BCI MONITOR

BRYANT CHRISTIE INC.

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A REPORT FOR THE CALIFORNIA CHERRY BOARD

SPECIFIC ISSUES OF INTEREST TO THE CCB:

USDA Publishes China Cherry Market Update

- China's cherry production is forecast to grow 6% in marketing year (MY) 2025/26 (April – March) to 900,000 metric tons, driven by acreage expansion and better crop management, according to a recent USDA GAIN report. Popular cherry varieties include Meizao, Russian No. 8, Brooks, Kordia, Lapins, and Rainier.
- Greenhouse cultivation is playing a larger role, extending the harvest season from February to early July and enabling production in less traditional areas. Greenhouses allow growers to achieve large fruit size and high market prices, though often at the expense of sweetness and shelf life. The shift is reshaping cherry farming practices, although most production remains in open fields.
- Rising input costs (labor, fertilizer) and equipment shortages – especially for sorting and handling fragile greenhouse cherries – are key challenges. Manual labor is essential but expensive, and fruit quality control remains labor-intensive.
- Domestic cherry prices have fallen due to oversupply and competition from Chilean imports. Chilean cherries, aided by a free trade agreement and strong seasonal alignment with Chinese New Year demand, have flooded the market and reduced prices. U.S. cherry exports face major barriers due to cumulative tariffs of 75%, leading to much higher retail prices and cautious importer behavior.
- Consumers are currently more cost-conscious, though cherry consumption continues to rise thanks to supply growth, improved quality, and better cold chain logistics. Cherries are now viewed as a more common fruit, with demand extending into lower-tier cities.
- China's cherry imports from Chile surged 44% in MY 2024/25 and are expected to rise again. New Zealand supplies small volumes of high-end cherries, while U.S. imports are expected to decline further due to high tariffs. Spain recently gained market access, though exportable volumes remain limited.
- Cherries are marketed as premium, healthy fruits, with sweetness, firmness, and size highly valued. Digital platforms (Tmall, JD, Douyin) drive most online sales, while premium retailers (Ole, Sam's Club, Hema) cater to upper-tier markets. Marketing now emphasizes regional branding and safety assurance, with group-buy models and gift cards emerging as key sales tools in major cities.

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