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Report Name: Stone Fruit Annual

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Report Highlights:

Peach and nectarine consumption is forecast to rise to 32,500 MT in MY2026/27, driven by higher nectarine imports, although production and import volumes remain significantly below levels seen a decade or more ago. Cherry consumption, which is entirely import-dependent, is expected to stabilize at 19,500 MT after reaching a record 23,725 MT in MY2025/26. The record was driven primarily by Chilean oversupply rather than structural growth in demand. While peach and nectarine demand shows renewed short-term momentum, cherry consumption remains highly sensitive to international supply fluctuations despite a longer-term upward trend in imports.

Stone Fruit at a Glance

Peaches, nectarines, and cherries exhibit distinctly different market trends in Taiwan. Peach and nectarine consumption has recovered in the short term, although domestic production and import volumes remain significantly below levels seen a decade or more ago. Taiwan does not produce cherries, and cherry consumption is highly sensitive to international supply fluctuations. Nevertheless, cherry imports have shown long-term growth and reached a historic high in MY2025/26. Taiwan produces peaches, and most imported peaches are sourced from the United States. Taiwan does not produce nectarines or cherries. Chile is the primary supplier of nectarines, while the United States and Chile are the leading suppliers of cherries.

Peaches and Nectarines

Production

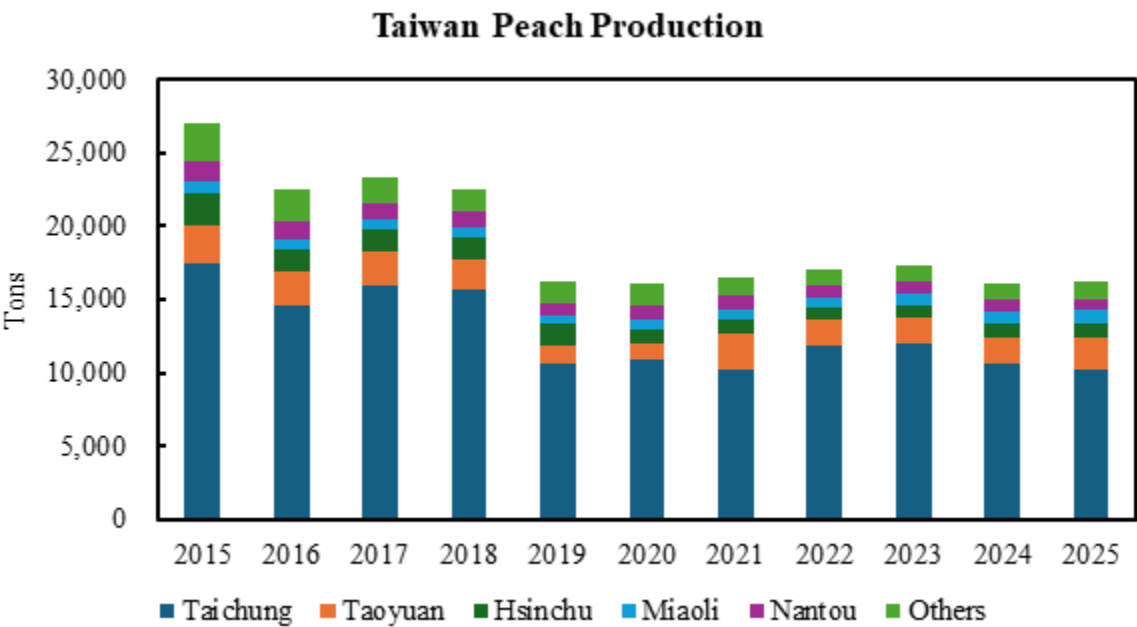
Taiwan's 2026 peach production is forecast at 16,700 MT. Although the crop did not experience significant rain damage this year, unusually hot weather accelerated fruit ripening. As a result, the harvest for both low-chill and high-chill peaches began approximately one to two weeks earlier than usual.

Taiwan produces peaches but not nectarines. The peach industry's overall scale is stable, with planted area remaining at approximately 1,900 hectares. About two-thirds of production consists of low-chill peaches, with the remaining one-third consisting of high-chill peaches. Heavy rainfall from typhoons late in the 2025 season reduced production to 16,157 MT, below the original forecast.

The main production areas are Taichung City, including the highland Heping District and foothill areas such as Xinshe and Dongshi districts, which account for about 60 percent of total production; Taoyuan City, particularly Fuxing District; and Hsinchu County, particularly Jianshi Township. Extreme weather, policy, and environmental pressures are expected to shift production gradually toward foothill areas and away from highland areas. Taiwan's peach crop generally has two production seasons: low-chill peaches from foothill areas are harvested from April to May, while high-chill mountain peaches are harvested from July to August. Hongyu (紅玉) and Hongling (紅鈴) are the dominant lowland varieties. The market share of low-chill peaches continues to increase, while high-altitude peach production is expected to decline because of transportation challenges and competition from other crops. Unstable water supplies in some mountain areas have also increased yield risks, while rising average temperatures are causing earlier fruit maturation and more concentrated harvest periods.

Recent observations indicate that extreme weather has already altered rainfall patterns in Taiwan. Peach production is expected to face increasing challenges, including continued declines in average fruit size. Common market sizes currently range from approximately 150 to 250 grams per fruit.

Taiwan's aging population and the concentration of peach production in low-mountain foothill areas limit the industry's potential for mechanization to offset labor shortages. As a result, planted area is expected to remain relatively flat in the near to medium term. Low-chill peaches generally have lower soluble solids than high-chill peaches, giving high-chill peaches an advantage in quality. However, low-chill peaches are harvested around May, before the heavy rain season, and their earlier market availability supports favorable prices. The share of low-chill peaches grown in lowland areas may therefore continue to increase relative to high-chill mountain peaches.



Data source: Ministry of Agriculture, Taiwan



Low-chill peach, Hongyu (紅玉), Grade 4A (130 g), cultivated in a net-covered orchard in Taichung, May 2026. (Photo credit: author)

Consumption

Post estimates that peach and nectarine consumption will increase to 32,500 MT in 2026. The increase is primarily driven by higher nectarine imports during the winter, while domestic production and summer imports are expected to remain near 2025 levels. A large domestic fruit harvest in summer 2026 has resulted in lower prices. Combined with higher international shipping costs, this has reduced the competitiveness of imported peaches during the summer; consequently, summer imports are expected to remain near last year's level.

Consumption reached 31,529 MT in 2025, closely matching Post's forecast. Summer import volumes offset a slight decline in domestic production, while competitively priced imported peaches supported consumer demand.

Temperate peaches are not a major crop in Taiwan, and total annual supply from domestic production and imports accounts for only about 1 percent of Taiwan's total fruit supply. Taiwanese consumers favor peaches with red skin, white flesh, a strong aroma, and high soluble solids, making peaches more popular than nectarines. Consumers also prefer larger peaches, particularly for gift-giving. Japanese peaches, which are known for their superior flavor, remain the top choice in the high-end market.

Trade

Post estimates that peach and nectarine imports will total approximately 15,800 MT in 2026, a slight increase from 2025. The increase is primarily driven by an approximately 1,200-MT increase in nectarine exports from Chile in early 2026, along with year-to-date trade data. Total nectarine imports are projected at 9,500 MT, while peach imports are estimated at 6,300 MT.

The primary peach consumption season is late spring to early summer. High-quality domestic peaches are largely sold through consumer pre-orders and home delivery, with the remainder entering wholesale markets or being distributed through intermediaries. Taiwan's low-chill varieties typically enter the market around April, providing a seasonal supply advantage. U.S. peaches have an advantage in consistent quality, while Japanese and Taiwanese peaches are known for their superior aroma. Because Taiwanese consumers favor larger imported peaches, supply can be unstable under current climate conditions. Higher international shipping costs, a strong U.S. dollar, and a strong domestic fruit harvest are expected to reduce U.S. peach imports in summer 2026 to 5,800 MT, down 150 MT from 2025.

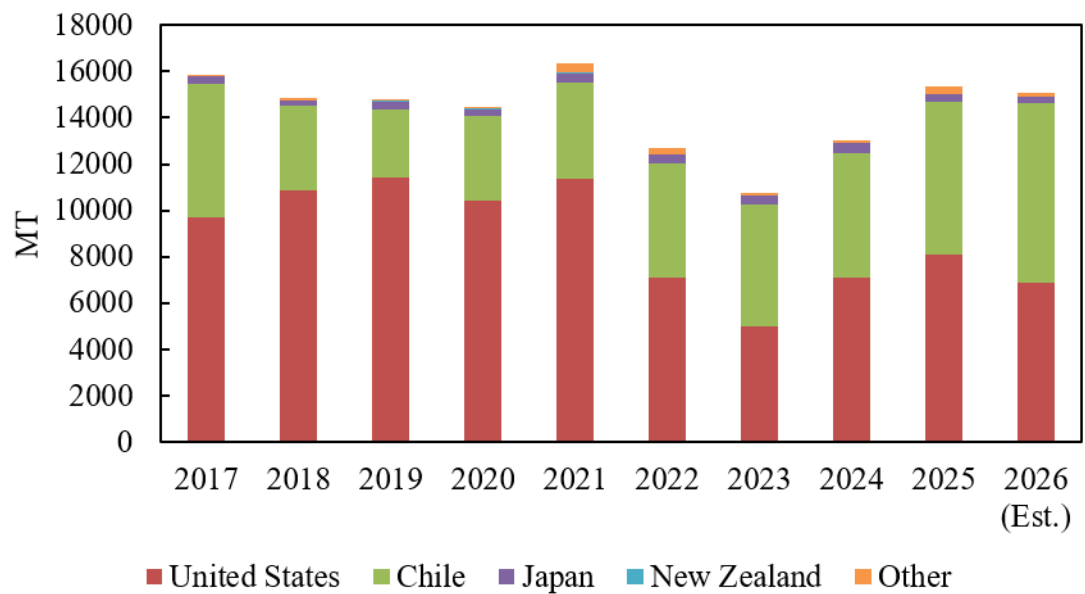
The United States remained the leading supplier of imported peaches in 2025, with a 91 percent market share. Japan's average import unit price was 160 percent higher than the U.S. price (\$12.5/kg versus \$4.8/kg). Chile has become the dominant supplier of nectarines, with a 72 percent market share and 6,345 MT supplied in 2025. Chilean nectarine exports to Taiwan reached 7,514 MT in 2026, while U.S. nectarine exports are projected at 1,750 MT.

Supply Season for Peaches and Nectarines

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Peach	Taiwan				Low Chill Variety			High Chill Variety					
	Japan												
	United States												
Nectarine	Chile												
	United States												

*Arrival season for imported products

Taiwan Import from World-Nectarine and Peach



Data source: TDM

Peach Market Share by Volume Unit: MT with and percent market share

Year Country	2022	2023	2024	2025
United States	6,080 (93 %)	4,441 (87 %)	6,066 (90%)	5957 (91%)
Japan	396 (6 %)	362 (7 %)	411 (6%)	348 (5%)
Chile	26	284	226	249
New Zealand	-	-	5	19
Australia	15	-	-	
Total	6,517	5,087	6,708	6573

Data Source: TDM

Nectarine Market Share by Volume Unit: MT and percent market share

Year Country	2022	2023	2024	2025
United States	1048 (17 %)	583 (10 %)	1,059 (17.5%)	2125 (24%)
Chile	4857 (79 %)	4971 (87%)	5,143 (81%)	6345 (72%)
Australia	271	135	145	328
Total	6,176	5,689	6,347	8798

Data Source: TDM

Peaches & Nectarines, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Taiwan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	1963	1963	1970	1948	0	1945
Area Harvested (HA)	1932	1932	1938	1910	0	1925
Bearing Trees (1000 TREES)	684	684	687	676	0	680
Non-Bearing Trees (1000 TREES)	12	12	10	15	0	10
Total Trees (1000 TREES)	696	696	697	691	0	690
Commercial Production (MT)	16117	16117	17000	16157	0	16700
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	16117	16117	17000	16157	0	16700
Imports (MT)	13100	13055	15000	15372	0	15800
Total Supply (MT)	29217	29172	32000	31529	0	32500
Domestic Consumption (MT)	29217	29172	32000	31529	0	32500
Exports (MT)	0	0	0	0	0	0
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	29217	29172	32000	31529	0	32500
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Cherries

Production

Taiwan does not produce cherries because its subtropical climate is not suitable for commercial cherry production. Domestic demand therefore relies entirely on imports.

Consumption

Post estimates that cherry consumption will reach 19,500 MT in MY2026/27. Although cherry consumption reached a historic high in MY2025/26, the increase was driven primarily by volatility in international supply and demand rather than a structural shift in consumer demand. Consumption is therefore expected to stabilize in MY2026/27, although it will remain elevated compared with historical levels.

Taiwanese consumers are enthusiastic buyers of cherries, attracted by their convenience, appearance, and perceived nutritional value. Average annual per capita consumption ranges from 600 to 800 grams, although consumption is highly sensitive to price. During MY2025/26, Chilean oversupply led some new fruit vendors to sell sea-freighted cherries at retail prices below \$8/kg to attract customers, at times making them less expensive than domestically produced greenhouse tomatoes. The 2.5-kg original packing boxes were particularly popular. This pricing pressure reduced sales of other local winter fruits during the same period.

Cherries were traditionally imported primarily as a summer fruit. However, summer now presents strong competition from a wide range of domestic fruits, including mango, lychee, and cantaloupe gift boxes. In winter, fewer fruit varieties are available, and gift-giving traditions around year-end and Lunar New Year have driven winter cherry consumption above summer consumption, accounting for 53 percent and 47 percent of consumption, respectively.

Taiwanese consumers generally favor cherries that are dark red, crisp, and large. Consumer knowledge of specific cherry varieties has traditionally been limited, but more fruit vendors have recently begun marketing cherries by variety, enabling them to target high-end consumers more effectively.

Supply Season for Cherries

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cherry	Chile												
	United States												

*Arrival season for imported products

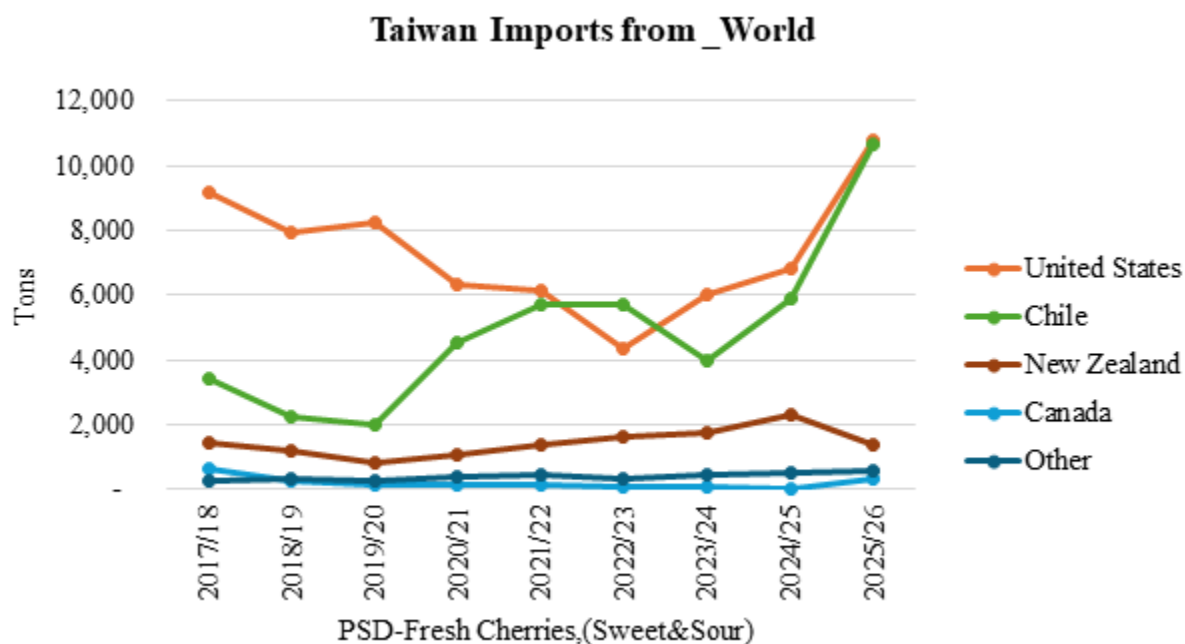
Trade

Cherry imports are expected to decline to 19,500 MT in MY2026/27, reflecting a strong U.S. dollar, an earlier harvest season, a realignment of international supply, and a strong domestic summer fruit harvest.

Cherry imports reached a historic high of 23,725 MT in MY2025/26, making cherries the fourth-largest imported fruit by volume. Export volumes from both the United States and Chile also reached records, with each exceeding 10,000 MT for the first time. Total import value reached \$174 million, ranking second only to apples and accounting for approximately 17 percent of Taiwan's total fruit import value.

The primary suppliers of cherries to Taiwan are the United States, Chile, and New Zealand. U.S. cherries arrive by both air and sea freight; Chilean cherries are shipped primarily by sea; and New Zealand cherries are shipped primarily by air. Although Taiwan opened its market to Turkish cherries several years ago, there have been no recorded imports to date. The United States therefore remains the leading supplier during the summer season.

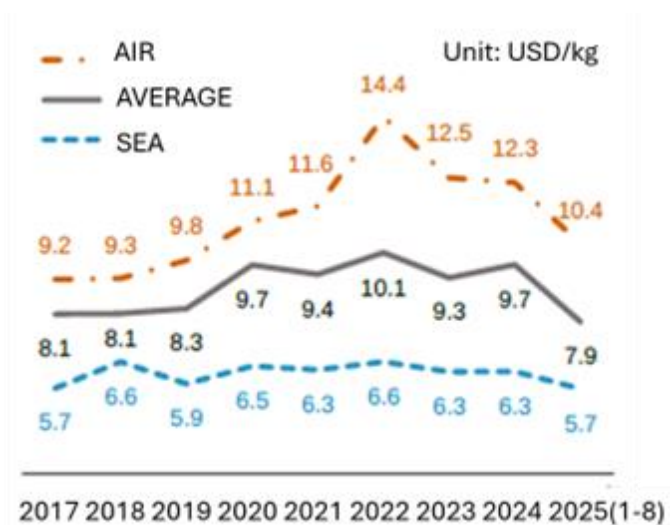
New Zealand cherries command the highest average import unit price among the three leading suppliers. Over the past five years, the average price has been roughly twice the U.S. average and higher than the average price of air-freighted U.S. cherries. New Zealand's supply volume has remained stable at approximately 1,000–2,000 MT, reflecting its focus on the high-end market segment.



Average Cherry Import Price (\$/kg)

Year	World	United States	Chile	New Zealand
MY 2021/2022	8.46	7.43	6.19	20.16
MY 2022/2023	9.46	9.41	6.66	18.40
MY 2023/2024	8.86	7.07	7.03	17.52
MY 2024/2025	8.88	7.49	7.05	16.38
MY 2025/2026	7.35	6.61	6.54	16.21

Cherry Import Price by Transportation Type



Note: Calendar year

Data source: Ministry of Finance, Taiwan

Cherries (Sweet&Sour), Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Taiwan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	0	0	0	0	0	0
Area Harvested (HA)	0	0	0	0	0	0
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)	0	0	0	0	0	0
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	0	0	0	0	0	0
Imports (MT)	15600	15568	20000	23725	0	19500
Total Supply (MT)	15600	15568	20000	23725	0	19500
Domestic Consumption (MT)	15600	15568	20000	23725	0	19500
Exports (MT)	0	0	0	0	0	0
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	15600	15568	20000	23725	0	19500
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Peach, Nectarine, and Cherry Policy

Fruit imports are regulated by the Taiwan Food and Drug Administration (TFDA) under the Ministry of Health and Welfare (MOHW) and the Animal and Plant Health Inspection Agency (APHIA) under the Ministry of Agriculture (MOA). TFDA is responsible for food safety inspection, while APHIA oversees animal and plant health, pests, diseases, and quarantine.

Fresh fruit exported from the United States to Taiwan must be accompanied by an APHIS-issued phytosanitary certificate (PPQ Form 577). The certificate may be issued by designated APHIS personnel or APHIS-authorized state and county cooperators. Taiwan's plant health authorities no longer accept other phytosanitary certificates for shipments of U.S.-origin fresh fruit.

TFDA is the competent authority for border food safety inspections. TFDA regularly inspects shipments at ports and monitors food products for pesticide and heavy metal residues. TFDA's regulation ‘‘[Pesticide Residue Limits in Food](#)’’ and ‘[Sanitation Standard for Contaminants and Toxins in Food](#)’ list allowable tolerance including pesticide residue and heavy metal. Taiwan uses a positive maximum residue limit (MRL) list. Because cherries and peaches are not major crops in Taiwan, U.S. exporters and producer groups should monitor pesticide application trends and encourage pesticide manufacturers to apply for Taiwan import tolerances to minimize potential trade barriers. The application process typically takes two to three years.

If a perishable product is selected for testing, the importer may apply to TFDA for a special dispensation allowing the product to be temporarily released to the importer's warehouse. In the event of a detection, completing quarantine at the importer's warehouse can reduce import costs. Cargo may not enter commerce until it passes all required tests. Noncompliance with Taiwan's standards may result in refusal of entry, re-export, or destruction.

HS Code	Item	Major exporter	General Tariff rate	Import regulation*
0809.29.00	Other Cherries, fresh	United States /Chile	7.5 %	B01/F01
0809.30.00.10.5	Fresh peaches	United States	20 %	B01/F01/MW0
0809.30.00.20.3	Fresh nectarine	United States/ Chile	20 %	B01/F01/MW0

B01: Importation shall be subject to the prescription set forth in the Table of Commodities Subject to Legal Animal & Plant Quarantine compiled by Animal and Plant Health Inspection Agency, Ministry of Agriculture, Executive Yuan.

F01: Importation of foods shall follow the "Regulations of Inspection of Imported Foods and Related Products". The importer shall apply for inspection to the Food and Drug Administration, Ministry of Health and Welfare (FDA).

MW0: Importation of China products is prohibited.

Attachments:

No Attachments