

A Quarterly Newsletter published by Chestnut Growers of America, Inc. · chestnutgrowers.org



2018 Annual Market Survey: Reduced Yields, Grown Demand, and Increased Organic Production

By Dr. Mike Gold and Dr. Zhen Cai, Center for Agroforestry, University of Missouri

The Annual Chestnut Market Survey was initiated by the Center for Agroforestry at the University of Missouri and the Chestnut Growers Association in 2009. The aim of this annual survey is to track the growth of the chestnut industry over time and provide chestnut growers with information on the current and potential chestnut market. The 2018 Annual Chestnut Market Survey was sent out to 126 current CGA members. In total, 49 useable surveys were collected with a response rate of 39% (51% in 2017). We appreciate all CGA members' who took the time to complete the 2018 annual survey (the better the response rate, the more accurate the picture of the total CGA marketplace). These are our findings:

Photo above: Chestnut orchards at Harrison's California Chestnuts, Gridley, CA



Meet the Board and Board Meeting Summary

Production Operation

Of the 49 respondents, 96% are chestnut growers, sellers, or value-added producers, and 4% are either new orchard growers or hobby growers. Nineteen percent of respondents are members of chestnut cooperatives, including Chestnut Growers, Inc. (MI), RT 9 Co-op (OH), and Prairie Grove Chestnut Growers (IA).

Chestnut orchards owned by respondents are located across 20 states (Figure 1) including: Michigan (6), Iowa (5), California (3), Florida (3), Missouri (3), North Carolina (3), South Carolina (3), Tennessee (3), Washington (3), Illinois (2), Oregon (2), Virginia (2), and one

each from Georgia, Indiana, Kentucky, Massachusetts, New York, Nebraska, Ohio and Oklahoma. In terms of orchard size (Figure 2), a total of 663 acres of land were reported to be planted in chestnuts, and of these, 239 acres (36%) are in commercial production. Compared to the 2017 survey results, a higher percentage (2%) of our respondents indicated that they have less than 10 acres of chestnuts planted (51%). Approximately 39% of respondents indicated that they had plans to expand their orchards by establishing 157 acres of new chestnut orchards with an estimated 15,000 trees planted (increased from 66 acres of new chestnut orchards and 3,490 trees according to the 2017 survey results).

THE CHESTNUT GROWER

July 2018

About Chestnut Growers of America, Inc.

The purpose of Chestnut Growers of America is to promote chestnuts, to disseminate information to growers of chestnuts, to improve communications between growers within the industry, to support research and breeding work, and generally to further the interests and knowledge of chestnut growers. CGA advocates the delivery of only high-quality chestnuts to the marketplace.

CGA began as the Western Chestnut Growers in 1996 in Oregon where about 30 or so chestnut growers understood the need to join forces to promote chestnuts in the U.S. Eventually they realized that they needed to be a national organization and solicited memberships from every grower in the country, which took the membership to over 100. The name of the organization was changed to Chestnut Growers of America, Inc., and it was granted 501(c)(5) status. Annual meetings take place around the country in an effort to make it possible for a maximum number of people to attend. A newsletter, The Chestnut Grower, is published quarterly and distributed by mail and/or email. We maintain an extensive resource site available only to members containing information helpful in growing and marketing. Visit chestnutgrowers.org for more information.

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Annual Membership Dues

Single membership, \$35; Household membership, \$45; Associate membership, \$50. Members receive The Chestnut Grower quarterly. Emailed newsletters are included. Mailed newsletters are an additional \$5 per year. A \$5 discount applies if payment is postmarked or submitted through the website by Feb. 15. Foreign mailings may include a surcharge to cover the cost of additional postage.

Advertising Rates

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Deadlines

Issue	Deadline	Mailed
Winter	Dec. 10	Jan. 1
Spring	Mar. 10	April 1
Summer	June 10	July 1
Fall	Sept. 10	Oct. 1

Editorial Opinion

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Message from CGA President Roger Blackwell, Chestnut Grower



Thank you all for attending and having a great time at our 2018 Annual Chestnut Growers of America Meeting at Chico and Gridley, California. This newsletter is devoted to a few of the presentations made at this event. More will follow in upcoming issues. I want to thank all the presenters and Luke

Wilson and his family for hosting a very informative chestnut meeting. Growing chestnut trees in California is unique, and it is great to see how well the trees thrive. It was also interesting to see the different orchards of kiwi, walnut, hazelnut, and pistachios in the area.

Highlights of this meeting were touring the Sierra Nevada Brewery, where the owner, Ken Grossman, generously bought dinner for all of us. Another highlight was visiting the Earthworm Soil Factory and hearing from Dave Royal about using natural soil processes in place of conventional methods. An article on the process he has developed will appear in one of our future newsletters.

In this issue, Mike Gold reports on the updated annual survey of chestnut production and markets administered through the Center of Agroforestry at the University of Missouri. Luke Wilson gives a very interesting history of the Wil-Ker-Son Ranch and their growing chestnut operation. In future newsletters we will have articles from other presentations given at the meetings, including the Earthworm Soil Factory, the Sierra Oro Farm Trail, USDA sizes and standards for chestnuts, and an update from Dr. Jeanne Romero-Severson's grant research on "Ancestry Informative DNA Markers for chestnut genetics and identification (AIMS)" project, which CGA is supporting.

Please mark your calendars for next year as we plan to have our next annual meeting in Michigan. The tentative dates for the meeting are June 7, 8, and 9th, 2019.

Remember the purpose of CGA is to promote chestnuts, to disseminate information to growers of chestnuts, to improve communications between growers within the industry, to support research and breeding work, and generally to further the interests and knowledge of Chestnut Growers. Our organization advocates the delivery of only high quality chestnuts to the marketplace. As members, I hope you can help us expand and bring new members to our organization.

Have a wonderful summer and many pounds of chestnuts in the coming harvest season.

Best Regards,

Roger I. Blackwell

How We Did It: Wil-Ker-Son Ranch, Gridley, California

Wil-Ker-Son Ranch was founded in 1978 by Doug Wilson, an ex-surfer from Huntington Beach, California and a Vietnam Vet, who wanted to get out of the city and raise his family off the fruits of the land. After graduating from Chico State in 1973 with a degree in Plant Science, Doug worked as a technical consultant for a local kiwifruit nursery. A few years later while managing a kiwifruit ranch, he started looking for his own piece of property. In partnership with his in-laws, Doug and his wife Linda purchased a 40-acre ranch that was originally planted with peaches.

Over the next few years, Doug started growing his own kiwifruit nursery stock and slowly converted the ranch over to a kiwifruit vineyard. He realized quickly that vertically integrating would be a necessity to survive in the long run, so he started thinking about how he could add as many parts of the production process to his operation as possible. As the kiwi vineyards matured, he added a small packing shed and built a cold storage facility. Pretty soon, he was packing fruit for many of the neighborhood kiwi farms.

The early '80s were a hot time for kiwi. Growers were doing so well that if you had an extra acre or two in your backyard, you could make a good chunk of change.



Doug and his family in their kiwifruit vineyards in the mid-'80s.

by Luke Wilson

Like anything, when everyone in the neighborhood is planting one thing, you can count on people to be doing that in many other places around the world. With the industry in its infancy, not enough people were consuming the fruit that was rapidly coming into production. When supply was at its peak in the early '90s, it was catastrophic for the fledgling industry. In those days, the more acreage you had, the more money you lost due to farming costs and having to pay the packing and cold storage bills. This is when it really paid off to be vertically integrated, which Doug was.

The '90s also brought about another opportunity for Wil-Ker-Son Ranch: sugar plums! Sugar plums are the fresh prunes before they are dried. During this period of time, the Butte and Sutter county areas were flooded with prunes, and the prune market was in the toilet too. Doug saw an opportunity to make lemonade with lemons...and sell the fresh plums to the Asian market through his early kiwifruit contacts. The luck he had with the sugar plums during this period was vital to keeping the ranch above water. As Doug watched all his neighbors ripping out and selling their kiwifruit vineyards, he still believed the market would someday make a rebound. He was able to pick up another 100 acres of productive vines for cheaper than the cost of bare land. At the time, kiwifruit was considered more of a liability. But this turned out to be the best business move he ever made.

The next stroke of luck for Wil-Ker-Son Ranch was in 2000 when a man named David Weed approached Doug to see if he knew anything about farming chestnuts. David had just purchased 30 acres of chestnuts and kiwifruit right down the road

Mark Your Calendars!

For the Chestnut Growers of America 2019 Annual Meeting in East Lansing, Michigan, hosted by Roger Blackwell and Bill Nash

June 7 - 9, 2019

More information coming soon!

right down the road and was looking for someone to manage the operation. He came to Doug because of the kiwi packing operation, with the hopes that he could help him out with the chestnuts. In true Doug Wilson fashion, Doug said, "I don't know



Wil-Ker-Son Ranch is a multi-generational operation: Jake, Doug, and Luke Wilson

anything about it, but we can give it a shot!" Sure enough, he was able to figure out enough about chestnut farming to make David a little money on his investment property. Over the years, a few more chestnut growers were added to the operation, including Paul and Sandy Harrison with 10 acres and Harold Galliett with 8 acres.

In 2010, Doug's lifelong dream came true: his son Luke came back to the farm. A break for college and several years in the city made Luke appreciate the small-town farm living he had grown up with. To top it all off, Doug's other son, Jake, who had successful local financial and agricultural estate planning practice, thought, "What the heck – maybe I can help my big brother Luke out and we can give the old man a break!" Doug's vision of a multigenerational operation had finally come true, and better yet, he could retire!

Planning for the future, the Wilson boys have since grafted over three new varieties of kiwifruit, planted chestnut orchards of their own, returned to growing nursery stock, built their own chestnut packing machine, and Luke even purchased Harold Galliett's chestnut orchard after his passing. The Wilson boys hope to have as much luck in their farming careers as their Dad did – and they're going to need it with the current state of agriculture in California!

A huge thanks to Luke Wilson and his family and crew for hosting the Chestnut Growers of America annual meeting this year, and to the other CGA members nearby who invited us to tour their orchards, Sandy Harrison and Flavio Alfaro, and Manuel Silva.

Continued from Page 1...

Conventional production methods were more frequently used during chestnut orchard management as compared to organic production methods. Conventional methods (i.e. methods using agrochemicals for fertilization and weed/pest control) were used by 72% of the respondents when growing chestnuts. Eighty five percent used inorganic fertilizer, 58% used insecticide, and 82% used herbicide. Twenty six percent of respondents indicated that their chestnuts were produced using organic production methods (an increase of 3% compared to 2017 survey results). Approximately 23% of the organic chestnut producers indicated that their products were certified by USDA.

Harvest and Yield

A total of 363,975 pounds of chestnuts were reported as harvested in 2017. There were a lower percentage of respondents who harvested at least 10,000 pounds of chestnuts in 2017 (21%) compared to 2016 (31%) (Figure 3). A smaller percentage of respondents harvested less than 100 pounds of chestnuts in 2017 (8%) compared to 2016 (17%). Twenty eight percent of respondents indicated that they used a nut wizard to harvest chestnuts and 32% picked up their chestnuts by hand. Forty percent of respondents either used commercial sweeper and harvester, or had customers harvest chestnuts through a U-pick business. Thirty two percent of respondents reported their yields were higher compared to the previous year, 28% reported yields to be the same, and 40% reported lower yields. Respondents also mentioned that maturing trees and



Figure 1. States where respondents' chestnut orchards are located.

the application of fertilizer were factors that helped to increase yields. Bad weather was the main factor that hurt the chestnut yields chestnuts, including frost, cold weather during pollination, drought, and heat.

Marketing

The majority of our respondents (71%) indicated they produced and market chestnuts by themselves (Figure 4). There was a decline of respondents who marketed all their chestnuts through a grower co-op in 2017 (4%) vs. 2016 (30%). [NOTE: Discussion during the CGA meeting, June 2018, indicated that future CGA surveys will include a separate component strictly focused on chestnut cooperatives as this rich source of data was not accurately reported on in the current version of the annual survey]. Approximately 26% of respondents produce and sell value-added chestnut products, compared to 23% in the 2016 survey.

Sales

Twenty five percent of survey respondents indicated an annual gross sales income from chestnuts greater than \$50,000 in 2017 (excluding shipping and delivery) (Figure 5). In the 2016 survey, this figure was 15%. It is interesting to mention that the percentage of respondents who had an annual gross sales less than \$5,000 also increased in 2017 (52% in 2017 vs. 41% in 2016). The majority of respondents (74%) indicated they did not earn any income from value-added chestnut products, 9% earned 1%-25% of their gross annual income from selling value-added products, and 13% indicated that value-added products contributed to more than 50% of their sales.

Market Outlets

Growers sell fresh chestnuts and value added products through different outlets including: marketing cooperatives (prices received ranged from \$1.50 - \$4.50/ lb), farmers markets (\$4.00 - \$6.00/lb),



Figure 2. Sizes of chestnut orchards owned by respondents.

Figure 3. Number of pounds of chestnuts harvested by respondents in 2017.



Figure 4. How respondents marketed their chestnuts in 2017.

Figure 5. Approximate annual gross sale income from chestnuts in 2017 excluding shipping and delivery.

"The Chestnut Industry is growing steadily. Growers are planning to expand their chestnut orchards and plant more chestnut trees. A majority of growers are optimistic about the market and believe chestnut demand exceeds supply."

restaurants/chefs (\$3.50/lb), distributors/ brokers (\$3.50 - \$4.10/lb), health and natural food stores (\$2.25 - \$5.75/ lb), grocery stores (\$3.25 - \$4.10/lb), wholesalers (\$3.50 - \$4.00/lb), online (\$5.50 - \$8.00/lb), and on-farm sales (\$2.00 - \$8.00/lb). The percentages of respondents who marketed their chestnuts through onfarm sales, grocery stores, and wholesalers increased in 2017 (Figure 6). The percentage of respondents who marketed their products at farmers markets was unchanged from 2016.

Demand for Fresh Chestnuts and Valueadded Products

Fifty six percent of respondents indicated an increase in demand for fresh chestnuts in 2017. In terms of the supply and demand in current market, 56% of respondents indicated that demand exceeds supply (8% higher in 2017 compared to 2016), demand is equal to supply (16%), demand is below supply (20%), and don't know (8%).

A question on respondents' perceptions on the demand for value-added chestnut products was also asked; however, only 3 respondents answered this question. One respondent reported a strong demand, but others indicated that they don't know the demand for value-added products. This may suggest that market information on value-added chestnut products is lacking.

Conclusion

The 2018 survey results suggest that the chestnut industry is growing steadily. Growers are planning to expand their chestnut orchards and plant more chestnut trees. A majority of growers are optimistic about the market and believe chestnut demand exceeds supply. The use of organic production methods during chestnut orchard management has increased. Almost half of the growers sold their products on-farm, and fresh chestnuts sold at farmers markets or online were priced higher than other outlets. However, due to bad weather, chestnut yields on average decreased by 42% per respondent in 2017 compared to 2016. Market information on the value-added chestnuts products market is needed.

The authors of this annual report are looking forward to the release of the 2017 National Agricultural Census. The first time that chestnut production and acreage was ever reported was in the 2007 National Agricultural Census. Strong growth occurred during that 5-year period. Expectations are that the 2017 National Agricultural Census results will show even faster growth in the U.S. chestnut industry. Stay tuned!



Figure 6. Market outlets for fresh chestnuts and value-added products (numbers in parenthesis are data from the 2017 survey).

Scenes from the weekend in California...



Luke Wilson welcomes CGA members to Wil-Ker-Son Ranch and gives a tour of their packing and shipping operation.



At the Earthworm Soil Factory, Dave Royal explains how to change your thinking about fertilizer and use natural soil processes instead.



Wil-Ker-Son Ranch foreman Jordan LaRose demonstrates their chestnut sorter.



Digging for the worms that are used in vermicomposting to produce castings inside the Earthworm Soil Factory.



USDA representative Dave Horner presents on the process of potentially developing standards for chestnuts.



Learning about orchard operation at Harrison's California Chestnuts.



Braving the California "dry heat" while touring young orchards at Manuel Silva's.



Luke Wilson explains the irrigation setup in Wil-Ker-Son Ranch chestnut orchards.



Sandy Anagnostakis came with several interesting items for the silent auction, discovered while 'cleaning out the office'.



Roselyn and Weylin Eng with their silent auction winnings, seedlings provided by Bernie Hilgart of Washington Chestnut Co.



An entertaining and informative tour of Sierra Nevada Brewery in Chico, CA.



Dinner with the whole group at Sierra Nevada following the brewery tour.

Meet the Board

Meet the 2018-2019 CGA Board of Directors:







Roger Blackwell President

My current farm, New Era Chestnuts, LLC, is located in Montague, Michigan and is owned by my brother-in-law Doug, his wife Kathy, and my wife Sue and I. Our chestnut orchard is 8 acres on a 35 acre plot of land with 800 chestnut trees, mostly between 12 to 15 years old. All are grafted European/Japanese cultivars; the majority are Colossal with Nevada as the primary pollinators. I am also on the Board of Directors of Chestnut Growers, Inc., a chestnut marketing cooperative started in 2002. The cooperative allows a group of growers to share the same equipment to process, grade, and market chestnuts. Also, not every grower will have the same amount of chestnuts each year, but as a group we can maintain a regular customer base and have a reasonable amount of chestnuts to bring to market each year. Ultimately, we save by working together and in some ways improve the wholesale pricing of chestnuts in Michigan. We are actively growing a commercial chestnut industry in Michigan.

Derek Waltchack Vice President

My full time job is running a commercial real estate firm, Shannon Waltchack, located in Birmingham, Alabama. But in 2013, I began developing Alabama's only commercial chestnut farm. Named after the nearby town, Alpine Farms has 900 chestnut trees with plans to have 2,000 trees in the ground by 2018. I chose to plant Dunstan, Qing, Gideon and Greg Miller's 'extra special' seedlings, as he tries to determine the best cultivar for Alabama. In addition to chestnuts, Alpine Farms grows pumpkins and has 10 beehives. I joined CGA in 2013 and I am particularly interested in encouraging other farmers to start growing chestnut trees in the south. My wife, Rushton, and I have 5 children who range in age from 5 to 13 years old, and we will soon be adopting another.

Jack Kirk Secretary/Treasurer

Around 2005, as I began winding down my career in financial management and strategic planning, I searched for a retirement project that would be both rewarding and entirely different from the corporate world. After lots of research, and developing a detailed business plan, I settled on "Chestnuts". In 2010, I found a wonderful piece of property east of the Blue Ridge Mountains of Virginia. In 2011, we began planting Dunstan seedlings. Hopefully, the nuts will fall in greater quantities in the future and soon I will be able to kiss the corporate world good-bye. As a new kid on the chestnut block, I have many questions about the chestnut business, especially how to balance the evolution of the business, from planting and growing, to harvesting, processing, and storage, to marketing and sales, with limited investment dollars. I have found members of CGA to be helpful and candid with answers. Don't hesitate to email or call me if I can help!

2018 Annual Board Meeting Summary

The Board met at the Annual Meeting Sunday, June 3, 2018. Board meetings are open and members are welcome to attend. A summary of this year's meeting follows.

Change in Board of Directors

Sandy Bole is stepping down from the board after many years of service. We will be looking for someone new to join the board. Derek Waltchack (Vice President) will create a nominating committee in January and will have a list of new potential directors by March 1. Since Sandy is from Oregon, we would like to add a new director from the Northwest region, but we may have to look more broadly. An official vote was held to approve the slate of officers for 2018-2019. The motion was passed.

Sierra Nevada

Ken Grossman, owner/founder of Sierra Nevada Brewery, covered dinner for CGA members at the Brewery restaurant on Saturday. This was an over-the-top and much appreciated gesture. Luke Wilson will handle sending him a thank you from CGA.

Sizes and Standards

We may want to consider forming a committee to handle a possible USDA request about developing sizes and standards for chestnuts. However, this may not work at this time because the chestnut industry is still so small. This was tried about ten years ago, and a consensus could not be reached.

Financial and Membership Report

CGA has about \$25,000 in the bank before annual meeting expenses. There were no unusual expenses this year, just normal liability insurance, corporate registration, etc. We are breaking even and are covering our expenses. We made >\$200 on the silent auction. CGA currently has 91 members, which is down from last year, but many members are new this year. Meeting







Chestnuts became the answer after several years of planning for an interesting and challenging retirement project for our country land. They seemed to be a natural fit for my husband Ben's background in farming and my interest in nutrition. In planting our orchard, we chose to grow our trees organically using sustainable methods. We joined the small Western Chestnut Association shortly after our orchard began production. As growers and researchers around the country met, CGA evolved. It has been extremely satisfying to watch this organization become a viable source of information for all aspects of the chestnut industry.

Greg Miller

I have been a full-time chestnut grower since 1984. At that time, my father's chestnutgrowing hobby had gotten out of control and it became my business. He had planted his first chestnut trees in 1957. Chestnuts do well on our well-drained hilltops of Appalachian Ohio. Since the 1980s, I have evaluated thousands of chestnut seedlings and cultivars representing all species of Castanea, including both pure species and hybrids. In terms of nut quality and adaptation, I've found that the Chinese chestnut is the best species for us. In the early 1990s, my neighbors planted thousands of Chinese chestnut seedlings over about 50 acres. The production from these trees combined with production from my trees was the basis for forming a chestnut marketing cooperative, Route 9 Cooperative, in 2010. The cooperative now sells both culinary chestnuts and my chestnut nursery stock.



Tom Wahl

I was born and raised in Iowa and graduated from Iowa State University in 1984 with a degree in Fisheries and Wildlife Biology. For the next 16 years I worked for various government agencies in wildlife research, wildlife management, forestry, and park management. My wife, Kathy Dice, and I bought a farm in Louisa County in 1986. I quit my day job in January 2001 to work on the farm full time. We raise high value tree crops such as chestnuts, heartnuts, persimmons, and paw paws, and also operate a small tree nursery. I was interested in sustainable agriculture and began working to find a way to make agriculture work in harmony with natural systems. I joined Practical Farmers of Iowa in 1995 and was awarded a SARE grant for my project Comprehensive Integrated Agroforestry.



Luke Wilson

I am a farmer from Gridley, California, a small town at the north end of the Sacramento valley. I manage my family's 200-acre grower/packer/shipper operation. We produce kiwifruit, sugar plums, and chestnuts. We farm approximately 15-20 acres of our own chestnuts, but pack and market for other growers who represent about 30 acres of productive orchards and another 30 acres that will be in production in the next few years. I am excited about the potential for growth in the U.S. chestnut industry, and I look forward to serving on the CGA board and doing my part to help bring chestnuts into the mainstream!

attendance was 34, which is smaller than in the past couple years. We seem to be on target financially. No dues increase is recommended.

Next Annual Meeting

The next annual meeting will be in Michigan, and Roger Blackwell and Bill Nash will host. The meeting will take place in the Michigan State University area. We will be based in East Lansing but will also visit Jackson and Clarksville and tour orchards in the area. The strategy is to move the meeting around the country so that the greatest number of people can attend the meetings. We would like to find an east coast location for the following year. The dates for 2019 will be June 7-9.

AIMS Project

Greg Miller delivered a message from Jeanne Romero-Severson, who is heading up the AIMS project, which CGA is supporting. She is committed to the making this project work and getting useful results. The project will benefit any tree breeding program, but chestnuts are the priority. By next year she wants to have developed a process we can use.

Newsletter

The suggestion was made to develop a short mission statement for CGA that

could go in the masthead on the newsletter and to include more information about the values and purpose of CGA in the newsletter so that anyone who picks it up can tell immediately what we're about.

Marketing of Chestnuts

Since so many questions are received from new growers about marketing, the board will begin developing a 'starter guide' for marketing chestnuts for new growers, either as a themed newsletter or a standalone resource. We are also considering developing a flyer for CGA that can be bundled with nursery trees as a way to grow our membership. COOK'S

Chummus (AKA Chestnut Hummus)

Thanks to Sandy Harrison of Harrison's California Chestnuts for providing this recipe and the delicious batch of Chestnut Hummus that was enjoyed at the Friday night reception at the annual meeting!

INGREDIENTS

12 ounces cooked, peeled, chopped Chestnuts

- 1 clove chopped garlic
- 1/8 cup tahini

1/4 cup fresh lemon juice

3/4 tsp ground cumin

1/3 tsp sea salt

1/8 cup extra virgin olive oil

1/3 cup water

Optional: Dash of cayenne pepper

PREPARATION

Combine chestnuts, garlic, tahini, lemon juice, cumin, sea salt, olive oil, and water in a food processor.

Mix until smooth. Add extra water for desired consistency.

Serve in a bowl. Garnish with thinly sliced carrots, purple onions and whole cilantro leaves. Drizzle extra virgin olive oil over the Chummus, carrots and onion, top with the cilantro. Serve with Rice Crackers or Pita Bread (sliced and warm).

<i>For Sale / Seeking</i> CGA members can post equipment or other items they want to buy or have for sale, free.				
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July 2018

