United States Department of Agriculture Foreign Agricultural Service

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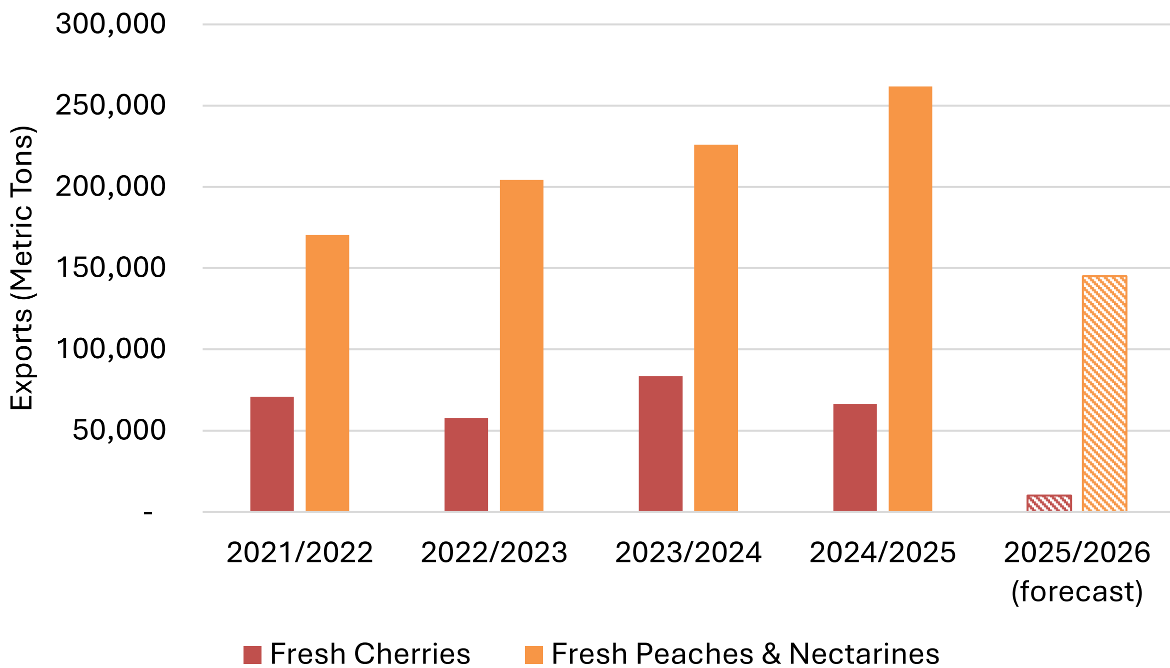
Fresh Peaches and Cherries: World Markets and Trade

Turkey Stone Fruit Exports Forecast to Fall After Spring Frosts



Turkey stone fruit production and exports are forecast to fall drastically in marketing year 2025/26 due to damaging spring frosts.[1] Fresh peach and nectarine exports are forecast down 45 percent to 145,000 metric tons (tons). Fresh cherry exports are forecast down 85 percent to 10,000 tons. If realized, Turkey will fall from the top peach and nectarine exporter in 2024/25 to second largest in 2025/26 and from the third largest cherry exporter to tied for eighth largest.

Turkey experienced widespread frosts in April 2025 that impacted fruit production throughout the country. Additionally, stone fruit production was negatively impacted by drought, hail, and excessive rainfall this year.[2] Peach and nectarine production is down 45 percent year-over-year to 649,000 tons and cherry production is down almost 60 percent to 400,000 tons. The damaging weather in 2025/26 follows a decade of production growth for peaches and nectarines that nearly doubled output with higher-yielding varieties and increasing nectarine acreage.[3] While cherry acreage has remained stable, yields have benefited from orchard modernization efforts in recent years.

[1] Marketing year 2025/26 for fresh peaches and nectarines is January to December 2025. Marketing year 2025/26 for fresh cherries is April 2025 to March 2026. In this article, stone fruit refers to fresh peaches, nectarines, and cherries.
[2] For more information, see August 2025 Stone Fruit Annual from FAS Ankara.
[3] For more information, see Fresh Peaches and Cherries: World Markets and Trade from September 2022.

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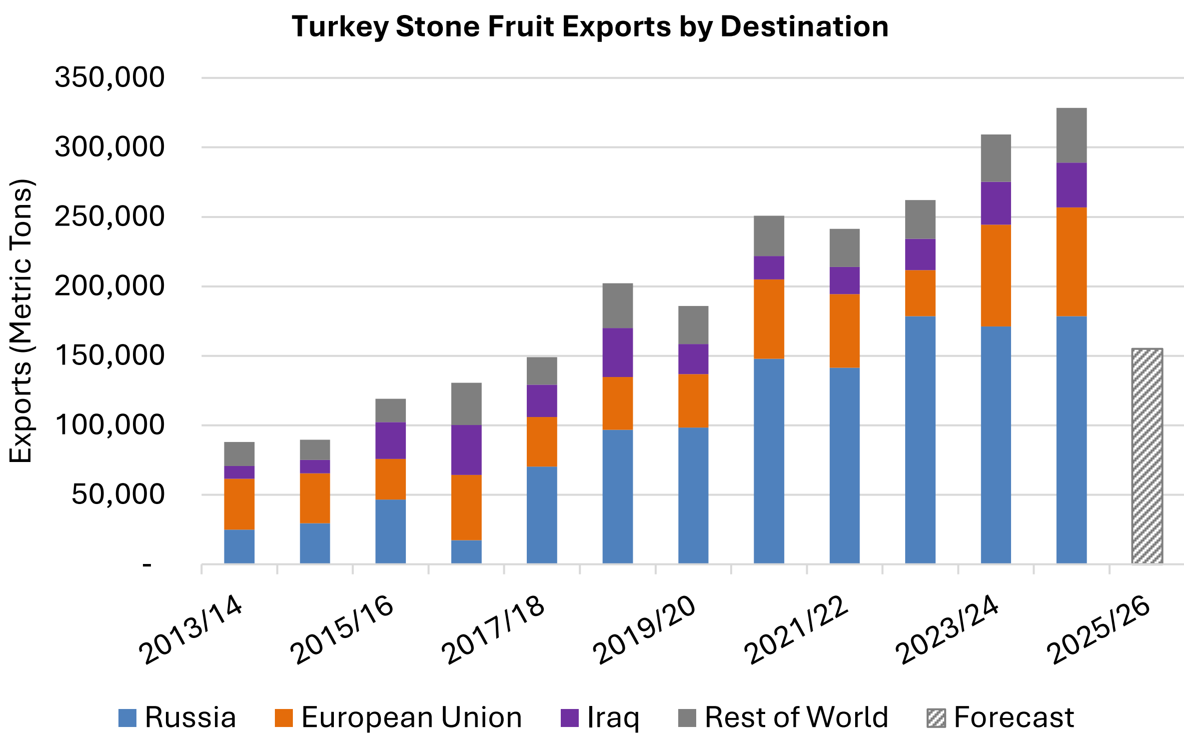
Export unit values for cherries more than doubled in the first 3 months of the marketing year compared to last year, but domestic prices have grown even more, leading to a greater percentage of production projected to be consumed domestically. Fresh cherry consumption is forecast at about 98 percent of production compared to 93 percent in 2024/25. Fresh peach and nectarine consumption is forecast at 78 percent of production, similar to past years.



Source: Trade Data Monitor, LLC.

The top three markets for Turkey stone fruit exports are Russia, the European Union, and Iraq. While fresh peach and nectarine shipments to all countries declined more than 50 percent in the first 6 months of the marketing year, Turkey has focused exports to maintaining the Russia market, where it has held the top spot since 2018/19. Other top markets, including Iraq and the European Union, have seen shipments fall at a higher rate with limited options to compensate from other Northern Hemisphere suppliers. Turkey fresh cherry exports to all three top markets have fallen by roughly 86 percent in the first 3 months of 2025/26. Russia's imports from all suppliers are only forecast down slightly as it can source cherries from Uzbekistan, Iran, and Azerbaijan, but EU fresh cherry imports are forecast down 60 percent as Turkey historically accounts for three quarters of EU imports.

The impact of Turkey's smaller crop will be felt beyond its main trading partners and will result in lower global fresh stone fruit consumption in 2025/26 as other suppliers will not be able to offset the decline in Turkey's production.

2025/26 Fresh Cherry Highlights

Global fresh cherry production is forecast to fall more than 10 percent to 4.6 million tons as smaller crops in Turkey, the European Union, and the United States more than offset increased production in China and Chile. If realized, this would be the first decline in global production in 6 years. U.S. production is forecast down 18,000 tons to 403,000, mainly due to smaller cherry crops in California and Michigan. EU production is forecast down 118,000 tons to 644,000 as spring frosts in Poland, Greece, and Italy more than offset a larger crop in Spain.

Global fresh cherry consumption is forecast down with the largest declines forecast for Turkey and the European Union due to smaller crops in both countries.

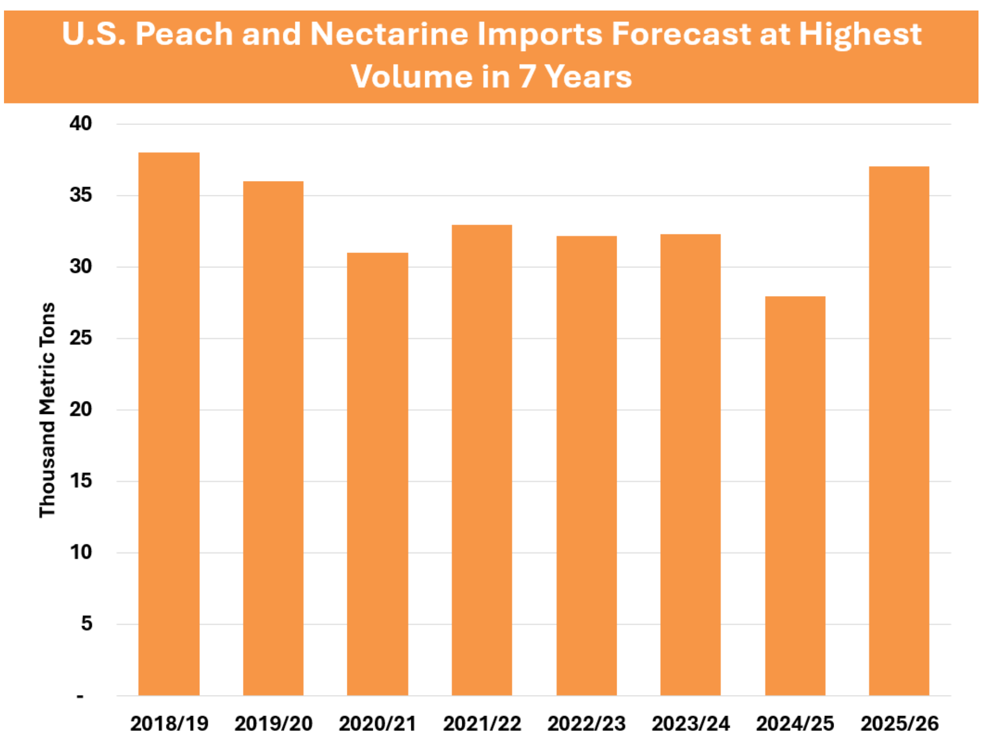
Global fresh cherry exports are forecast nearly unchanged at 939,000 tons. Chile exports are projected to grow nearly 10 percent to a record 670,000 tons. This is offset by a 56,000-ton decline in Turkey exports that are forecast at 10,000 tons. China imports are forecast up 46,000 tons to 600,000 and U.S. imports are forecast up 6,000 tons to 30,000 on anticipated higher Chile shipments. If realized, this will be a record level of imports for both countries. This is offset by projected declines in EU and Russia imports on lower Turkey supplies.

2025/26 Fresh Peach and Nectarine Highlights

Global fresh peach and nectarine production is forecast down 6 percent to 23.8 million tons on expected smaller crops from the top four producers. If realized, this would be the first decline in global production in 5 years. China production is projected to fall 600,000 tons to 17.0 million due to drought and a spring frost in major growing regions. EU production is forecast down nearly 10 percent to 3.1 million tons on hail damage in top producer Spain and a spring frost in Greece. Turkey and U.S. production are also forecast down year-over-year.

Global fresh peach and nectarine consumption is projected down on smaller crops in China, the European Union, and Turkey lowering domestic consumption in these countries.

Global fresh peach and nectarine exports are forecast down more than 10 percent to 922,000 tons on lower Turkey and EU exports. Russia, Iraq, and EU imports are all projected down on lower Turkey shipments. Russia imports are forecast at 310,000 tons, nearly 20 percent below last year's record volume, but Russia remains the top importer by a significant margin. U.S. imports are forecast at the highest level in 7 years on increased Chile shipments at the start of the marketing year.



Future Releases and Contact Information
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The *Fresh Peaches and Cherries: World Markets and Trade* circular is based on reports from FAS Overseas Posts and on available secondary information. The individual country reports can be obtained on the FAS Global Agricultural Information Network (GAIN) at: https://gain.fas.usda.gov/Pages/Default.aspx.

PSD Online
The entire USDA PSD database is available online at: https://www.fas.usda.gov/psdonline

Additional Resources
For additional data and analysis, please refer to the USDA-FAS website: https://www.fas.usda.gov/data/commodities/fresh-fruit

NOTES TO USERS:
European Union definition: includes 27 countries in the customs union (Austria, Belgium/Luxembourg, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden).

HS Codes:
The following codes at the 6-digit level are used for compiling trade data:
- Peaches/nectarines – 080930
- Cherries (sweet and tart) – 080921, 080929

Marketing Years:
- **Peaches/Nectarines -** Northern Hemisphere countries are on a January-December year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.
- **Cherries** - Northern Hemisphere countries are on an April-March year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.

Cherries (sweet and sour), Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2020/21	2021/22	2022/23	2023/24	2024/25	Sep 2025/26
Production						
China	520	630	680	760	850	900
Chile	386	392	471	470	684	730
European Union	653	726	828	850	762	644
United States	329	406	308	401	421	403
Turkey	914	874	833	948	933	400
Russia	306	332	357	325	325	325
Uzbekistan	256	287	298	305	305	305
Iran	271	250	240	280	280	280
Ukraine	238	256	238	216	216	216
Serbia	181	171	187	160	160	160
Other	248	228	262	278	260	275
Total	4,301	4,551	4,702	4,993	5,197	4,638
Domestic Consumption						
China	856	948	1,058	1,148	1,403	1,498
European Union	688	751	841	895	808	656
Russia	417	440	457	445	428	420
Turkey	827	803	775	865	867	390
United States	274	350	293	341	361	350
Uzbekistan	224	226	271	254	271	250
Iran	244	230	227	251	253	245
Ukraine	239	257	239	217	216	216
Serbia	164	159	173	151	152	158
Syria	36	38	64	63	60	63
Other	300	310	272	303	310	335
Total	4,269	4,512	4,669	4,932	5,127	4,581
Imports						
China	336	319	378	388	554	600
Russia	111	108	100	120	103	95
Canada	26	32	19	31	36	35
United States	13	21	27	21	24	30
European Union	53	44	29	58	58	23
Korea, South	17	19	11	16	17	23
Taiwan	13	14	12	12	16	20
United Kingdom	14	16	14	12	13	15
Kazakhstan	18	29	9	11	7	10
Saudi Arabia	7	5	5	7	6	7
Other	29	29	25	32	26	23
Total	634	637	628	707	861	881
Exports						
Chile	353	356	415	414	626	670
United States	67	77	42	82	85	83
Uzbekistan	32	61	26	51	35	55
Iran	27	20	13	29	27	35
Azerbaijan	31	20	29	36	26	20
Moldova	10	8	13	18	13	13
European Union	15	19	16	12	12	11
Argentina	6	5	5	7	8	10
Canada	7	10	12	8	1	10
Syria	6	6	7	10	13	10
Other	112	93	81	102	86	22
Total	664	675	660	769	931	939

Note: The marketing year begins in April of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries. Fresh cherries includes sweet and sour cherries.

Peaches and Nectarines, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2020/21	2021/22	2022/23	2023/24	2024/25	Sep 2025/26
Production						
China	15,000	16,000	17,000	17,500	17,600	17,000
European Union	3,224	2,907	3,120	3,299	3,406	3,120
United States	715	742	693	654	748	732
Turkey	890	892	1,008	1,077	1,179	649
Iran	605	548	577	614	614	614
Mexico	173	217	238	258	266	266
Uzbekistan	184	193	212	218	218	218
Chile	160	171	161	173	199	206
Brazil	202	199	209	201	201	201
South Africa	175	181	201	188	188	188
Other	560	643	638	654	655	641
Total	21,888	22,693	24,058	24,835	25,274	23,835
Domestic Consumption						
China	14,959	15,989	16,982	17,482	17,576	16,975
European Union	3,058	2,813	3,036	3,210	3,323	3,050
United States	686	692	664	641	715	709
Iran	505	481	527	524	526	534
Turkey	727	722	804	851	917	504
Russia	324	292	364	377	427	353
Mexico	195	257	266	287	297	296
Brazil	214	210	221	216	213	216
South Africa	145	151	174	160	159	159
Argentina	96	166	149	147	152	152
Other	959	885	888	914	922	895
Total	21,869	22,657	24,075	24,809	25,225	23,842
Imports						
Russia	286	250	317	334	384	310
Iraq	76	59	53	94	99	75
United Kingdom	63	57	64	67	72	70
China	37	33	45	43	54	61
European Union	39	43	41	48	59	50
Kazakhstan	53	32	24	20	37	45
United States	31	33	32	32	28	37
Canada	41	41	36	28	38	35
Kyrgyzstan	23	13	27	28	29	35
Saudi Arabia	49	39	36	45	32	35
Other	228	190	154	174	184	176
Total	926	789	829	913	1,013	929
Exports						
Chile	99	112	104	115	141	146
Turkey	163	170	204	226	262	145
European Union	180	137	125	137	142	120
Uzbekistan	86	56	77	92	104	100
China	78	45	63	60	78	86
Iran	100	67	50	90	88	80
Jordan	54	59	42	56	64	65
Azerbaijan	8	23	27	45	56	60
United States	61	83	61	46	61	60
South Africa	32	31	29	29	30	30
Other	61	43	31	43	37	30
Total	921	825	812	938	1,062	922

Note: The marketing year begins in January of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries.