

2026 CALIFORNIA MARKETABLE WALNUT POSITION REPORT

Oct. 1, 2026

California Walnut Board & Commission



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Introduction:

Crop measurements taken “on the tree” do not fully reflect the crop ultimately available for sale. This year, we are taking steps to close that gap. The Boards of Directors of the California Walnut Board and California Walnut Commission approved updates to industry data-reporting protocols to address the variables that can contribute to market uncertainty and volatility for both sellers and buyers.

The following California Marketable Walnut Position Report emphasizes **finished, marketable walnut data** for in-shell walnuts and kernels, giving growers, processors and buyers reliable information for making confident market decisions.



2026 CALIFORNIA MARKETABLE WALNUT POSITION REPORT

Initial 2026 Crop Outlook:

- The initial USDA crop estimate and early harvest results indicate that California's 2026 walnut crop will be about 16% smaller than last season and comparable in volume to 2024.
- Inconsistent winter chill hours and variable spring temperatures caused uneven pollination, a lighter nut set and higher non-marketable walnut eliminations during processing.
- The substantial Chandler plantings made over the past 8 to 10 years are now in full production, with the peak harvest typically beginning around Oct. 1. However, the early spring has put this year's harvest ahead of schedule with the Chandler harvest now in its second week. Fortunately, with no rain forecast in the near future, we are confident in this year's quality and volumes reflected in the attached reports.
- Strong global and domestic market development programs continue to support demand for California walnuts. While the crop may be smaller than in 2025, supplies are sufficient and include a broad range of products to meet demand for premium California walnuts.

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Why Focus on Crop Utilization:

1. **Industry reporting will center on 2026 Marketable Supply (Kernels and In-Shell).** Kernels now account for 80% of walnut sales, and the industry relies on advanced equipment for cracking, sorting, inspection, product differentiation and quality control to meet the needs of customers and consumers. The objective of this new reporting focus is to maximize crop utilization from tree to consumer while clearly showing the volumes, quality levels and product choices the California walnut industry can consistently supply each year.
2. **The USDA-NASS Objective Measurement Crop Estimate Report** measures the on-tree, in-shell walnut volume before harvesting, hulling, grading, sorting and inspection. Because it precedes these steps, the estimate is best viewed as an initial benchmark.
3. **Broad industry statistics combine** variation across growing regions, varieties, farming practices and market demand. More than 3,700 family farms rely on processors and handlers whose capabilities, capacity, walnut products, grower networks and customer bases differ. **For practical, decision-ready information**, buyers are strongly encouraged to consult handlers directly for detailed insight into available inventory, products and services.



2026 MARKETABLE CROP INSIGHTS

- California walnut acreage remains stable
- Harvest started 2+ weeks sooner than normal (as was the case for most CA crops), primarily due to early spring bud break and favorable weather during the season
- Following the record crop in 2025, individual growers report up to 10% to 20% lower production, with average huller eliminations
- Early Quality Inspection reports indicate:
 - Size curve shifted to a slightly smaller nut size versus 2025
 - Quality is strong and color is light, with some variability between varieties, growers and regions
 - Direct handler communications will be key to match supply with customer expectations



2026 CALIFORNIA INDUSTRY INSIGHTS

California walnut industry dynamics:

- Typical California Product Shipments:
 - 80% Kernels
 - 20% In-Shell
- Annual Sales Distribution:
 - 65% International Sales
 - 35% Domestic Sales
- Varietal Mix (Production)
 - 70% Chandler
 - 14% Howard
 - 14% Tulare

Domestic highlights

- U.S. Domestic Retail sales YOY increased 11% in Q1 and Q2, 2026
- 14,000 Tons USDA Purchase (Shipping Dec. 2026 through April 2027)

2026 USDA-NASS On-Tree Objective Measurement Crop Estimate



United States Department of Agriculture
National Agricultural Statistics Service



2026 California Walnut Objective Measurement Report

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WALNUT PRODUCTION FORECAST DOWN

The 2026 California walnut production is forecast at 680,000 tons, down 16 percent from the 2025 production of 809,000 tons. The preliminary estimate of producing bearing acres is 371,000. Land IQ, walnut acreage, age, and removals mapping data were consulted.

The 2026 Walnut O.M. Survey utilized a total of 749 blocks with two sample trees per block. Survey data indicated an average nut set per tree of 796, down 18 percent from the 2025 average of 972. For estimating purposes, 82 trees/acre were utilized.

Estimated nut sets, sizing measurements, average number of trees per acre, and estimated bearing acreage were used in the statistical models.

ON-TREE SAMPLING PROCEDURES

Once a block is randomly selected and permission is granted by the operation for enumerators to enter the block, two trees are randomly selected. An accessible branch is chosen which is 5-15 percent of the total cross-sectional area of the primary limbs and reachable with a twelve-foot ladder.

Measurements are made on the trunk, each primary, and each split leading to and including the accessible branch. The sample tree and accessible branch are marked by a single tag, so that the same trees are sampled the following year if that orchard is selected. On the accessible branch, every nut is counted, and the first of every five nuts is picked for use in size and grade determinations. If available, at least ten nuts are harvested from the accessible branch for this purpose.

The following measurements are made on nuts selected for sizing:

1. Weight of nut in-shell
2. Width of shell at suture
3. Width of shell 90 degrees to suture line (cross-suture)
4. Length of shell
5. Kernel grade

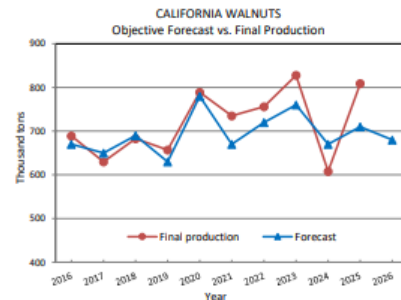
SURVEY HISTORY

The Walnut O.M. Survey began in 1958 to fulfill industry needs for an accurate walnut production forecast prior to harvest. The original sample was chosen proportionally to county and variety of bearing acreage. With each successive year, additions and deletions have been made in the sample to adjust for acreage removed, new bearing acreage, and operations that choose not to participate in the survey.

FIELD SAMPLING PROCEDURES

The 2026 Walnut Objective Measurement (O.M.) Survey was officially conducted from July 20 through August 29, 2026. There were a few samples completed before July 20 for training and scheduling purposes. There were 1,498 trees sampled from 749 orchards. Additional orchards were not sampled for one of the following reasons:

- 1) Orchard had been sprayed.
- 2) Orchard had been recently irrigated and was wet.
- 3) Orchard had been pulled.
- 4) Grower would not grant permission or could not be contacted



Year	Forecast	Final	Percent Difference
	Thousand Tons	Thousand Tons	Forecast/Final
2016	670	689	-3%
2017	650	630	3%
2018	690	683	1%
2019	630	657	-4%
2020	780	789	-1%
2021	670	735	-9%
2022	720	756	-5%
2023	760	828	-8%
2024	670	608	10%
2025	710	809	-12%
2026	680		

Key Take Aways:

- **2026 USDA On-Tree Objective Measurement Crop Estimate: 680,000 Short Tons**
- **2026 Marketable Supply (Kernels and In-Shell) Projected: 633,000 Short Tons ⁽¹⁾**

⁽¹⁾ Included in the projected number above:

- 5% Projected Hulling and Drying Eliminations*
- 2% Projected Processing Loss / Non-Marketable Eliminations*

**(Median average estimate based on a survey of industry handlers)*

For the full online report: [USDA Walnut Estimate](https://www.nass.usda.gov/california-walnuts)



California Walnut Board (2025) Year-End Inventory Report

2025 HARVESTED CROP

809,360 Tons*

**(Second-largest harvested crop)*

2025 FINAL SHIPMENTS AND COMMITMENTS

(Sept. 1, 2025 – Aug. 31, 2026)

894,050 Tons

2025 AVAILABLE MARKETABLE VOLUME

(Sept. 1, 2025 – Aug. 31, 2026)

880,794 Tons

2025 CARRY-IN / UNCOMMITTED INVENTORY

(As of Aug. 31, 2026)

-13,256 Tons*

* Includes pre-orders

For the online link: [Aug. 31 California Walnut Inventory Report](#)

California Walnut Board Year End Shipment Report (2025)

California Walnut Board MONTHLY SHIPMENT REPORT AUGUST 2026 SHIPMENTS



Important Reporting Updates

- Please note that all shipment data is now reported in **short tons**.
- Monthly receipt data will no longer be published in the shipment report.

Inshell (tons)

	<u>2024/25 Marketing Year</u>		<u>2025/26 Marketing Year</u>	
	9/1/2024 to		9/1/2025 to	
	<u>August 2025</u>	<u>8/31/2025</u>	<u>August 2026</u>	<u>8/31/2026</u>
Domestic	74	5,386	255	7,735
Export	<u>1,311</u>	<u>72,374</u>	<u>1,839</u>	<u>146,886</u>
Total	1,385	77,759	2,095	154,621

Kernel (tons)

	<u>2024/25 Marketing Year</u>		<u>2025/26 Marketing Year</u>	
	9/1/2024 to		9/1/2025 to	
	<u>August 2025</u>	<u>8/31/2025</u>	<u>August 2026</u>	<u>8/31/2026</u>
Domestic	6,869	93,585	9,982	102,731
Export	<u>3,690</u>	<u>135,871</u>	<u>7,882</u>	<u>166,051</u>
Total	10,558	229,456	17,864	268,782

August Purchase Commitments

Inshell Conventional: 6,755 tons Inshell Organic: 0 tons
Kernel Conventional: 40,814 tons Kernel Organic: 1,785 tons

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WALNUT SHIPMENTS BY REGION OF DESTINATION

	In-shell (tons)			Kernel (tons)		
	2023/24	2024/25	2025/26	2023/24	2024/25	2025/26
North America	10,272	6,116	8,733	138,008	101,336	111,833
Central & South America	88	0	0	93	31	42
Europe	33,814	29,120	28,227	86,487	75,769	96,060
Middle East/Africa	104,650	23,004	95,782	16,480	6,367	11,150
Asia / Pacific Rim	15,972	19,295	19,819	50,686	42,738	46,048
Other	1,182	224	2,060	5,028	3,215	3,550
GRAND TOTAL	165,977	77,759	154,621	296,690	229,435	268,682
Domestic Total	9,308	5,386	7,735	129,921	93,585	102,726
Export Total	156,670	72,035	146,886	166,862	135,871	165,956

For the full report click here: [August End of 2026 Season Shipment Report](#)



2026 California Walnut - Land IQ Acreage Report

2026 STANDING ACREAGE AS OF JULY 15, 2026

In cooperation with the California Walnut Board

For Release: October 1, 2026



INTRODUCTION

For the last four years, Land IQ has produced an in-year, statewide walnut acreage estimate. This estimate is the result of extensive ground truthing and advanced remote sensing analytics, to differentiate walnut orchards from other tree and annual crops.

The result is highly accurate mapping of walnuts that are a minimum of four years old. Walnut orchards that are less than 4 years old cannot be consistently differentiated from other similarly aged tree crops using remotely sensed methods. The ground truthing data, proportionality of walnuts to other tree crops, and other lines of evidence are used to numerically estimate acreage for orchards that are one to four years old. Both the remotely sensed and numerical estimates are combined for a total statewide acreage estimate.

PRODUCING ACRES

The resulting acreage statistics as of July 15, 2026 are:

2025 Final Bearing Acreage:	380,205
Inter-year adjustments/corrections:	122
2026 Removed Acreage:	6,990
2026 New Bearing Acreage:	7,199
2026 Total Final Bearing Acreage:	380,536
2026 Non-Bearing Acreage Estimate:	7,800
2026 Total Standing Acreage:	388,336

2026 Total Final Bearing Acreage:	380,536
2026 Abandoned Standing Acreage:	9,630
2026 Producing Bearing Acreage:	370,906

SUMMARY TABLES

The tables on the following pages represents standing acreage, removed acreage, and potentially abandoned acreage by County. More detailed acreage by year planted is provided as well.

REMOVALS

Land IQ produced an initial bearing acreage estimate in June, which included a removals analysis as of April 30, 2026. This update provides the additional removals identified between May 1, 2026 and July 15, 2026.

As a result, the 2026 removals estimate was updated:

- 4,665 - Acres removed from the initial estimate
- 2,325 - Acres removed from the final estimate
- 6,990 - Total acres removed in 2026 crop year

The average age of removed orchards in the 2026 crop year was 28 years old.

POTENTIALLY ABANDONED

To fully understand the acres of producing walnuts, Land IQ performed an additional analysis to determine how many acres are in various degrees of abandonment.

- Abandoned - 9,630 acres
Orchards are likely abandoned and assumed to be not producing.
- Stressed - 7,716 acres
Orchards are assumed to be producing at a reduced yield potential.

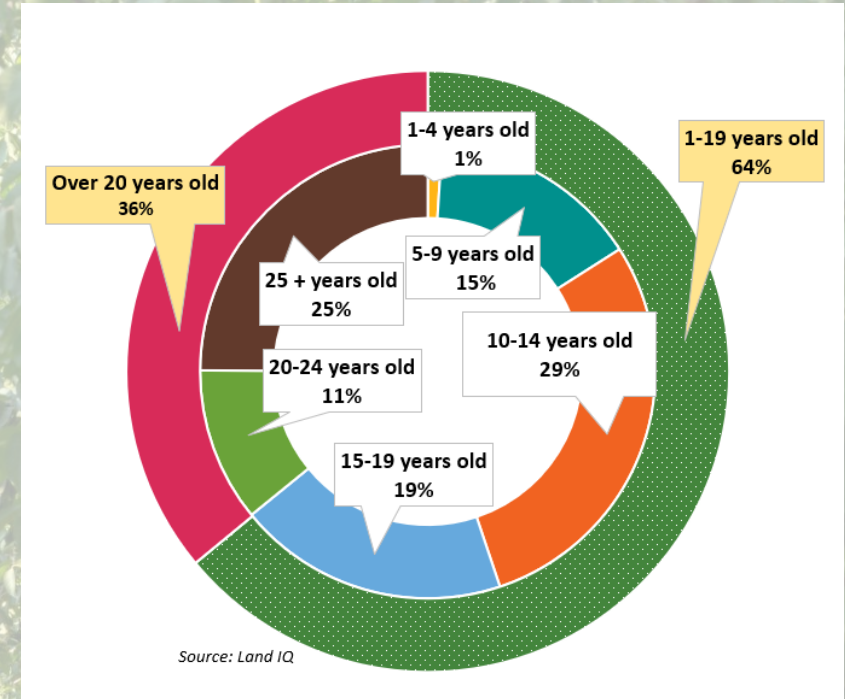
AGE

Each mapping year, Land IQ not only maps all walnut orchards within the state, but also applies a separate analysis to quantify the age of each individual orchard. The accuracy of this estimate is greater than 95% at +/- 1 year. Based on that analysis, Land IQ determined that:

- 1 percent of walnut orchards were 1-4 years old,
- 15 percent were between 5 and 9 years old,
- 29 percent were between 10 and 14 years old,
- 19 percent were between 15 and 19 years old,
- 11 percent were between 20 and 24 years old, and
- 25 percent were over 25 years old.

Key Take Aways:

- Acreage unchanged versus Fall 2025
- Removals equals new acreage coming into production
- 7,800 non-producing acres coming into production over the next four years



For the full version click here: [California Walnut Acreage](#)