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Report Highlights:

China’s apple and pear production is estimated to decrease, primarily due to adverse weather conditions. Table grape production is estimated to rise, resulting from improved orchard management practices. Apple imports are expected to maintain an upward trend due to demand for diverse varieties. However, imports of grapes and pears are projected to decline due to improvement in the supply and quality of domestic counterparts. The market share for U.S. fruit continues to fall, facing challenges from escalated tariffs and significant domestic competition.

APPLES

Table 1. China: Production, Supply, and Distribution for Apples

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Begin Year	Jul 2023		Jul 2024		Jul 2025	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	1,928,460	1,928,460	1,910,000	1,907,100	0	1,888,000
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	46,500,000	46,500,000	48,000,000	49,300,000	0	47,000,000
Non-Comm. Production	0	0	0	0	0	0
Production	46,500,000	46,500,000	48,000,000	49,300,000	0	47,000,000
Imports	87,800	87,800	105000	116,000	0	120,000
Total Supply	46587800	46587800	48,105,000	49,416,000	0	47,120,000
Domestic Consumption	45,676,700	45,676,700	47,105,000	48,452,000	0	46,140,000
Exports	911,100	911,100	1,000,000	964,000	0	980,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	46,587,800	46,587,800	48,105,000	49,416,000	0	47,120,000

Unit: hectare (Ha), metric ton (MT)

PRODUCTION

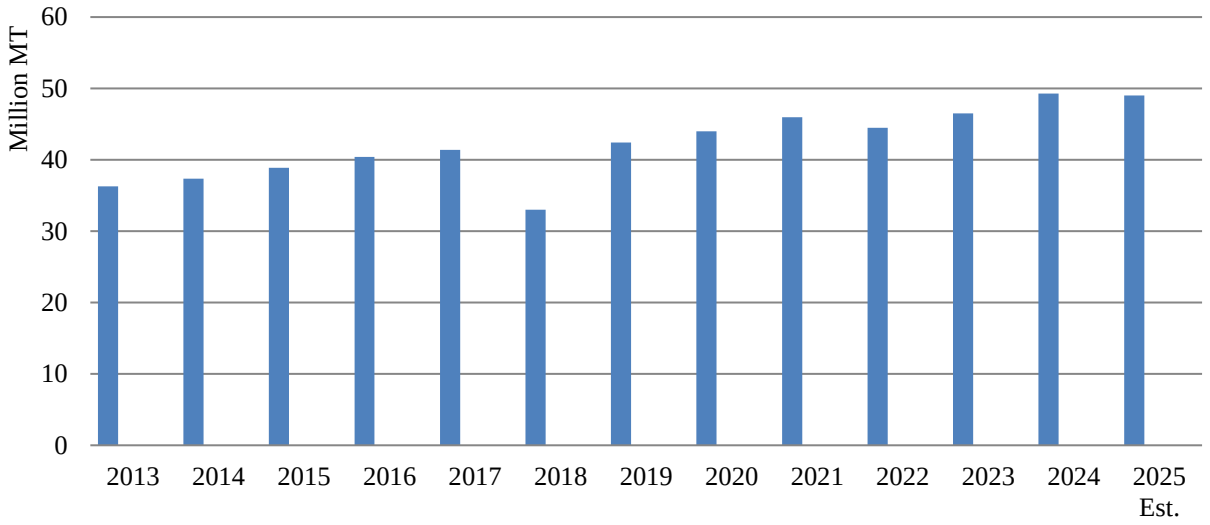
Post estimates China's apple production at 47 million metric tons (MMT) in marketing year (MY) 2025/26 (July-June), a decrease of nearly 5 percent from Post's revised estimate for MY 2024/25. The forecast indicates significant regional variations in output. Favorable weather is expected to boost production in Shanxi by 20 percent. However, drought conditions are projected to reduce yields in Shaanxi and Gansu provinces by roughly 5 percent. Shandong is likely to experience a production drop of more than 10 percent due to both reduced acreage and unfavorable growing conditions, including heat in June-July and excessive rain during August-September. Conversely, Liaoning recorded a modest increase in 2025 production, which is attributed to improved orchard management and stable weather. During MY 2025/26, adverse weather, such as drought, strong winds, and high temperatures, negatively impacted main production regions, including top two producers, Shaanxi and Shandong, which have led to decreased proportion of high-grade marketable fruit and generally small fruit, according to industry analysts. Moreover, apple acreage continues to decline. This is particularly noticeable in more developed regions, such as Shandong, driven by labor shortages and farmland policy related to grain security. The national farmland policy prohibits the replanting of fruit trees on basic farmland once old trees are removed, requiring farmers to plant grain crops instead (see GAIN report CH2023-0026); however,

replacing old varieties with new and improved varieties of the same fruit is sometimes permitted depending on local authorities. The national farmland policy constrains increased fruit production acreage and encourages land consolidation and yield improvement upgrades on existing fruit acreage that is not considered basic farmland.

The apple industry is currently characterized by an intensive focus on varietal modernization and quality improvement, a movement driven by evolving consumer trends that emphasize quality and flavor. While there have been no formal reports of completely new varieties, there is substantial evidence of varietal replacement and upgrading underway, where older, low-productivity types are being supplemented or replaced. For example, Venus Gold is being introduced in Dalian, and optimized Fuji varietals are being adopted in Luochuan of Shaanxi. Other production regions are promoting varieties that have been developed and cultivated in recent years, including Ruixue, Ruixianghong, Qincui, and Hong Lumei. However, Fuji still dominates cultivation, constituting 70 percent of the total production. Meanwhile, local governments are pushing for overall quality enhancement, such as encouraging the application of organic fertilizers. This governmental push has proven successful in regions like Luochuan, where the apple brix level has increased to 15 degrees.

The industry faces several persistent structural and economic challenges, even as management practices improve, with the rising labor costs being the most pressing one. The lack of young labor in rural areas is a major concern, leading local governments to facilitate socialized services to cover farming operations for aging fruit farmers. Although mechanization helps mitigate labor shortages, its adoption is inefficient in many areas because orchards are small, and land is fragmented. To overcome these issues and maximize yields, the governments in western regions, such as Shaanxi, promote the adoption of dwarf and dense planting models, which effectively doubles the yield of traditional patterns (from 30-37.5 MT to 60-75 MT per hectare) while enhancing fruit quality, reducing labor costs, and facilitating mechanization. Meanwhile, the establishment and improvement of modern infrastructure, such as air conditioning storage and intelligent grading lines, also supports the industry's trend towards higher efficiency and improved post-harvest handling.

Chart 1. China: Apple Production



Source: National Bureau of Statistics (NBS), FAS Beijing

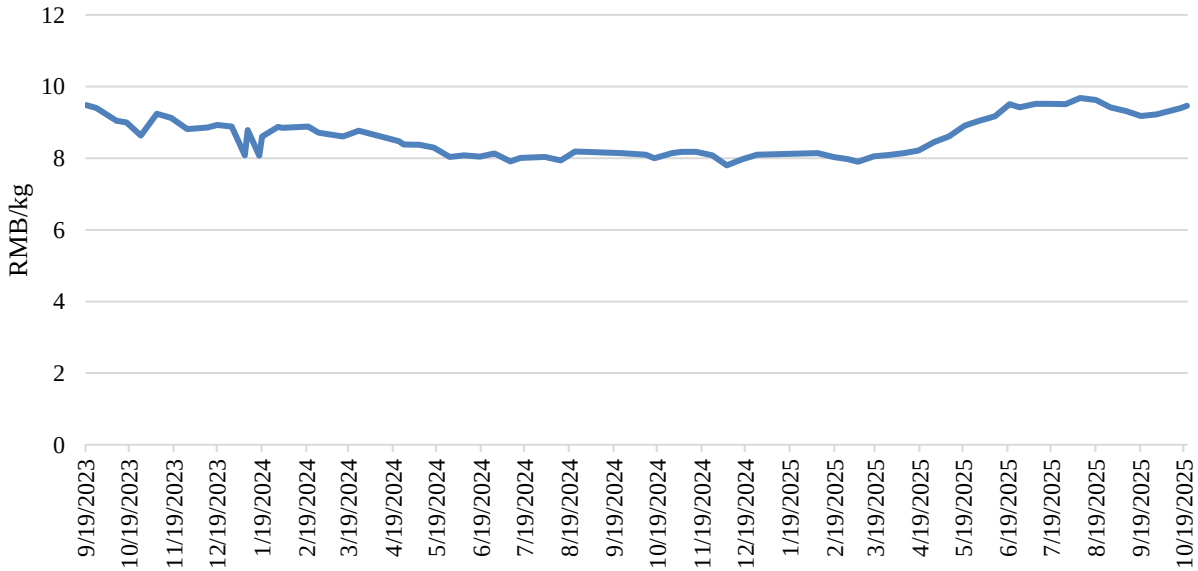
PRICES

Apple prices dropped from their peak levels in September 2023. This decline was largely attributed to oversupply and stagnant consumption resulting from tepid economic conditions. However, market prices began to pick up in March 2025 when apple stocks became quite low (see Chart 2). This low stock situation followed the previous marketing year (MY 2023/24), during which companies and individuals who stored apples (primarily Fuji varieties) reportedly lost a significant amount of money. Consequently, farmers and traders reduced the volume of apples placed in cold storage during MY 2024/25 (July-June) by 10 percent from the previous year.

In MY 2025/26, adverse weather negatively impacted several major production regions, which contributed to increased occurrences of fruit cracks, fruit rust, or smaller fruit sizes. According to media reports, the proportion of high-quality apples decreased notably from previous years, particularly in Shandong. As a result of this reduced quality, the national average procurement price for high-grade Fuji apples (defined as 8 cm in diameter or above) increased by nearly 20 percent year-on-year, reaching RMB 8.3 ($1.2) per kilogram, as reported by the China Fruit Marketing Association (CFMA).

Apple prices are determined not only by the fruit's quality but also by the product's location. For example, apples cultivated in northwestern “excellent growing areas,” such as Shaanxi, generally command higher prices compared to those grown in “suitable growing areas,” such as Shandong. Appearance is also a factor, as bagged apples, which present a prettier appearance, can capture better prices than unbagged ones. Overall prices for imported fruits have remained relatively stable, except for U.S. apples, whose prices have increased because of retaliatory tariffs.

Chart 2. China: Wholesale Price Fuji Apples



Source: China Fruit Marketing Association

CONSUMPTION

The general economic slowdown, which has resulted in cautious consumer spending and market stagnation, has influenced current consumption trends for deciduous fruits. Traders have observed a decline of approximately 10 percent in sales during traditional holiday periods. Although consumers prioritize taste and freshness, they are increasingly price-sensitive, often preferring affordable, mid-range fruits and smaller packaging as a strategy to manage overall costs. The market is experiencing consumption stratification and the development of personalized tastes, broadening consumption scenarios. For instance, the urban middle class seek premium fruit products, contrasting with the demand for cost-effective items in lower-tier markets. Additionally, Generation Z consumers show high receptivity to ready-to-eat convenience products, thereby increasing the popularity of niche categories, such as fruit slices and fruit teas.

Chinese consumers continue to prioritize the internal qualities of apples, with sweetness and flavor acting as the primary drivers of preference. Consumers generally prefer a firm texture. While northern consumers historically favored larger fruits, a recent trend indicates growing interest in medium-sized fruits, which are perceived as providing better portion control and being more cost-effective. Appearance remains a significant factor, with smooth skin and vibrant colors being preferred. Furthermore, younger generations are reportedly weary of the monopoly flavor of Fuji apples, leading to a considerable demand for novelty.

Most apples are consumed fresh in China. Among processed products, apple juice holds the dominant position, accounting for over 95 percent of the total processing volume. Additional processed apple products include apple cider, apple vinegar, preserved apples, and dehydrated apple chips.

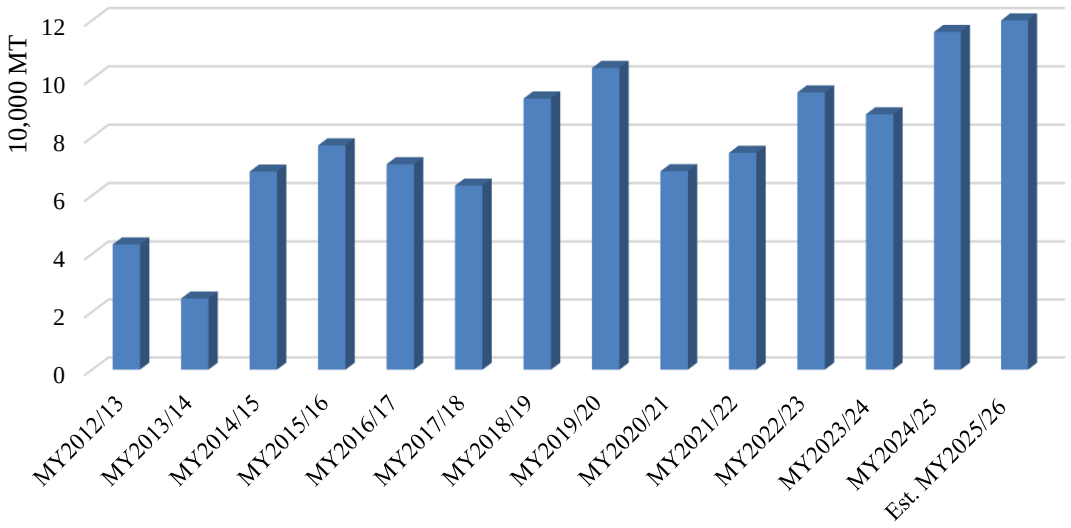
TRADE

Imports

Overall imports of deciduous fruits, except for apples, are projected to decline further in 2025. Improved availability and quality of domestic produce is driving this anticipated drop, as well as competition from popular categories, such as tropical fruit. To satisfy demanding domestic consumers, imported deciduous fruits must offer new varieties and exceptional taste. Imports from the Southern Hemisphere are projected to continue rising because they tailor new varieties to Chinese tastes. Conversely, deciduous fruit imports originating from the United States are declining, largely due to retaliatory tariffs imposed by the Chinese government.

Post expects China’s apple imports to steadily increase. New Zealand is primarily driving this growth, as the largest supplier and offers a wide range of varieties combined with duty free access. Australia gaining market access for continental apples is expected to add more import options for Chinese consumers in MY 2025/26. Suppliers from the Southern Hemisphere, including New Zealand, South Africa, and Chile, supply the China market with diversified products and fresh fruit during the local off-season. South Africa and Chile specifically provide apples with competitive prices. While U.S. apples are well-regarded in China for their consistent quality and taste, including new varieties such as Cosmic Crisp, challenges like domestic competition and tariffs are preventing U.S. apples from gaining market share.

Chart 3. China: Apple Imports by Marketing Year (July-June)



Source: Trade Data Monitor, LLC; FAS Beijing

Exports

Post expects that China's apple exports will see continued improvement in marketing year (MY) 2025/26. Southeast Asia stands as the most important market for Chinese apples, characterized by strong consumer demand. Traders note that consumers in Southeast Asia prioritize taste and price and are generally less concerned about fruit appearance, size, and sweetness. Consequently, Chinese apples, especially those that are small with lower prices, perfectly meet this demand. Furthermore, Chinese apples offering a competitive price have also gained more market share in Central Asia and Russia. Domestically, adverse weather conditions during MY 2025/26 have resulted in an increased number of lower grade apples available for export.

Chart 4. China: Apple Exports by Marketing Year (July-June)

Source: Trade Data Monitor, LLC; FAS Beijing

PEARS

Table 2. China: Production, Supply, and Distribution for Pears

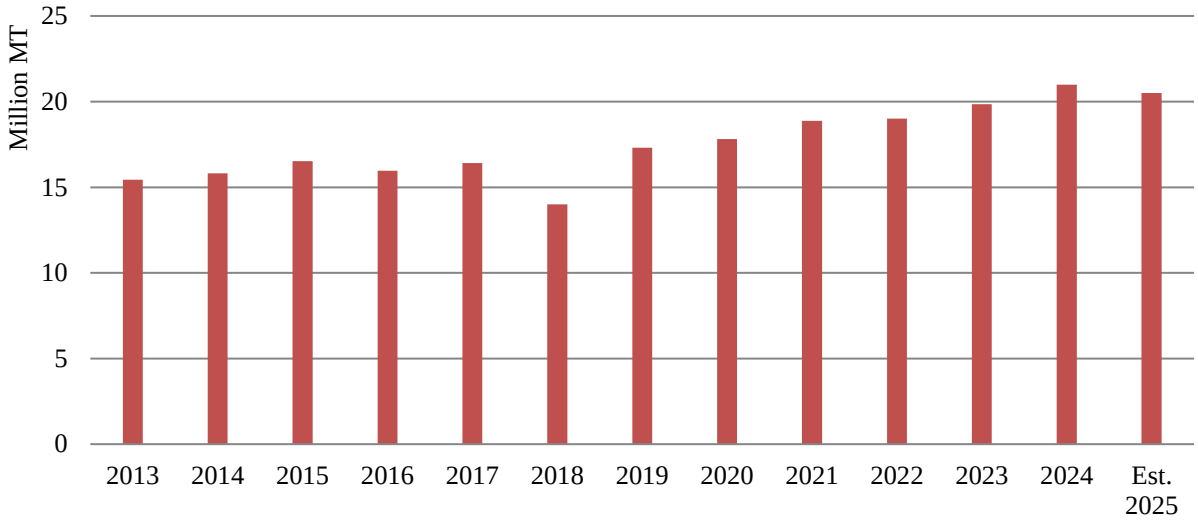
Pears, Fresh	2023/2024		2024/2025		2025/2026	
Market Begin Year	Jul 2023		Jul 2024		Jul 2025	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	904,000	904,000	900,000	892,000	0	890,000
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	19,850,000	19,850,000	20,200,000	20,980,000	0	20,500,000
Non-Comm. Production	0	0	0	0	0	0
Production	19,850,000	19,850,000	20,200,000	20,980,000	0	20,500,000
Imports	11,500	11,500	15,000	8,800	0	6,000
Total Supply	19,861,500	19,861,500	20,215,000	20,988,800	0	20,506,000
Domestic Consumption	19,256,600	19,256,600	19,555,000	20,335,800	0	19,786,000
Exports	604900	604,900	660,000	653,000	0	720,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	19,861,500	19,861,500	20,215,000	20,988,800	0	20,506,000

Unit: hectare (Ha), metric ton (MT)

PRODUCTION

Post estimates China's pear production for marketing year (MY) 2025/26 (July-June) at 20.5 million metric tons (MMT). This forecast indicates a 2 percent decrease compared to Post's revised estimate for MY 2024/25. Regionally, Hebei, the largest producer, is expected to have a stable crop. Anhui, a major producer in southern China, reports a steady upward production trend, supported by favorable climatic conditions and improved cultivation techniques. Conversely, Shandong, a major producer in the north, anticipates a 5 percent decline in output due to an earlier drought situation. Summer drought and heat have also negatively affected production in Shaanxi. Pear acreage across China is projected to gradually contract due to a decline in domestic demand.

Chart 5. China: Pear Production



Source: National Bureau of Statistics (NBS), FAS Beijing

The quality of the fruit varies significantly across different producing regions. Enhanced orchard management, pest control, and irrigation systems in Anhui have improved quality from last year. However, northern producing regions, including Hebei and Shandong, experienced high temperatures and drought conditions which resulted in a reduced proportion of large-sized pears. Additionally, persistent rain during the harvest period in Shaanxi and Shandong may negatively affect the texture and flavor of the fruit.

Farmers are actively experimenting with new varieties that feature heightened sweetness and more vibrant skin colors. Traditional varieties, such as Snow pears and Huangguan Pears, are gradually losing favor. The provincial government in Anhui has promoted high-quality varieties, including Hu Mi, Hua Tong, Hua Jin, and Wang Xiang Cui, which are expected to increase planting in the coming years. Newer, specialty pears, such as Cuimi, Long Stem pears, Hong Xiang Su, Barlette, Nanguo, and Qiuyue, remain popular.

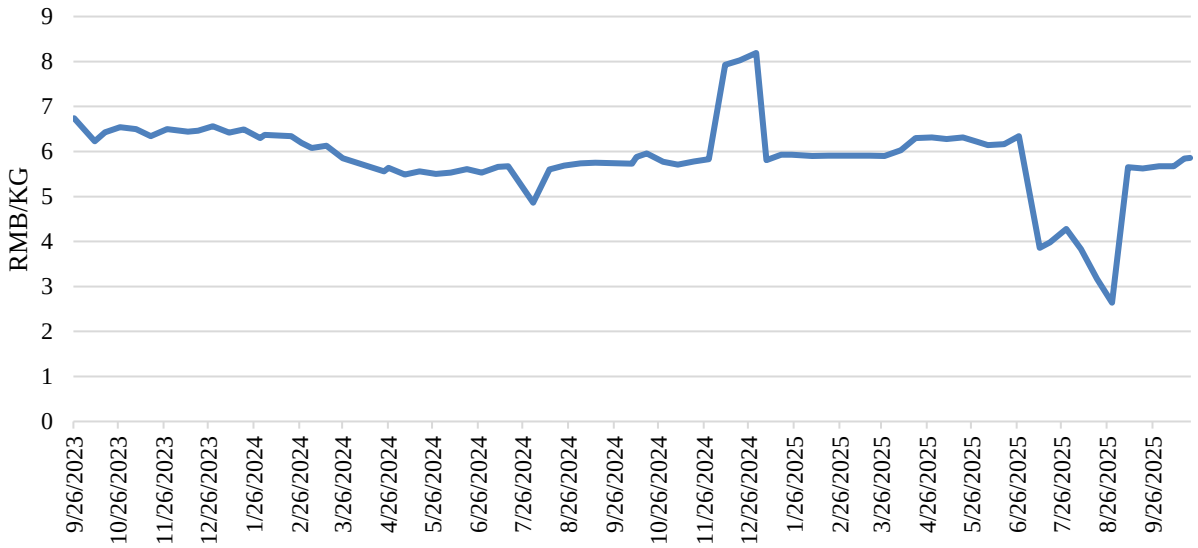
The pear industry is challenged by oversupply and stagnant domestic consumption. Similar to the apple industry, production difficulties are exacerbated by rising costs for labor, inputs, and freight, coupled with a pervasive labor shortage, particularly of young and skilled workers. Specific challenges arise post-harvest due to the delicate skin of pears. This characteristic requires sorting and grading operations to rely on expensive manual processes rather than automated sorting machines, which negatively impacts overall profitability. Despite these structural challenges and constraints, pears remain a crucial agricultural commodity, with significant volumes specifically produced for exports.

PRICES

Oversupply and stagnant consumption have caused the domestic pear market to struggle from low prices (see Chart 6). However, decreased numbers of high-quality pears in northern producing areas because of high temperatures and droughts during the summer have caused market prices for new crops to rise. Huangguan pears, for example, were purchased at an average price of RMB 3.9 ($0.55) per kilogram in

mid-July, an increase of 5 percent from the same period of last year, according to CFMA statistics. Pear prices show variability depending on the region and the timing of the market entry. In East China, for instance, pear prices have declined compared to the previous years, influenced by abundant supply and a substitution effect from other seasonal fruits. It is worth noting that the price of Qiuyue pears, a popular variety in recent years, has dropped from the previous year, possibly due to oversupply according to market sources.

Chart 6. China: Wholesale Price Huangguan Pears



Source: China Fruit Marketing Association

CONSUMPTION

Chinese consumers value pears for their crisp texture and sweet flavor. Consumers also show a preference for juicier pears. Consumption patterns for pears vary regionally. Northern China remains the main consumption area, accounting for about 60 percent of total consumption. However, the southern market, especially Guangxi, Guangdong, and Sichuan, is growing rapidly, thanks to the promotion of local varieties and the popularization of e-commerce. Despite the overall domestic market struggling due to oversupply and stagnant consumption, consumers still demand higher quality, taste, and nutrition from pears, leading to increasing popularity for products like organic pears. Meanwhile, the appeal of traditional pear varieties, such as Huangguan pears, is declining, but novel varieties are selling well.

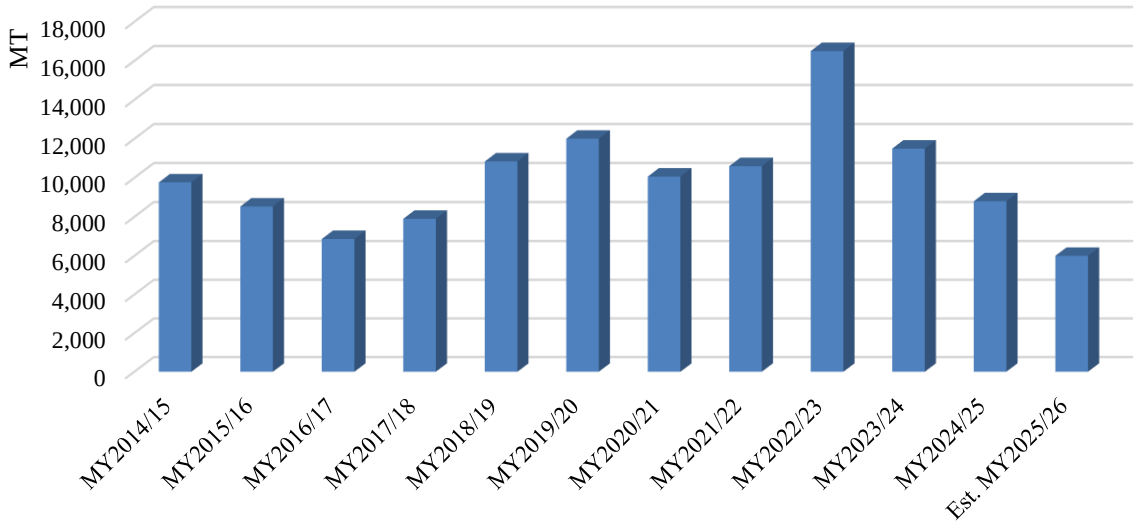
Although fresh-consumption pears still dominate (about 70 percent market share), consumption of processed pear products is growing steadily, reflecting the increasing market demand for diversified pear products. Pear processed products mainly consist of pear juice (beverage) and canned pears. Other processed products include pear paste, pear wine, and dried pears.

TRADE

Imports

Post expects China's pear imports will keep trending downward in MY 2025/26 (July-June), given modest consumer demand for western pear varieties and tepid consumption. Mainstream consumers favor crispy and juicy Asian pears. Most suppliers, from both Southern and Northern Hemispheres, see their exports to China declining. Faced with retaliatory tariffs, U.S. pear exports to the Chinese market remain difficult.

Chart 7. China: Pear Imports by Marketing Year (July-June)

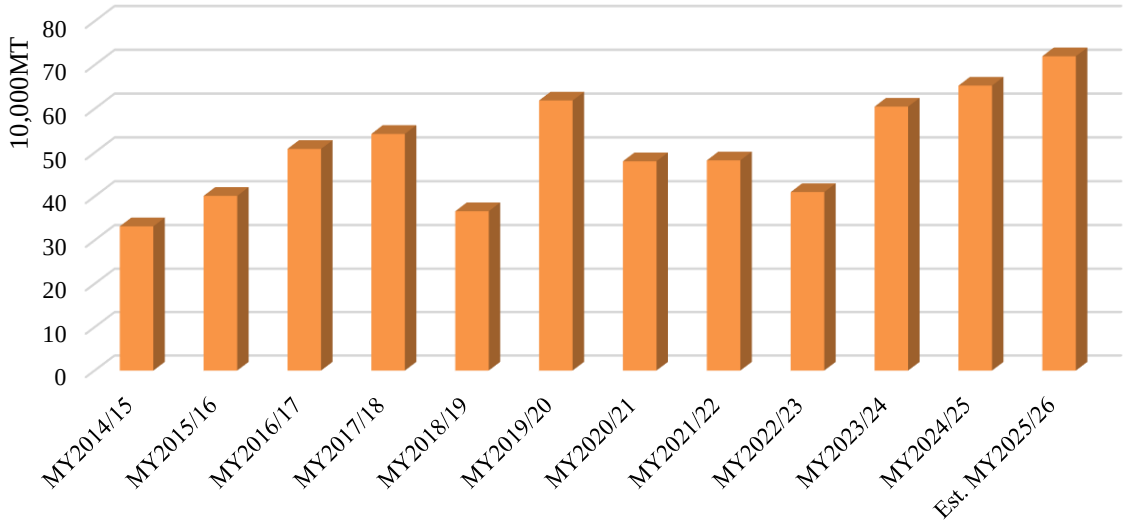


Source: Trade Data Monitor, LLC; FAS Beijing

Exports

China's pear exports are also projected to continue rising in the coming year. Pear packing houses are actively purchasing pears for shipment to key export destinations. These markets include Southeast Asia, specifically Vietnam, Thailand, and Indonesia. Lower quality pears are often sent to markets like Burma. Additional destinations include the Middle East, Central Asia, and Russia. Notably, the volume of pear exports to Russia has increased quickly in the last two years, indicating a growing trend. Asian pears are also gaining popularity among Asian population in the EU. China has long been the world top supplier of fresh pears, with its exports accounting for more than 30 percent of the global trade volume in 2024, according to Trade Data Monitor, LLC.

Chart 8. China: Pear Exports by Marketing Year (July-June)



Source: Trade Data Monitor, LLC; FAS Beijing

GRAPES

Table 3. China: Production, Supply, and Distribution for Table Grapes

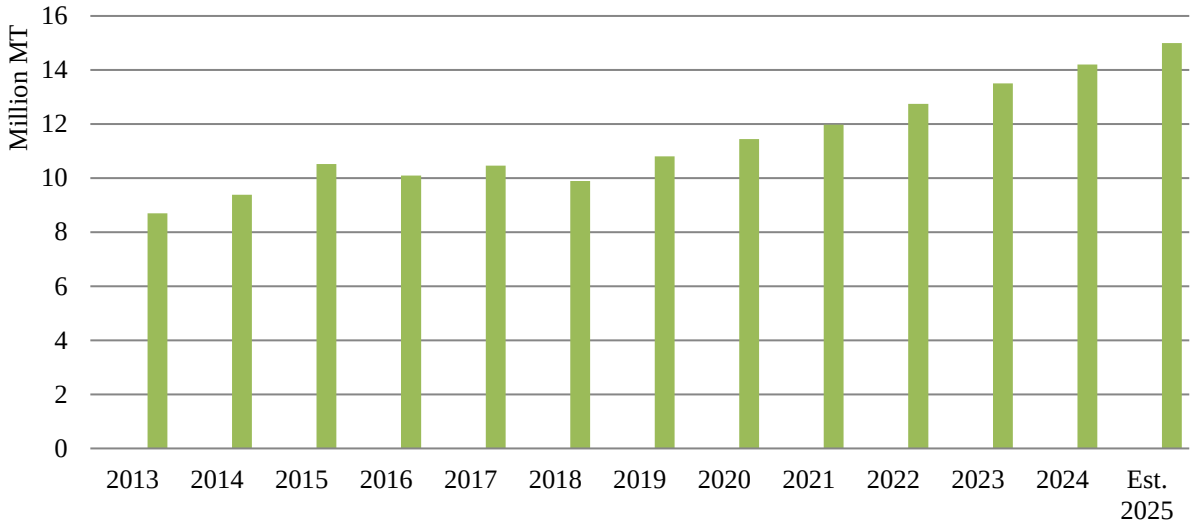
Grapes, Fresh Table	2023/2024		2024/2025		2025/2026	
Market Begin Year	Jun 2023		Jun 2024		Jun 2025	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	728,000	728,000	725,000	725,000	0	710,000
Area Harvested	0	0	0	0	0	0
Commercial Production	13,500,000	13,500,000	14,200,000	14,200,000	0	15,000,000
Non-Comm. Production	0	0	0	0	0	0
Production	13,500,000	13,500,000	14,200,000	14,200,000	0	15,000,000
Imports	118,500	118,500	125,000	103,500	0	98,000
Total Supply	13,618,500	13,618,500	14,325,000	14,303,500	0	15,098,000
Fresh Dom. Consumption	13,119,900	13,119,900	13,725,000	13,638,500	0	14,328,000
Exports	498,600	498,600	600,000	665,000	0	770,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	13,618,500	13,618,500	14,325,000	14,303,500	0	15,098,000

Unit: hectare (Ha), metric ton (MT)

PRODUCTION

Post estimates China's table grape production at 15 million metric tons (MMT) in marketing year (MY) 2025/26 (June–May)**,** up nearly 6 percent from the previous year. Despite unfavorable weather in northern producing areas, overall output continues to rise as many orchards have invested in protected horticulture installations such as rain shelters. Meanwhile, grape production in southern China is expected to continue rising given favorable climate conditions. However, excessive rainfall in August-September negatively affected the flavor of grapes grown in northern areas.

Chart 9. China: Table Grape Production



Source: FAS Beijing

China's grape industry is characterized by substantial acreage, high production volumes, and advanced technological integration that facilitates year-round availability. Even though grape acreage expansion halted after 2024 due to oversupply, production volumes have maintained an upward trend. Cultivation now spans 31 provinces, with planting areas increasingly moving toward southern and western regions. For instance, the northwestern Shaanxi province has emerged as the country's second-largest producer. A significant technological advancement is the introduction of dormancy-free cultivation, which has allowed grapes to be produced in tropical regions like Hainan, where they were historically not grown.

The industry features a diverse array of cultivated table grape varieties, including Kyoho, Summer Black, Red Globe, Crimson Seedless, Jumbo Muscat, and Shine Muscat. The expansion of new varieties has been rapid. Shine Muscat became the premium flagship variety in the southern regions for being seedless, disease-resistant, and durable for transportation. However, its market price collapsed due to oversupply, and the acreage dedicated to this variety is consequently expected to contract in coming years. Furthermore, because producers and distributors prioritized appearance and large size, some Shine Muscat grapes have lost their original flavor. New varieties, such as Shenyu and Crystal, are continually gaining favor. The licensing cultivation model is also gradually gaining traction in the industry. Sun World, a global leader in grape variety development, has licensed varieties like Autumn Crisp and Sweet Globe to growers. Reports suggest that cultivation of these new licensed varieties will substitute Shine Muscat to some extent within two or three years in Yunnan, Zhejiang, and Shandong.

Despite advancements in technology and diversification of varieties, the industry faces challenges stemming from market restructuring and persistent oversupply. This situation has led farmers to reduce their cultivation areas. Agricultural production challenges include soil issues resulting from excessive fertilization and watering, as well as damage caused by extreme weather conditions such as typhoons/storms, heat, cold, and frost. The overapplication of plant regulators is another concern. Furthermore, the labor force presents a structural challenge because cultivation and maintenance are highly labor-intensive. According to one industry source, future efforts should be made to optimize

varieties to improve quality. Moreover, new cultivation methods, materials, and technology must be implemented to reduce labor requirements.

PRICES

The key trend for table grapes is the dramatic price decline for the highly popular Shine Muscat grapes, largely driven by the rapid expansion in supplies. In areas such as Weinan of Shaanxi, the farm gate prices of Shine Muscat grapes dropped significantly to RMB 8-10 ($1.1-1.4) per kilogram, compared to RMB 12-14 ($1.7-1.9) per kilogram in 2024, based on industry contacts. In contrast to the collapse of Shine Muscat, the market prices for other grape varieties seemed to have bottomed out in MY 2025/26. Kyoho grapes, for example, were purchased at an average RMB 10.5 ($1.5) per kilogram in early August, an increase of 10 percent from the previous year, according to CFMA statistics. Grape prices started to fall in MY 2024/25 due to oversupply and subdued consumption amid economic slowdowns. New varieties, however, still command high prices. For example, the retail prices of Autumn Crisp are quoted as high as $5.50-$6.25 per kilogram.

CONSUMPTION

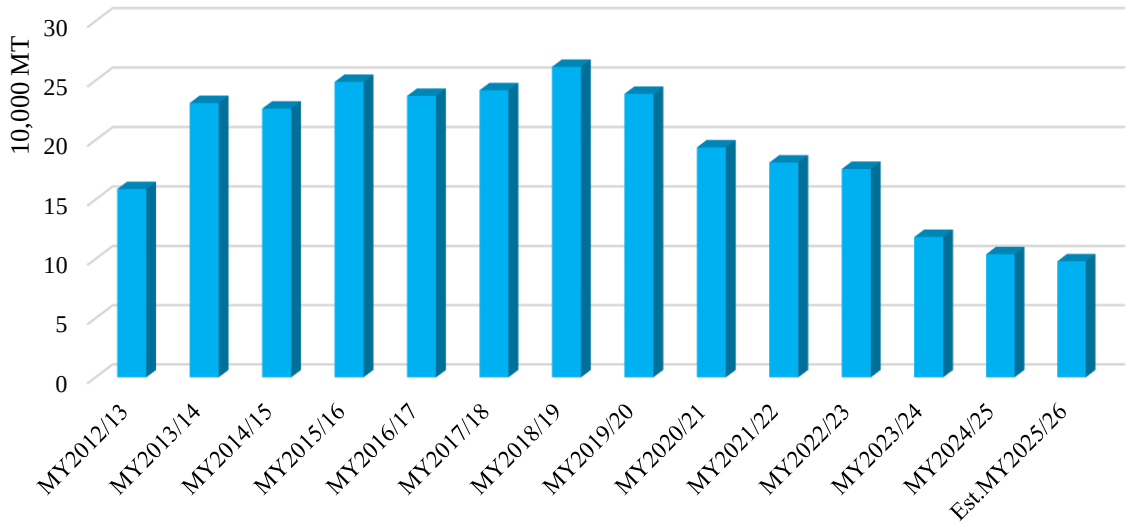
Similar to apples and pears, the consumption of table grapes has also become stagnant as domestic supplies keep improving against the backdrop of a tepid economy. Despite subdued consumption, consumers now look for grapes with quality, safety, and perceived health benefits. Therefore, wholesome or organic grapes with no pesticide residues are gaining popularity. Chinese consumers generally prefer sweet, large size, and seedless varieties. Grapes with a firm texture are also preferred. Nowadays, people place more importance on fruit flavor (aroma), and they like to try new varieties such as Nina Queen, Autumn Crisp, and Moon Drop. As more grape varieties have been introduced to the marketplace, consumers have begun to show interest in grapes with different colors.

TRADE

Imports

China’s grape imports have fallen quickly over the past few years, primarily because of improved production, quality, and varieties of domestic counterparts. Post expects the downward trend to continue in MY 2025/26 (June-May). In addition, the extended supply season because of innovative farming and storage technologies will further pressure grape imports during the winter months. China imports almost all its fresh grapes from Southern Hemisphere countries, led by Australia, Chile, and Peru. The Chinese government’s retaliatory tariffs have been devastating for U.S. table grapes, which, despite their distinctive flavor profiles, are quickly losing market share.

Chart 10. China: Table Grape Imports by Marketing Year (June-May)

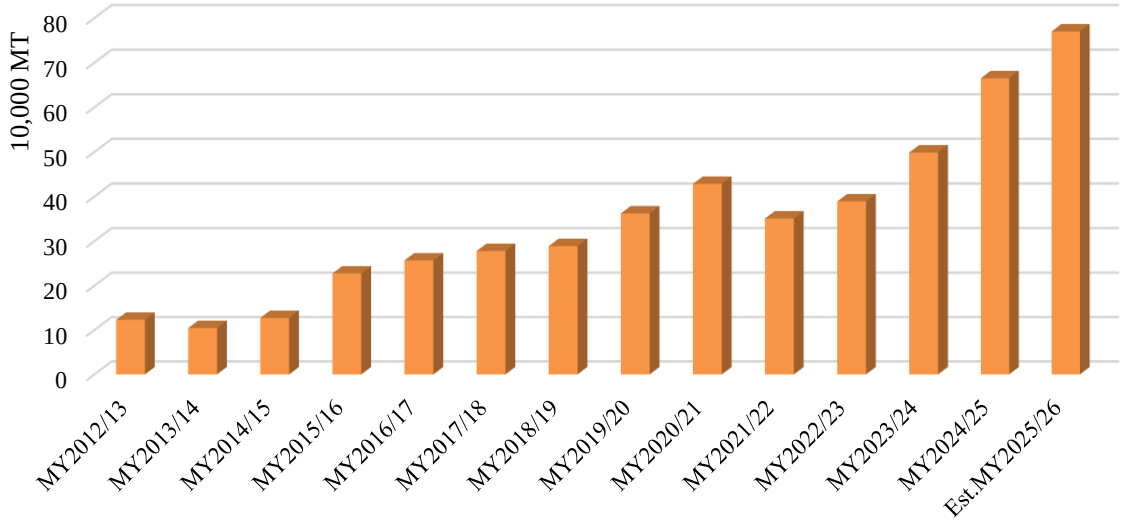


Source: Trade Data Monitor, LLC; FAS Beijing

Exports

Supported by improved production and quality, China's table grape exports are projected to continue rising in MY 2025/26. Low prices of Shine Muscat have directly fueled this rise. For example, traders indicate that exports of Shine Muscat to Russia have doubled from the previous year. The key market for Chinese grape exports remains Southeast Asia, led by Vietnam, Thailand, and Indonesia. The country also exports large volumes of grapes to markets in Central Asia and South Asia. China has quickly become an important table grape competitor, with its 2024 exports catching up with Peru, the world leading grape supplier.

Chart 11. China: Table Grape Exports by Marketing Year (June-May)



Source: Trade Data Monitor, LLC; FAS Beijing

POLICY

Inspection and quarantine

On July 22, 2025, China notified the WTO of the revised Administrative Measures of Inspection, Quarantine, and Supervision on Entry of Fresh Fruit. It is not immediately available when the final regulations will be implemented, but trading partners were required to submit their comments by September 20, 2025. Compared with the current measures, which were put in place in 2005, the updated regulations propose a new requirement that imported fruits enter through ports designated by the General Administration of Customs of China (GACC). Procedurally, the new measures simplify the quarantine permit application by removing the specific rule that the permit must be acquired before signing the contract. Additionally, the 2025 regulations eliminate the detailed requirements for storing uninspected fruits in GACC-designated locations that possessed specific physical conditions, such as sufficient independent space and disinfestation capabilities. Finally, the measures update transit rules by adding specific compliance requirements for non-containerized modes of transport, such as air freight, via Hong Kong or Macao, and streamline documentation by referring to laboratory findings as a result report (refer to GAIN report CH2025-0157 for more details).

Trade

China has implemented several rounds of retaliatory tariffs against U.S. products, including fresh fruits, since February 2025 (refer to USDA GAIN report CH2025-0164). On November 5, 2025, the Chinese government removed the 10 percent retaliatory tariffs imposed on U.S. fruits effective on November 10, 2025 (see USDA GAIN report CH2025-0209). However, the 10 percent reciprocal tariffs on all products from the United States, including fruits, remain in place. In addition, industry sources report that the Ministry of Finance has extended market-based exclusions from Section 301 retaliatory tariffs to December 31, 2026. This exclusion process has allowed importers to apply for exemptions from these tariffs since March 2020. The following table provides detailed import tariff rates and value added tax (VAT) applied to U.S. deciduous fruits.

Table 4. China: Import Tariffs and VAT for Fresh Deciduous Fruit in 2025

Country	Apples (HS 080810)	Pears (HS 080830)	Grapes (HS 080610)	VAT
Country/region with FTA				
Chile	0	0	0	9%
Peru	No access	No access	0	9%
Australia	0	No access	0	9%
New Zealand	0	0	0	9%
South Korea	No access	No access	7.8% (RCEP)	9%
Japan	6.4% (Under RCEP)	6.4% (Under RCEP)	No access	9%
Country/region with no FTA				
United States	35%* As of Nov. 10, 2025	35%* As of Nov. 10, 2025	38%* As of Nov. 10, 2025	9%
South Africa	10%**	10%**	13%**	9%
Belgium	No access	10%	No access	9%
Argentina	10%	10%	13%	9%
Poland	10%	No access	No access	9%
France	10%	No access	No access	9%
Germany	10%	No access	No access	9%
Serbia	10%	No access	No access	9%
Iran	10%	No access	No access	9%
Netherlands	10%	10%	No access	9%
Italy	No access	10%	No access	9%
Portugal	No access	10%	13%	9%
India	No access	No access	13%	9%
Egypt	No access	No access	13%**	9%
Spain	No access	No access	13%	9%
Mexico	No access	No access	13%	9%
Uzbekistan	No access	No access	13%	9%
Kyrgyzstan	No access	No access	13%	9%
Tajikistan	No access	No access	13%	9%
Brazil	No access	No access	13%	9%

Source: China Customs
Note:
*Actual rate that includes MFN tariffs, PRC's Section 232 retaliatory tariffs, and Reciprocal tariffs if Section 301 tariffs are exempted.
**Tariffs to be eliminated upon official announcement.

On December 2, 2024, GACC published the plant quarantine requirements for fresh table grapes from Brazil, officially granting market access to Brazilian grapes. In addition, a new direct shipping route connecting China's southern port of Gaolan (Guangdong province) with the Brazilian ports of Santana and Salvador was opened in April 2025. The new route is expected to shorten shipping time between China and Brazil by up to 30 days and reduce logistics costs by over 30 percent, according to a media report, which noted that the route would perfectly serve the needs of grape and melon exports to China.

Brazil is one of the world's major grape producers. In 2024, Brazil exported nearly 59,000 MT of fresh grapes to major markets such as EU (Netherlands), the United States, and UK, according to Trade Data Monitor, LLC.

On May 22, 2025, GACC allowed imports of fresh apples from Netherlands by publishing the plant quarantine requirements for Netherlands-origin apples. Netherlands produced some 197,000 MT of apples in 2024, according to media reports, which added that 85-90 percent of its apples were sold domestically, with limited volumes being exported to EU countries and UK.

On August 5, 2025, GACC granted access to Australian continental fresh apples after cold treatment was approved for Mediterranean fruit flies. Previously, only apples planted in Tasmania Island could be exported to the Chinese market. It is reported that around 90 percent of Australia's nearly 300,000 MT of annual apple production comes from its main continent.

On September 22, 2025, GACC granted access to Portuguese pears by issuing the plant quarantine requirements for fresh pears from Portugal. In 2024, Portugal growers harvested around 128,000 MT of pears, mostly Rocha pear varieties, according to media reports, which revealed that Portugal exports some 60 percent of its Rocha pears to markets like Germany, UK, France, Spain, and Brazil.

Furthermore, China announced its intention to eliminate tariffs on all exports from 53 African countries that maintain diplomatic relations with China. This declaration was made during the Forum on China-Africa Cooperation Ministerial Meeting held in Changsha on June 10-12, 2025. This new policy builds upon an earlier zero-tariff policy that had been in effect for 33 least-developed African countries since December 1, 2024. Although the implementation date for this expanded policy is not yet available, industry sources anticipate it being particularly beneficial for the South African fruit industry. Currently, South Africa is China's largest supplier of pears and the second largest supplier of apples. This policy is expected to benefit South African fruit exports to China in the medium future.

MARKETING

Shanghai (Huizhan Market) remains the strategic hub for fruit imports into East China, while Guangzhou (Jiangnan Wholesale) and Shenzhen (HiGreen Wholesale) continue to serve as principal gateways to the South. In Northern China, Beijing's Xinfadi Market plays a critical distribution role, while ongoing improvements at Dalian Port are essential for ensuring more efficient fruit distribution across the Northeast.

China's fruit market continues to evolve under the combined influence of economic pressures, shifting consumer preferences, and competitive domestic production. Across the regions, there are commonalities and differences. There are four common challenges: the impact of high tariffs, focus on value-for-money, the rising competitiveness of domestic fruits, and aggressive marketing from international brands. Non-tariff barriers also remain a major challenge. The impact of these issues is heightened by the uncertainty of U.S.-China trade.

- High Tariffs: Tariffs – ranging from 35-38 percent – continue to limit U.S. deciduous fruit trade with China. While some traders identify a maximum tariff range of 20-30 percent to continue buying U.S. fruits, compressed profit margins suggest even that range may be too high to facilitate substantive trade.

- Value-For-Money**:** Consumers are increasingly cautious and price-sensitive, prioritizing cost-effective purchases over branding. New retail formats and instant-purchase e-commerce models are reshaping how imported fruits are marketed and distributed. The transformation is allowing buyers to easily compare prices and buy only what they need. Online platforms, including warehouse clubs (e.g., Sam's Club and Costco), are accelerating the "instant purchase" model with rapid delivery options. These platforms emphasize convenience and freshness, requiring importers and marketers to adapt their promotional strategies to shorter sales windows and localized delivery systems.

- Increasing Competition from Domestic Fruits**:** Novel varieties are grown by licensed growers who pay royalties, and the system aims to control supply, ensure quality, and provide a stable income through a branded, managed marketing approach. Diverse varieties, continuous quality improvements, expanding acreage, and strong promotional campaigns (often government-supported) are strengthening domestic fruit brands. Locally grown fruits benefit from proximity to the customers, upgraded packaging, and improving cold-chain systems. Investments in protected horticulture, and acreage expansion in mountainous SW China allow grapes to mature throughout much of the year.

- Marketing By International Brands: While profit margins are restricting trade in U.S. deciduous fruits, imports from some other countries are projected to rise – largely due to lower tariffs, aggressive marketing, and brand recognition.

Innovative marketing initiatives are important to maintain visibility amid increasing competition. Livestreamed promotions, seasonal campaigns, and interactive marketing are effective tools for engagement and brand differentiation. Seasonal promotions, retailer partnerships, and themed

campaigns could effectively build brand awareness. Premium packaging is important to consumers seeking gift options, as well as a justification for higher price points.

Apples:

In 2024, the United States ranked as the fourth-largest apple supplier to China, following New Zealand, South Africa, and Chile. Other suppliers include France, Australia, Japan, and Poland. Popular apple varieties in the Chinese market include Envy, Queen, Pacific Rose, Ambrosia, Cosmic Crisp, Sonya, Gala, Red Delicious, Granny Smith, and Fuji. China continues to produce large volumes of premium Fuji apples, while other domestic varieties (i.e., Venus, Guoguang, Wanglin, Qinyang, Huahuo, Xiangfu, Zhongcheng Tengga) continue to be affordable and improving in quality. These new varieties address the consumers' demand for novelty and diversity.

Pears:

China primarily imports pears from South Africa, Belgium, Chile, the Netherlands, Argentina, New Zealand, and the United States. In recent years, U.S. pears have faced considerable challenges in both price competitiveness and variety differentiation. The Red Anjou variety appeals primarily to a niche segment of consumers who prefer softer textures but face stiff competition from Belgium pears that account for roughly half of the soft pears imported by China. Retaliatory tariffs and limited marketing further constrain pear expansion in China. Most Chinese consumers favor sweet, juicy, and crispy pears, though a growing segment appreciates softer varieties. Educational campaigns will be essential to gaining market share in China, particularly those that highlight nutritional value, cold chain requirements, and flavor profiles could help raise awareness and build consumer confidence.

Table Grapes:

China primarily imports table grapes from Australia, Peru, Chile, South Africa, India, and Uzbekistan. Imports from the United States have dropped sharply in recent years due to high prices and retaliatory tariffs imposed by the Chinese government since 2018. At the same time, domestic grape quality has improved substantially, serving as significant competition. Specialty grape varieties with unique flavor profiles may find niche opportunities in premium channels. Chinese consumers prefer thin-skinned, firm, sweet, seedless grapes that are large. As domestic production continues to expand, market prices are likely to trend downward. Therefore, exporters need to take into account the margin importers need to make a profit. Marketing campaigns should focus on taste and nutritional advantages.

Attachments:

No Attachments