



# California Walnut Industry Update

The release of the crop estimate signals the start of a new crop year and as you will see below, the numbers are favorable. The global marketplace “pipeline” is low on inventory, confidence in our crop’s size and excellent quality is high, and international buyers have started placing orders. It will require discipline, patience and direct sales conversations between sellers and buyers to maintain consistent sales momentum.

The California Walnut Board and Commission staff started planning for the new crop in March of this year. We have a long-term view as we continue to build out the strategic plan. At the same time, the tariff and trade landscape has kept everyone on their toes trying to anticipate what the trade picture would look like by the time our crop is ready to sell. At the time of this writing, the upside is that tariffs on California walnuts have not changed in any market. We thought the US and India were close to signing an initial “mini deal” that would have included a reduction in the tariff in India (currently 100%). Unfortunately, the two countries have not been able to complete an agreement and while there are ongoing negotiations, you read the same news and know the challenges are at the highest level. We are optimistic that once a trade agreement is reached on non-walnut issues, that we will see a more favorable tariff rate on our walnuts. We continue to educate and inform officials about the critical importance of getting the tariff reduced as it will be good for our growers, buying companies and Indian consumers.

Having been on tractors and in coolers during harvest season for the many crops I have grown, I understand and greatly appreciate what lies ahead as the California walnut harvest season is upon you. We understand the challenging weeks ahead which the days and nights will be long and hard, keeping one eye on the weather and the other on the orchards, shakers, trucks, hullers/dryers, scales and the incoming crop numbers. Those of us at the California Walnut Board and Commission will continue our efforts in the domestic and international markets to get more consumers to eat more walnuts in more ways and more often. I wish you all the best in the weeks to come.

Executive Director/CEO

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California Walnut Board and Commission

## CALIFORNIA WALNUT BOARD & COMMISSION ELECTION RESULTS

The California Walnut Board (CWB) and California Walnut Commission (CWC) are pleased to announce the newly elected Boards of Directors, who will serve a two-year term beginning Sept. 1, 2025, and ending Aug. 31, 2027.

### California Walnut Board

The CWB Board of Directors consists of 10 growers and 8 handlers, which include three new individuals:

#### DISTRICT 1

**Grower Member:** William D. Carriere, Glenn

**Grower Member:** Ben Walsh, Orland

**Handler Member:** Jack Mariani, Winters

**Handler Member:** Eric Heidman, Stockton

**Grower Alternate:** Jeff Gallagher, Rio Oso

**Grower Alternate:** Michael Petz, Tracy

**Handler Alternate:** John Aguiar, Winters

**Handler Alternate:** Dick Wolf, Stockton

#### DISTRICT 2

**Grower Member:** Brent Barton, Escalon

**Grower Member:** Greg Wiersma, Visalia

**Handler Member:** Frank Guerra, Hollister

**Handler Member:** Mike Poindexter, Selma

**Grower Alternate:** Daniel Bays, Westley (New)

**Grower Alternate:** Benjamin Crane, Merced

**Handler Alternate:** Brock Middleton, Hughson

**Handler Alternate:** Aaron Martella, Hughson (New)

#### At LARGE

**Grower Member:** Michael Machado, Linden

**Grower Alternate:** John Heier, Live Oak (New)

### California Walnut Commission

The CWC Board of Directors consists of 16 producers and 8 handlers, which include 7 new individuals:

#### DISTRICT 1

**Producer Member:** Jay Colombini, Linden

**Producer Member:** Ashley DeValentine Mckenzie, Rio Oso

**Producer Member:** R. Davin Norene, Woodland

**Producer Member:** Kali Dittrich (New)

**Producer Alternate:** Jack Vickery, Winters

**Producer Alternate:** Donald Norene, Rio Oso

**Producer Alternate:** Henry Gilbert (New)

**Producer Alternate:** John Heier, Live Oak (New)

#### DISTRICT 2

**Producer Member:** Darrell Cordova, Denair

**Producer Member:** Andrew Souza, Crows Landing (New)

**Producer Member:** Neil Jolliff, Modesto (New)

**Producer Member:** Everett Souza Jr, Crows Landing (New)

**Producer Alternate:** Gordon Heinrich, Modesto

**Producer Alternate:** Gurjant Khosa, Fowler

**Producer Alternate:** Open

**Producer Alternate:** Open

#### HANDLER

**Handler Member:** Brian Dunning, Olivehurst

**Handler Member:** Jack Mariani, Winters

**Handler Member:** Charles Crain, Los Molinos

**Handler Member:** Christopher Cromwell, Stockton (New)

**Handler Alternate:** William Carriere, Glenn

**Handler Alternate:** Jeffery Sleeper, Orland

**Handler Alternate:** William Crain, Los Molinos

**Handler Alternate:** Matt Langford, Stockton

## 2025 CA WALNUT INDUSTRY CROP ESTIMATE

USDA's National Agricultural Statistics Service (NASS) released the official 2025 California Walnut Industry Objective Measurement Report on September 4th. The upcoming 2025 crop is forecasted at 710,000 tons, 18% larger than 2024, and will deliver the exceptional quality, with growers who have opened walnuts commenting that the kernels are completely filling the shells and have exceptionally light color for this time of the year. In addition, early estimates indicate it will be one of the lowest unsold carry-in inventory volumes the industry has seen in years and much of which will be sold in September and October. The industry is well positioned to start shipping new harvest California walnuts immediately, providing seller and buyer confidence and stable markets.

The full report can be found in the reports section on [www.walnuts.org](http://www.walnuts.org) or by clicking [here](#).

CALIFORNIA ENGLISH WALNUT ACREAGE, PRODUCTION, PRICE AND VALUE IN-SHELL

Year	Bearing acres	Trees per acre	Per bearing acre	Total production	Price per ton	Total value
			Tons	Dollars	1,000 Dollars	
2015	300,000	72.0	2.02	606,000	1,670	1,012,020
2016	315,000	73.3	2.19	689,000	1,850	1,274,650
2017	335,000	74.1	1.88	630,000	2,490	1,568,700
2018	350,000	75.5	1.95	683,000	1,350	922,050
2019	365,000	76.9	1.80	657,000	1,890	1,241,730
2020	385,000	76.8	2.05	789,000	1,200	946,800
2021	395,000	78.0	1.86	735,000	1,450	1,065,750
2022	400,000	80.0	1.89	756,000	600	453,600
2023	385,000	81.0	2.15	828,000	870	720,360
2024 <sup>1</sup>	370,000	81.0	1.63	603,000	1,720	1,037,160
2025 <sup>2,3</sup>	365,000	81.0	1.95	710,000	NA	NA

<sup>1</sup> Price per ton and Total value are May 2025 preliminary data.

<sup>2</sup> Bearing years include plantings of the following: Chandler, Chico, Howard, Ivanhoe Tulare (2021 & Earlier); Amigo, Ashley, Cisco, Marchetti, Nuggett, Payne, Pedro, Serr, Sunland, Tehama, Trinta, Vina (2020 & Earlier); Franquette, Franquette Scharsch, Mayette, Poe (2018 & Earlier); all other varieties not specified (2019 & Earlier).

<sup>3</sup> Price per ton and total value preliminary data will be released May 2026.

NA Not Available

Source: USDA NASS

**AUGUST SHIPMENT REPORT**

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

# FINAL

## Inshell (1000 pounds)

	<u>2023/24 Marketing Year</u>		<u>2024/25 Marketing Year</u>	
	<u>August 2024</u>	<u>9/1/2023 to 8/31/2024</u>	<u>August 2025</u>	<u>9/1/2024 to 8/31/2025</u>
Domestic	906	18,616	147	10,772
Export	<u>799</u>	<u>313,339</u>	<u>2,622</u>	<u>144,071</u>
<b>Total</b>	<b>1,705</b>	<b>331,955</b>	<b>2,769</b>	<b>154,842</b>

## Kernel (1000 pounds)

	<u>2023/24 Marketing Year</u>		<u>2024/25 Marketing Year</u>	
	<u>August 2024</u>	<u>9/1/2023 to 8/31/2024</u>	<u>August 2025</u>	<u>9/1/2024 to 8/31/2025</u>
Domestic	19,523	259,842	13,737	187,145
Export	<u>11,914</u>	<u>333,724</u>	<u>7,379</u>	<u>271,699</u>
<b>Total</b>	<b>31,437</b>	<b>593,566</b>	<b>21,117</b>	<b>458,844</b>

### August 2025 Purchase Commitments

Inshell Conventional: 2,120,341 pounds

Shelled Conventional: 65,726,731 pounds

Inshell Organic: 0 pounds

Shelled Organic: 1,893,189 pounds

### Final walnut receipts for 2024/2025 as reported by handlers on Crop Acquisition forms:

Conventional: 591,856 tons

Organic: 14,807 tons

## 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, driving trade engagement, expanding new market development and generate trade and consumer sales. The following are some recent activities the CWC participated in to promote California walnuts.

### Global Market Development

As we enter new markets and develop a preference for California walnuts, the CWC is organizing a series of educational sessions for handlers to learn about resources and market insights. The first webinar, held in early August, provided handlers information about mitigating financial risk when selling to less developed or unstable markets. Experts shared information about US government programs and private sector finance tools. A second webinar, held in late August, spotlighted an overview of the Moroccan port landscape as it relates to nuts as well as insights from a leading freight forwarder operating in Morocco and other markets. Future educational sessions will be provided on other countries and resources.

Additionally, the CWC has been in key markets meeting with the trade to promote California walnuts and the upcoming harvest. Pam Graviet and Billy Ng attended Asia Fruit Logistica, held in Hong Kong, the leading international trade show for Asia's fresh produce business. To showcase the importance of walnuts in the region, Ms. Graviet was invited to be a speaker in the Nuts and Dried Fruit Forum during the show.



Pam Graviet was also in India for discussions with leading importers and traders on demand trends, quality and grading, and consumer awareness for California walnuts in India. While in market, Nuts and Dry Fruits Council (India) hosted an event where Ms. Graviet provided insights on the California walnut crop estimate to stakeholders after its release.

### International Food Technology Tradeshow - IFT FIRST (Food Improved by Research Science and Technology) Annual Conference & Expo



Walnuts made a big splash at this year's IFT FIRST, the leading event for food scientists and technologists. The California Walnut Board booth starred our lovable mascot Shelly and was a must-visit destination on the show floor. The Food Manufacturing & Innovation (FMI) team was joined by Bill Carriere who provided attendees with grower insights about the industry and updates on this year's crop. A few big takeaways from food scientists and attendees included the focus on functional nutrition and clean label in product innovation as well as snacking remains dominant as a key consumer format for on-the-go.



## Global Walnut Nutrition Science Summit

At the end of July, the CWC hosted prestigious international and US based health and nutrition researchers to discuss the latest emerging trends, topics and findings on California walnuts and strategize research opportunities for the future. Researchers from leading institutions such as Harvard, Perdue University, Penn State, USDA Agriculture Research Service as well as universities in Spain and the UK participated in a mix of research updates and panel discussions to spur new ideas on how to further advance walnut health and nutrition research. A panel of growers and handlers shared walnut stories, giving attendees a perspective on the growers' family history, their passion and dedication to growing healthy, good-for-you California walnuts. The conference has led to new collaborations among researchers and project ideas for the next funding cycle. The conference was also attended by select media dietitians who are now integrating what they have learned into articles and presentations.



## “Flavor Experience” – teaching executive chefs the versatility of walnuts



The California Walnut Board (CWB) was a sponsor of the 2025 Flavor Experience, a multi-day event hosted by Flavor & The Menu Magazine that brings research and development chefs from major restaurant operators together to learn the latest trends in culinary innovation. The CWB showcased the versatility of walnuts in a workshop diving into the flavor complexity and texture of walnuts, led by Chef-in-Residence Robert Danhi and Chef Chase Obenchain. Walnuts were also highlighted in dishes such as a Vietnamese-Style California Walnut & Pork Spring Roll with a Walnut Hoisin Sauce and California Walnut Chorizo Tartine where walnuts were showcased in three separate ways. CWB representatives engaged with research & development chefs across national restaurant chains, with some expressing interest in participating in custom innovation sessions with the CWB culinary team to explore how walnuts could fit into their menu offerings.

Interest in menu innovation with walnuts is growing in the USA, with Technomic reporting the addition of 138 new core menu items and 52 limited time offers in the first six months of 2025.

## NEW INDUSTRY E-NEWSLETTER - SIGN UP TODAY!

Starting in October, a new Industry e-Newsletter will be available for growers and handlers to keep you informed and connected to the latest developments shaping the California walnut industry. The monthly digest will feature timely updates on industry news, initiatives, and upcoming events direct to your inbox.



Subscribe today for our monthly e-Newsletter by scanning the QR code or visiting <https://walnuts.org/industry-subscribe/>

## GROWER AMBASSADOR PROGRAM

### Terra Madre Americas – Help us Promote California Walnuts to Foodies September 26-28

California Walnuts will be participating in Terra Madre Americas, a first-of-its-kind California culinary celebration featuring food and drink tastings, live music, celebrity chef demonstrations, educational panels, artisan vendors, and more. Bringing world flavors and traditions together, this is a fantastic opportunity to showcase the ways California walnuts can elevate food experiences. The CWC will be sampling recipes that highlight the innovative ways walnuts can be enjoyed.

We are looking for growers to help share with attendees about what makes California walnuts special. The event runs Friday, September 26<sup>th</sup> through Sunday, September 28<sup>th</sup> from 10am to 8pm. If you are interested in participating, please contact Christine Lott at [clott@walnuts.org](mailto:clott@walnuts.org) or 916-932-7070.

Not available to help in September but want to know of other ways you can help to promote the California walnut industry. Contact Christine Lott to learn more about the Grower Ambassador program and future opportunities.

## UPCOMING KEY DATES & EVENTS

**Terra Madres America** – September 26-28, 2025, at the SAFE Credit Union Convention Center, Sacramento

**Land IQ acreage survey results** – Early November 2025

**CWB/CWC Board of Directors meeting** – November 6, 2025, at the Marriott Hotel, Rancho Cordova

**Tree & Vine Expo** – November 10, 2025 - Stanislaus County Fairgrounds

**Grape, Nut, & Tree Fruit Expo** – November 14, 2025 - BIG Fresno Fairgrounds

**California Walnut Conference - February 19, 2026 - Stanislaus County Fairgrounds**

- *High impact Speakers*
- *International guests & speakers*
- *Suppliers, Vendors, Handler booths, and more!*





**California Walnut Board and Commission**

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