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Report Highlights:

China remains a leading global almond importer, with imports supplying the majority of domestic demand. Market growth has entered a cooling phase following years of rapid expansion. Consumption continues to be led by the snack segment, supported by demand for convenient, health-oriented products and premium gifting, while food processing and plant-based beverages provide additional growth opportunities. A growing preference for ready-to-use shelled almond products reflects a broader shift toward convenience and processing efficiency. Despite near-term moderation, almonds are well-positioned to benefit from rising health awareness and premiumization trends in China's evolving food sector.

Market Overview

China is the world's second-largest almond importer, with imports accounting for over 80 percent of domestic supply. In 2025, China’s shelled almond imports reached 103,700 metric tons (MT) valued at $586 million, a record high, with an average price of $5.65/kg. From August 2025 to June 2026, imports across all major exporting countries weakened notably due to tariffs, logistics disruptions, and weak domestic demand. This decline primarily affected shipments from the United States, which is traditionally China's dominant supplier with over 60 percent market share. According to the Almond Board of California's June 2026 Almond Industry Position Report, U.S. almond shipments to China/Hong Kong totaled approximately 14,675 MT during August 1, 2025–June 30, 2026, down 35 percent from same period of last year.

During the past three years, China increasingly sourced almonds from alternative suppliers such as Australia, whose almonds have zero-tariff access under the China-Australia Free Trade Agreement (ChAFTA).

Domestic shelled almond production for MY 2025/26 is estimated at around 22,000 MT, concentrated primarily in Xinjiang's Shache County, which accounts for over 90 percent of national output. According to industry press, Xinjiang’s planting area reached 184,000 hectares in 2025, with total in-shell production estimated between 100,000 and 168,000 MT, depending on official versus industry sources. Industry sources indicated that Xinjiang almond production in MY 2025/26 may decline slightly due to unfavorable spring weather conditions, including cold weather events and sandstorms during the flowering period that may have affected pollination. While no precise cross-year statistics are available, annual production in-shell almond is generally assessed within the range of 100,000–150,000 MT.

Almonds are a key component of China’s tree nut demand. Per capita nut consumption remains relatively modest at around 3.2 kg by Euromonitor and 2.9 kg by the China Food Industry Association in 2025, suggesting substantial room for market expansion. The industry’s forecast for China's tree nut market growth rate is consistently projected to be between 4.6 and 6.6 percent over the next decade. Consumption growth is underpinned by three key drivers: the expanding purchasing power of China's rising middle class, government nutrition initiatives supported by the China Nuts Association (CNA), and a consumer shift away from traditional snacks toward protein-rich alternatives with nuts as main ingredients.

Almond Imports

According to Chinese customs data, China’s total shelled almond imports remained relatively stable in volume, fluctuating around 41,000- 45,000 MT during the three-year period, while import value increased significantly from $203 million in 2023 to $314 million in 2025. The relatively stable import volume alongside rising import value indicates higher average prices and stronger demand for premium processed almonds. China’s in-shell almond total world imports increased from 66,665 MT in 2023 to 77,889 MT in 2024, before declining sharply to 59,056 MT in 2025, while import value followed a similar trend, rising from $221 million in 2023 to $288 million in 2024, then easing slightly to $272 million in 2025.

China's almond import market underwent a major structural shift between 2023 and 2025. While total import volume remained relatively stable, the sourcing pattern changed dramatically from heavy dependence on the United States toward Australia, marked by the rapid expansion of Australian supply, favorable tariff rates, the sharp contraction of U.S. exports, and a broader adjustment in China's almond import composition between in-shell and shelled products.

China In-shell Almond Imports 2023-2025 (Unit: USD, MT)

Country	2023		2024		2025	
	Value	Quantity	Value	Quantity	Value	Quantity
U.S.	144,364,689	44,825	77,257,157	23,280	23,799,833	6,223
Australia	76,786,139	21,840	210,391,773	54,608	248,549,110	52,833
World	221,150,828	66,665	287,648,930	77,889	272,348,943	59,056

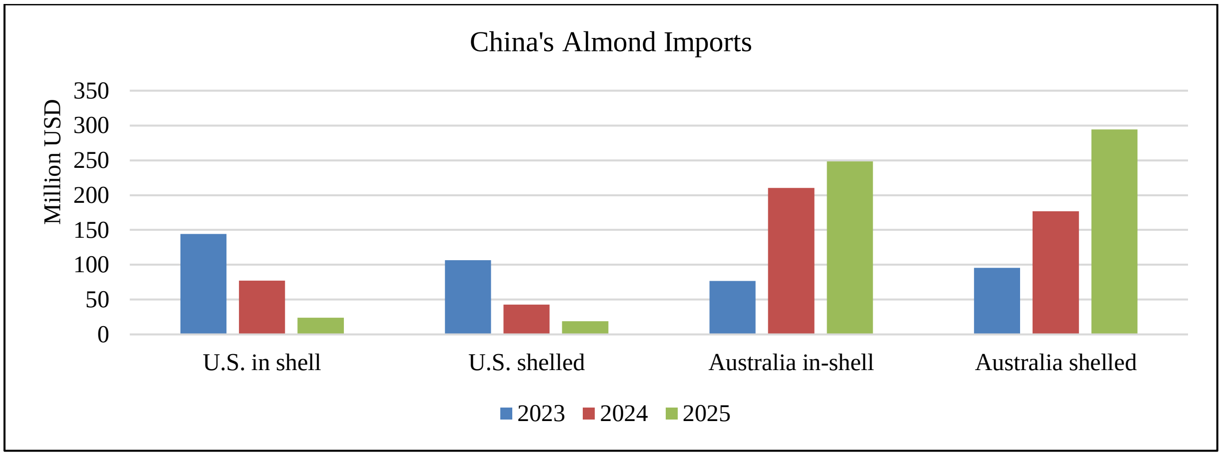
Source: Trade Data Monitor

China Shelled Almond Imports 2023-2025 (Unit: USD, MT)

Country	2023		2024		2025	
	Value	Quantity	Value	Quantity	Value	Quantity
U.S.	106,708,830	24,893	42,882,459	8,546	18,970,592	3,017
Australia	95,819,426	19,799	176,727323	32,296	294,460,682	41,612
Spain	119	0	1,816,365	399	229,721	47
Vietnam	141,120	22	6349.32	0	0	0
World	202,669,495	44,715	221,426,147	41,241	313,661,001	44,676

Source: Trade Data Monitor

U.S. exports experienced a substantial decline in China's shelled almond market. U.S. shelled almond exports to China fell from 24,893 MT in 2023 to only 3,017 MT in 2025, while import value dropped from $107 million to $19 million. This mirrors the decline observed in the in-shell almond sector and reflects reduced competitiveness of U.S. almonds in China. Trade tensions, retaliatory tariffs, logistics costs, and China's diversification of agricultural sourcing away from the United States contributed to the contraction. In contrast, Australia became the dominant supplier of shelled almonds, with export volume more than doubling from 19,799 MT in 2023 to 41,612 MT in 2025, while export value surged from $96 million to $295 million. Australia also became the dominant supplier of in-shell almonds to China, with exports of in-shell almonds more than doubled from 21,840 MT in 2023 to over 52,800 MT in 2025, while export value surged from $77 million to $249 million.



Source: Trade Data Monitor

By 2025, Australia accounted for nearly 90 percent of China's total in-shell almond import volume and an even larger share in value terms. Australia's rise was driven by several advantages, including favorable tariff treatment under ChAFTA, geographic proximity with shorter shipping times, and counter-seasonal harvest timing, allowing more flexible supply into the Chinese market.

A comparison between China's imports of in-shell and shelled almonds reveals an important shift in market structure and consumption patterns. In 2023, shelled almonds accounted for roughly 40 percent of combined almond imports. In 2025, in-shell imports declined to 59,056 MT while shelled imports remained at 44,676 MT, increasing shelled almonds' share to approximately 43 percent of total almond imports. Although gradual, it reflects China's almond market is shifting from raw, snack-oriented consumption toward processed and ingredient-based demand. While in-shell almonds remain popular for seasonal snacking and gifting, shelled almonds are gaining ground due to their convenience in food manufacturing, bakery applications, plant-based beverage as dairy alternatives, and health-focused products such as energy bars. This trend reflects rising consumer demand for convenience and healthy lifestyles, expanding food processing capacity, and higher domestic labor costs that favor importing ready-to-use shelled almonds over raw products requiring additional processing.

In the first four months of 2026, imports from all partners were down 50 percent by volume, with Australia down 26 percent. This appears to be the result of increased prices, with the unit value of almonds from Australia up 28 percent. U.S. prices also remain elevated relative to prior-year levels, which may constrain demand. Weak domestic demand may also have been a contributing factor.

Almond Consumption Trends

Chinese consumers continue to value almonds as a premium health food. Snack foods and bakery products remain the primary applications with plant-based beverages and food service accounting for smaller shares of overall almond utilization.

China Almond Consumption Breakdown

Segment	Share
Snacks	55- 60%
Food processing (bakery/confectionery)	15- 20%
Beverage (almond milk)	10- 15%
Food service (desserts, western cuisine)	5- 10%

Source: ATO Shanghai Market Research

Snacks

By structure, China's almond consumption is still concentrated in the snack segment, which accounts for 55- 60 percent of total demand reflecting strong consumer preferences for convenient, health-oriented snacking options that align with broader wellness trends. Two structural factors amplify this segment's strength: China's e-commerce infrastructure, which facilitates direct-to-consumer sales and enables brands to reach consumers across tier-one through tier-three cities efficiently, and the country's deeply rooted gifting culture, where premium nut packages serve as popular gifts during festivals such as Chinese New Year. While the snack-driven demand base provides a strong foundation for growth, the market's susceptibility to trade policy shifts and price volatility presents ongoing challenges for importers and distributors seeking stable market penetration.

Baking Ingredients

Food processing applications, particularly in bakery and confectionery products, constitute the second-largest use case at 15- 20 percent share, serving as a stable industrial demand base for almond ingredients in various forms including slices, powder, and paste. These almond derivatives are widely incorporated into an expanding range of products, from Western-style bread and cakes, almond butter, protein bars and artisanal chocolates to traditional Chinese delicacies like mooncakes, where almonds add premium positioning and nutritional value. Growth in this segment is linked to two trends reshaping China's food landscape: the proliferation of premium bakery chains and domestic upscale brands that emphasize quality ingredients and Western baking techniques, and the broader Westernization of Chinese diets, particularly among younger, urban consumers who increasingly embrace bread, pastries, and confections as daily staples.

Plant-based Beverages

The beverage sector, driven primarily by the growing popularity of almond milk and other plant-based drinks, captures 10-15 percent of consumption, benefiting from accelerating plant-based diet trends among urban, health-conscious consumers. Almond milk and plant-based drinks have experienced rapid expansion, driven by widespread lactose intolerance among the Chinese population (estimated at 85- 90 percent of adults) and growing interest in vegan and flexitarian diets among health-conscious consumers. The segment has also benefited from technological advancement, particularly the adoption of High-Pressure Processing (HPP) technology that enables quality retention, extended shelf life, and superior taste profiles compared to traditional heat-pasteurized products. Major domestic brands and emerging startups have invested heavily in product innovation, creating flavored almond milk varieties, almond-based yogurt alternatives, and protein-enriched beverages that appeal to fitness enthusiasts.

Food Service

Food service remains the smallest segment at around 5-10 percent, but this modest share suggests significant untapped growth potential as China's restaurant and cafe sectors catering sectors continue to expand and increasingly incorporate almond-based ingredients into menu offerings. Almonds are featured in diverse culinary applications including Western-style desserts, health-conscious salads, and innovative Asian fusion dishes that blend traditional Chinese flavors with international ingredients. The segment's growth is propelled by two structural shifts in China's dining landscape: restaurant premiumization, where mid-to-high-end establishments differentiate themselves through ingredient quality and menu sophistication, incorporating almonds as a premium garnish or core ingredient that signals health-consciousness and culinary refinement; and the growth of café culture, particularly specialty coffee chains and independent cafes.

The U.S. almond industry has invested and cultivated in the Chinese market for over three decades, established strong consumer awareness and industry recognition. California almonds continue to be regarded as a premium, high-quality product, particularly in the hotel, restaurant, and institutional (HRI) sector and among bakery manufacturers, where consistent quality and reliable supply are key. As Chinese consumers increasingly growth in health-conscious, they are paying closer attention not only to what they eat, but also to where their food comes from. This shift in consumer mindset presents an opportunity for U.S. almond exporters. Those who effectively communicate California almonds' origin story, rigorous quality standards, and nutritional credentials are well-positioned to strengthen brand loyalty and command premium pricing in an increasingly discerning market.

Key Growth Drivers for 2026

Convenience and versatility are the twin engines of future almond consumption growth in China. On the consumer side, products that are easy to eat, portion-friendly, and suited to a wide range of consumption occasions, whether as an on-the-go snack, a post-workout boost, or a festive gift, will suit with today's busy, health-oriented Chinese consumers, in particular in major cities.

On the industrial side, almonds' adaptability across product formats, from sliced toppings in premium bakery items, to almond paste in confectionery, to almond protein in plant-based beverages, and almond flour, positions the ingredient as a versatile and value-added input for food manufacturers seeking to meet evolving consumer demand. Expanding almond applications across both retail (including new retail, or instant retail) and food service channels will be essential to sustaining long-term market growth.

Health & Nutrition Positioning

Almonds are increasingly perceived as a high-protein, heart-healthy, low-carbohydrate snack that aligns with government-led health initiatives and widespread interest in weight management, particularly among the middle class where wellness-oriented lifestyles have become status markers. As consumers become more sophisticated in understanding nutrition, almonds' natural advantages in healthy fats, fiber, vitamin E, and magnesium position the product well for future growth.

Premiumization of Snacks

The premiumization of China's snacking landscape represents a fundamental shift in consumer behavior that directly benefits almond consumption, as traditional snacks progressively lose market share to premium nuts and functional snacks. As an imported nut, almonds convey sophistication and health-consciousness, yet remain accessible for regular consumption. This dual positioning enables almonds to capture both everyday snacking occasions and gifting moments, particularly during festivals when elaborately packaged nut assortments serve as prestigious gifts.

Expansion of Plant-Based Foods

Plant-based foods are also driving almond consumption in 2026, led by rising demand for almond milk and dairy alternatives in China. This trend is fueled by widespread lactose intolerance among Chinese consumers and increasing sustainability awareness among younger demographics. Almond milk meets both needs by offering a lactose-free, more resource-efficient alternative to traditional dairy. Beyond beverages, expanding applications in baking and food processing are broadening consumption and accelerating mainstream adoption across consumer groups.

E-commerce & New Retail

E-commerce and new retail channels have become the primary drivers of nut sales in China, which also reshapes the almond distribution. Online platforms fueled by livestreaming commerce and group-buy that offer better pricing, freshness, and engagement is becoming a more important distribution channel for almond in China. Livestreaming is particularly effective, combining product education, entertainment, and instant purchasing to boost sales. As a result, success in China’s almond market increasingly depends on digital strategies, favoring brands with strong e-commerce and influencer capabilities.

Product Innovation




Product innovation and processing advances are key drivers of almond consumption growth, expanding usage into new formats and occasions. New products such as protein bars, almond butter, and ready-to-drink beverages target specific needs like convenience, nutrition, and on-the-go consumption. These innovations move almonds beyond traditional snacking into functional food categories, attracting new consumer segments. Together, these developments support premium positioning and will be essential for sustaining growth in an increasingly competitive market.

Key Market Players

The leading almond importers in China are the following companies:

Company	Profile
COFCO	A state-owned enterprise and the largest food importer in the country. Through its subsidiary COFCO Tunhe, it manages bulk almond imports to ensure national food supply stability.
Olam Food Ingredients (OFI) Shanghai	A subsidiary of the global company Olam. It imports California and Australian almonds, offering traceability and quality assurance to meet local standards.

Company	Profile
Guangdong Tian Hong	Founded in 1958, Guangdong Nanxing Rainbow Nut Products Co., Ltd. specializes in importing, processing, and producing a variety of nut products with a high market share in pistachios and macadamia nuts.

Processing in China is dominated by large-scale snack brands that perform the final roasting, flavoring, and packaging of both domestic and imported bulk shelled almonds. The leading almond processors in China are the following companies:

Company	Profile
Three Squirrels Inc.	Headquartered in Anhui Province, the company is the market leader in online nut sales. They operate high-tech "Smart Factories" that automate the roasting and sorting of almonds. Their focus is on rapid innovation in flavor (e.g., wasabi, honey butter) for the youth market.
Qiaqia Food Co., Ltd.	Headquartered in Anhui Province, and branded as ChaCha Food, the company is one of the largest producers of roasted seeds and nuts in China. Its key product lines include roasted sunflower seeds, daily nuts and baked goods & chips.
Be & Cheery (Haoxiangni Health Food Co.)	A major integrated snack provider headquartered in Zhejiang Province. They specialize in high-protein snacks and have heavily invested in cold-chain processing to maintain almond freshness and shelf life.
Bestore Co., Ltd.	Headquartered in Hubei Province, Bestore sources globally and processes all kinds of nuts snacks for its 3,000+ retail stores in China.
Lyfen	Headquartered in Shanghai, Lyfen is one of the large domestic retail chain for nuts snack food with nearly 3,000 stores in more than 20 provinces and cities across the country.

Trade Shows and Conferences

There are two major annual tree nuts events in China.

Food Exhibition for Nuts and Dried Fruits

- Date: Mid-April
- Location: Hefei, Anhui Province
- Organizer: China Nuts Association (CNA)
- Description: Usually includes a one-day conference and a three-day exhibition. The 2026 China Nuts Expo organized by CNA hosted over 2,000 exhibitors and professionals in tree nuts, dried fruits, snack foods, baking products, and plant-based foods business.

Annual China International Nut Conference

- Date: First week of August
- Location: Normally organized in East China, where import and processing of tree nuts is primarily located.

- Organizer: China Chamber of Commerce of Import and Export of Foodstuffs, Native Produce and Animal By-products (CFNA)
- Description: Usually includes a two-day convention and a trade show running in parallel. The 2025 Conference was attended by more than 1,000 representatives from over 20 countries and regions with nearly 100 exhibitor booths.

USDA Cooperators engaged in almonds, pistachios, pecans, cranberries, blueberries, tart cherries, raisins, prunes, walnuts, peanuts, dry pea and lentils regularly send representatives to attend the above two events in coordination with USDA FAS.

For more information, please email atoshanghai@usda.gov.

Note: All photos in this report were provided by the Almond Board of California.

Attachments:

No Attachments.