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Report Highlights:

China's peach and nectarine production is forecast to rebound marginally to 17.3 MMT in MY 2026/27. Cherry production is expected to reach 1.02 MMT, continuing its upward trend driven by maturing orchards and expanding greenhouse capacity. Weakening consumer purchasing power is dampening fruit consumption, which will likely reduce cherry imports from Chile, the single largest supplier. Imports of U.S. cherries, however, are projected to rebound following eased bilateral trade tensions and a reduction in retaliatory tariffs.

Peaches and Nectarines

Table 1. China: Peaches/Nectarines Production, Supply, and Distribution

Peaches & Nectarines, Fresh	2024/2025		2025/2026		2026/2027	
Market Begin Year	Jan 2024		Jan 2025		Jan 2026	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	830000	830000	820000	820000	0	810000
Area Harvested	830000	830000	820000	820000	0	810000
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	17600000	17600000	17000000	17000000	0	17300000
Non-Comm. Production	0	0	0	0	0	0
Production	17600000	17600000	17000000	17000000	0	17300000
Imports	53500	53500	61000	63000	0	52000
Total Supply	17653500	17653500	17061000	17063000	0	17352000
Domestic Consumption	17575900	17575900	16975000	16975000	0	17252000
Exports	77600	77600	86000	88000	0	100000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	17653500	17653500	17061000	17063000	0	17352000

Unit: hectare, metric ton

Production

Post estimates China’s peach and nectarine production to rebound by 2 percent year-on-year to 17.3 million metric tons (MMT) in marketing year (MY) 2026/27 (January-December). Peach farmers note that excessive spring rainfall across key northern production areas of Shandong, Hebei, Shaanxi, and Henan has not posed a significant impact on peach and nectarine flowering. In most southern peach producing regions, notably Anhui, Jiangsu, and Zhejiang, peach and nectarine production is expected to remain stable or improve slightly under normal weather conditions. In northern production areas, peaches and nectarines bloom from early April to early May, with early maturing open-field nectarines beginning harvest in mid-June and the supply season ending around mid-October. Greenhouse-cultivated peaches and nectarines are harvested between mid-April and mid-May. In southern producing areas, peaches bloom from mid-March to early April, with harvest season beginning in late May and ending in late July.

Fruit quality varies significantly by region and farm size. While persistent rains have led to slightly declined peach and nectarine quality features, such as brix level, in northern production areas, upgraded cultivation techniques and favorable weather conditions have contributed to desired appearance and flavor for peaches grown in southern provinces. In general, the quality gap continues to widen between well-managed orchards that use advanced farming practices and smallholder orchards with traditional varieties and low-input management practices.

The total peach and nectarine acreage has declined over the past few years on flat market returns. However, nectarine area has maintained an upward trajectory. A broader industry shift is reflected by geographical migration where traditional production areas like Shandong and Hebei are reducing peach acreage due to rising labor costs and national food security policies that restrict fruit development on basic farmland. In contrast, emerging regions such as Sichuan, Yunnan, and Shanxi continue to see area growth in peaches and nectarines. To improve resilience, industry is also moving toward facility-based cultivation, such as greenhouses, to mitigate climate risks and extend the supply season. Industry reports indicate that the peaches and nectarines cultivated in various types of greenhouses have steadily replaced the open-air orchards in Shandong, Hebei, Shaanxi, and Dalian.

According to industry sources, while traditional peach varieties remain the mainstay, nectarines are increasing in popularity, now accounting for nearly 20 percent of the total planting area. To combat market volatility, industry is shifting toward high-value varieties such as yellow-flesh peaches, flat peaches, and "hard-melting" nectarines that are better suited for long-distance transport and longer shelf life. Still, the industry is faced with challenges such as an aging labor force and rising production costs, as well as lack of national brands.

Price

In 2026, China's peach and nectarine market is experiencing sharp price polarization between premium and ordinary fruit. Ordinary fruit, typically grown from traditional varieties under low-input management, with inconsistent grading and unstable flavor, has seen farm-gate prices plummet by as much as 20 percent compared to 2025. Nectarines sold for as little as \$0.20–\$0.53 (1.4–3.6 RMB) per kilo in early June across major producing regions such as Hubei, Shandong, and Henan, while early-maturing peaches fetched just \$0.24–\$0.44 (1.6–3.0 RMB) per kilo in Anhui and Henan. In contrast, premium fruit, distinguished by superior varieties, standardized orchard management, uniform sizing, and strict grading, has held firm or seen moderate price increases. Top-tier nectarines fetched \$0.70–\$0.90 (4.8–6.2 RMB) per kilo at farm gates, and premium honey peaches reached as high as \$2.00 (13.6 RMB) per kilo. This divergence reflects strong demand from supermarkets and e-commerce platforms, which are prioritizing high-standard fruit that remains in short supply.

In addition, media reports indicate lower market prices for common peaches and nectarines are also attributed to concentrated market entry by peaches from southern production areas where early maturing varieties have ripened 7 to 10 days earlier this year, leading to temporary oversupply and heavy downward pressure. Prices for common fruit are expected to continue their downward trend as mid-season varieties, especially peaches, arrive in bulk in late June and early July. On the other hand, premium, late-maturing, and yellow peach varieties are projected to remain price-stable.

Consumption

China's fruit consumption is shifting toward health-conscious, value-driven purchasing, with premium domestic produce gradually displacing imports as domestic quality improves and consumers spend more pragmatically. Moreover, lower-tier cities and rural areas are becoming major growth engines thanks to improved logistics and cultivation practices. Middle-class consumers continue to prioritize food safety and fruit flavor, even as they become more price-value sensitive. Fruit purchases rely more on online sales through live-streaming and community group buying.

Chinese consumers maintain a strong preference for sweet, juicy peaches and nectarines with a rich aroma, while increasingly rejecting sour varieties in mainstream retail. While texture preferences vary between crisp and tender, younger consumers favor firm and crunchy nectarines, and yellow peaches are gaining popularity due to their perceived sweetness and visual appeal. In northern China, there is a notable shift toward high-quality, medium-sized fruit over strictly large varieties, provided the fruit is flavorful. Meanwhile, consumers in southern China continue to favor sweet, juicy, soft varieties in both white and yellow flesh. Peaches and nectarines face pressure from early maturing varieties of apples, grapes, and pears, which continue to see improvements in both quality and varieties.

Trade

Imports

Post estimates China's peach and nectarine imports to see a moderate decline in MY 2026/27 (January-December), largely because of subdued domestic demand. The greenhouse cultivated peaches and nectarines have shortened the local off-season which used to be dominated by imported fruits. China imports peaches and nectarines primarily from Southern Hemisphere countries, notably Chile and Australia. Peach and nectarine imports normally begin in January and end in May, with shipments peaking in March.

Table 2. China's Fresh Peach and Nectarine Imports by Country

Partner Country	Quantity (MT)				
	2021	**2022**	**2023**	**2024**	**2025**
World	33,299	44,559	42,517	53,549	62,858
Chile	26,037	37,139	35,109	46,228	57,695
Australia	7,228	7,374	7,389	7,302	5,163
United States	34	28	20	19	0

Source: TDM

Exports

China exports a very small portion of its peach and nectarine production to the world. Nonetheless, Post forecasts China's peach and nectarine exports to continue increasing in MY

2026/27 due to improved fruit quality and varietals combined with improved logistics to China's two largest export markets, Kyrgyzstan and Russia. Peach volumes exported to traditional Southeast Asian markets remain relatively stable. China exports peaches and nectarines all year round, but large volumes begin in May and end in September, with the heaviest flow occurring in July.

Cherries

Table 3. China: Cherries Production, Supply, and Distribution

Cherries (Sweet&Sour), Fresh	2024/2025		2025/2026		2026/2027	
Market Begin Year	Apr 2024		Apr 2025		Apr 2026	
China	USDA Official	New Post	USDA Official	Post New	USDA Official	New Post
Area Planted	199000	199000	205000	205000	0	210000
Area Harvested	0	189050	0	195000	0	199500
Bearing Trees	0	0	0		0	
Non-Bearing Trees	0	0	0		0	
Total Trees	0	0	0		0	
Commercial Production	850000	850000	900000	950000	0	1020000
Non-Comm. Production	0	0	0		0	
Production	850000	850000	900000	950000	0	1020000
Imports	553900	553900	600000	502000	0	480000
Total Supply	1403900	1403900	1500000	1452000	0	1500000
Domestic Consumption	1402700	1402700	1498000	1450700	0	1497500
Exports	1200	1200	2000	1300	0	2500
Withdrawal From Market	0	0	0		0	
Total Distribution	1403900	1403900	1500000	1452000	0	1500000
For Processing	0	0	0		0	

Unit: hectare, metric ton

Production

Post estimates China's cherry production to increase by 7 percent year-on-year to reach 1.02 million metric tons (MMT) in MY2026/27 (April-March), driven primarily by new bearings and the proliferation of greenhouse facilities. Additionally, new tree plantings mean that area planted is slightly greater than area harvested, as some trees are not yet fruit-bearing. Production gains are expected in major cherry producing regions including Shandong, Shaanxi, Gansu, and Sichuan, where new plantings over the past decade have gradually entered the full production cycle. Dalian farmers and packers told Post that cherry production may surge by 20-30 percent from the previous year due to an increased number of greenhouses. Cherry production has expanded further west to provinces like Xinjiang where greenhouses are built to protect cherries from weather-related damage. Post has revised MY 2025/26 cherry production to 950,000 MT based on market research tours.

In traditional cherry-producing regions, while national food security policies restrict planting fruit crops on basic farmland, farmers are permitted to replace existing fruit crops with other fruit varieties. For example, an agriculture official told Post that producers are substituting cherries for apples and peaches in Yiyuan of Shandong, the largest open-air cherry production area in China. The pace of greenhouse expansion in Dalian is slowing as local governments began to discourage construction of greenhouses to mitigate the risks of oversupply and potential price declines. An industry report indicates that greenhouse-cultivated cherries (including those covered with rain shelters) account for more than 40 percent of total cherry production.

Image 1&2: China: Cherry Production in a Greenhouse and Open Air in Dalian

Source: FAS China

Protected and open-air cultivation differ significantly in fruit quality in 2026. Greenhouse-grown cherries, particularly in Dalian, maintain high quality standards in terms of freshness, crunchiness, and size that often outperform imported varieties in the high-end market. Conversely, persistent rainfall in May across major producing regions like Shandong, Hebei, and Shaanxi has severely impacted open-field cherries, causing widespread fruit splitting and/or diminishing sweetness. Domestic cherries are generally more delicate than imported ones. Therefore, most domestic cherries are not suitable for post-harvest treatment such as pre-cooling and machine sorting.

Variety trends remain dominated by Meizao. For example, Meizao cherries account for 95 percent of production in Dalian due to easy management, long shelf life, and suitability for transport. The Russia 8 varietal is emerging as a premier choice for high-end domestic and export markets, valued for its superior size, color, and crunchiness despite being difficult to manage in open fields. Other notable varieties include Jiahong, Summit, and Brooks. Chinese scientists have developed or introduced many new cherry varieties, but few have been accepted by the market or planted at large scale.

The industry faces several critical challenges, most notably weather impacts as climate change increases the frequency of spring frosts, excessive rain, and heat-induced fruit deformation in northern production areas. Logistical weaknesses also persist, including a lack of efficient pre-cooling infrastructure and specialized packaging, which leads to high loss rates throughout the entire production chain. Economically, farmers are grappling with rising costs, especially fertilizers and fuel after the outbreak of conflicts in the Middle East, and an aging labor force, coupled with a "consumption downgrade" that has caused market prices to drop.

Price

In 2026, cherry prices are lower than the previous year, primarily due to an overall decline in fruit quality. Yiyuan (Shandong) farmers told Post that the wholesale price of Meizao cherries had dropped from $5 (34 RMB) per kilo in 2025 to $3.8 (26 RMB) per kilo in late May 2026. Despite the overall market downturn, premium greenhouse varieties such as Russia 8 continue to command high prices, fetching as high as $29.4 (200 RMB) per kilo at retail. Greenhouse cherries also benefit from early market entry — Dalian's greenhouse harvest begins in early March, well ahead of the bulk open-field harvest in late May. An industry report suggests that greenhouse cultivated cherries account for 34 percent of the cherry planted area in Dalian but generate 70 percent of the total output value.

In MY 2025/26, imported Chilean cherries also saw a 10-percent price decline, largely because of subdued market demand (see consumption below).

Consumption

Cherries are expanding beyond their status as a luxury fruit to become more accessible to middle-class households, driven by increased supplies that have led to declining prices. Consumption has evolved to include integrated sales channels such as fresh food E-commerce, live-streaming platforms, and high-end membership stores. Meanwhile, demand for premium cherry varietals, including Rainier, Russian 8, and Meizao remains strong among upper-income consumers who are willing to place a high value on visual presentation and price-value when making buying decisions. Chinese consumers generally prefer large size, dark color, and high brix cherries.

The consumption of cherries has been challenged by the rising availability of alternative fruits, such as blueberries and strawberries. Specifically, a surge in blueberry production in Yunnan province has led to lower market prices and direct competition, as their harvest season overlaps with that of cherries.

Trade

Imports

Cherry imports are projected to decline marginally in MY 2026/27 (April-March) due to weakened consumption. Chilean imports, which hold more than 95 percent of the market share, face significant pressure from market saturation following rapid expansion in supplies in recent years. Traders add that economic downturns have hindered the gift-giving market around the Chinese Lunar New Year holiday, a peak for high-value imported cherry demand. In general, imports are greatest around the holiday season, picking up in November, peaking in January, and tapering off in March. Although U.S. Northwest cherries encounter reduced production this summer, trade sources predict the cherry imports from the United States will likely rebound in MY 2026/27 due to partially reduced tariffs following the November Busan Agreement and reduced bilateral trade tensions after a leadership meeting in May. Import demand continues to be driven by the same quality attributes preferred by Chinese consumers (firmness, size, color, and brix).

Table 4. China's Fresh Cherry Imports by Country

Partner	Quantity (MT)			
	MY 21/22	**MY 22/23**	**MY 23/24**	**MY 24/25**
World	318,441	377,728	387,961	554,103
Chile	305,182	369,217	374,334	542,364
United States	8,644	3,410	8,688	7,935
Argentina	1,593	1,495	1,890	2,335

Source: TDM

Exports

China exports limited quantities of cherries in the absence of adequate post-harvest treatment and cold chain logistics. Still, the export volumes are increasing quickly to neighboring markets, especially Southeast Asia and Russia. China's exports of cherries increased 766 percent from 2024 to 2025, from $1 million to almost $9 million.

Policy

In recent months, China has granted market access for stone fruit to several countries including dried cherries from the Kyrgyz Republic and Uzbekistan, fresh stone fruit from South Africa, and the removal of tariffs for 20 African countries.

On September 22, 2025, the General Administration of Customs (GACC) published phytosanitary requirements for dried fruit from the Kyrgyz Republic, granting market access to dried cherries. Similarly, GACC officially allowed the import of dried cherries from Uzbekistan on October 28, 2025, provided that the dried cherries intended for export to China first undergo fumigation treatment.

On November 14, 2025, GACC published the phytosanitary requirements to allow market access for fresh stone fruit (peaches, nectarines, plums, apricots, and prunes) from South Africa. Industry sources report that South Africa produces 180,000 MT of peaches and nectarines annually. The country exports stone fruit mainly to the EU, UK, and Middle East with a supply season from October to April.

On April 28, 2026, the State Council Tariff Commission (SCTC) announced the implementation of zero tariffs for 20 African countries that have diplomatic relations with China but are not classified as least developed countries (LDC) from May 1, 2026 to April 30, 2028. For products subject to tariff-rate quotas (TRQ), only the in-quota tariff rate is reduced to zero, while outquota tariff rates remain unchanged. China has previously implemented zero tariffs for all tariff lines from 30 LDC in Africa. Currently, only South African stone fruit including peaches and nectarines has access to the China market.

On November 5, 2025, the SCTC announced the removal of 10-15 percent retaliatory tariffs on 740 agricultural products, including stone fruit, from the United States, effective November 10, 2025. Meanwhile, the 10-percent reciprocal tariff on all U.S. products remains in effect until November 9, 2026. In addition, China's retaliatory Section 232 tariff and Section 301 tariff, which can be excluded, are still valid. The following table provides a detailed comparison between the United States and other trading partners regarding tariffs and value-added tax (VAT) on stone fruit.

Table 5. Import Tariff and VAT on Stone Fruit with Major Trading Partners in 2026

Trade partner	Tariff		VAT (%)
	Peaches/Nectarines (HS code 080930)	**Cherries (HS code 080929)**	
Country/Region with FTA			
Chile	0	0	9
Australia	0	0	9
New Zealand	No market access	0	9
Taiwan	Peaches-0 Nectarines-No market access	No market access	9
Pakistan	No market access	0	9
South Africa	0	No market access	9
Country/Region with no FTA			
United States	Nectarine-35% (as of Nov. 10, 2025)* Peaches-No market access	35% (as of Nov. 10, 2025)*	9
Canada	No market access	10%	9
Argentina	No market access	10%	9
Spain	Peaches-10% Nectarines-No market access	10%	9
Turkey	No market access	10%	9
Uzbekistan	10%	10%	9
Kyrgyzstan	No market access	10%	9
Tajikistan	No market access	10%	9
Kazakhstan	Peach-10% Nectarines -No market access	No market access	9
Hungary	No market access	10%	9

Source: China Customs
Note: *Actual rate (including MFN, Section 232, and reciprocal) if Section 301 tariffs are exempted.

Marketing

Consumers have become more price conscious amid ongoing economic uncertainty. While demand for cherries and other premium fruits remains relatively strong, consumers are increasingly sensitive to price and more likely to compare options before purchasing. At the same time, second- and third-tier cities are emerging as important growth markets, as consumers in these locations generally face less financial pressure and demonstrate greater willingness to spend on premium fruit products than their counterparts in some first-tier cities.

- Imported fruit suppliers continue to invest heavily in marketing activities in China. Chile remains one of the most active competitors, implementing large-scale promotional campaigns for cherries, peaches, and nectarines that emphasize themes such as health, vitality, everyday consumption, and seasonal celebrations. Marketing programs increasingly integrate online and offline channels, including supermarket promotions, in-store displays, sampling activities, social media campaigns, and livestreaming events. Imported stone fruits are increasingly positioned as part of consumers' daily healthy lifestyles rather than occasional premium purchases.

- E-commerce has become one of the most important drivers of fruit sales growth in China. Content-driven platforms such as Douyin and Xiaohongshu are gaining market share rapidly and have become influential channels for product discovery, consumer education, and brand promotion. Livestream commerce, short-video marketing, and influencer endorsements are now widely used to market both imported and domestic fruit. These channels enable suppliers to showcase product quality, origin stories, and consumption occasions while engaging directly with consumers.

- Advancements in cold-chain logistics and rapid delivery services have further strengthened the role of e-commerce by making imported and premium fruits more accessible across a wider geographic area. Community group-buying programs, instant-delivery platforms, and platform-driven bulk purchasing models are expanding fruit distribution into lower-tier cities and county markets where premium supermarket penetration remains limited. As a result, digital commerce is increasingly serving not only as a sales channel but also as a key platform for brand building, consumer engagement, and market expansion.

Cherries

China's domestic cherry industry continues to expand its marketing efforts beyond traditional sales channels. Producing regions increasingly organize cherry festivals, orchard tourism activities, and social media influencer campaigns to promote local production and stimulate consumption. In some regions, particularly Dalian, cherry promotion has evolved into a comprehensive "agriculture + tourism + e-commerce" model that combines fruit sales with tourism, family recreation, and local branding initiatives. These efforts aim to position cherries not only as agricultural products but also as part of broader lifestyle and destination experiences.

Some consumers prefer to purchase mid-size cherries that are less expensive because of the ongoing economic slowdown. In the first-tier cities in the south (Shenzhen and Guangzhou), however, consumers still prefer large, crispy, high-brix cherries. In the wholesale market, 2 kilogram, 2.5 kilogram, and 5 kilogram containers are available to satisfy different consumer demands.

The main suppliers of imported cherries are Chile, the United States, New Zealand, Canada, Argentina, and Australia. Emerging suppliers include Uzbekistan and Tajikistan. Chile remains the largest supplier of fresh cherries in China, with its peak season coinciding with Chinese Spring Festival. U.S. Northwest cherries enjoy a strong reputation. Promising varieties include Regina, Lapins, Bing, and Skeena. Industry professionals expect to see more yellow-color varieties such as Rainier and new varieties such as Early Robin and Skylar Rae enter the market.

Peaches and Nectarines

Domestic competition for peaches and nectarines remains high. With large supply, ordinary local peaches and nectarines are nearly saturated, while consumers seek higher-quality varieties with unique flavors. Juicy, organic, and easy-to-peel peaches from Jiangsu Province, for example, are gaining popularity through livestreaming promotions.

High-end retailers display and promote in-season products in attractive gift boxes. In terms of packaging, many fruit distributors and e-commerce platforms offer durable designs. These packages typically carry 6–8 peaches per box to accommodate increasing demand for lower total prices per box. Farmers also sometimes offer "Buy One Get One Free" promotions through online livestreams.

Imported peaches are well received in first-tier cities. China imports peaches and nectarines from Chile and Australia. Previously, the United States exported nectarines to China but have since lost competitiveness in the Chinese market as expanded domestic production and low local prices eroded market share.

Attachments:

No Attachments