



California Walnut Industry Update

In this edition of our newsletter, we cover a wide range of topics, none more top of mind than tariffs and the impact they may have on our export marketplace. This is such a fluid topic that daily, and sometimes hourly, there are developments that may or may not impact our walnut industry. Our focus has been the elimination of the 100% tariff on US walnuts going into India. Under the banner of the California Walnut Commission, we have worked with various stakeholders to inform them of the benefits of removing the tariff and to allow the marketplace to achieve its full potential. In May, a walnut industry delegation traveled to Washington DC to educate, inform and remind regulators and CA Senators and Congressmen about the importance of having open access to all markets, with India being the highest priority. From all indications this topic has been discussed at recent trade negotiations, and we remain optimistic, but as stated earlier everything is subject to change or delay.

The latest LandIQ acreage report (below) shows that the removal of walnut acres has slowed, and the industry added limited new plantings. The data shows that over 65% of the CA acreage is less than 20 yrs old which provides a solid foundation for the industry. The trade, especially abroad, is keenly interested in the long-term viability of the industry and our numbers show we are well positioned to serve the international markets and consumers everywhere.

USDA NASS will conduct their annual crop estimate survey starting in Mid-July, which will be combined with the Land IQ acreage numbers to give an objective estimate of the industry crop volume for 2025. Coming off a very light crop in 2024, we anticipate the upcoming crop to be higher in volume. The official objective crop estimate will be published on Sept 1, 2025. International markets are anxious for Chilean and California walnuts to return to the market. Importers have reported disappointment in the quality, taste and shelf life of the Chinese walnuts that filled the void left by our and Chile's short crops in 2024.



If you have any questions, please feel free to contact me rverloop@walnuts.org or 916-932-7070.

All the Best,

Best,
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California Walnut Board and Commission

CALIFORNIA WALNUT COMMISSION JOINS US AG SECRETARY ROLLINS IN THE UK



On May 12th, the California Walnut Commission had a seat at the table as part of U.S. Secretary of Agriculture Brooke Rollins' trade delegation to the United Kingdom. This is her first trade mission as part of the administration, with a focus to meet with counterparts and discuss the commitments of the new U.S.-U.K. trade agreement that will lower tariffs, remove trade barriers, provide significant expansion in U.S. market access in the U.K., and create a \$5 billion opportunity for new exports for U.S. stakeholders, including U.S. farmers, ranchers, and producers.

As part of the trip, Secretary Rollins hosted a U.S. agriculture industry roundtable at the US Embassy in London to discuss ways for USDA to support agricultural exports to the U.K. through trade promotion programs which Jack Mariani and Robert Verloop represented the California walnut industry. In addition, Secretary Rollins posted on her Instagram page @SecRollins throughout her U.K. visit promoting American products, including California walnuts!



APRIL SHIPMENT REPORT

The following is a snapshot of the April Shipment Report. For the full report that shows shipments to individual markets, please visit the reports section on walnuts.org.

Inshell (1000 pounds)

	<u>2023/24 Marketing Year</u>		<u>2024/25 Marketing Year</u>	
	<u>April 2024</u>	<u>9/1/2023 to 4/30/2024</u>	<u>April 2025</u>	<u>9/1/2024 to 4/30/2025</u>
Domestic	1,010	9,923	1,284	9,213
Export	<u>20,186</u>	<u>293,892</u>	<u>3,611</u>	<u>123,862</u>
Total	21,197	303,816	4,896	133,075

Kernel (1000 pounds)

	<u>2023/24 Marketing Year</u>		<u>2024/25 Marketing Year</u>	
	<u>April 2024</u>	<u>9/1/2023 to 4/30/2024</u>	<u>April 2025</u>	<u>9/1/2024 to 4/30/2025</u>
Domestic	22,313	183,164	14,431	130,158
Export	<u>33,598</u>	<u>253,172</u>	<u>31,367</u>	<u>223,282</u>
Total	55,912	436,336	45,798	353,441

April 2025 Purchase Commitments

Inshell Conventional: 8,595,694 pounds
 Inshell Organic: 0 pounds

Kernel Conventional: 111,985,254 pounds
 Kernel Organic: 4,764,858 pounds

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

Conventional: 589,557 tons
 Organic: 14,807 tons

LAND IQ ACERAGE REPORT

Below is a snapshot of the 2025 California Walnut Standing Acreage report, conducted by Land IQ, as of April 30, 2025. The final annual acreage report will be provided in November 2025, and will include bearing acreage, non-bearing acreage, total removed acreage (Sept 1, 2024 – Aug 31, 2025), and stressed and abandoned acreage. The full report with county-level information can be found in the reports section on walnuts.org.

2025 Initial Estimate (as of April 30, 2025)	Initial Estimate
2024 Standing Bearing Acreage	379,854
New Bearing Acreage Coming into Production	8,538
Initial Removed Acreage	7,486
2025 Initial Standing Bearing Acreage	381,472
2024 High Stress/Abandoned Acreage Still Standing	7,417
2025 Initial Producing Bearing Acreage	374,055

INC GLOBAL PRODUCTION ESTIMATE – MAY 2025

THE FOLLOWING CHART REFLECTS METRIC TONS

42nd World Nut and Dried Fruit Congress. Mallorca, May 8-10, 2025

ESTIMATED WORLD WALNUT PRODUCTION

In-shell Basis. Metric Tons

COUNTRY	2024/2025				2025/2026			
	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK	BEG. STOCK	CROP	TOTAL SUPPLY	ENDING STOCK
CHINA	50,000	1,550,000	1,600,000	20,000	20,000	1,550,000	1,570,000	60,000
USA	83,000	542,700	625,700	72,000	72,000	616,000	688,000	68,000
CHILE	542	134,576	135,118	400	400	168,000	168,400	600
UKRAINE	1,000	88,750	89,750	1,600	1,600	100,800	102,400	1,200
ROMANIA	1,000	40,000	41,000	1,200	1,200	53,000	54,200	800
TÜRKIYE	0	48,000	48,000	0	0	46,800	46,800	0
FRANCE	0	25,000	25,000	0	0	40,000	40,000	0
IRAN	0	35,000	35,000	0	0	38,700	38,700	0
INDIA	10,000	33,000	43,000	3,500	3,500	30,000	33,500	3,000
ARGENTINA	1,000	21,000	22,000	0	0	22,000	22,000	0
MOLDOVA	300	17,680	17,980	400	400	21,000	21,400	300
SPAIN	0	13,000	13,000	0	0	18,000	18,000	0
ITALY	0	14,900	14,900	0	0	15,000	15,000	0
HUNGARY	0	14,000	14,000	0	0	11,900	11,900	200
AUSTRALIA	0	14,000	14,000	0	0	11,000	11,000	0
OTHERS	0	23,100	23,100	0	0	24,500	24,500	0
WORLD TOTAL	146,842	2,614,706	2,761,548	99,100	99,100	2,766,700	2,865,800	134,100
WORLD CONSUMPTION (Supply - End. Stock)				2,662,448				

Sources 2024/25: California Walnut Board and Commission, Chilenu, Walnut Growers Association of Türkiye and other INC sources. Sources 2025/26: Chile Nut and other INC sources. *California Walnut Board and Commission does not measure in kernel basis. Kernel equivalent is an INC estimation. Season 2024/2025 starts as of 2024 harvest; and 2025/2026 as of the 2025 harvest in both hemispheres.

CALIFORNIA WALNUT BOARD & COMMISSION ELECTIONS

The election process for both the Board and Commission are 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.

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

Currently for the CWB, all ballots postmarked by May 16, 2025 are having votes tabulated and receiving USDA certification. 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, ballots to vote on the producer and handler candidates will be mailed out at the end of June. Producers will vote for four members and four alternates to represent their district. The four nominees for member and four nominees for alternate receiving the most votes in each district will be elected.

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

FOOD SAFETY UPDATES

Upcoming Food Safety Trainings for Growers, Huller/Dryers and Handlers - To support the industry's efforts and commitment to food safety, the California Walnut Commission (CWC) will again be sponsoring food safety workshops for growers, huller/dryers, and handlers to share best practices, provide updates on regulations and strengthen food safety culture in preparation for harvest in the coming months. Training courses will be held in July and early August, and in multiple locations across the growing regions. Workshops will cover walnut-specific food safety updates on best practices and latest regulations and provide additional resources to support food safety programs.

Walnut Grower and Huller/Dryer Best Practices

- July 2nd – Yuba City, CA at the Veteran's Hall
- July 8th – Chico, CA at the Butte County Farm Bureau
- July 22nd – Kingsburg, CA at Safe Food Alliance
- August 5th – Stockton, CA at Robert Cabral Ag Center
- All sessions: 8:30am – 4:30pm

Walnut Handler Facility Best Practices

- July 1st – Yuba City, CA at the Veteran's Hall from 8:30am – 4:30pm

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More information and how to register will be provided by the CWC as it becomes available. If you have any questions, please contact Billy Ng at bng@walnuts.org.

Grower Training Courses from CDFA Produce Safety Alliance - The Food Safety Modernization Act (FSMA) Produce Safety Rule (PSR) sets minimum food safety standards for the production of fruits, vegetables, and tree nuts. Unlike other tree nuts, California walnuts and pistachios are required under the PSR. For the upcoming walnut harvest season, the walnut growers should familiarize themselves with the revised pre-harvest water requirements under FSMA produce safety rule. The Produce Safety Alliance (PSA) Grower Training course was developed to educate growers and farm workers about the PSR and assist with implementation of practices to satisfy the regulatory requirements set forth by the PSR. At least one individual from the farming operation must attend a PSA Grower training course to meet regulatory requirements. CDFA offers free services to all walnut growers such as onsite/virtual training courses, technical assistance with UC specialists and on-farm readiness reviews (OFRR) to ensure growers understand the rules and regulations for compliance. For more information, growers can visit CDFA website www.cdfa.ca.gov/producesafety/ or call 916-654-0466.

SUSTAINABILITY

Sustainability Webinar Series - In May, the California Walnut Board kicked off a virtual Sustainability Series, designed to connect walnut growers eager to explore innovative, science-backed practices that promote a healthier, more sustainable future with industry experts and support the industry's efforts in building a strong sustainability story for California walnuts, one of the core priorities as outlined in the industry's strategic plan. The first session was held May 14th, with future sessions planned each month to cover the topics of Water Management, Integrated Pest Management (IPM), and Greenhouse Gas Emissions (GHG). The next session, Water Management, will be held on June 25th at 1:00pm.

All webinars are free to attend and registration can be found on the events calendar on walnuts.org. All sessions will be recorded. If you would like to get a copy of a session recording, please contact Billy Ng at bng@walnuts.org.

Soil Health Academy - Soil Health Academy, founded by leading regenerative farmers including Gabe Brown, Dr. Allen Williams, and Ray Archuleta, provide intensive 3-day seminars for farmers, by farmers. On April 1-3, 2025, they held a seminar at Burroughs Family Farms, located in Denair, CA, with several California walnut growers participating, thanks to sponsorship by Nut-based cracker brand Simple Mills. The Burroughs family are pioneers in the regenerative space and manage over 1,000 acres of tree nuts in California's Central Valley. The seminars were supported by expert teams of educators to provide growers with the practical tools they need to successfully (and profitably) implement regenerative agriculture principles on their land. The walnut growers attending the seminars shared that they found this to be very informative and practical to their operations. One walnut grower who participated said: *"Regenerative farming isn't just a trend, but the future of how growers must approach health: soil health, consumer health, farm employee health, etc. Increased learning opportunities can only help to provide more growers with the information and inspiration they need to adopt new practices."* With another walnut grower commenting: *"The Soils Health Academy hosts three-day hands-on workshops at an actual Soil Health Regeneration site utilizing the currently known regeneration practices. Hands-on participation and related discussions*

involving attendees provided an enrichment of understanding not available through print or media.”

If you would like more information on Soil Health Academy and any upcoming events, please visit their website at soilhealthacademy.org or contact Billy Ng at bng@walnuts.org.

Sustainability Survey Update - THANK YOU to growers that participated in the recent walnut industry sustainability survey. This voluntary survey provides key information on the initiatives and processes adopted by walnut growers to preserve the environment while meeting the needs for future generations to continue to farm.

The CWB will use the information collected, along with third party sources and past surveys, to develop messaging that shares the great work being done by the industry to adopt sustainability. In addition, these results will be used to identify areas where additional support could enhance the industry’s sustainability efforts.

REGULATORY UPDATES

Miticide Bifenazate MRL - The EU has revised MRLs for Miticide Bifenazate, known under brand names of Acramite®, Enervate™ or Vigilant®, for usage on tree nuts including walnuts from 0.2ppm to 0.01ppm. While CWC found no issue with these products in our annual screening of the 2024 crop, we highly recommend growers to read the miticide’s labeling for application to ensure the 2025 harvest will meet this new EU requirement.

Mancozeb MRL - As reported in the last newsletter, 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 and 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 growers can still use Mancozeb with confidence from an export to EU perspective.

For more information or updates on these topics, please reach out to Billy Ng at bng@walnuts.org.

2024-25 PRODUCTION AND POST HARVEST RESEARCH UPDATES

Earlier this year, the CWB Research committee evaluated proposals to award grants for production research that benefit the California walnut industry. The following are the approved projects for 2025.

NEW VARIETIES & ROOTSTOCKS

- **Walnut Improvement Program, *Pat J. Brown, UC Davis***: High quality early- and mid-season varieties: Kernel size, yield, color and stability, low rancidity
- **Exploring and exploiting novel biological resistance traits of clonal walnut rootstocks, *Pat J. Brown, UC Davis***: Breed new nematode, Phytophthora, and crown gall resistant rootstocks
- **Nematode-resistant walnut rootstocks, *Shahid Siddique, UC Davis***: **Biotechnological solutions for a sustainable California walnut industry**: Use advanced genetic tools to bioengineer new nematode resistant rootstocks
- **Development of a walnut blight protecting rootstock, *Abhaya Dandekar, UC Davis***: Genetically engineer new rootstocks that impart enhanced blight suppression to tree scion

KERNEL QUALITY

- **Deploying genome editing tools for protection of walnut productivity and quality, *Abhaya Dandekar***: Adapt gene-editing CRISPR-based tools to target genes that improve control kernel color, rancidity potential, productivity, and other attributes.
- **Defining the susceptibility of kernel color darkening, *Abhaya Dandekar***: Understand genetics and biochemistry of kernel darkening and enable development of remedial strategies for growers and handlers
- **Investigating the environmental and physiological factors affecting edible yield in California walnuts, *Barbara Blanco-Ulate, UC Davis***: Explore causes and possible mitigation measures for declining edible yields in Chandler and other varieties

ORCHARD MANAGEMENT

- **Nutrient requirements for young walnut orchards after whole orchard recycling, *Clarissa Reyes, UC ANR***: Documenting nematode population and tree nutritional impacts of whole orchard recycling
- **Testing the Suitability of Optical Dendrometry for Automated SWP Measurement, *Ken Shackel, UC Davis***: Continued efforts to develop an automated, remote, and reliable tree water status sensor for irrigation scheduling in walnuts
- **Improving walnut crop yield estimations with aerial data collection, *Joshua Miranda, CSU Chico***: Drone-based advanced imagery analysis for early-season yield estimation in walnuts
- **Weed management in the conventional walnut production system; field research and extension, *Brad Hanson, UC Davis***: Supports herbicide efficacy research and outreach efforts of statewide UC Davis Weed Specialist

PEST & DISEASE MANAGEMENT

- **Epidemiology and management of walnut blight: *Jim Adaskaveg, UC Riverside***,
Ongoing effort to identify and evaluate effective treatment alternatives for blight
- **Attract-and-kill strategies for utilizing lactone pheromones as attractants, *Robert Van Steenwyk, UC Riverside***: Better walnut husk fly trapping control
- **Walnut mold and its management, *Themis Michailides, UC Davis***: Validating efficacy of bloom spray timing for Bot and Phomopsis blight and husk-split sprays for controlling kernel mold
- **Implementing soil treatment strategies for suppression of plant-parasitic nematodes in walnut, *Andreas Westphal, UC Riverside***: Evaluate new and promising pre- and post-plant chemical and non-chemical treatments to control root lesion nematode

For more information on our production research program, please contact Joe Grant at jagrant@ucanr.edu.

GLOBAL MARKETING UPDATES

The California Walnut Commission (CWC) conducts marketing and trade promotion programs in the U.S. 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 participated in to promote California walnuts.

INC Congress - From May 8–10, Robert Verloop (CEO) and Pamela Graviet (VP of Integrated Marketing) of the California Walnut Commission, along with 12 walnut handlers, participated in the annual International Nut and Dried Fruit Council (INC) Congress held in Mallorca, Spain.

Throughout the congress, numerous sessions and roundtable discussions were held. Preliminary insights shared during the round tables suggest that global tree nut production for the 2025/26 season is expected to remain stable, with walnut production projected to increase by 6%.

Key challenges facing the industry include volatile weather patterns affecting crop yields, pricing pressures, market uncertainty, and international trade tariffs. Despite these hurdles, consumer demand continues to grow for foods that are healthy, sustainable (emphasizing clean labels, traceability, eco-friendly packaging), and affordable.



Ask Shelly.



SNAXPO 2025 – CWB exhibited at this year’s SNAXPO, March 30 – April 1, the only vertically integrated supply chain trade show exclusively for the snack industry. As the premier full equipment international sourcing expo, SNAXPO brings together snack producers and leading suppliers from across the industry looking for the latest innovation to grow their business to the next level and achieve greater efficiency, profitability, and market share.

Foodservice Presentations – At the beginning of May, the California Walnut Board presented to major US foodservice providers Aramark and GoTo Foods (parent company to Jamba Juice, Cinnabon, Auntie Anne’s, Scholtzsky’s Deli, and more) to showcase the versatility of walnuts. Chef-in-Residence, Robert Danhi, walked through a demonstration for these two companies to show that walnuts are more than just an ingredient—they’re a platform. He transformed walnuts into components and illustrated how simple it could be to build them into existing menu items or create limited time offers that allow space for additional R&D. To kick off sessions, groups were welcomed with bites and sips that brought walnut creativity to life—Chocolate Walnut & Greens Protein Shakes, cinnamon walnut cream–topped breakfast items, and a savory California Walnut Meat Chorizo for morning menus.

The Aramark culinary team of chefs and cooks jumped into the kitchen to put that inspiration, knowledge, and the walnut component recipes to work, developing menu-ready concepts in real time. Meanwhile, GoTo

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Foods' cross-functional team of R&D, marketing, and licensing professionals ideated on the spot about bringing more California walnuts into their menus across multiple brands, as Jennifer Olmstead and Chef Danhi showcased how the CWB can support menu development and marketing of new walnut menu items.

California Walnuts. Feel Good. – New U.S. Consumer Campaign -

California Walnuts launched a new "Feel Good" integrated marketing campaign in the U.S. market, focusing on attracting younger consumers with significant purchasing power to the walnut category. Guided by consumer research, the new campaign will target Millennial and Gen Z consumers who have high disposable incomes and a love for food culture with a fresh, energetic look and feel and to reposition California walnuts as a must-have ingredient and snack for younger shoppers. The campaign will include digital and social media channels, influencer partnerships, paid streaming, retail-tagged advertising, shopper marketing and sampling events. A cornerstone of the campaign is collaborations with more than 20 cooking, wellness, lifestyle and hosting influencers who collectively reach millions of these potential buyers, shaping their purchasing decisions.



To see how we are bringing the campaign to life, follow us on Instagram or TikTok @CAWalnuts

FDA Healthy Definition - As of April 28, 2025, walnuts meet the updated definition for a “healthy” food based on the important role they play in recommended dietary patterns. The announcement from December 2024 from the U.S. Food and Drug Administration (FDA) detailed a new definition for foods that can be identified or labeled as “healthy.” This announcement, originally previewed in 2022 on the heels of the historic White House Conference on Hunger, Nutrition and Health, is a significant step toward ensuring food labeling is consistent with the most up-to-date nutrition scientific evidence and Dietary Guidelines for Americans (DGA) recommendations to support individuals and families in building healthy eating patterns. “The inclusion of walnuts in the new “healthy” definition affirms consumers’ belief that walnuts are a healthy food. It also aligns with decades of nutrition research reinforcing the important contributions walnuts can make in a healthy lifestyle,” shared Robert Verloop, chief executive officer for the California Walnut Commission. “It’s simple. Just adding walnuts to Americans’ daily diet can potentially have wide-ranging positive impacts.”

WORLD WALNUT SUMMIT 2025

On April 24, the California Walnut Commission hosted the World Walnut Summit 2025 in Tokyo, with the goal of promoting the health benefits of California walnuts and sharing the industry’s story throughout Japan. The event brought together California’s walnut industry—growers and processors—with Japanese trade professionals, health experts, and media. Over 340 attendees were engaged in insightful presentations from CWC’s Scientific Advisor, Rachel Blaine, and three guest researchers, who focused on the top three health benefits gaining traction in Japan: gut health, cognitive health, and sleep quality.

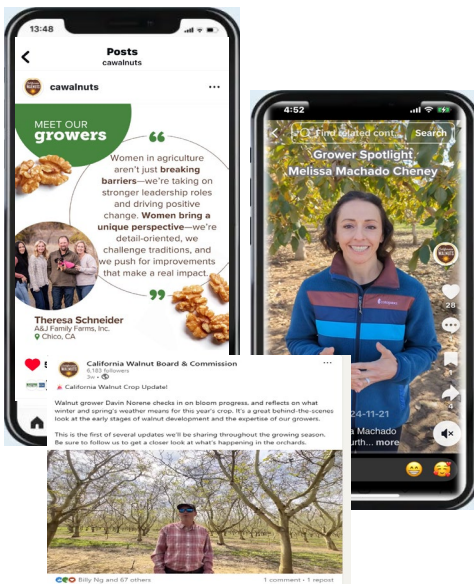
California walnut growers and processors immensely contributed to the event's success, sharing the stage with renowned Japanese actor and walnut enthusiast, Honami Suzuki, to discuss their passion for California

walnuts. The summit also featured a walnut-themed lunch buffet, highlighting the versatility of the nut in various dishes from around the world.

The summit garnered substantial media coverage, generating 120 web articles, six newspaper features, and over 50 social media mentions by May 2. The CWC estimates that the World Walnut Summit has already reached over 20 million Japanese consumers through both traditional and social media channels, leading to increased awareness and understanding of the positive attributes of California walnuts. The CWC will be monitoring sales movements in the weeks to come.



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 or at 916-932-7070.

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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 600 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/>





California Walnut Board and Commission

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UPCOMING EVENTS AND KEY DATES:

- **Sustainability Webinar Series** – Water Management: June 25, 2025, at 1-2pm; additional sessions in July and August. For more information, see page 6.
- **Walnut Food Safety Workshops** – July thru early August in various locations, see article on page 5 for all details.
- **CWB/CWC Board of Directors meeting** – August 7, 2025 (tentative), at the Rancho Cordova Marriott Hotel
- **2026 Walnut Conference** – February 19, 2026, at the Stanislaus County Fairgrounds

SAVE THE DATE!