

Voluntary Report – Voluntary - Public Distribution

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Report Name: US 2025 Cherry Season Demonstrates Resilience in the Face of Challenges

Country: China - People's Republic of

Post: Guangzhou ATO

Report Category: Dried Fruit, Fresh Fruit, Stone Fruit, Strawberries

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Report Highlights:

According to the industry, the end of August is also the end of 2025 U.S. cherry shipments to China. As the season comes to an end, shipments reached an estimated 65 percent of last year's volume - reflecting resilience in a difficult environment. U.S. varieties remained in strong demand, as U.S. shipments were hampered by tariffs, competition, and disruptions. Many importers remained committed to U.S. cherries, despite shrinking profit margins. The 2025 season underscores China's continued importance alongside ongoing efforts to accomplish greater market diversification.

Summary

The final shipments of the 2025 Northwest cherry crop arrived in Mainland China at the end of August. Despite high tariffs, strong domestic competition, and weather-related disruptions, U.S. cherries closed the season with resilience. Official data is pending, yet the industry estimates sales were down by only 35 percent compared to last year's volume. Northwest cherries retained a significant market share, though profit margins narrowed due to lower prices, stronger competition, and logistical costs.

2025 Cherry Market Dynamics

- **Extensive Use of Airfreight.** Unlike past seasons, significant volumes arrived by air shipment, even after ocean shipments began. Buyers relied heavily on the more expensive airfreight for flexibility as the United States and China continued efforts to reach a new trade deal.
- **Competition from Domestic Lychees.** Lychees are an alternative stone fruit, equally rich in antioxidants and Vitamin C. China's 2025 lychee harvest was exceptionally large and available into mid-July, competing with U.S. cherries.
- **Competition from Canadian Cherries.** Canada produces less cherries than the United States. This year, however, Canadian cherries were shipped mainly by air in small but stable-quality volumes, directly competing with U.S. cherries.
- **Competition from Domestic Cherries.** Northern China's domestic cherries are improving in quality and quantity and are offered at a competitive price. Furthermore, the adoption of greenhouse cultivation has effectively extended the Chinese cherry season, ranging from February to early July. Domestic cherry production is expected to continue to increase.
- **Congestion led to Price Drops.** Large volumes of U.S. cherries arrived back-to-back between late July and mid-August. The abundant U.S. cherries were met with extreme heat and temporary wholesale market closures due to weather abnormalities. The result was a decline in quality (i.e., off-flavors, decay, bruises). Some prominent outlets had to drop prices to improve the flow of U.S. cherries.

Consumer Preferences

Premium varieties such as *Chelan*, *Skeena*, *Santina*, *Black Pearl*, and *Regina* remain especially popular with middle-class and upper-class consumers in China. Purchases are concentrated through e-commerce platforms (JD.com, Tmall, Douyin), high-end supermarkets (Ole, Sam's Club, City Super, BLT, Costco), and specialty fruit retailers (Pagoda, Greenery, and boutique chains).

Industry Feedback

Importers cite profitability and quality as the biggest challenges this year. Specifically, traders and logistics providers highlighted the role of tariffs as a barrier, limiting competitiveness and making large-volume shipments less profitable. Lower-priced cherries observed in some retailers were often linked to quality concerns, aligning with broader reports of storage and handling challenges. Varieties such as *Lapins* and *Sweetheart* received less consumer favor.

Similarly, U.S. exporters highlighted some challenges for 2025, including the need to improve quality consistency, optimize logistics, and continue efforts to diversify demand beyond Mainland China. Early reports suggest increased U.S. cherry exports to other Asian markets (i.e., Korea, Taiwan, Vietnam).

Transportation and Logistics

Traditionally, air freight plays a key role at the start of the season, while sea freight dominates later varieties in August. Guangzhou, Shenzhen and Shanghai are three major importing cities. This year, some buyers in southern China continued to rely on air shipments even after ocean arrivals began to better match retailers' daily demand. Meanwhile, certain U.S. exporters and packers avoided containerized shipments altogether due to tariff uncertainty and inspection concerns, resulting in fewer sea containers compared to 2024. Traders in south China had new airline options arriving directly to Guangzhou and Shenzhen. But in Shanghai, some of the traditional airlines operated fewer U.S.-China flights dedicated solely to cherry trade. Instead, cherries were shipped as cargo on passenger flights (LAX–PVG), which is not optional. It is unclear if this was simply a cost-management adjustment, while the change highlights the weaker profitability and tighter margins across the supply chain.

Seasonal Outcome

According to Northwest Cherry Growers (NWCG), the 2025 crop is approximately 15 percent larger than the 2024 harvest. Direct shipments to China were estimated at 8,200 tons—down 35 percent year-on-year and 38 percent below the five-year average (8,480 tons). In the difficult trading environment, the U.S. cherry industry successfully sustained a meaningful presence in the China market. The 2025 season underscores both the importance of diversification and the continued consumer demand for Northwest cherries in China's premium fruit segment.

Attachments:

No Attachments.