Required Report: Required - Public Distribution **Date:** August 19, 2026

Report Number: JA2026-0053

Report Name: Stone Fruit Annual

Country: Japan

Post: Tokyo

Report Category: Stone Fruit

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Report Highlights:

FAS/Tokyo forecasts Japan's fresh cherry production for marketing year (MY) 2026/27 at 14,000 metric tons (MT), up 25 percent from 11,200 MT in MY 2025/26. The recovery is driven by improved fruit sets in 2026 and generally favorable growing conditions in Yamagata prefecture, which accounts for roughly three-quarters of national production. FAS/Tokyo forecasts cherry imports to decline 15.6 percent to 4,200 MT as domestic availability improves. For peaches and nectarines, FAS/Tokyo forecasts MY 2026/27 production at 110,000 MT, up 9.3 percent from MY 2025/26 as the average fruit size has improved compared to the prior year's heat and drought conditions that resulted in smaller fruit. Greater domestic supply is forecast to lift consumption to 107,800 MT and support an expansion in exports to 2,500 MT, while imports remain limited at about 300 MT, consisting almost entirely of U.S. nectarines.

Cherries:

Cherries (Sweet&Sour), Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	4110	4110	4000	3950	0	3810
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	10000	10000	11000	9700	0	12200
Non-Comm. Production (MT)	1500	1500	1500	1500	0	1800
Production (MT)	11500	11500	12500	11200	0	14000
Imports (MT)	4800	4794	5000	4976	0	4200
Total Supply (MT)	16300	16294	17500	16176	0	18200
Domestic Consumption (MT)	16300	16292	17500	16174	0	18197
Exports (MT)	0	2	0	2	0	3
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	16300	16294	17500	16176	0	18200
(HA), (1000 TREES), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Harvested Area:

The number of cherry orchards in Japan continues to decrease. Japan's Ministry of Agriculture, Forestry, and Fisheries (MAFF) reports that in marketing year (MY: April-March) 2025 the national cherry harvested area was 3,950 hectares (ha), down 160 ha, or 4 percent, from the previous MY. FAS/Tokyo forecasts a further decline to 3,810 ha in MY 2026/27, down 140 ha, or 3.5 percent, year-on-year.

The decline in orchards remains structural rather than crop-year specific. Various issues that include aging growers, limited farm successions, shortages of seasonal labor, and the costs of maintaining rain-protection structures continue to push the marginal orchards out of production. However, orchards are consolidating into larger operating units, but not fast enough to offset the decline. These issues are most consequential in Yamagata prefecture, which represents 74 percent of Japan's MY 2025/26 cherry production.

In March 2026, the Yamagata prefectural government initiated a Cherry Production Area Revitalization Vision. The plan highlights rapid acreage decline associated with climate risk, producer aging, and labor shortages as key issues. According to the plan, by the year 2035 objectives include maintaining 2,000 ha of cultivated cherry area, increasing yields to 5 metric tons (MT) per ha, and sustaining at least 10,000 MT of annual production, with 2026-2028 designated as the priority implementation period. These actions are important for slowing the long-term contraction, but FAS/Tokyo's opinion is that the measures will not increase the national harvested area for MY 2026/27.

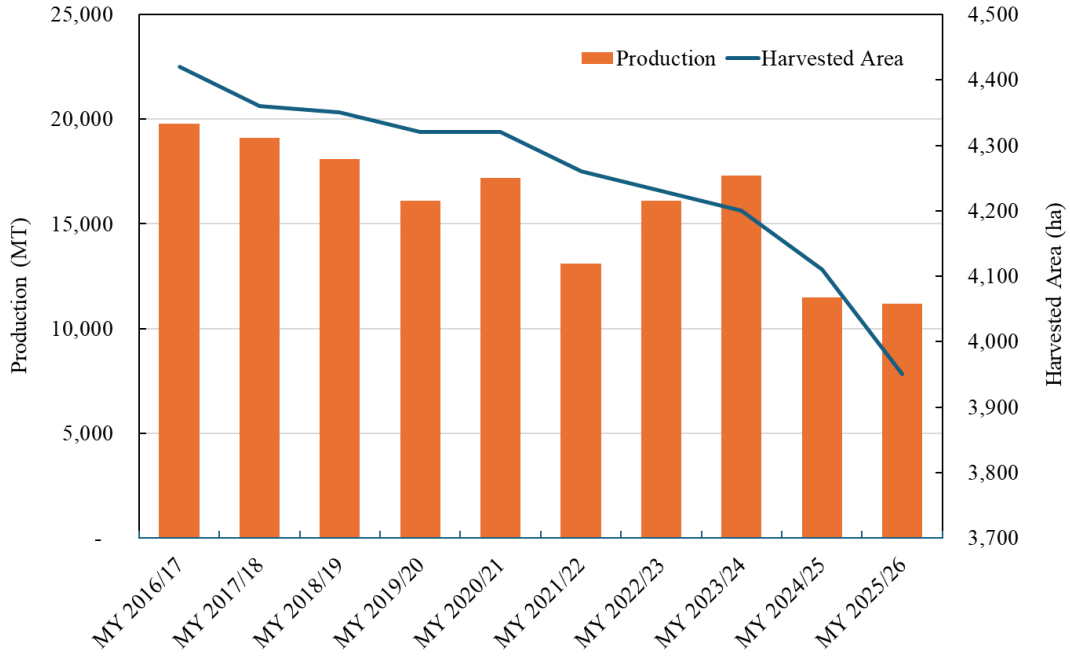
Crop Production:

The growing conditions are materially better in MY 2026/27. Yamagata's official crop survey forecasts prefectural production of 10,200-11,100 MT, well above the prior year's 8,310 MT. The prefecture reports improved pollination following expanded use of honeybees, hand pollination, and flowering branches, combined with generally favorable weather during flowering. Fruit set was therefore higher

than in MY 2025. A late-May wind event damaged some rain-protection coverings, but the prefectural government expects limited impact on overall quantity and quality.

The crop is not without constraints. An April 9th frost negatively affected some orchards in a major Yamagata cherry production area, while the Yamagata prefectural survey reported substantial orchard-to-orchard variation. Additionally, the formation of twin fruiting is above normal, particularly for *beni shuho* (a late maturing variety), reducing the packout for premium grades. Furthermore, the larger crop increased the importance of having sufficient harvest labor. The MY 2026/27 crop developed earlier than normal, with peak Yamagata harvest estimated around June 11-15 for *sato nishiki* (the most popular variety) and June 17-21 for *beni shuho*.
After accounting for robust fruit sets and a continued acreage decrease, plus quality/packout constraints, FAS/Tokyo forecasts Japan's national MY 2026/27 cherry production at 14,000 MT, a 25 percent increase from MY 2025/26. Commercial production is forecast at 12,200 MT, with a further 1,800 MT classified as non-commercial production. The forecast represents a meaningful recovery but not a full return to the stronger crop levels seen prior to the two recent down seasons (Chart 1). In other words, Japan's cherry production would still be roughly 19 percent below the 17,300 MT recorded in MY 2023/24. Note that sour cherries in Japan are not commercially produced in meaningful quantities.

Chart 1 – Japan Ten-year Cherry Production Trends



Source: Trade Data Monitor

Consumption:
Fresh cherries in Japan are a seasonal, premium fruit that are consumed overwhelmingly as a fresh product. Off-grade fruit is used for processing, but processing accounts for only a small share of total production. Domestically grown cherries are sold through wholesale markets, direct sales, fruit-picking operations, summer gifting, and the *Furusato Nozei* (hometown tax donation) system. Recent shortages

have been especially visible in gifting and *Furusato Nozei* channels, where municipalities and suppliers have had difficulty filling advance orders during weak crop years.

FAS/Tokyo estimates MY 2025/26 domestic cherry consumption at 16,174 MT. For MY 2026/27, the recovering domestic production more than offsets the forecast decline in imports, raising the total supply to 18,200 MT and domestic consumption to 18,197 MT, a 12.5 percent increase year-on-year. Consumption nevertheless remains below the levels seen in stronger domestic crop years. Structural headwinds also persist such as younger consumers are less engaged in Japan's summer gifting tradition, and high retail prices continue to constrain growth in sales volumes. Accordingly, FAS/Tokyo expects the 2026/27 increase to be primarily supply-led, rather than evidence of a broad expansion in underlying demand.

Trade:
The United States remains Japan's dominant foreign supplier of fresh cherries. In MY 2024/25, U.S. cherries accounted for more than 90 percent of Japanese imports and imported cherries continue to be commonly marketed as "American cherries" (Table 1). California cherries typically enter the market in May, followed by Washington and Oregon supplies arriving later in the season. U.S. cherries occupy a different consumer position from premium Japanese yellow-cherry varieties, but import volumes are still sensitive to domestic availability, U.S. crop size, exchange rates, and retail price competition from other fruits.

FAS/Tokyo forecasts MY 2026/27 imports to decline to 4,200 MT, down 15.6 percent from 4,976 MT in MY 2025/26. Two supply-related factors point in the same direction. Firstly, the recovery in Japan's domestic crop reduces the need for imports relative to the prior two seasons. Secondly, USDA/NASS forecasts the 2026 U.S. sweet cherry crop at 310,500 tons, down about 17 percent from 2025. Washington state production is forecast at 200,000 tons (down 23.4 percent) and Oregon at 38,000 tons (down 23.5 percent). California production, by contrast, is forecast to increase 24.3 percent to 63,000 tons, but is unlikely to fully offset the smaller Pacific Northwest crop during the later import window. Japan's fresh cherry exports remain negligible, and FAS/Tokyo forecasts exports at approximately 3 MT for MY 2026/27.

Table 1 - Japan's Fresh Cherry Imports by Country (MT)

	MY 2021/22	MY 2022/23	MY 2023/24	MY 2024/25	MY 2025/26
World	5,927	2,363	3,702	4,797	4,976
United States	3,958	5,493	1,984	4,427	4,423
Market Share:	*93%*	*84%*	*91%*	*92%*	*89%*
Chile	192	158	180	186	258
Others	242	221	146	184	295

Source: Trade Data Monitor

Policy:
Under the U.S.-Japan Trade Agreement (USJTA), Japan's import tariff on U.S. fresh sweet cherries (HS 0809.29) has been eliminated. Japan continues to apply phytosanitary requirements to U.S. fresh cherry

imports. FAS/Tokyo is not aware of a major tariff or market access change affecting U.S. cherries for MY 2026/27.

Peaches and Nectarines:

Peaches & Nectarines, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	9310	9310	9215	9120	0	9030
Bearing Trees (1000 TREES)	0	0	0	0	0	0
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	0	0	0	0	0	0
Commercial Production (MT)	103600	103600	93500	92900	0	103000
Non-Comm. Production (MT)	7200	7200	7500	7700	0	7000
Production (MT)	110800	110800	101000	100600	0	110000
Imports (MT)	300	266	300	292	0	300
Total Supply (MT)	111100	111066	101300	100892	0	110300
Domestic Consumption (MT)	108800	108752	99300	99031	0	107800
Exports (MT)	2300	2314	2000	1861	0	2500
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	111100	111066	101300	100892	0	110300
(HA), (1000 TREES), (MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Harvested Area:
Japan's combined peach and nectarine production base is continuing to gradually shrink. MAFF's principal Fruit Production and Shipment Statistics reports 9,120 ha for the MY 2025/26 harvested area for Peaches & Nectarines. FAS/Tokyo forecasts the MY 2026/27 harvested area at 9,030 ha, a further decline of about one percent.

The long-term causes remain consistent: aging farm population, insufficient succession, aging trees, orchard conversion to residential or other land uses, and the high labor requirements of pruning, thinning, bagging, crop protection, and selective harvesting. Peach production is geographically more diversified than cherry production. In MY 2025/26, Yamanashi prefecture accounted for 32 percent of national peach production, followed by Fukushima prefecture at 23 percent, Nagano prefecture at 10 percent, Yamagata prefecture at 8 percent, and Wakayama prefecture at 7 percent. This diversification is beneficial for risk mitigation, but does not alter the nationwide decrease in acreage trend (Chart 2).

Nectarine production in Japan is much less compared to peaches and is concentrated primarily in Nagano prefecture. MAFF's Specialty Fruit Production Dynamics Survey indicates roughly 100 ha of nectarine cultivation and production of around 1,100 MT.

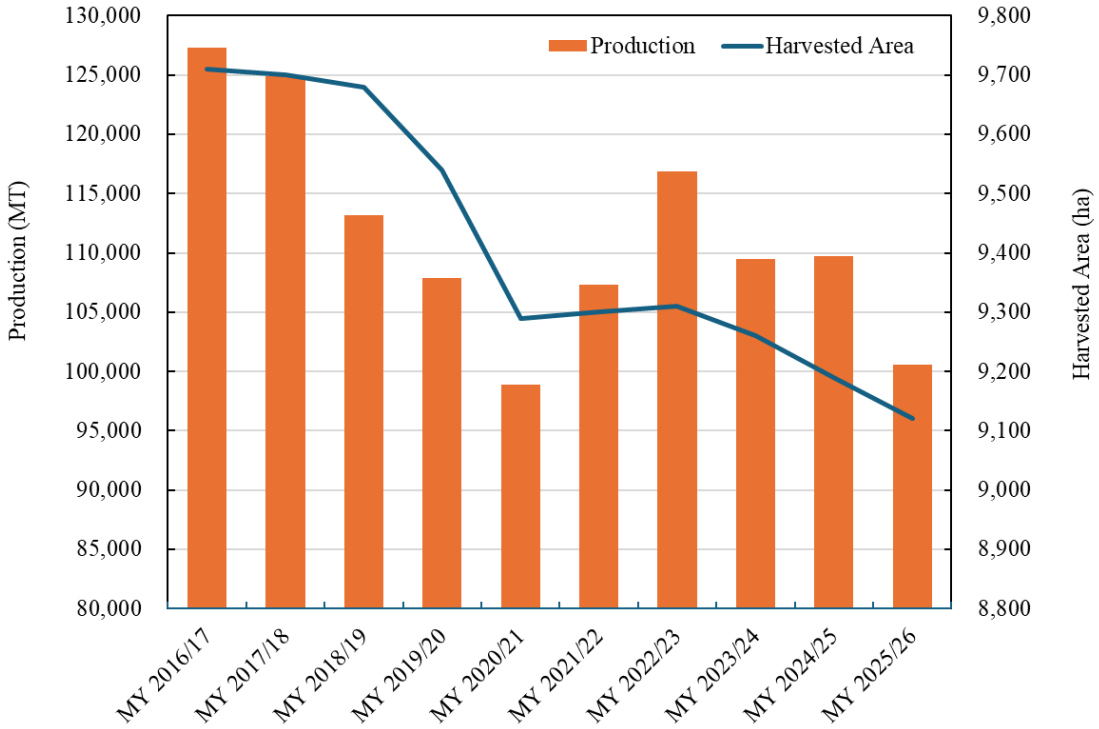
Production:
MY 2025/26 production was impacted primarily by fruit-size decreases rather than a collapse in fruit numbers. MAFF reports that peach and nectarine production fell to 100,600 MT for MY 2025/26, down

8 percent from the previous MY, as high temperatures and low rainfall during the fruit enlargement period resulted in smaller fruit. The MY 2025/26 national yield fell to 11 MT per ha.

The MY 2026/27 crop is developing under more favorable size growing conditions in several important production areas. Yamanashi's 2026 field monitoring showed their peach development was well ahead of the previous year and normal for the spring season. In Fukushima, extension monitoring dated July 16 found the *akatsuki* fruit variety in one monitored orchard larger than normal on a days-after-full-bloom basis, although the survey is cautionary in that the monitored orchard was changed, meaning the comparison should be treated as directional in nature. Fukushima also forecast that the *akatsuki* harvest would begin around July 23 with peak harvest around July 26 in the monitored region. These observations are consistent with a recovery in fruit size from MY 2025/26, but they do not constitute a nationwide production forecast.

FAS/Tokyo therefore forecasts MY 2026/27 peach and nectarine production at 110,000 MT, up 9.3 percent from MY 2025/26. Of which, ,100 MT is anticipated nectarine production. The estimate assumes that the average fruit weight will be close to the recent normal levels, while the number of producing hectares continues to decline. Commercial production is forecast at 103,000 MT and non-commercial production at 7,000 MT. The continuing elevated summer temperatures, localized drought, sunburn, typhoon damage, and disease pressures remain critical risks for late-maturing varieties.

Chart 2 – Japan Ten-year Peach and Nectarine Production Trends



Source: Trade Data Monitor

Consumption:
Approximately 90 percent of Japanese peaches and nectarines are consumed fresh, with off-specification fruit accounting for most processing use. White-fleshed peaches dominate the domestic fresh market, while yellow peach varieties remain a smaller but increasingly visible late-season segment. Households are the principal consumers, and peaches are also popular in the premium gifting market.

FAS/Tokyo estimates MY 2025/26 domestic consumption at 99,031 MT, reflecting the sharp reduction in domestic production. For MY 2026/27, the increased supply is forecast to raise consumption 8.9 percent to 107,800 MT. This would restore consumption close to the MY 2024/25 level but not materially change the long-term trend toward lower per capita fruit consumption. The recovery in supply should improve retail availability after the smaller size fruit crop in 2025, while entrenched premium pricing and demographic changes continue to limit the demand growth.

Trade:
Japan remains a net exporter of fresh peaches and a small importer of nectarines. The Government of Japan continues to treat high-quality fruit, including peaches, as a priority export category. Hong Kong and Taiwan have historically been the principal destinations for Japanese peach exports, supported by strong demand for premium Japanese fruit and, in recent years, a weak yen that has improved price competitiveness in foreign currency terms (Table 2).

Peach and nectarine exports in MY 2025/26 were 1,861 MT, down from 2,314 MT in MY 2024/25 as the domestic crop contracted. With production expected to recover in MY 2026/27, FAS/Tokyo forecasts exports to rebound to 2,500 MT, up 34 percent year-on-year and modestly above the MY 2024/25 level. The export forecast assumes the restoration of marketable volume and continued demand from core Asian markets, while the crop quality and domestic wholesale prices remain the main uncertainties.

Fresh fruit imports remain very small. The United States does not have general market access to Japan for fresh peaches because of phytosanitary restrictions, so Japan's imports under this commodity are effectively nectarines. The United States has historically supplied nearly all imported nectarines to Japan. FAS/Tokyo estimates MY 2025/26 imports at 292 MT and forecasts MY 2026/27 imports at 300 MT, broadly consistent with the approximately 250-300 MT range seen in recent years. Limited consumer familiarity with nectarines and exchange-rate-driven import costs constrain stronger growth.

Table 2 - Japan’s Fresh Peach and Nectarine Exports by Country (MT)

	MY 2021/22	MY 2022/23	MY 2023/24	MY 2024/25	M 2025/26
World	1,926	2,340	2,155	2,314	1,861
Hong Kong	1,461	1,808	1,636	1,730	1,346
Taiwan	388	401	379	414	358
Others	77	131	140	170	157

Source: Trade Data Monitor

Policy:
Under the U.S.-Japan Trade Agreement, Japan's import tariff on U.S. fresh nectarines (HS code 0809.30) has been eliminated. U.S. nectarines continue to enter Japan, subject to the necessary phytosanitary requirements. General market access for fresh U.S. peaches remains closed. FAS/Tokyo is not aware of any major MY 2026/27 policy change that would adversely impact U.S. nectarine access.

Attachments:

No Attachments