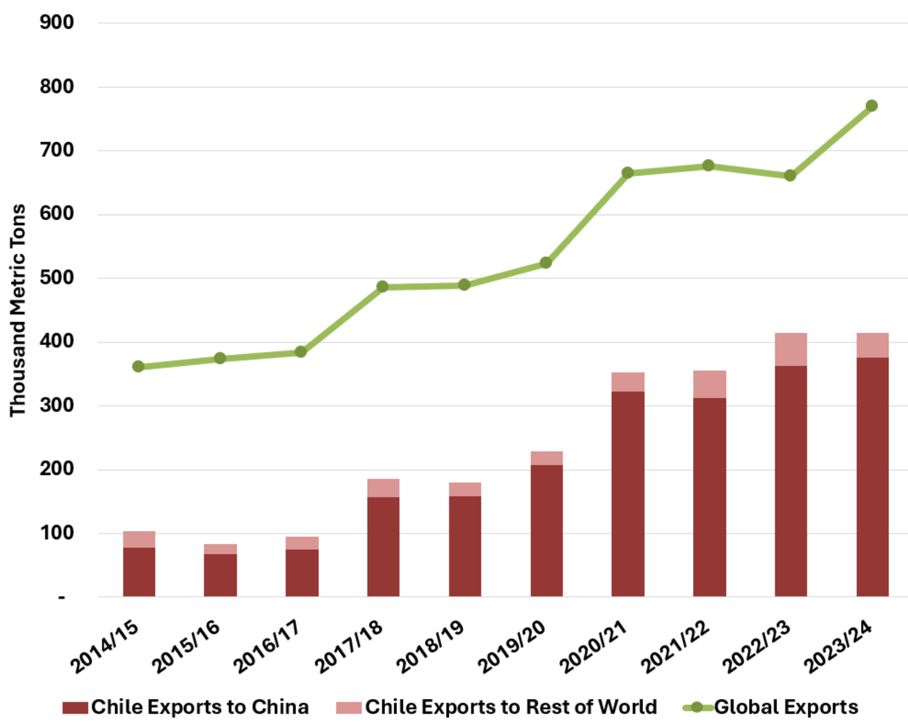
United States Department of Agriculture Foreign Agricultural Service

September 2024

Fresh Peaches and Cherries: World Markets and Trade

China Demand Propels Chile Fresh Cherry Exports



Source: Trade Data Monitor, LLC.

Chile fresh cherry exports have quadrupled in the last decade with around 90 percent destined for China to provide important counter-seasonal supplies. Chile exports to China accounted for nearly half of the global trade in fresh cherries by volume in marketing year (MY) 2023/24 (November 2023 to October 2024 in the Southern Hemisphere) estimated at 375,000 metric tons (tons).[1] With both Chile production and China domestic consumption forecast to rise further, this bilateral relationship is likely to continue playing an outsized role in the global trade of fresh cherries.

China fresh cherry production has grown steadily in recent years, reaching 800,000 tons in MY 2023/24 (April 2023 to March 2024 in the Northern Hemisphere) but has not kept pace with demand for domestic consumption. Imports from Chile provide important counter-seasonal supplies from December through February and coincide with peak demand around Lunar New Year. The United States is the second largest source of imported cherries in China, but U.S. market share is limited by high tariffs and seasonal competition with China's domestic production.[2]

[1] While the marketing year is not completed, historically, more than 99% of Chile fresh cherry exports occur in November through March.

[2] For more information, read the [Stone Fruit Annual Report – 2024](#) from FAS Post in Beijing, China.

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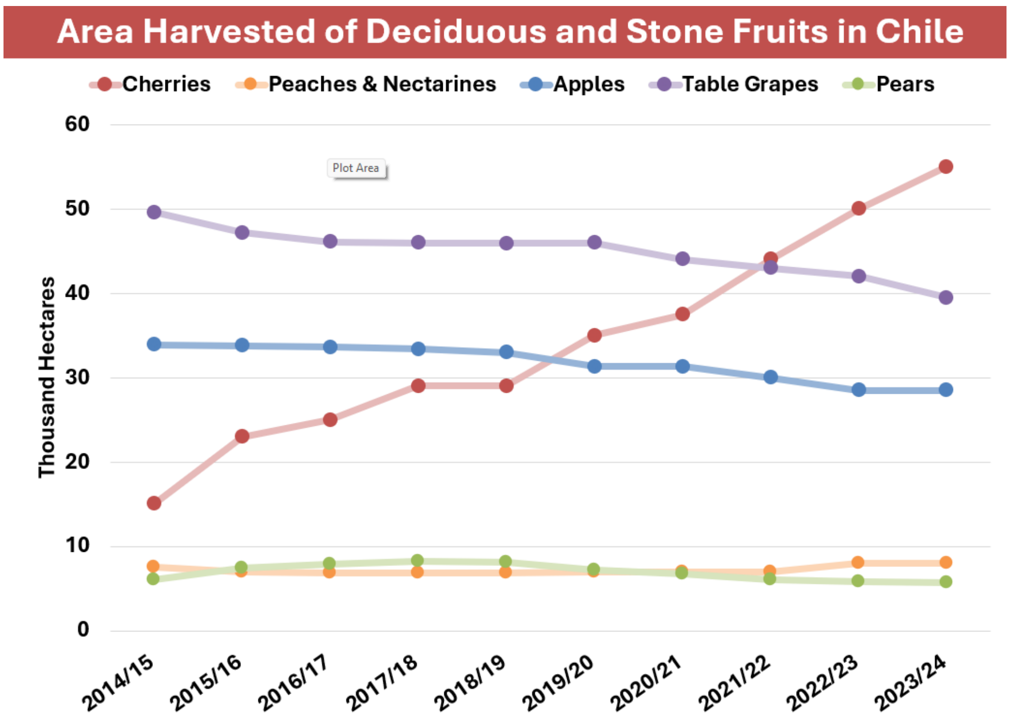
Chile is the fourth largest cherry producer but the top exporter, exporting roughly five times the volume of the second largest exporter, Turkey. In Chile, area harvested and production have nearly quadrupled in the past 10 years while domestic consumption has only doubled. This growth has come at the expense of other less-profitable fruit production in Chile, especially apples and table grapes, which have seen area transitioned to cherry production. In 2023/24, Chile cherry exports fell slightly due to a warm winter and rainy spring lowering yields.[3] Exports to the United States fell 20 percent by volume, but exports to China rose 3 percent by volume and nearly 15 percent by value. The absence of production growth in Chile last year and the continued high demand in China led to higher prices for Chilean cherries in the Chinese market and limited attempts to diversify export markets.



In 2024/25, China fresh cherry imports are forecast up to 415,000 tons, which would mark the tenth consecutive year of growth, as concerns about an economic slowdown in China are not expected to impact the sector. Chile experienced favorable winter conditions and production is forecast at a record 502,000 tons. As the only Southern Hemisphere country among the top 15 cherry producers, Chile's export dominance is unlikely to change in the short-term and its bilateral trade with China will likely remain a major catalyst for the global cherry sector.

[3] For more information, read the Stone Fruit Annual Report - 2024 from FAS Post in Santiago, Chile.

Fresh Cherry 2024/25 Highlights

World cherry production is forecast up slightly to 5.0 million tons as normal growing conditions in China, Chile, the European Union, and the United States lead to gains that more than offset a reduction in Turkey. Exports are projected at 759,000 tons, nearly matching last year's record volume as shipments from Chile rise but exports from Uzbekistan and Iran decline.

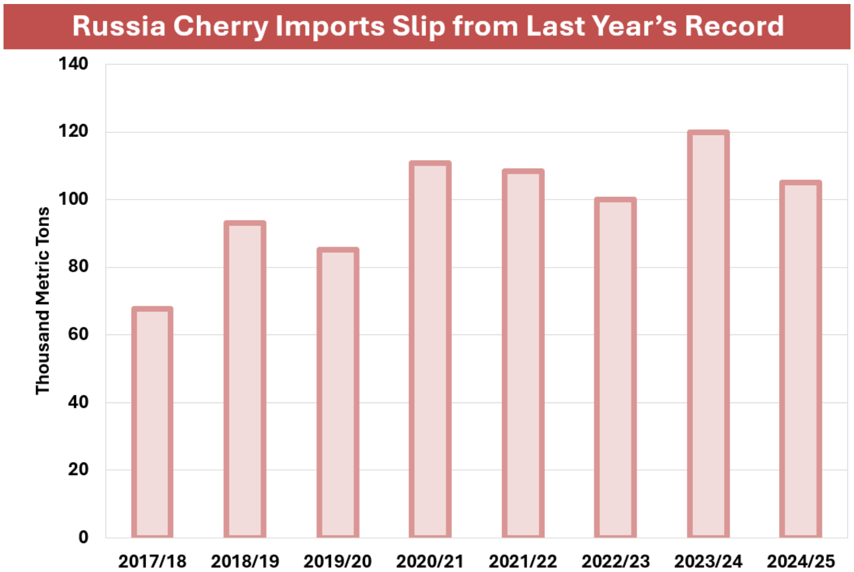
Turkey production is projected down 48,000 tons to 900,000 as growing conditions this year are favorable but are not expected to match last year's exceptional weather and record high production. Exports are forecast nearly the same at 85,000 tons as demand from the European Union remains strong.

China production is forecast up 50,000 tons to 850,000 despite drought conditions in Shandong, the top cherry producing province, as increased area planted and normal growing conditions in other regions support the sector's continued growth. Imports are projected up 7 percent to 415,000 tons on rising production in Chile and the United States. Driven by the simultaneous growth of production and imports, domestic consumption has more than doubled in the past 6 years and is forecast at 1.3 million tons in 2024/25.

EU production is forecast up 10,000 tons to 715,000 as the recovery from last year's weather-damaged crop is limited due to frost damage in top-producer Poland. Imports are projected up slightly to 60,000 tons, the highest level in 17 years, on strong shipments from Turkey. Exports are expected to rise 3,000 tons to 15,000 but remain below the 5-year average.

Chile production is expected to rise 32,000 tons to 502,000 as an increase in area planted combines with abundant rain and favorable weather conditions this winter. Exports are projected up 31,000 tons to 445,000 with record volumes likely to continue pushing the harvest and packing capacity as the sector strives to meet high demand in China and diversify to other export markets.

U.S. production is forecast up 13,000 tons to 413,000 for sweet and tart cherries despite freeze damage to sweet cherry orchards in Washington. Michigan tart cherry production is forecast up but there are quality concerns due to warm wet conditions and pest pressures this summer. Exports are projected to rise slightly to 85,000 tons, above the 10-year average. Imports are forecast essentially unchanged at 20,000 tons as greater shipments from Chile offset lower shipments from Canada.



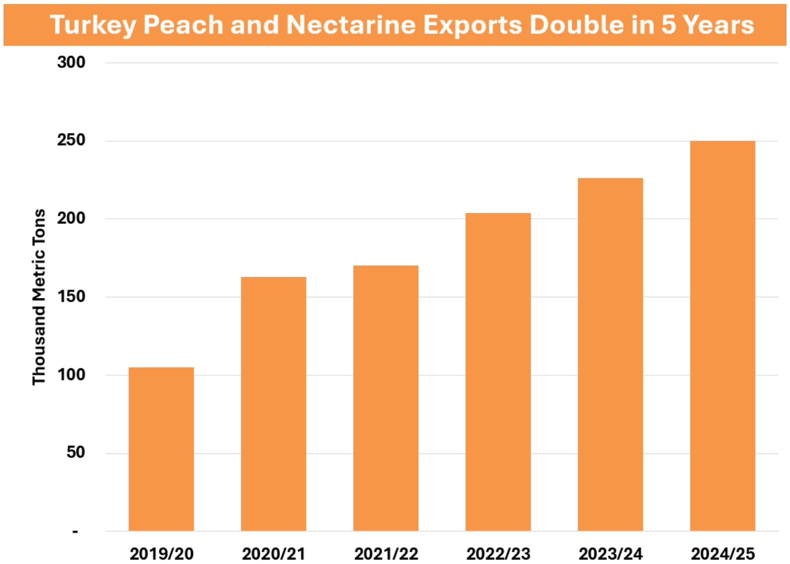
Russia imports are forecast down 15,000 tons from last year's record high volume to 105,000 on lower shipments from Azerbaijan and Uzbekistan that more than offset greater shipments from Turkey.

Fresh Peach and Nectarine 2024/25 Highlights

World peach and nectarine production is forecast up 425,000 tons to 25.4 million on rising output from the top four producers – China, the European Union, Turkey, and the United States. Driven by greater supplies in these countries, exports are projected up 65,000 tons to 1.0 million. Imports are also expected to rise as higher shipments to Russia, the United Kingdom, China, and Canada more than offset declining shipments to Iraq and Saudi Arabia.

China production is expected to rise 100,000 tons to 17.6 million as strong output in southern provinces more than offsets lower yields from drought conditions in the north and continued declining acreage. Exports are forecast up 25 percent to 75,000 tons on increased shipments to Vietnam, Kyrgyzstan, and Russia. Despite increased production, imports are projected to rise 11,000 tons to 54,000 as China recently granted market access for Chilean peaches in addition to existing market access for nectarines.

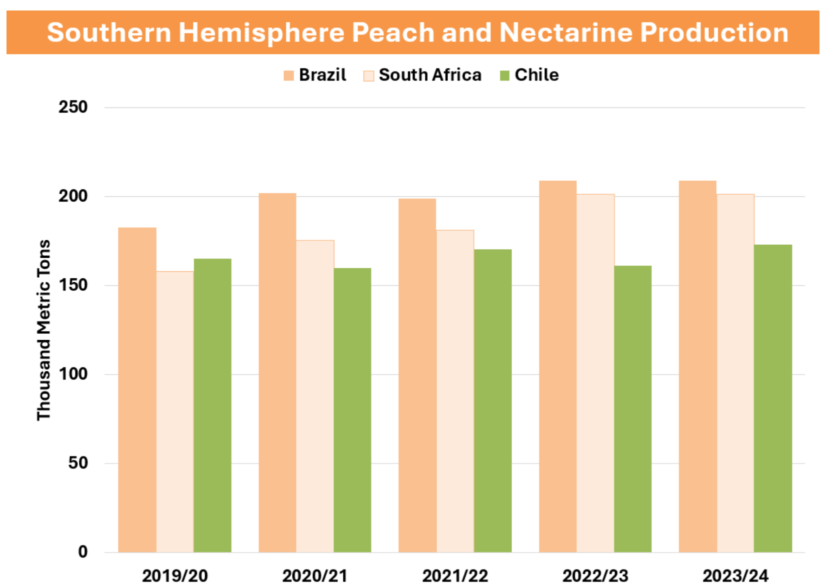
EU production is projected up 201,000 tons to 3.6 million on favorable growing conditions, especially in top producer Spain. Greater output is expected to raise exports 63,000 tons to 200,000, the highest level in 5 years. Imports are forecast up slightly to 50,000 tons on greater supplies from Turkey.



Turkey production is forecast up 123,000 tons to 1.2 million on expanded acreage, higher-yielding varieties, and favorable growing conditions. Nectarine production has doubled in the last 5 years in response to local and foreign consumer demand but remained only a quarter of total peach and nectarine production in 2023/24. Exports are forecast up 24,000 tons to 250,000 on increased supplies and greater shipments to Russia and Iraq.

U.S. production is projected up 15,000 tons to 669,000, a slight improvement over last year which was the lowest level in at least 40 years. Georgia and South Carolina production rebounded after 2 years of damaging freezes. California experienced favorable spring conditions, but quality was negatively impacted by high summer temperatures. Exports are expected to rise 30 percent to 60,000 tons as greater exportable supplies allow shipments to Canada, Mexico, and Taiwan to rebound above 2022/23 levels. Imports are forecast down more than 5,000 tons to 27,000 on lower shipments from Chile at the start of the marketing year.

Chile production is forecast mostly unchanged at 174,000 tons as increased nectarine acreage offsets declines in peach acreage. Exports are forecast up slightly to 116,000 tons. Chile is by far the top Southern Hemisphere exporter of peaches and nectarines although both Brazil and South Africa are larger producers.



Russia imports are forecast up 11,000 tons to 345,000 on greater shipments from Turkey and China. If realized, this would be a record level of imports passing the record of 334,000 tons set in 2023/24.

Future Releases and Contact Information
For additional information, please contact Stephanie Galbraith at (771) 221-5954 or stephanie.galbraith@usda.gov.

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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 FAS Online 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)

	2019/20	2020/21	2021/22	2022/23	2023/24	Sep 2024/25
Production						
Turkey	846	914	874	833	948	900
China	450	520	630	680	800	850
European Union	738	653	726	828	705	715
Chile	256	386	392	471	470	502
United States	398	329	406	308	400	413
Russia	292	306	332	357	357	357
Uzbekistan	241	256	287	298	298	298
Iran	253	271	250	240	240	240
Ukraine	236	238	256	238	238	238
Serbia	114	181	171	187	187	187
Other	237	248	228	254	261	258
Total	4,062	4,301	4,551	4,694	4,905	4,958
Domestic Consumption						
China	680	856	948	1,058	1,188	1,265
Turkey	766	827	803	775	865	815
European Union	770	688	751	841	751	760
Russia	378	417	440	457	476	462
United States	324	274	350	293	340	348
Uzbekistan	224	224	226	271	247	268
Ukraine	233	239	257	239	240	239
Iran	238	244	230	227	211	225
Serbia	98	164	159	173	178	173
Syria	62	36	38	64	62	65
Other	257	300	310	264	288	299
Total	4,029	4,269	4,512	4,661	4,844	4,918
Imports						
China	230	336	319	378	388	415
Russia	85	111	108	100	120	105
European Union	50	53	44	29	58	60
Canada	28	26	32	19	31	35
United States	10	13	21	27	21	20
Korea, South	15	17	19	11	16	15
United Kingdom	13	14	16	14	12	15
Taiwan	12	13	14	12	12	12
Iraq	15	12	10	9	14	10
Kazakhstan	8	18	29	9	11	7
Other	24	24	25	20	25	25
Total	491	634	637	628	708	719
Exports						
Chile	229	353	356	415	414	445
Turkey	81	88	71	58	84	85
United States	84	67	77	42	82	85
Uzbekistan	17	32	61	26	51	30
Azerbaijan	27	31	20	29	36	25
European Union	18	15	19	16	12	15
Iran	16	27	20	13	29	15
Moldova	7	10	8	13	18	15
Serbia	17	18	12	14	10	15
Canada	9	7	10	12	8	7
Other	19	18	22	21	25	22
Total	524	664	675	660	769	759

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)

	2019/20	2020/21	2021/22	2022/23	2023/24	Sep 2024/25
Production						
China	15,800	15,000	16,000	17,000	17,500	17,600
European Union	4,066	3,224	2,907	3,120	3,425	3,626
Turkey	830	890	892	1,008	1,077	1,200
United States	728	715	742	693	654	669
Iran	591	605	548	577	577	577
Mexico	159	173	217	238	238	238
Uzbekistan	189	184	193	212	212	212
Brazil	183	202	199	209	209	209
South Africa	158	175	181	201	201	201
Chile	165	160	171	161	173	174
Other	694	560	643	629	673	658
Total	23,563	21,888	22,693	24,049	24,939	25,364
Domestic Consumption						
China	15,706	14,959	15,989	16,982	17,483	17,579
European Union	3,801	3,058	2,813	3,036	3,336	3,476
Turkey	725	727	722	804	851	950
United States	694	686	692	664	640	636
Iran	557	505	481	527	487	512
Russia	231	324	292	364	381	391
Mexico	190	195	257	266	267	273
Brazil	196	214	210	221	226	224
South Africa	138	145	151	174	173	172
Argentina	196	96	166	149	145	148
Other	1,057	959	885	879	927	965
Total	23,489	21,869	22,657	24,066	24,915	25,325
Imports						
Russia	194	286	250	317	334	345
Iraq	82	76	59	53	94	80
United Kingdom	93	63	57	64	67	75
China	27	37	33	45	43	54
European Union	24	39	43	41	48	50
Canada	39	41	41	36	28	40
Kyrgyzstan	11	23	13	27	28	35
Mexico	32	23	40	28	30	35
Saudi Arabia	38	49	39	36	45	35
Ukraine	48	48	35	24	34	35
Other	283	241	180	158	164	181
Total	870	926	789	829	914	965
Exports						
Turkey	105	163	170	204	226	250
European Union	259	180	137	125	137	200
Chile	102	99	112	104	115	116
China	121	78	45	63	60	75
Uzbekistan	56	86	56	77	92	75
Iran	35	100	67	50	90	65
United States	71	61	83	61	46	60
Jordan	70	54	59	42	56	50
Azerbaijan	8	8	23	27	45	35
South Africa	21	32	31	29	29	30
Other	64	61	43	31	42	47
Total	914	921	825	812	938	1,003

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.