

SEPTEMBER 9, 2025

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SPECIFIC ISSUES OF INTEREST TO THE CCB:

USDA Reports on U.S. 2025 Cherry Season in China

- The 2025 U.S. cherry export season to China ended in late August, with shipments reaching about 65% of 2024 levels, reflecting resilience despite challenges including tariffs and competition, according to a recent U.S. Department of Agriculture Foreign Agricultural Service (USDA FAS) [GAIN report](#).
- Final industry estimates place shipments at 8,200 metric tons (MT), down 35% year-on-year and 38% below the five-year average, though U.S. cherries retained a meaningful share in the premium market segment.
- During the 2025 season, profit margins narrowed due to lower prices, high logistics costs, and strong domestic and international competition. Notably, importers continued using costly air shipments even after sea shipments began, driven by tariff uncertainty and demand for flexibility.
- Regarding competition, greenhouse-grown domestic cherries extended China's season from February to July, boosting quality and supply at lower prices. Canadian cherries provided additional competition with stable-quality shipments by air.
- Premium U.S. varieties (Chelan, Skeena, Santana, Black Pearl, Regina) remained popular with middle- and upper-class consumers. Sales concentrated in e-commerce (JD.com, Tmall, Douyin), high-end supermarkets (Ole, Sam's Club, City Super, BLT, Costco), and specialty fruit retailers (Pagoda, Greenery, boutique chains). Lower-priced cherries often reflected storage and handling problems, with Lapins and Sweetheart varieties less favored.
- Importers flagged tariffs, profitability, and quality consistency as primary challenges, while U.S. exporters stressed the need for better logistics management and market diversification beyond China, citing early gains in Korea, Taiwan, and Vietnam. According to USDA, the season demonstrated the enduring importance of China as a premium market for U.S. cherries, while also highlighting the need for diversification and improved supply chain efficiency.

EU Cherry Market Declines Amid Weather Impacts

- EU cherry production for marketing year (MY) 2025/26 (April-March) is forecast at 647,000 metric tons (MT), down from 764,000 MT in 2024. Losses in France, Hungary, Italy, Poland, Greece, and Bulgaria outweigh gains in Spain, Germany, and Portugal. Adverse spring weather, frosts, hail, and cold spells were the primary drivers of reduced yields across many member states. Additional details are provided in a recent U.S. Department of Agriculture Foreign Agricultural Service (USDA FAS) [GAIN report](#).

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**A REPORT FOR
THE CALIFORNIA
CHERRY BOARD**

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EU Cherry Market Declines Amid Weather Impacts (continued)

- EU cherry consumption is similarly expected to contract due to reduced domestic supply and lower imports. The EU is a net importer of cherries, with Turkey supplying nearly 70% of imports. Imports are projected to fall sharply after record highs in recent years.
- EU cherry exports are forecast slightly below 2024 levels, with main markets including the UK, Switzerland, Belarus, and Albania. China granted market access for Spanish cherries in spring 2025, offering new export opportunities, though compliance with a 15-day cold treatment requirement may influence varietal selection and harvest timing.

GENERAL ISSUES OF INTEREST TO THE CCB:

APHIS Publishes Dates for Upcoming Plant Bilateral Meetings

- The U.S. Department of Agriculture (USDA) Animal and Plant Health Inspection Service (APHIS) updated information on its Plant Health Technical Bilateral Meetings [webpage](#), including the following:
- U.S. – Canada Plant Health Bilateral Meeting, September 23, 2025: (virtual) Contact Fan Wang-Cahill for details, ppq.pim.requestsmanagement@usda.gov.
- U.S. – Thailand Plant Health Bilateral Meeting, October 15–17, 2025: (in-person; Thailand) Contact Sajedul Islam for details, ppq.pim.requestsmanagement@usda.gov.
- U.S. – Philippines Plant Health Bilateral Meeting, October 20–22, 2025: (in-person; Philippines) Contact Sajedul Islam for details, ppq.pim.requestsmanagement@usda.gov.

Brazil Updates Requirements for Regenerated Cellulose Food Contact Material

- On August 27, Brazil adopted [Resolution 992](#) and [Normative Instruction 396](#) (both in Portuguese), providing requirements applicable to regenerated cellulose used as a food contact material (FCM).
- *Resolution 992* establishes the general sanitary requirements relevant to regenerated cellulose FCM, while *Normative Instruction 396* establishes the positive list of authorized substances for regenerated cellulose FCM. Both enter into force six months following publication, on February 27, 2026.