



Ladies and gentlemen, good afternoon. It is a great honor to be here today to share with you, our industry peers, the latest insights into the China Prune market. This report provides a systematic overview of the development trajectory and current landscape of the China Prune industry, along with an outlook on future trends. We hope it will serve as a valuable reference for everyone.

# China Prune Industry Development Report

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2026 Annual Analysis and Future  
Outlook

Global Plum Association Conference |  
2026

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This report will be divided into four sections. First, we will review the development history and current planting pattern of Chinas nectarines. Second, we will conduct an in-depth analysis of the structure and yield of major varieties. Next, we will focus on market demand, covering both fresh fruits and dried fruits. Finally, we will outline future trends and directions for industry development.

# 01 Development History: A Century of Introduction, A Millennium of Rise

**1871**

## The Beginning of Scientific Plant Introduction

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American missionary Joseph Nye established a nursery in Yantai, Shandong, where he systematically introduced and cultivated Western fruit trees such as European plum for the first time, marking the beginning of the scientific cultivation history of Prunes in China.

**2000**

## Large-scale trial cultivation

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Xinjiang Jia Shi County, leveraging its unique soil, water, light, and thermal conditions, took the lead in initiating large-scale trial cultivation, successfully developing superior varieties, and becoming the birthplace of this industry.

**2015**

## Exponential Growth

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With growing market awareness and surging consumer demand, domestic cultivation areas have expanded rapidly, propelling the industry into a phase of high-speed development with an average annual growth rate exceeding 30%.

**2025**

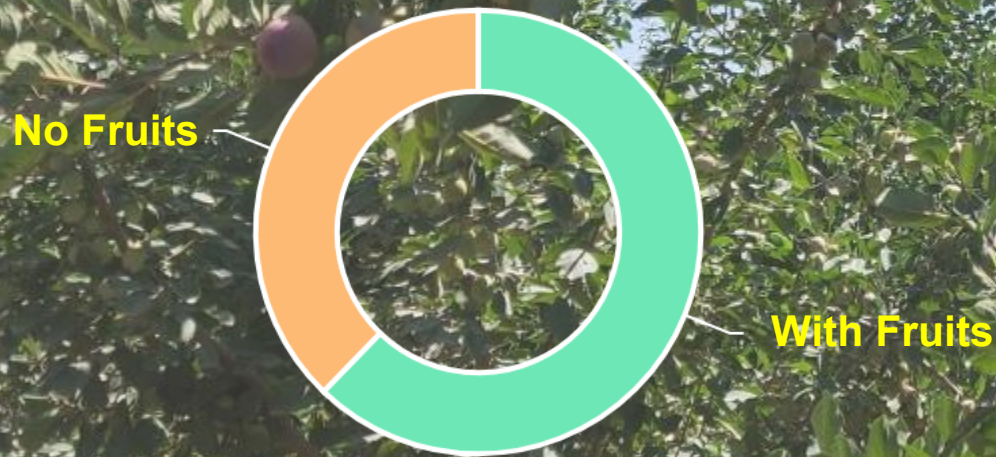
## The Formation of Patterns

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A nationwide industrial framework characterized by "Xinjiangs leadership with coordinated efforts from multiple provinces" has been officially established. Domestic Prunes have achieved dual breakthroughs in both quality and production volume, with their market share exceeding 60% for the first time.

The development of Chinas Prune industry did not happen overnight. From the scientific introduction in 1871, to large-scale exploration in the early 21st century, and then to explosive growth in the past decade, we have witnessed a century-long rise of this industry. By 2025, domestically produced Prunes will dominate the market.

## Composition of planting area in 2026



**930,000 mu ▲ A year-on-year increase of 25%**

**Total planting area**

**600,000 mu accounts for 65%.**

**Fruit-bearing area**

**330,000 mu accounts for 35% of the total.**

**Area without fruiting**

## 01 Core Production Areas: Xinjiang takes the lead with coordinated efforts from multiple provinces



### Core Production Area • Xinjiang (Xinjiang)

📍 The Kashgar region (including Jiashi County, the largest planting base in China covering 570,000 mu, as well as Shufu County and Yingjisha County) accounts for over 60% of the national output, truly earning its reputation as the "Hometown of Chinas Prunes."

📍 Bayingolin Mongolian Autonomous Prefecture (Bayingolin) primarily produces crops in Heshuo County and Yanqi County, where the superior water, soil, sunlight, and temperature conditions yield exceptional quality. The cultivation area in Heshuo County spans 50,000 mu (approximately 3,333 hectares).

📍 The Ili Kazakh Autonomous Prefecture (Ili) is primarily located in Yining County and Huocheng County, providing strong support for diversified development of agricultural production. The cultivation area in Huocheng County reaches 150,000 mu (approximately 10,000 hectares).



### Collaborative Production Areas • Inter-provincial Cooperation

🌈 Gansu: In areas such as Jingyuan County and Suzhou District of Jiuquan City, the current planting area has reached 30,000 mu (approximately 2,000 hectares).

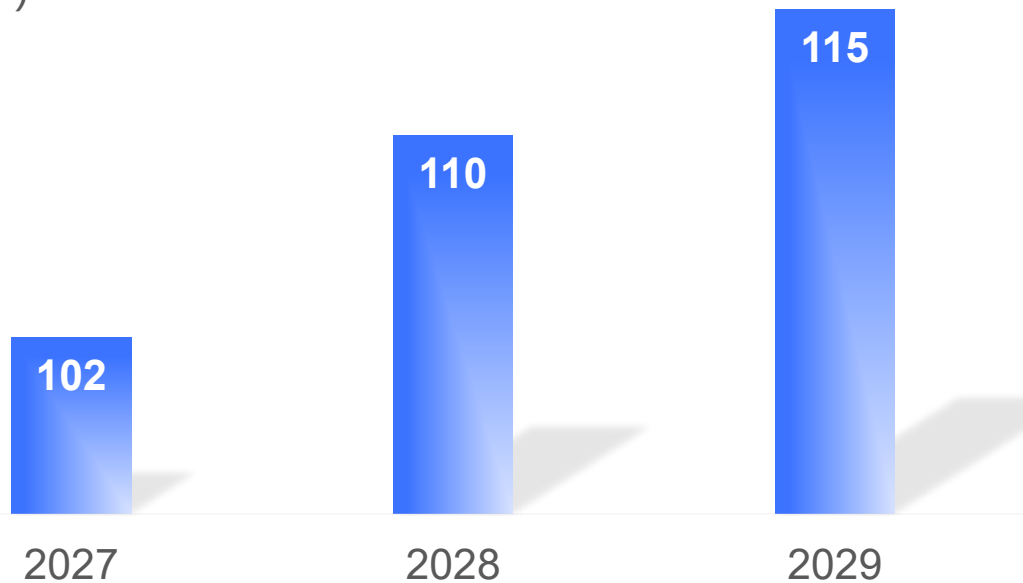
🌿 Yunnan: In areas such as Binchuan County and Huaning County, the cultivation area spans 30,000 mu (approximately 2,000 hectares).

• -other provinces: Shaanxi, Shanxi, Shandong, Sichuan, Hebei, Henan and other provinces also engage in cultivation on a considerable scale, totaling approximately 100,000 mu.

Currently, Chinas plum industry follows a "Xinjiang core + multi-provincial collaboration" pattern: Kashgars Gashi County in Xinjiang leads the nation with a planting area of 570,000 mu, accounting for over 60% of the national output; Bazhous Heshuo County and Yilis Huocheng County also engage in large-scale cultivation. Additionally, provinces such as Gansu and Yunnan have achieved considerable planting scales, while Shaanxi, Shanxi, Shandong, and Sichuan are in the stage of specialized development.

# 01 Prediction of Planting Area for the Next 3 Years (2027-2029)

■ Forecast of China's Prune Planting Area (2027-2029 )



### price advantage

Domestically produced nectarines are significantly cheaper than imported ones, offering strong market competitiveness and substantial profit margins for growers.



### growth in demand

The health benefits of "golden fruit for relieving constipation" have gained widespread recognition, with the consumption scenarios for nectarines continuously expanding and market demand remaining robust.



### policy support

The national and local rural revitalization strategies provide strong support for distinctive forestry and fruit industries, offering robust guarantees in terms of funding, technology, and infrastructure development.

Looking ahead, we anticipate that the planting area will continue to grow at a rapid pace, reaching 1.15 million mu by 2029. This growth is primarily driven by three factors: price advantages, increasing demand, and policy support, indicating substantial potential for market expansion.

## 02 Analysis of Major Varieties: The Three Main Players



**France (Red Plum)**

- ✦ **Status:** The primary cultivated variety, accounting for approximately 60%, serving as the market cornerstone.
- ☀ **Characteristics:** Yield per mu ranges from 1,200 to 1,750 kg; sugar content is 18–22°; cold-resistant.
- ✅ **Advantages:** Highly accepted by the market and broad environmental adaptability.



**Richard**

- ✦ **Status:** A highly promising new high-yield variety that has garnered significant attention in recent years.
- ☀ **Characteristics:** Yields approximately 2,500–3,000 kg per mu, with excellent storage stability and crack-free fruits.
- ✅ **Advantages:** Exceptional yield potential and significant economic benefits.



**Moil**

- ✦ **Status:** A late-ripening specialty variety targeted at the premium market.
- ☀ **Characteristics:** The fruit is large in size (single fruit weighing 51–90 g), with a bright purple-black skin, yielding 1,500–2,000 kg per mu.
- ✅ **Advantage:** The market price is significantly higher than that of the blue variety, resulting in substantial profit margins.

In terms of varieties, French cultivars remain the dominant force in the market, but high-yielding and premium varieties such as Richard Early are rapidly gaining prominence. Meanwhile, the late-maturing variety "Mao Ye," renowned for its large fruit size and higher selling price, also demonstrates significant market potential.

## 02 Milestone of Independent Innovation: Huajie No.1 (Jizao No.1)

### | Varietal characteristic



#### **Maturity stage: Very early maturity (mid-to-late July)**

Significantly ahead of mainstream market offerings, securing a first-mover advantage in the launch.



#### **Single fruit weight: 45-55 g**

The fruit size is moderate, meeting the standard for mainstream fresh food market products.



#### **Yield per mu: 1000–1500 kilograms**

It demonstrates excellent yield performance, combining early maturity with high productivity, making it highly suitable for widespread adoption.

### | Strategic Significance



#### **Filling the supply gap during the summer market season**

The domestic plums market launch date was moved forward by nearly a month, effectively reducing reliance on imports and expanding consumer choices.



#### **The first ultra-early maturing variety with independent intellectual property rights**

This breakthrough ended the long-term monopoly of high-end varieties by foreign companies, marking a significant milestone in China's Prune breeding efforts.



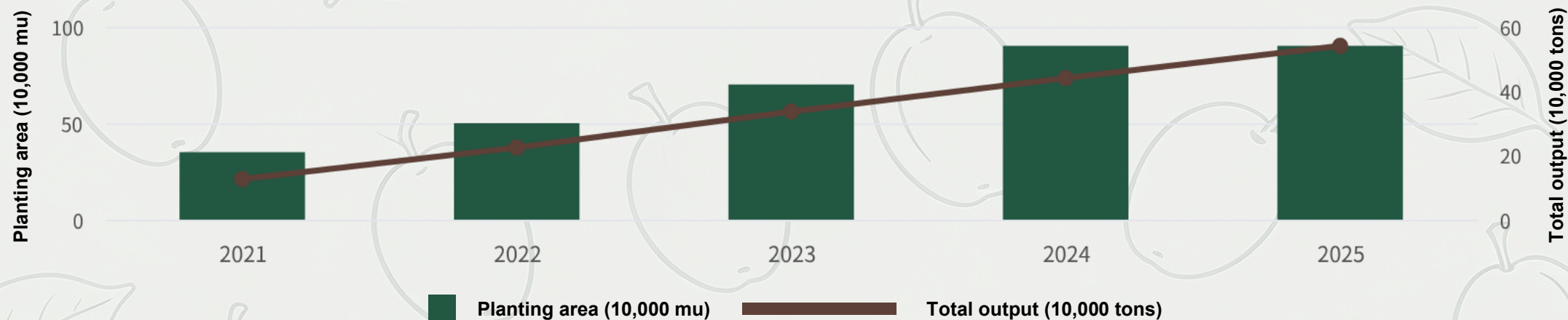
#### **High Premiums and Potential Economic Benefits**

The scarcity of early ripening endows products with stronger market bargaining power, creating better conditions for fruit farmers to increase their income.

It is particularly noteworthy that our independently bred ultra-early maturing variety "Huajie No.1" has been successfully developed. This variety not only advances the market release date of domestically produced Prunes to July, effectively filling the summer market gap, but also marks China's Prune industry's achievement of independent innovation in core technologies.

## 02 Growth in Production and Area Over the Past 5 Years (2021–2025)

### Growth Trends of Chinese Prune Planting Area and Total Output



**The growth rate of production volume exceeds the growth rate of area.**

Total production more than tripled over five years, rising from 126,000 tons to 540,000 tons, with significant improvements in both fruit yield rates and precision management practices.



**The growth rate has stabilized; the focus is shifting toward quality-driven development.**

With the planting area reaching 900,000 mu, growth has slowed, marking a critical transition for the industry from "scale expansion" to "quality and efficiency."

## 03 Fresh Fruit Market: Robust Supply and Demand, with Domestic Products Gaining Momentum



### Current Status of Market Supply and Demand in 2026

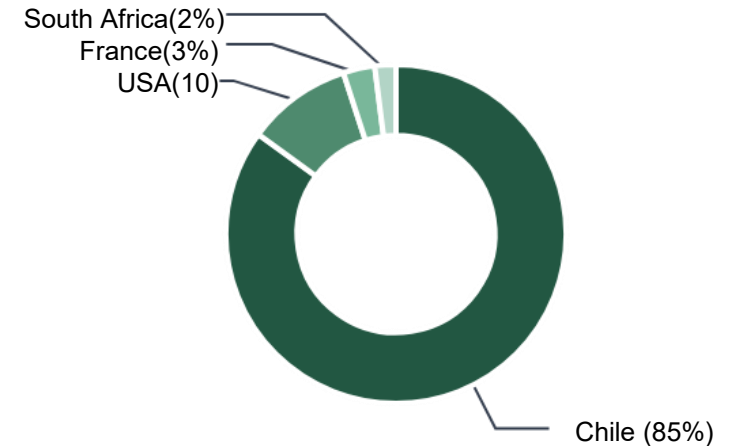
- Total demand: 650,000 tons (up 18.1% year-on-year)
- Domestic supply: 550,000 tons (accounting for 84.6%)
- Total imports: 100,000 tons (accounting for 15.4%)



### The pace of domestic substitution is accelerating.

With the maturation and scaling up of domestic cultivation technologies, domestically produced Prunes have dominated the market by 2026, significantly reducing import shares and creating a robust supply-demand balance.

### Distribution of countries of origin for imported fresh fruits



Chile holds an overwhelming 85% market share, making it the primary source of imports.

Turning to the market sector, the fresh fruit market exhibits robust supply and demand dynamics. By 2026, domestically produced Prunes accounted for over 80% of the market share, successfully replacing imports. Chile remains the largest source of imports, primarily filling the market gap before domestically produced Prunes become available.

### 03 Fresh Fruit Market: Three Core Driving Forces



#### Health Awareness-Driven

The health benefits of "the golden fruit for relieving constipation" have gained widespread recognition, with its consumer base rapidly expanding from specific groups such as pregnant women and the elderly to the general public pursuing health.



#### Driven by price advantage

Domestically produced nectarines average only 10-15 yuan per jin, significantly lower than the 20-30 yuan per jin for imported varieties. Their highly competitive price-performance ratio effectively lowers the barrier to trying these fresh fruits.



#### Driven by channel transformation

Emerging channels such as e-commerce platforms and community group-buying have experienced rapid growth, driving explosive online sales growth, breaking geographical barriers, and significantly expanding market coverage.

The thriving fresh fruit market is driven primarily by three key factors: first, the growing awareness of health benefits; second, the significant price advantage of domestically produced Prunes; and third, the rapid development of emerging channels such as e-commerce—all of which have collectively fueled the markets prosperity.

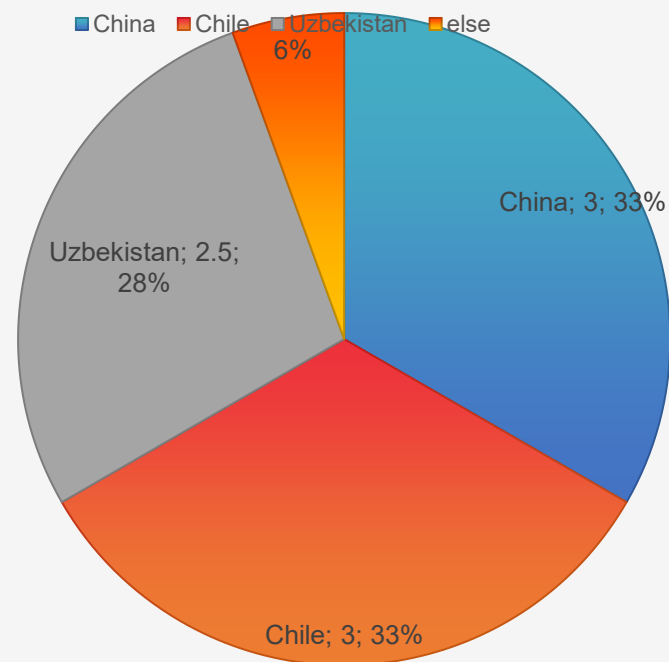
### 03 Dried Fruit Market: Dependence on Imports, Domestic Industry Catching Up



The estimated market demand for 2026 is 80,000 tons.

30,000 tons Domestic supply	25,000 tons Uzbekistan supply	30,000 tons Chilean Supply	0.5 million tons from other countries
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Proportion of the main sources



Unlike the fresh fruit market, the dried fruit market remains highly dependent on imports, with an import dependency rate approaching 80%. Chile and the United States are the primary import sources. This reflects that domestic dried plum products still have significant room for improvement in terms of processing and branding.

## 03 Dried Fruit Market: Three Core Characteristics



### 01 Consumption Patterns

- **Snacks (70%):** Consumed directly as healthy snacks represents the mainstream consumption scenario.
- **Baking ingredients (20%):** Widely used in the production of baked goods such as cakes, bread, and biscuits.
- **Health supplements (10%):** As high-fiber dietary supplements, they are popular among health-conscious individuals.



### 02 Brand Strategy Market Landscape

The high-end market is dominated by renowned retail brands such as **Oriental Selection, Walmart, and Hema**, which enjoy high brand recognition and strong consumer trust.

**Domestic brands in the mid-to-low-end market emphasize high cost-effectiveness, with their product competitiveness steadily improving and gradually expanding market share, demonstrating substantial growth potential.**



### 03 Price Differentiation Price Tiering

Imported dried fruits: ¥100–120 per kilogram

Domestically produced ordinary dried fruit: ¥40–80 per kilogram

The dried fruit market exhibits three distinct characteristics: consumption patterns are predominantly focused on leisure snacks; in terms of brand landscape, Oriental Selection, Walmart, and Hema dominate the premium segment, while domestic brands emphasize cost-effectiveness; and there is significant price differentiation. These features provide clear direction for the upgrading and brand development of domestic dried fruit products.

## 04 Future Trends: Production Boom and Domestic Substitution



### Fresh Fruit Market Trends

**01. Production surge:** By 2029, output is expected to exceed 1.2 million tons, with domestically produced fresh fruits accounting for over 90%, ensuring ample market supply.

**02. Price decline:** With capacity expansion and intensified market competition, fresh plum prices will gradually return to reasonable levels, benefiting consumers.

**03. Diversification of varieties:** Early-maturing and late-maturing varieties will significantly enrich the market, effectively extending the fresh fruit sales period to five months (July–November).



### Dried Fruit Market Trends

**01. Domestic substitution is accelerating:** By 2029, China's dried fruit production is projected to reach 50,000 tons, with its market share rising significantly to 40%, while the proportion of domestically produced dried plums will gradually increase.

**02. The processing and upgrading of deep-processing products** such as plum juice, fruit purees, and baking ingredients holds tremendous potential, with the overall market size projected to exceed 8 billion yuan.

**03. Health-conscious Trend:** Growing consumer focus on health has significantly boosted demand for dried plums certified as additive-free, low-sugar, and organic.

Looking ahead, the fresh fruit market is poised for a surge in production and a rational price recovery. Domestic substitution will dominate the dried fruit market, with deep processing emerging as a new growth driver. The entire industry is evolving toward higher production volumes, greater variety, and more advanced processing technologies.

## 04 Industrial Challenges and Development Opportunities

### Core Challenges • CHallenges



#### **The risks associated with blindly expanding cultivation areas**

Local areas may experience an oversupply, leading to significant price fluctuations that affect fruit farmers incomes.



#### **High postpartum loss rate**

Due to limitations in cold chain logistics and preservation technologies, the post-harvest loss rate of nectarines reaches as high as 20–30%, resulting in resource waste.



#### **Severe homogenization of varieties**

The absence of breakthrough varieties with independent intellectual property rights makes it difficult to establish a differentiated competitive advantage.

### Development Opportunities • OPPORTunities



#### **The upgrade in health consumption is driving this trend.**

The positioning of "third-generation functional fruits" is increasingly strengthened, meeting consumers growing demand for health and nutrition.



#### **The value potential of deep processing is vast.**

The company has expanded from offering only fresh foods to diversifying its offerings to include fruit juices, fruit purees, and health supplements, significantly enhancing product value.



#### **The "Belt and Road" opens up a new blue ocean for exports**

The Belt and Road Initiative has opened up tremendous potential for domestic Prune to expand into overseas markets such as Central Asia and the Middle East.

Of course, industrial development also faces challenges, such as the risks of indiscriminate expansion of cultivation, high post-harvest losses, and the issue of product homogenization. However, more importantly, we have identified tremendous opportunities: the upgrading of health consumption, the expansion of deep processing, and the potential of export markets all open up vast prospects for the future development of Chinas nectarine industry.

# Summary

1. Although China has a large planting area, the country's demand for fresh fruit far exceeds that for dried fruit. Personally, I believe this will not affect other countries' export volumes to China within the next three years.
2. China's dried fruit market has gradually shifted from demand for small-sized fruit to large-sized fruit. Chinese consumers' demand for pitted (seedless) fruit continues to grow at an annual rate of 10%.
3. The C-end consumer market in China is only entering its middle stage. Many consumers still have limited knowledge of prunes. Driven by the national "Great Health" industry initiative, there are still many opportunities in this latent blue ocean. We welcome all industry peers to join us in exploring China's C-end market, bringing products and brands directly to consumers. Our company is willing to provide every possible convenience.
4. Many of you are interested in Xinjiang prunes from China. Please do not just listen to hearsay. Take some time out of your busy schedule — our company is willing to provide every convenience to take you to the core production areas of Xinjiang prunes, so you can truly understand Chinese prune cultivation.
5. Our company is open and integrative. We welcome everyone to visit China and guide our work at our company, as we jointly make the due efforts and contributions to the prune industry.



**Thank you for listening.**

**Q & A**

We welcome all criticism and suggestions for joint discussion and exchange.

That concludes my report. Thank you all for your attention. I would now be very happy to answer any questions you may have. Thank you!