

Table 1. China: Eligible U.S. Specialty Crops with Market Access to the PRC

Tree Nuts (based off of historical PRC import statistics) , including: almonds, walnuts, pistachios, hazelnuts, macadamia nuts, and coconuts
Fresh Fruit , including: apple , avocado , blueberry , cherry , citrus , grapes , nectarines , pear , plums , strawberry
Fresh Vegetables , including: baby carrots (fresh), celery, cowpeas and kidney beans (whether or not podded, fresh and chilled), peas (fresh or chilled). Note: Other products may have access or historical access, but no current facility or product registrations or recent trade has occurred
Coffee and Cacao , including: raw/green coffee and unroasted cacao
Plant Based Seasonings , including: rosemary, black pepper (unground), chili peppers (dried and unground), mint leaves (dried), marjoram, oregano, celery seeds, vanilla
Spices (based off of historical PRC import statistics), including: ginseng roots
Nursery Products and Cut Flowers (based off of historical PRC import statistics), including: plants (live); cuttings and slips; bulbs and tubers (dormant); foliage branches (fresh and other), and cut flowers (fresh and dried)

Note: Hyperlinks are to PRC General Administration of Customs websites that maintain market access lists.

Tree Nuts

In 2017, the United States exported \$242.9 million in tree nuts to China. Between 2017 and 2023, U.S. tree nut exports to China grew nearly 400 percent to reach \$1.2 billion. The Chinese tree nut industry has developed rapidly from 2017 to 2023, as the concept of tree nuts being a healthy and nutritional food keeps expanding among Chinese consumers, especially those in urban areas. In addition, the introduction of “daily nuts,” a retail packaged snack food containing a variety of nuts and dried fruit, in 2016, has gained popularity and has driven the boom in sales of nuts. As a result, China’s nut imports started to take off as the country relies heavily on the world market for most of its tree nuts. The retaliatory tariffs imposed on the US products, including tree nuts, beginning in 2018, initially seemed to have little impact on the overall imports of tree nuts. In many cases, U.S. tree nuts have entered the market through a third country to avoid the retaliatory tariffs. Meanwhile, other competitors, especially those who have signed bilateral free trade agreements with China, such as Australia, have quickly expanded their tree nut production for exports to China. For more information, please see China: Tree Nuts Annual ([CH2023-0130](#)).

PRC imposed retaliatory tariffs on the United States and free trade agreements with competitors, especially Australia, have decreased U.S. market share since 2017 (see **Table 2**). Several U.S. products, including tree nuts, are still subject to a 15-percent retaliatory Section 232 tariff on top of MFN tariffs, despite being exempt from a 30-percent retaliatory Section 301 tariff on U.S. agricultural products since March 2020 (see GAIN report [CH2020-0017](#)). The following table provides a detailed breakdown of import tariffs and value added tax (VAT) on various nut products. China is also increasing its tree nuts production, especially walnuts, macadamia nuts, and hazelnuts in recent years, to meet the strong domestic demand.

Table 2. China: Tree Nut Import Tariff and Value-added Tax (VAT) in 2023

HS Code	Description	Tariff (%)				VAT (%)
		MFN	U.S. (as of March 2020*)	Australia	Chile	
0801.2100	Brazil nuts, inshell	7	22	0	0	9
0801.2200	Brazil nuts, shelled	7	22	0	0	9
0801.3100	Cashew nuts, in-shell	7	22	0	0	9
0801.3200	Cashew nuts, shelled	7	22	0	0	9
0802.1100	Almonds, in-shell	10	25	0	0	9
0802.1200	Almonds, shelled	10	25	0	0	9
0802.2100	Hazelnuts/Filberts, in-shell	25	40	0	0	9
0802.2200	Hazelnuts/Filberts, shelled	10	25	0	0	9
0802.3100	Walnuts, in-shell	25	40	0	0	9
0802.3200	Walnuts, shelled	20	35	0	0	9
0802.5100	Pistachios, in-shell	5	20	0	0	9
0802.5200	Pistachios, shelled	5	20	0	0	9
0802.6190	Macadamia nuts, in-shell	12	27	0	0	9
0802.6200	Macadamia nuts, shelled	12	27	0	0	9
0802.9990.30	Pecans, inshell or shelled	7	22	0	0	9
2008.1910	Walnut kernels, in airtight containers	5	5	0	0	13
2008.1920	Other nuts, in airtight containers	5	5	0	0	13
2008.1999.30	Prepared/preserved nuts and other seeds, nes	5	5	0	0	13

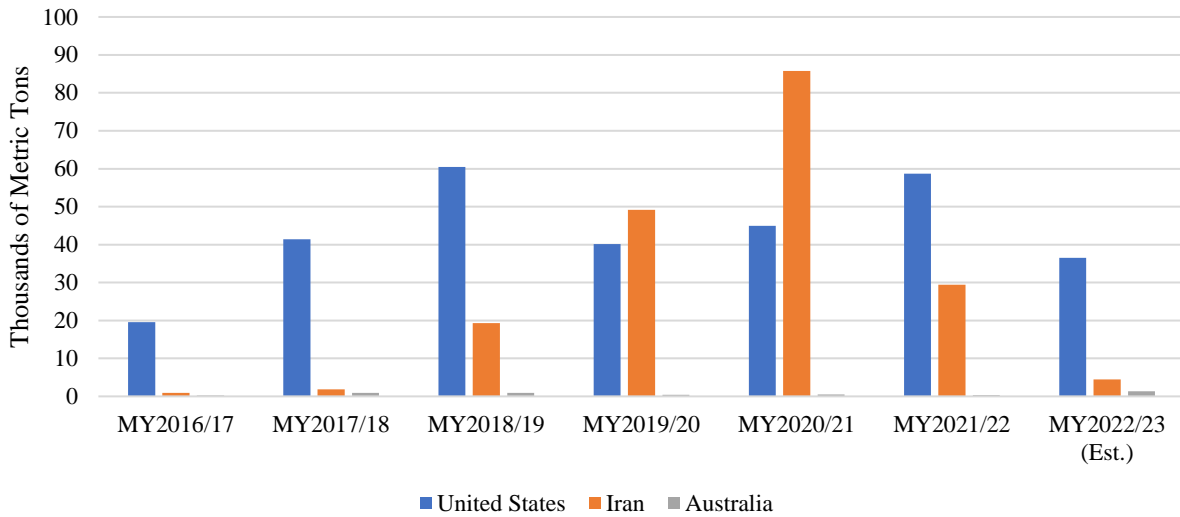
Source: China Customs

Note: *Actual rate (includes MFN and China’s Section 232 retaliatory tariffs) if Section 301 tariffs are exempted upon approval.

Pistachios

In 2017, the United States value of U.S. pistachio exports to China was \$41.6 million. Between 2017 and 2023, U.S. pistachio exports to China grew exponentially to \$766.5 million. During that period China’s imports of pistachios on an inshell basis, expanded from 29,274 MT to 73,418 MT. The United States remained China’s largest supplier in 2023, but Iran, whose crop yields dramatically reduced during marketing year (MY) 21/22 and MY 22/23, may regain its status as the top supplier. It is worth noting that Chinese food manufacturers started to increase their imports of roasted nuts, mostly pistachios, since the trade war between China and the United States began in 2018. Roasted nut products fall under a different tariff line that is not subject to Section 232 retaliatory tariffs. (Note: Section 301 retaliatory tariffs can be waived under a tariff exclusion process.)

Graph 1: Chinese Imports of Pistachios (Inshell Basis) from Major Partners



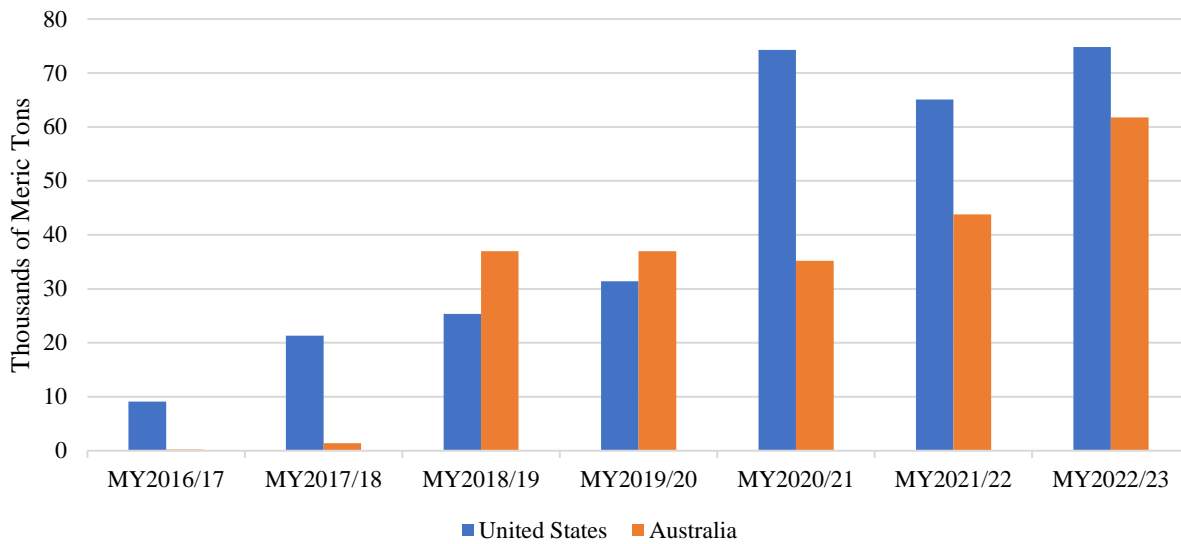
Source: Trade Data Monitor, LLC

Note: Marketing Year (MY) for pistachios begins in September and ends in August.

Almonds

In 2017, the value of U.S. almond exports to China was \$100.9 million of almonds to China. Between 2017 and 2023, U.S. almond exports to China rose 193 percent to \$295.5 million. During that period China’s imports of almonds on a shelled basis, expanded from 16,169 MT to 111,380 MT. Despite retaliatory tariffs imposed by the PRC on U.S. almonds, the United States remains China’s main supplier. Nevertheless, the U.S. market share has declined significantly from being virtually China’s only supplier in calendar year 2017, to just under 63 percent market share in 2023. Australia has significantly increased its production capacity since their almonds exports enjoy advantageous tariff rates. Other competitors, such as Spain to which China has just granted access, may start exporting almonds to the China market in the future.

Graph 2. China: Almond Imports (Shelled Basis) from Major Partners (in MT)



Source: Trade Data Monitor, LLC

Note: Marketing Year (MY) for almonds begins in August and ends in July.

Other Tree Nuts: Pecans, Walnuts, Macadamia Nuts, and Hazelnuts

Pecans

In 2017, the value of pecan exports to China was \$34.7 million. Between 2017 and 2023, U.S. pecan exports to China grew 168 percent to \$93.1 million. The United States remains a major supplier of pecans. But South Africa has quickly caught up and has become the largest supplier because of expanding production and lower tariffs. Likewise, Mexico has overtaken the U.S. as the second largest supplier since 2019 when retaliatory tariffs were imposed on U.S. products.

Walnuts

In 2017, the value of U.S. walnut exports to China was \$32.5 million. Between 2017 and 2023, U.S. walnut exports to China have dropped by 93 percent to \$2.3 million. The United States used to be China’s largest walnut supplier, but U.S. walnut exports to China began to decline in 2013 when domestic production took off. Taking advantage of a bilateral free trade agreement, Chile is currently the largest walnut exporter to China, but the volume is quite small.

Macadamia Nuts

In 2017, the United States exported \$9.8 million of macadamia nuts (mostly inshell) to China. Between 2017 and 2023, U.S. macadamia nut exports to China have dropped 7 percent to \$9 million. The United States is not a major exporter of macadamia nuts. South Africa and Australia remain the two largest suppliers of macadamia nuts to China as a result of increased production and much lower tariffs.

Hazelnuts

In 2017, the value of U.S. hazelnut exports was \$2 million. Between 2017 and 2023, U.S. hazelnut exports to China have risen 635 percent to \$14.9 million. The United States remains the single largest supplier of inshell hazelnuts to China. Turkey has been the single largest supplier of shelled hazelnuts.

Fresh Fruit

In 2017, the value of U.S. fresh fruit exports was \$225.6 million dropping significantly to \$86.0 million in 2023. In 2023, Cherries (\$43.7 million), oranges (\$24.1 million), apples (\$8.8 million), temple oranges (\$3.3 million), and plums (\$2.2 million) continued to comprise the vast majority of U.S. fruit exports to China. Since 2017, China has significantly improved domestic fruit quality and cold chain logistics. Improved domestic production and distribution, retaliatory tariffs against U.S. fresh fruit, and free trade deals with counter cyclical producers in South America explain the significant drop in U.S. fresh fruit exports to China from 2017 to 2023. Affluent Chinese still value high end U.S. fruit, with an emphasis on freshness and new varieties. For example, fresh air shipped Northwest Cherries command over \$16/kg in wealthy first tier markets. Targeted marketing is key to maintaining U.S. market share in fresh fruit to showcase their quality and highlight new varieties that attract high end clientele in China.

Deciduous Fruit

In 2017, the value of U.S. apple exports to China was \$17.7 million. Between 2017 and 2023, U.S. apple exports dropped 50 percent to \$8.8 million. While the United States remains the largest supplier from the northern hemisphere, most apple imports to China come from southern hemisphere countries, including New Zealand, South Africa, and Chile, during the local off-season. Notably, these southern hemisphere countries are shipping duty-free or have much lower tariff for apples to China (see **Table 3**). In addition, the major exporting countries, such as New Zealand, have developed numerous apple varieties to satisfy Chinese consumers like Envy, Jazz, and Rocket apples. For more information, please refer to China: Fresh Deciduous Fruit Annual ([CH2023-0153](#)).