	MY 2022/23	MY 2023/24	MY 2024/25
World	1,599	1,926	2,340	2,155	2,314
Hong Kong	1,230	1,461	1,808	1,636	1,730
Taiwan	285	388	401	379	414

Source: Ministry of Finance

The United States does not have Japan market access for fresh peaches due to quarantine reasons. There is no record of Japan importing fresh peaches in at least the last 10 years. As a result, Japan only imports nectarines, with 100 percent market share for U.S. nectarines. Japan's nectarine imports have remained around 250 tons during the post-COVID years, with 266 tons imported in the 2024/25 MY. With the weak yen negatively impacting imported fruits, FAS/Tokyo forecasts nectarine imports for the 2025/26 MY will be 250 tons.

Policy

Under the U.S.-Japan Trade Agreement (USJTA), the import tariffs on U.S. fresh nectarines (HS code: 0809.30) for export to Japan have been eliminated.

Attachments:

No Attachments