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A REPORT FOR  
THE CALIFORNIA  
CHERRY BOARD

## SPECIFIC ISSUES OF INTEREST TO THE CCB:

## Australia Cherry Market Update

- A recent U.S. Department of Agriculture Foreign Agricultural Service (USDA FAS) [GAIN report](#) forecasts Australian cherry production at 18,000 metric tons (MT) in MY 2025/26 (November-October), a 10 percent decline from the prior year and slightly below the five-year average. The downturn reflects projections for a wetter-than-average spring expected to reduce yields and fruit quality from poor pollination, increased disease pressure, and waterlogging.
- Consumption in MY 2025/26 is forecast at 15,500 MT, down eight percent, tracking the reduced marketable crop. A greater share of lower-quality fruit is expected to remain in the domestic market, while premium fruit from Tasmania will target export channels.
- Exports are forecast to decline nine percent to 4,000 MT, broadly in line with the five-year average. Victoria and Tasmania together account for about 90 percent of shipments. Key destinations remain Hong Kong, Vietnam, Taiwan, Singapore, and China, which collectively absorb 75–80 percent of Australia's cherry exports.
- Imports are forecast at 1,500 MT, slightly higher than last year's 1,200 MT. These are almost entirely U.S.-sourced, counter-seasonal shipments arriving by air freight. Imports have trended lower over the past decade but remain an important supplement to domestic supply, particularly outside Australia's harvest window.
- Structurally, Australia's cherry sector faces continued vulnerability to weather volatility. Tasmania remains the most export-oriented region, leveraging its later harvest window to supply Chinese New Year demand in East Asia, while earlier-harvesting mainland regions serve peak Christmas demand domestically.

## Japan Cherry Market Update

- Japan's fresh cherry production for marketing year (MY) 2025/26 (April-March) is forecast at 12,500 metric tons (MT), reflecting a nine percent increase from last year's historically poor harvest but still 25 percent below average levels, according to a recent U.S. Department of Agriculture Foreign Agricultural Service (USDA FAS) [GAIN report](#).
- Consumption in MY 2025/26 is forecast at 16,800 MT, a modest recovery (up three percent year-on-year), but still below historic levels. Fresh cherries continue to hold cultural value as a summer gift item.
- Imports remain critical - in MY 2024/25, Japan imported 4,754 MT of cherries, with the United States supplying 93 percent of the total. U.S. cherries enjoy strong brand recognition as "American cherries," but price competitiveness is important given a weaker yen and heightened consumer price sensitivity.
- For MY 2025/26, imports are forecast to decline slightly to 4,300 MT. Reduced shipments from California have tempered overall U.S. export performance to Japan. Import tariffs on U.S. cherries were eliminated under the U.S.–Japan Trade Agreement (USJTA), ensuring continued duty-free access for U.S. suppliers.

**Bryant Christie Inc. – Seattle**  
2033 Sixth Avenue, Suite 1030  
Seattle, WA 98121  
Phone: (206) 292-6340 Fax: (206) 292-6341

**Bryant Christie Inc. – Sacramento**  
2005 "I" Street, Suite 200  
Sacramento, CA 95811  
Phone: (916) 492-7062 Fax: (916) 492-7061

### Chile Cherry Market Update

- The U.S. Department of Agriculture Foreign Agricultural Service (USDA FAS) projects continued strong growth for Chilean cherries, driven by sustained demand from China and steady expansion of planted area, according to a recent [GAIN report](#).
- For marketing year (MY) 2025/26 (November-October), Chilean cherry production is forecast at 730,000 metric tons (MT), up seven percent from the prior year. This growth reflects an increase in planted area to 198,000 acres and more orchards reaching maturity. Harvested area is projected at 183,000 hectares. Regional concentration is pronounced - the Maule (43 percent) and O'Higgins (39 percent) regions account for more than 80 percent of national plantings.
- In MY 2025/26, Chile is forecast to export 670,000 MT of cherries, a seven percent increase year-over-year. China is expected to take over 90 percent of shipments, though exporters are also targeting growth in South Korea, Taiwan, Vietnam, and emerging markets within China beyond the coastal hubs.
- MY 2024/25 exports (data until May) already reached a record 625,208 MT, up 51 percent from the prior year, but oversupply compressed prices and exposed quality inconsistencies, sparking industry efforts to tighten post-harvest handling and broaden market access. Export value has surged alongside volume growth: Chile shipped \$3.4 billion worth of cherries between November 2024 and May 2025, up nearly 38 percent from the previous year.
- Long-term growth prospects remain positive given strong Chinese demand and rising productivity, but the sector faces challenges around price volatility, market concentration risk, and the need to maintain strict quality standards.

### GENERAL ISSUES OF INTEREST TO THE CCB:

#### U.S., EU Publish Joint Statement on Tariff Deal

- The U.S. and EU have [announced](#) the publication of a [joint statement](#) regarding their recent tariff and trade deal, providing additional details about the terms of the agreement. A recent USDA [GAIN report](#) provides information about the impact on U.S. food and agricultural products.
- Notably, the EU will extend preferential access for U.S. seafood and agricultural exports, including tree nuts, dairy products, fresh and processed fruits and vegetables, processed foods, planting seeds, soybean oil, and pork and bison meat. Tariff reductions will be implemented through product-specific Tariff Rate Quotas (TRQs), with details on products and tariff levels to be published by the European Commission at a later date.
- The U.S. and EU also committed to address non-tariff barriers affecting food and agricultural trade, including: 1) streamlining requirements for sanitary certificates, particularly for pork and dairy; and 2) enhancing technical cooperation on standards and conformity assessments to facilitate trade, though the EU stressed that its sanitary and phytosanitary (SPS) rules and standards remain a "clear red line."
- On sustainability, the EU acknowledged that U.S. production of covered commodities poses negligible deforestation risk. The EU committed to work with the U.S. to ensure its Deforestation Regulation does not unduly restrict U.S.-EU trade.
- EU Trade Commissioner Maroš Šefčovič noted that the next steps involve translating the Joint Statement into legislative proposals, with the possibility of expanding exemptions to additional sectors in the future.

#### USDA Publishes Translation of China's Amendments to Administrative Rules of Inspection, Quarantine, and Supervision on Entry of Fresh Fruit

- The U.S. Department of Agriculture Foreign Agricultural Service (USDA FAS) has [published](#) English translations of China's revised import inspection and quarantine measures, including China's Administrative Rules of Inspection, Quarantine, and Supervision on Entry of Fresh Fruit. China notified the WTO of the amendments in July (*BCI Monitor* 7-22-25).

*USDA Publishes Translation of China's Amendments to Administrative Rules of Inspection, Quarantine, and Supervision on Entry of Fresh Fruit (continued)*

- The amended regulation retains the framework for the entry of fresh fruit but strengthens measures on institutional authority (through China's General Administration of Customs – GACC), biosafety oversight, emergency tools such as import suspension, cross-border controls affecting transshipments from Hong Kong and Macau, and authorization for pre-inspection at origin. Once finalized, it will replace the current measures implemented in 2005, covered in an old USDA FAS [GAIN report](#).