



# California Walnut Industry Update

We just returned from attending two major tradeshows, MEWA in India and Gulfood in Dubai, where it was clear that California walnuts are in demand and consumer sales are increasing. While there were plenty of discussions about our smaller crop this year and the hope for a better crop in 2025, buyers were bullish on the strength in the market.

In India, there was a lot of discussion about the meetings between Prime Minister Modi and President Trump with special focus on reducing tariffs on California walnuts in India. While there was no formal announcement regarding walnuts, we are encouraged by the commitment from both leaders to engage in constructive bilateral trade discussions over the next 6 months. India's Minister of Commerce will be coming to the US in March to initiate the trade discussions. Several media outlets in India have reported that walnut tariff reductions are under consideration. While we are optimistic about the prospect of tariff reductions, we live in unprecedented times and must allow the process to run its full course.

In Dubai, we participated at Gulfood, touted as the largest food and beverage show in the world which brings together buyers from the MENA region (Middle East and North Africa), Turkey, India and more. Walnut discussions at this event focused on the future potential for market development and increasing per capita consumption due to strong economies, improved consumer buying power, and increased focus on health and wellness, especially for the younger generations. However, China has made a concerted market push to fill the void in the MENA region due to the short crops in Chile and the US this season. They offered aggressive pricing, which was as much as 50% below Chile and US Chandler sales, which caused many importers, brokers, traders and processors in several key markets to try Chinese walnuts. China's early shipments to these markets had good appearance, but the flavor was bitter and lacked any appeal. Later shipments showed short shelf life and had to be moved very quickly, leading to lower prices. As a result, the majority of buyers we contacted are now anxious to move to the Chilean crop, which will arrive in June, followed by the California crop in November.

With the California crop virtually sold out, Chilean sellers are aggressively pricing their upcoming harvest. Coupled with current strong demand, it is likely Chile will sell out by early fall leaving a favorable market for California walnuts. The inventory and shipment numbers indicate that we will have virtually no unsold inventory (carry-in) by September 1st. Which means the industry can start shipments of fresh, new crop walnuts immediately. While we are a long way from harvest, winter rains have replenished the deep root zone moisture, the reservoirs are at or above capacity levels, and the late season storms have brought the snowpack levels very close to normal.

While the indicators above are favorable for the upcoming crop, we continue our focus to implement programs that align with the six core priorities in the 2023 strategic plan. The role of the CWB and CWC is to execute a wide range of consumer and trade programs, focusing both on the current year market needs while simultaneously looking longer-term, to build demand for future crops. Our recent travels reinforced the importance of being in the marketplace and the need to build stronger, resilient relationships with retailers, food service operators, food manufacturers, and consumers. In today's very competitive market, relationships matter more than ever. The handful of handlers who attended the MEWA and Gulfood tradeshow were there to foster relationships, despite being sold out or nearly sold out, with the goal of reinforcing long-term relationships built on trust, confidence and stability.

In closing, I would like to thank those who attended the Walnut Conference in January and those who will attend the upcoming Farm Advisors Walnut Days. These events provide an opportunity to learn about emerging research, market development and expansion, and to keep abreast of the latest developments in production and pest management. I welcome this chance to meet with you.

As always, if you have any questions or would like to talk about these topics, please do not hesitate to reach out to me.

Best,  
Robert Verloop

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California Walnut Board and Commission

**DECEMBER INVENTORY & ACQUISITION REPORT**

The following is a snapshot of the December Inventory & Acquisitions Report. For the full report that shows production by county, variety and more, please visit the reports section on walnuts.org or click [here](#).

**Inshell (1,000 pounds)**

<u>Crop Year</u>	<u>Conventional</u>	<u>Organic</u>	<u>December 31 Inventory</u>
2022*	0	0	343,972
2023	420,832	8,720	429,552
2024	364,028	11,099	375,127

**Shelled (1,000 pounds)**

<u>Crop Year</u>	<u>Conventional</u>	<u>Organic</u>	<u>December 31 Inventory</u>
2022*	0	0	363,098
2023	349,740	9,252	358,992
2024	222,524	5,169	227,693

**Crop Acquisitions as reported by handlers as of  
December 31, 2024: 598,221 tons**

Organic: 13,650 tons

Conventional: 584,571 tons

**FEBRUARY SHIPMENT REPORT**

The following is a snapshot of the February Shipment Report. For the full report that shows shipments to individual markets, please visit the reports section on walnuts.org or click [here](#).

**Inshell (1000 pounds)**

	<u>2023/24 Marketing Year</u>		<u>2024/25 Marketing Year</u>	
	<u>February 2024</u>	<u>9/1/2023 to</u>	<u>February 2025</u>	<u>9/1/2024 to</u>
		<u>2/29/2024</u>		<u>2/28/2025</u>
Domestic	685	7,594	544	7,570
Export	<u>34,275</u>	<u>238,579</u>	<u>6,050</u>	<u>117,463</u>
<b>Total</b>	<b>34,960</b>	<b>246,173</b>	<b>6,593</b>	<b>125,033</b>

**Kernel (1000 pounds)**

	<u>2023/24 Marketing Year</u>		<u>2024/25 Marketing Year</u>	
	<u>February 2024</u>	<u>9/1/2023 to</u>	<u>February 2025</u>	<u>9/1/2024 to</u>
		<u>2/29/2024</u>		<u>2/28/2025</u>
Domestic	18,223	142,181	13,786	100,976
Export	<u>39,036</u>	<u>174,749</u>	<u>31,292</u>	<u>158,746</u>
<b>Total</b>	<b>57,258</b>	<b>316,930</b>	<b>45,078</b>	<b>259,722</b>

**February 2025 Purchase Commitments**

Inshell Conventional: 9,001,608 pounds  
 Inshell Organic: 0 pounds

Kernel Conventional: 150,369,436 pounds  
 Kernel Organic: 5,411,435 pounds

**Final walnut receipts for 2024/2025 as reported by handlers on the Crop Acquisition Report:**

Conventional: 584,571 tons  
 Organic: 13,650 tons

## CALIFORNIA WALNUT BOARD & COMMISSION ELECTIONS

The nomination and election process for both the board and commission will soon be underway. Elected board members serve a critical role in guiding our industry, offering their unique knowledge and expertise, representing the interests of growers and handlers in their regions, and providing oversight and governance functions to the California Walnut Board and Commission.

We are looking for individuals who recognize the importance of the Board and Commission functions and are willing to step up and serve as board members or alternates to contribute to the advancement of the industry. People who can think big and challenge the status quo to advance the industry - asking tough questions, engaging in respectful dialogue and not being afraid to move away from activities and practices that are not serving the industry well.

The CWB and CWC conduct elections for board members every two years to serve on the respective boards, beginning September 1, 2025, until August 31, 2027. While the election timing is similar, the process is slightly different for the two organizations.

For the CWB, nomination petitions to have a candidate's name included on the California Walnut Board 2025 ballot were sent to all growers in late February. Candidates with petitions containing at least 10 eligible grower signatures will qualify for the ballot. In mid-April, ballots listing the eligible candidates for grower positions will be mailed to all walnut growers in California. Growers will vote for two members and two alternates to represent their district as well as one member and one alternate for the statewide position. The nominees receiving the most votes in each district and at-large for representatives on the California Walnut Board will be presented to the Secretary of Agriculture in consideration for appointment.

For the CWC, producers and handlers participating in the election must complete a nomination form for their name to appear on the ballot in May. All producer candidates must return the form with at least 15 eligible grower signatures. All handler candidates must submit a petition with at least five other handler signatures. In late June, ballots will be mailed to producers and handlers. Producers will vote for four members and four alternates to represent their district. The nominees receiving the most votes in each district will be appointed by the California Secretary of Food and Agriculture.

For more information, please contact Suzanne Wuehler at the California Walnut Board and Commission office at (916) 932-7070 or [swuehler@walnuts.org](mailto:swuehler@walnuts.org).

## CALIFORNIA WALNUT CONFERENCE 2025 RECAP

On January 9<sup>th</sup>, nearly 600 growers, handlers and affiliated industry members came together in Yuba City for the California Walnut Conference. This year's event, which was held in partnership with JCS Marketing, had a full agenda that highlighted a renewed focus to provide tools and solutions growers could take home and implement. Content covered research, production practices, market dynamics, and advocacy, and a goal of providing relevant and impactful information that is timely and can drive change.



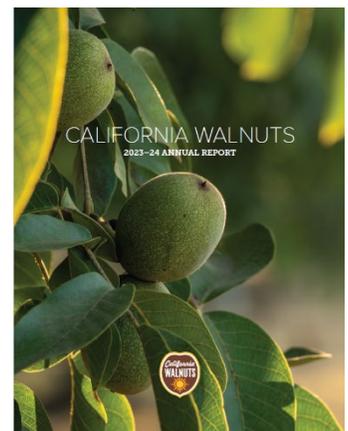
Sessions included a panel discussion with U.S. and international walnut buyers that shared their insights on what their markets are looking for to increase sales and expand consumption of California walnuts; a grower panel discussion on sustainable practices that support regenerative walnut growing; a panel on the future of pesticides with the evolving regulatory landscape as well as a state of the industry presentation and industry panel. As part of the trade show area, agencies such as US Department of Agriculture (USDA) Risk Management Agency, USDA National Resources Conservation Service, and California Department of Food and Agriculture were on hand with information on assistance and incentive programs they offer for walnut growers. And new this year, a dedicated research poster session was held to share the latest in walnut production and post-harvest research finding.



By bringing together growers, researchers, and industry leaders, this conference helps ensure the walnut industry's voice is heard and that it has the tools to adapt and thrive in an ever-changing landscape.

## CA WALNUT INDUSTRY ANNUAL REPORT 2023/24

The inaugural California Walnut Industry Annual Report was released at the 2025 CA Walnut Conference, January 9, 2025. This report contains and reflects on the facts and figures, general information and strategic efforts by the California Walnut Board (CWB) and California Walnut Commission (CWC) Boards of Directors, staff and the industry at large over the past year to address the challenges faced by our growers and handlers as we continue to adjust to a post-COVID marketplace. To read the full annual report, please visit the reports section on [walnuts.org](https://walnuts.org) or click [here](#). To request a physical copy of the annual report, please contact us at 916-932-7070 or [info@walnuts.org](mailto:info@walnuts.org).



## SUSTAINABILITY SURVEY

Consumers, food manufacturers and buyers want to learn about our walnut industry's sustainability story. Globally, for most retailers, details on an industry's efforts are now required from sellers. The California Walnut Board (CWB) has issued a voluntary grower survey to assist in the gathering of information to share about the great work being done by walnut growers to preserve and protect the environment while meeting the needs for future generations to continue to farm.



Scan here for survey

There's still time to help in telling the California walnut industry's sustainability story. Visit [californiawalnutssurvey.com](https://californiawalnutssurvey.com) to learn more and take the survey today. All responses will be aggregated for analysis; individual results will remain confidential and will not be shared publicly.

If you have questions, please reach out to the California Walnut Board at 916-932-7070 or [jrahm@walnuts.org](mailto:jrahm@walnuts.org).

## FOOD SAFETY UPDATES

### NEW Food Safety resources available on walnuts.org

The California walnut industry has long upheld food safety as paramount. To support the industry's efforts and commitment to food safety, we have tools and resources available online to assist growers, huller/dryers and handlers. Please visit the walnut industry section on walnuts.org or click [here](#).

### Upcoming Food Safety Trainings for Growers, Huller/Dryers and Handlers:

- CDFA Produce Safety Alliance Grower Training Course - The California Department of Food and Agriculture (CDFA) Produce Safety Program (PSP) is offering Produce Safety Alliance (PSA) Grower Training Courses at no cost to California produce growers and huller/dryers starting February 2025. The PSA Grower Training Course provides growers with information on the FSMA Produce Safety Rule requirements and Good Agricultural Practices (GAPs) for fruits, vegetables, and tree nuts to assist with the implementation of on-farm produce safety practices.

Courses will be offered in a web-based, remote format via Zoom with live instructors to provide convenient accessibility for individuals located across California. For more information or questions, please email [producesafety@cdfa.ca.gov](mailto:producesafety@cdfa.ca.gov). You can also visit [www.cdfa.ca.gov/producesafety/](https://www.cdfa.ca.gov/producesafety/).

- PTNPA Food Safety Symposium 2025 - The Peanut & Tree Nut Processors Association (PTNPA) is holding a Food Safety Symposium for nut industry food safety professionals on March 25-26, 2025 at Craig School of Business at California State University, Fresno. The event will include regional insights, expert-led sessions, and a certificate of participation on the latest food safety requirements and regulations. For more information or question please contact PTNPA at 301-365-2521 or [membership@ptnpa.org](mailto:membership@ptnpa.org). You can also visit [www.ptnpa.org/page/symposium](http://www.ptnpa.org/page/symposium).

## GROWER RESOURCE AND ASSISTANCE PROGRAM UPDATES

### Walnut Days

In February and March, University of California Cooperative Extension (UCCE) and farm advisors put on Walnut Days throughout the state to share updates on the latest production research and tools, led by experts and researchers in walnut production. In addition, the CA Walnut Board and Commission provide industry updates on interests and other topics of importance. Growers, CCAs, PCAs, and other agricultural professionals who work with California walnuts are encouraged to attend.

- **Sacramento/Solano/Yolo Walnut meeting** – March 12, 2025, at the Woodland Community College
- **Quad-County Walnut meeting** – March 18, 2025, at the San Joaquin County UC Cooperative Extension

For more information on each event and how to register, please click [here](#).

### 2024-25 Production and Post Harvest Research Updates

Every year, in late January through early March, the annual cycle of California Walnut Board-funded production research activity comes full circle with reporting on the previous year's projects and planning proposals for new and continued work in the coming year. To keep growers, handlers and stakeholders informed of project updates and key findings, the CWB makes available the research project summaries on walnuts.org. The 2024 research summaries are now available online and can be found [here](#).

For more information on our production research program, please reach out to Joe Grant at [jagrant@ucanr.edu](mailto:jagrant@ucanr.edu).

## TECHNICAL & REGULATORY UPDATES

### CA Agriculture Regulatory Update – Water Supply, Nitrate and Salinity (Provided by LandIQ).

California agriculture continues to face regulations on water quality and quantity, and potentially on water rights. Growers, collectively represented by third parties, respond to expanded monitoring, reporting and management requirements. This update focuses on activities between July 2024 and January 2025 related to water supply and quality regulations.

- Sustainable Groundwater Management Act (SGMA)
- Irrigated Lands Regulatory Program (ILRP)
- Central Valley Salinity Alternatives for Long-Term Sustainability (CV-SALTS)
- Bay Delta Plan

To read the full report, you can access it [here](#).

### Mancozeb Update

The European Union (EU) is evaluating a proposal to lower the maximum residue level (MRL) on Mancozeb usage in walnut production, which would essentially restrict its usage on walnuts shipping to the EU. The CWC has submitted technical information on the safety of the fungicide to counter the proposed reductions. A vote by the EU may take place at the earliest in June 2025 to determine if the MRL will be lowered for walnuts. If passed, it would go into effect 12 months from approval.

There is no impact to use for the upcoming crop and the Customers/Growers can still use Mancozeb with confidence from an export to EU perspective. For more information or updates on this topic, please reach out to Joshua Rahm at [jrahm@walnuts.org](mailto:jrahm@walnuts.org).

### CA Department of Pesticide Regulation (DPR) SprayDays California

The California Department of Pesticide Regulation (DPR) is anticipating the launch of SprayDays California, a first-of-its-kind statewide system designed to provide transparent, accessible and timely notifications and information about the application of specific pesticides, called “restricted material pesticides,” used on farms. SprayDays California will provide information online, and through email and text message notifications, 48 hours before the intended use of soil fumigants, a type of restricted material pesticide, and 24 hours before the intended use of other restricted material pesticides used on farms. Website visitors can search for scheduled applications anonymously using a map or by entering any California postal address to view applications planned within a one-square-mile area. Users can also opt in to receive notifications about planned applications near a specified address using a mobile phone number or email.

**The regulations that support the implementation of SprayDays California go into effect on February 24, 2025**, requiring growers and applicators to electronically submit Notices of Intent (NOIs) for restricted material pesticide applications in production agriculture via CalAgPermits or third-party partner platforms. DPR information sheet is available in [English](#) and [Spanish](#) for compliance guidance.

For more information or updates on this topic, please reach out to Joshua Rahm at [jrahm@walnuts.org](mailto:jrahm@walnuts.org).

GLOBAL MARKETING UPDATES

The California Walnut Commission (CWC) conducts marketing and trade promotion programs in the US and key export markets, with a focus on building consumer demand and driving trade engagement and involvement to expand market development and generate sales. The following are some recent activities the CWC is participating in to promote California walnuts.



**MEWA India 2025** - MEWA India 2025 presented an engaging three-day affair, creating a golden opportunity to interact with industry pioneers, buyers, sellers, and international delegates, and spotlighted the dynamic facets of the Indian nuts industry. The CWC had a booth at the event which received robust attendance throughout the show. In addition, there was strong industry support with 8 handlers participating. MEWA continues to be a great opportunity to provide a bridge between the California walnut industry and the Indian trade.

**Gulfood 30<sup>TH</sup> Edition**- The 30th edition of Gulfood, took place at the Dubai World Trade Centre from 17 – 21 February 2025, which hosted a 5,500+ exhibitors from over 129 countries and over 350,000 retailers, food suppliers, distributors, wholesalers, chefs and thought leaders. Existing customers from the Middle East, Türkiye and India visited our booth which also attracted hundreds of visitors interested in exploring business opportunities and learning about California walnuts. Additionally, there was strong industry support with 9 handlers in attendance.



Ask Shelly.

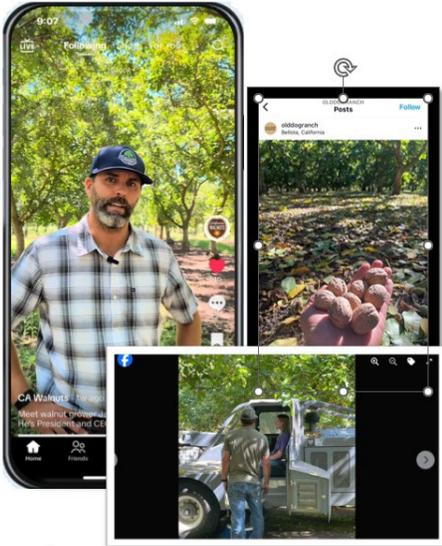


**Natural Products Expo West 2025** - Natural Products Expo West, March 4 – 7 2025, is the premier event for the natural, organic, and healthy lifestyle market to network with retailers, distributors, health practitioners, and food service professionals. For the first time, the CWC will be exhibiting at the show, highlighting how walnuts can assist in closing the innovation gap as a +1 ingredient in line extensions or as a new product platform. The CWB team will be on hand to answer questions and demonstrate how walnuts can help food brands with new product development.

**World Walnut Summit**

On April 24, 2025, the CWC will be hosting the World Walnut Summit in Tokyo, Japan. This event will celebrate the health benefits of walnuts and their significance to Japanese consumers. The event will feature presentations by four leading health researchers who will discuss findings that suggest how walnuts may benefit brain health, gut health and sleep. The event will also include an industry panel that will share production, processing and food safety practices that set California apart as a high-quality walnut producer. To register for the event, please email [clea@walnuts.org](mailto:clea@walnuts.org).

**GROWER AMBASSADOR PROGRAM**



Now more than ever, consumers want to know more about where their food comes from and who is growing it. Help promote the California walnut industry and share your stories by joining the new Grower Ambassador program. We are working to identify the latest generation of growers to be able to share their experiences while highlighting the rich history of multi-generational family farms. We want to showcase the unique and innovative approaches being undertaken within walnut operations while highlighting the passion and commitment that is in every walnut produced. Areas of participation would include social media content, online blog, consumer PR and events.

If you are interested in learning more, please contact Christine Lott at [clott@walnuts.org](mailto:clott@walnuts.org) or at 916-932-7070.

**RECEIVE THE LATEST INDUSTRY NEWS BY EMAIL, PHONE OR TEXT - SIGN UP TODAY!**

Sign up to receive timely and frequent California walnut industry updates in the ways you would like to receive them (email, text, or a call), with our “opt-in” communications platform called OnSolve. Over 500 industry members are currently enrolled and are the first to receive industry news and updates.

If you have not already done so, please sign up by going to <https://walnuts.org/onsolve-signup/>



**UPCOMING KEY DATES & EVENTS**

- Sacramento/Solano/Yolo Walnut meeting** – March 12, 2025, at the Woodland Community College
- Quad-County Walnut meeting** – March 18, 2025, at the San Joaquin County UC Cooperative Extension
- CWB/CWB Marketing, Promotions & Business Development Committee meeting** – March 27, 2025, at the California Farm Bureau
- CWB/CWC Board of Directors meeting** – April 10, 2025, at the Rancho Cordova Marriott Hotel



**California Walnut Board and Commission**

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