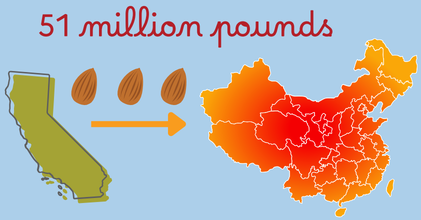
Market Profile: China/Hong Kong

Trade

- China was California almond's *#9 export market* in FY 24/25 (August-July) with shipments falling nearly 50% from the previous year to 51 million pounds.



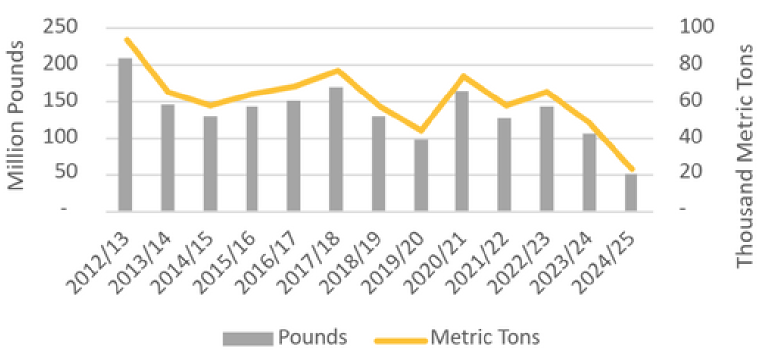
- Shipments to China/Hong Kong in FY 24/25 fell off by 52% due to new retaliatory tariffs on US origin nuts to 45% while tariffs on increasing shipments from Australia remain at zero tariff.

- The majority of almond handlers will need to renew their Chinese GACC facility registrations by the end of 2025. *Handlers should reach out to ABC if they need assistance with the renewal process.*

- While shipments to China/Hong Kong are lower, direct shipments to mainland China were trending higher up until the renewed trade conflict in 2025. However, Australian market share is growing since its FTA with China provides it with zero tariffs. Current tariffs of 45% on U.S. origin almonds are prohibitive.

- In January 2024, *China's Ministry of Agriculture included almond hulls in its official feed ingredients catalog that will finally allow US exporters to ship almond pellets and cubes to China to be used as feed ingredients.* Six facilities are on the approved list and eligible to ship almond hull pellets and cubes to China. ABC is working with the USDA/APHIS and Almond Alliance to expand the import protocol to include ground and whole almond hulls.

Almond Exports to China/Hong Kong (Million Lbs.)
Aug-July ABC Data in Lbs/MTs



Key Facts:

Current high retaliatory tariffs on US almonds are making it difficult to compete with Australian almonds that enter with zero tariff. However, trade negotiations are on-going and Chinese industry representatives indicate there is a strong preference for US origin almonds. Therefore, it is important for US processors to make sure their GACC facility registrations are up-to-date in case negotiators are successful in dropping tariffs for California almonds going into China.

california almonds
Almond Board of California

Summary of China's Retaliatory Duties on California Almonds

Code	Product Description	MFN Rate	232 Retaliatory Duties	301 Retaliatory Duties	New U.S. Aggregate Level	Current U.S. Rate Including 301 Waiver as of Sept 2025
802110	Almonds in shell	10%	15%	30%	75%	45%
8021200	Shelled Almonds	10%	15%	30%	75%	45%
20081920	Preserved almonds in cans, regardless of preserve and/or processed method	5%	0%	10%	35%	25%
20081999	Processed or preserved almond without vinegar, not in cans	5%	0%	25%	50%	25%

Key Issues

- In April 2018, China implemented retaliatory duties on various U.S. products including almonds in response to U.S. Section 232 duties on imported steel and aluminum and Section 301 duties related to USTR's investigation of China's forced technology transfers and other market distorting practices. At that time, China's tariffs on US origin almonds increased from 10% to 55%. In 2019, Australia's FTA with China reduced tariffs on Australian almonds to 0%.
- After the U.S.-China Phase One Agreement went into effect in February 2020, China implemented a waiver process on its Section 301 retaliatory duties bringing the tariffs on inshell and shelled almonds to an effective level of 25% that remained in effect until March 4, 2025, after the US implemented new tariffs on Chinese imports related to fentanyl trade and human trafficking. After an escalation of tariffs, new levels on U.S. almonds have remained stable at 45% since May 2025.
- At the end of August 2025, China announced it would stop approving retaliatory waivers at the end of October 2025. China's waiver program does not apply to the new retaliatory tariffs against U.S. almonds. If there is no change, then Chinese tariffs after October will increase to 75%.
- China's facility registration law, Decree 248, for all overseas food processors that export to China went into effect on January 1, 2022, and is managed by China's General Administration for Customs (GACC).
- Decree 248's Article 7, designated 14 food categories as "high-risk products" (including raw nuts and seeds) and required that the foreign countries' competent authorities be involved in China's CIFER registration of these facilities and products making the registration process complicated.
- US companies shipping these products must first register via FDA's Export Listing Module (ELM) for China Nuts and Seeds. Then directly register on GACC's cifer.singlewindow.cnportal their facility and any food products they plan to ship to China in the future. FDA is currently managing the US Government's CIFER portal. Most handler's registrations will need to be renewed by the end of 2025. ABC can assist with the renewal process.
- For those U.S. processors of roasted or packaged almonds for retail sale, they can self-register using the cifer.singlewindow.cn portal. After receipt of the application, GACC will review and assign an approval number to the facility that will also be needed for customs clearance. According to Decree 248's Article 15, U.S. food processors are required to include either their FDA Establishment Identifier (FEI) and/or GACC approval number on packaging for future shipments to China.

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