WSDA International Marketing Program

FY 2008 Annual Report

WSDA
WASHINGTON STATE
DEPARTMENT OF AGRICULTURE

Washington State Department of Agriculture

International Marketing Program
Annual Report

State Fiscal Year 2008

(July 1, 2007 – June 30, 2008)

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A Message from Governor Chris Gregoire

Agriculture is one of Washington's most important industries, and we lead the world in quality. The export of this bounty is critical to the vitality of our state's economy. In 2007, agricultural exports from Washington reached a record $9.29 billion.

This ongoing success results from the tremendous work of growers, processors, exporters, and commodity commissions, as well as key partners such as the Washington State Department of Agriculture (WSDA). Since 1998, the WSDA International Marketing program has assisted Washington companies in exporting more than $600 million of food and agricultural products.

Expanding agricultural sales contributes enormously to a strong economic future for Washington, and my Administration continues to work hard to strengthen our state's food industry. I lead trade missions that include agricultural leaders to develop opportunities that will make Washington more competitive in the global market. I also welcome foreign dignitaries to our state to highlight our quality crops and products and build long-term relationships.

Our strategy must take into consideration both the potential opportunities and the real challenges faced by the agricultural industry. In order to be globally competitive, we must think of Washington not as a state, but as a small nation. Everywhere in the world, Washington agricultural products are known for their quality. We need to capitalize on that international awareness and do what's necessary to get agricultural products through our transportation system and into the homes of the world.

Washington has long been a leader in international trade. Export sales not only bring direct revenue to producers and processors, but also support and stabilize prices for those who market domestically. When the agriculture and food industry prospers, so do our workers and communities. We are optimistic that, through the efforts of our dedicated farm families and food producers, agriculture will continue to be one of the strongest and most productive industries in our state.

Sincerely,

Christine O. Gregoire
Governor

A Message from Acting Director Robert Gore

I am pleased to present the fiscal year 2008 Annual Report of the Washington State Department of Agriculture's (WSDA) International Marketing program. Washington's food and agriculture industry contributed an estimated $42 billion to the state's economy in 2007. Agriculture is the state's largest employer with workers employed on farms and ranches or in processing plants, fruit packing warehouses, fertilizer manufacturers and many other related businesses.

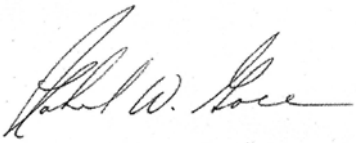
WSDA's International Marketing program helps our food and agricultural companies — large and small — find new markets and opportunities in the increasingly globalized economy. Our efforts particularly benefit rural Washington where food and agriculture are the core private-sector employers. We work in close partnership with companies and industry associations to uncover, engage and make the most of market opportunities worldwide.

The International Marketing program has trade specialists in Kennewick, Yakima, Olympia and Seattle who directly assist individual companies and work with industry organizations. We also have contract representatives in Japan, Taiwan and China who are experts in the export and marketing of our food products in those markets.

This marketing program is part of WSDA's broader efforts to strengthen and nurture Washington's economy. Our goal is to ensure a safe, wholesome and high-quality food supply and to create and foster opportunities that strengthen Washington's farming communities.

This report summarizes the accomplishments of WSDA's International Marketing program and its staff over the past fiscal year (July 2007 – June 2008). After reviewing this report, I hope that you will agree that our state receives a significant return on its investment in the WSDA International Marketing program.

Sincerely,



Robert Gore
Acting Director

Executive Summary

For every $1 spent on WSDA's International Marketing program in FY 2008 , $2.15 was returned to the State General Fund	
WSDA Assisted Sales, FY 2008	$53,107,770
Tax Revenue Generated by Sales	$2,129,622
Program Budget (from State General Fund)	$987,148
Net Income to State General Fund	$1,142,474
Estimated Jobs Supported	791

Washington's vast food industry is a vital element of the state's economy. Approximately 13% of the gross state product comes from the food and agriculture industry. Agriculture has an estimated annual economic impact of $42 billion and supports an estimated 160,000 jobs, mostly in rural communities.

Exports are critical to this industry and to the state of Washington. In 2008 Washington was the third largest exporter of food products in the US. Based on per capita exports, Washington is among the most trade dependent US states.[1]

The Washington State Department of Agriculture's (WSDA) International Marketing program works in partnership with Washington's food and agriculture industry to assist producers and companies to sell their products internationally. To accomplish this, WSDA partners with individual companies, the state's agricultural commodity commissions, the Governor's Office, other state agencies such as CTED, the US Department of Agriculture, the Western US Agricultural Trade Association (WUSATA) and other states.

The program's success is measured by the export sales in which WSDA's assistance is essential, referred to as *assisted sales*. In the 12-month FY 2008 period, **the program reported $53.1 million of assisted sales**. FY 2008 assisted sales generated an estimated $2.13 million in tax revenue[2] to Washington – a profit of $1.14 million after deducting program costs.[3] These sales also supported an estimated 791 jobs.[4]

Since 1998, WSDA has assisted with export sales exceeding $600 million.[5] These sales generated an estimated $24.3 million in state tax revenue.[6] The long-term value of the program's work is not fully reported because higher-value repeat sales usually occur well after a WSDA-led activity.

The International Marketing program works to sustain export sales to mature markets like Japan and Taiwan, while also targeting emerging markets such as Russia and India. The program targets markets and product sectors where Washington producers have competitive advantages and where the resources of other organizations with similar goals can be leveraged. We seek to balance the need for short-term sales results with longer-term market development efforts that will lead to greater sustained sales volumes.

In 2008 the program also assisted in the acquisition of $1.98 million of federal funds[7] on behalf of Washington companies and industry organizations. Program staff leveraged some of these funds ($402,358) to undertake 29 market promotion projects in more than a dozen countries to the benefit of hundreds of Washington exporters.

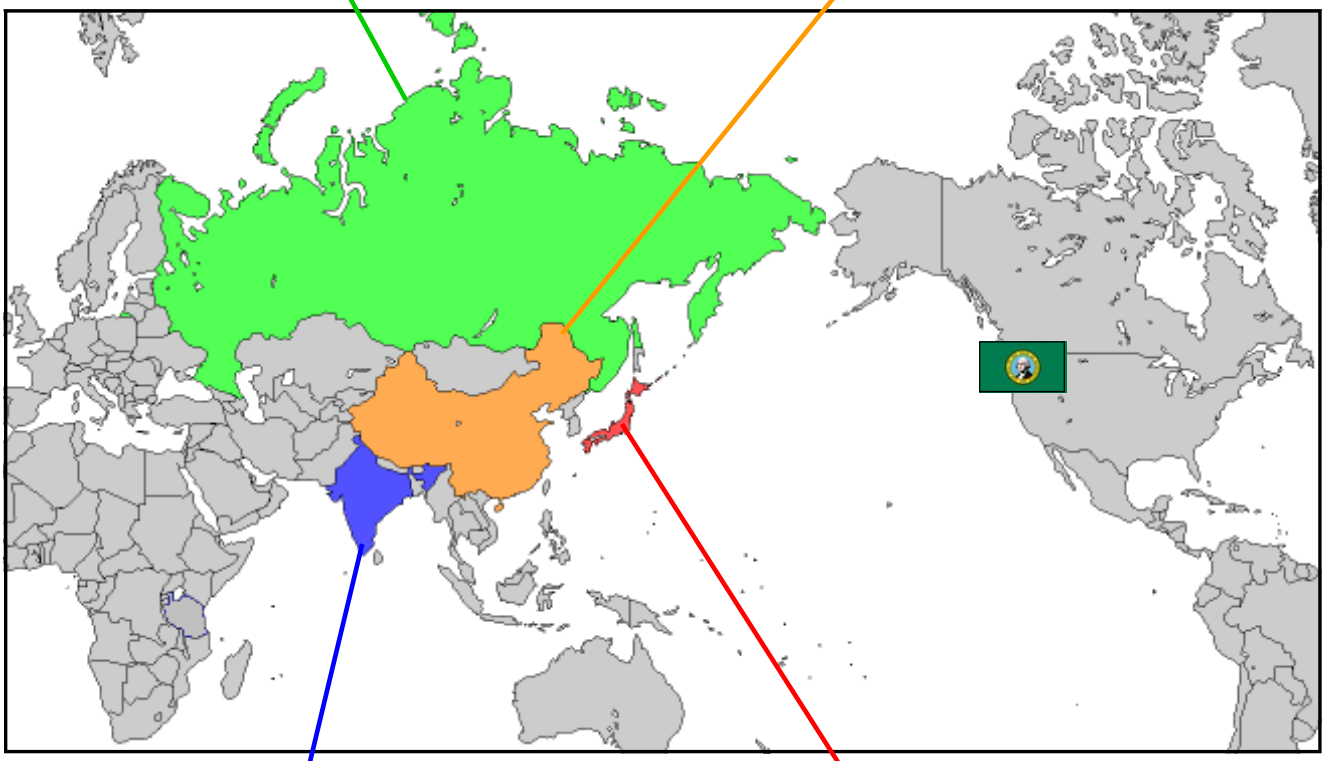
During fiscal year 2008 (July 2007 – June 2008), the International Marketing program consisted of a program manager, program assistant, four trade specialists and contract representatives in Japan, Taiwan and China. Program staff and core operations were supported by a FY 2008 state general fund appropriation of $987,148.

See endnotes on page 23 for details.

Building Economic Vitality Through Exports

RUSSIA — IM-led activities create overseas sales opportunities for Washington companies. The trade show and inbound trade mission formula continues to produce results, this time at World Food Moscow in Russia. During the show and an inbound trade mission, **sales by Washington seafood companies topped $2 million**, ranging from high-value salmon caviar to low-cost hake.

CHINA — For many small companies, WSDA-led inbound trade missions are the only way they can meet with major importers from distant markets. During a mission from China, a Brush Prairie-based honey producer met with a potential new customer in China. The high-end retailer immediately placed several orders, and their products were re-ordered during a WSDA-led retail promotion at the store chain later that fall. Now considering a more strategic focus on the China market, the **family-owned company credits WSDA for providing this market opportunity.**



INDIA — Sometimes IM's success stories take years to come to full bloom. In 2004 IM staff introduced a potential apple buyer to Washington packer/shippers and several shipments soon followed. In the 2007 season, this buyer became the Indian business development manager for one of the Washington packer/shippers. His contacts in India have led to the export of 134 containers to a new importer, **apple sales valued at $2.7 million.**

JAPAN — In September 2007, a WSDA-led trade mission brought onion buyers from Japan to eastern Washington to meet onion exporters. Following repeated food safety scares in Japan involving foreign products, many food processors are re-evaluating sourcing from safer suppliers. This mission resulted in **$2.24 million in sales of onions to Japan**, with more expected to follow.

Continued Sales Success

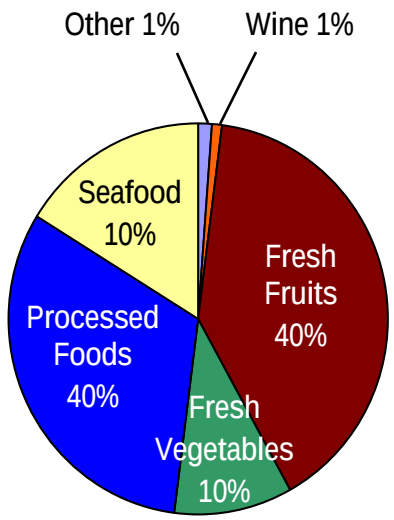
WSDA's export promotion activities are designed to increase income and employment for Washington companies and thereby increase revenue to the state. The International Marketing program measures its performance through *assisted sales*, as reported to us by customers. Assisted sales are those in which WSDA's assistance is essential. Each December and June, staff conducts telephone interviews to collect sales data (which is aggregated to ensure confidentiality). Significant and consistent sales may occur many months or years after a promotion. These larger, longer-term sales have the greatest benefit to the state and the food industry. Because program efforts are concentrated in the early stages of market development, results generally *underestimate* the value of assisted sales and their benefits to the Washington economy.

Because program efforts are concentrated in the early stages of market development, surveys generally underestimate the value of sales and their benefits to Washington's economy.

Export Sales Results

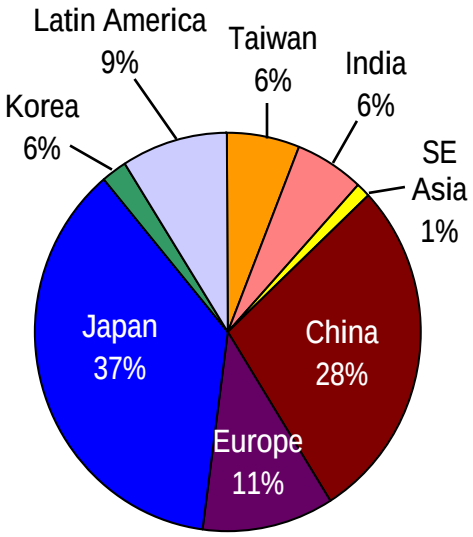
WSDA staff and overseas contract representatives worked with several hundred Washington companies in FY 2008. Of these, 44 reported sales totaling $53.1 million. The median transaction value per company sale was $80,000. Most sales were of fresh fruits, processed foods, fresh vegetables and seafood. More than 70% of sales occurred in markets where WSDA has in-country representatives: Japan, China and Taiwan.

Program Assisted Sales By Product, FY 2008



WSDA primarily assisted export sales of fresh fruits, processed foods, fresh vegetables and seafood. These products comprise the largest export categories for the state.

Program Assisted Sales By Market, FY 2008



More than 70% of WSDA assisted sales occurred in markets where WSDA maintains an in-country contract representative: Japan, China and Taiwan.

Accelerating Emerging Opportunities, Sustaining Mature Markets

This is an overview of program strategies and significant program activities. See Appendix B on page 25 for a complete list of export activities undertaken in FY 2008.

China

Access To China Where There Was None Before — As a prelude to a WSDA-led in-store promotion in Shanghai, an inbound mission included a key buyer from Shanghai's City Shop chain as well as three hypermarket buyers.. City Shop is a stylish high-end grocery store with a unique Western product mix. Its customer base includes upscale Chinese consumers and expatriates. **Of the more than seventy new US products picked up for the promotion, more than twenty were from Washington companies — all new exporters to China.**

Success Stories

A small Washington honey company makes a big impression with a high-end retailer. For many small companies, WSDA-led inbound trade missions are the only way they can meet with major importers from distant markets. During one of these missions from China, a Brush Prairie-based honey producer took advantage of the low-cost opportunity to meet with a potential new customer in China. The high-end retailer immediately placed orders for five of their unique products. These products were included in a WSDA-led retail promotion at the store chain that fall. As a result, several of the products were re-ordered. The family-owned company is now considering a more strategic focus on the China market and credits WSDA for providing this market opportunity.

Europe

Expanding Seafood Sales in Europe — Staff recruited Washington companies to the Brussels Seafood show in April and organized a follow-up inbound mission that brought five importers from five countries to the Pacific Northwest. Ten Washington companies participated in these events. During the Brussels show initial **sales of $2 million** were reported. WSDA-led inbound trade missions are an excellent follow-up to seafood trade shows due to the highly technical nature of seafood. Two months following the seafood inbound mission **an additional $1.18 million in sales** contracts were reported.

India

Growing Fruit Sales to India – Sometimes IM's success stories take years to come to full bloom. In 2004 IM staff introduced a potential apple buyer to Washington packer/shippers. Several shipments soon followed. In the 2007 season, this buyer became the Indian business development manager for one of the Washington packer/shippers. His contacts in India have led to the export of 134 containers of apples to a new importer, **sales valued at $2.7 million**.

Between meetings with Washington fruit suppliers, supermarket buyers from India visited the famous Apple Island Green in Yakima. WSDA-led inbound missions like this have generated millions in export sales in recent years.

International Marketing staff regularly connects Indian fruit importers to the apple industry. The apple buyers are often from parts of India not presently penetrated by our packers/shippers. In FY 2008, **sales from these efforts exceeded $2 million**. India continues to be an important market for

Washington fruit suppliers. Expanded activities are planned in the future, including several inbound buying missions and an outbound mission to a trade show in New Delhi.

These chefs from Guangzhou, China, participated in a WSDA-led Northwest menu promotion at the famous White Swan Hotel in 2006. In 2008 the chefs visited a Washington winery in effort to get more Washington wines on their restaurant menus.

Japan

Extensive Company Assistance in Japan Keeps Trade Flowing — Japan has long been one of Washington's premier trading partners. Because Japan's mature market demands very high quality and has strict health and safety standards, individual company assistance is one of the most valuable services WSDA provides. Unexpected customs, inspection and trade barrier issues can slow or stop the timely movement of Washington food exports to Japan. Domestic and international staff can provide discreet, timely support and access to foreign government officials. Both existing producers (of fresh cherries, fresh asparagus, bakery ingredients, frozen vegetables and wine, for example) and emerging exporters (of supplements, nutraceuticals and natural products) benefited from this form of assistance in FY 2008.

Inbound Missions for Buyers of Food Ingredients Create Sales — Japan's high-income, aging population is attuned to food's functional properties and willing to pay a premium for quality, efficacy and safety. In FY 2008, two groups of food ingredients buyers from Japan met with more than 20 Washington companies. Inbound missions like this are an integral part of WSDA's Japan food ingredients project, which generated **$2.47 million in sales** for Washington companies in FY 2008.

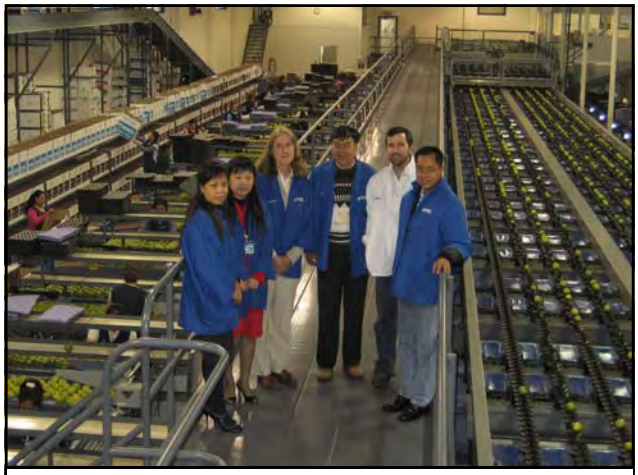
Korea

Foodservice Leads the Way — Korea remains a challenging market for Washington exporters. High tariffs, complex and confusing customs and inspection regimes, and lingering skepticism about foreign foods mean companies must take a long-term approach. Prospects continue to improve as younger Koreans adopt a more global outlook and because of the proposed US-Korea free trade agreement. Program activities have focused on foodservice importers, who are generally able to overcome market entry roadblocks.

In FY 2008, the Seoul Food & Hotel trade show and two inbound trade missions all targeted the Korean market. **Sales from these activities totaled $1.25 million**, with more expected in subsequent years. These efforts help strengthen knowledge of and affinity toward Washington

Success Stories

Malaysia Retail Inbound Mission Brings Candy Company It's First International Sale. In May 2008, seven Malaysian importers traveled to Washington. WSDA set up meetings to introduce them to local sellers of frozen vegetables, honey, produce, dried berries and a variety of processed retail items. One of these firms, a budding Washington candy company, worked diligently to ultimately land their first international sale! This represents a great success for this small company just getting started in exporting. For many small companies, WSDA led inbound trade missions are the only way they can meet with major importers from distant markets.



Retail buyers from Vietnam view packing lines while meeting with fruit suppliers during an inbound mission.

food products in Korea. The weak US dollar and the proposed US-Korea free trade agreement are of particular benefit to Washington food exporters because Korean importers are often price-sensitive.

Mexico and Latin America

Mexican Supermarket Buyers Want Washington Produce — Having uncovered supermarkets in Mexico that wanted to buy produce directly, International Marketing conducted two inbound buying missions for produce buyers from two large regional supermarkets in Mexico. By strengthening ties between Washington produce suppliers and the supermarket buyers, exports of apples, pears, onions and potatoes increased to these supermarkets in Mexico. These efforts resulted in **sales exceeding $1 million**.

Mexican TV Cooking Show Highlights Washington Seafood and Wine — International Marketing organized a Mexican TV cooking show which highlighted the products of three Washington companies. Celebrity chef Lulu Pedraza led on-air demonstrations of wine, shellfish and smoked salmon which will be featured in a 30-minute episode on Washington and our high quality food products.

Southeast Asia

The Southeast Asia region is defined as Singapore, Malaysia, Philippines, Thailand, Indonesia and Vietnam.

Washington's First Inbound Mission From Vietnam Yields Sales — WSDA hosted our first Vietnam retail buying group in December 2007. Participating buyers sought suppliers of fresh fruits, vegetables and processed foods. The group visited packing facilities and learned about new items to expand their product mix including varieties of fresh potatoes and stone fruits. Though the cold chain in Vietnam remains a work in progress, this mission was a solid success with **$195,000 in sales**.

During the outbound trade mission to Indonesia, representatives of Washington agriculture companies mingle with Indonesian buyers and officials at a reception at the US Agricultural Counselor's Residence in Jakarta.

Opening Doors In Indonesia — Traveling to your target market to gain first-hand intelligence and meet with buyers is often the best way to penetrate a market. This can be daunting, especially in distant places like Indonesia. This growing market boasts the fourth largest population in the world and areas of sophistication that appreciate safe, high quality Washington products. In April 2008 staff coordinated an outbound trade mission to Indonesia. Three Washington companies participated and reported **sales of $35,000**.

Connecting With Buyers In The Philippines — WSDA organizes Washington participation at the Food & Hotel Asia trade show in Singapore as well as trade missions to surrounding countries. In FY 2008 five Washington companies and three agents who handle Washington products participated in the show. Two joined the subsequent trade mission to the Philippines. Companies reported **$160,000 in sales and one new distributorship**, with additional sales anticipated for processed vegetables and seafood.

A WSDA grant co-sponsored the Washington Cattlemen's Association exhibit at the Food Taipei show. This popular exhibit included beef sampling and VIP meeting space for importers to meet with meat exporters.

Taiwan

Inbound Missions And Trade Shows Continue To Bring Sales — Inbound missions from Taiwan to Washington continue to produce strong sales results. Missions in May and June 2008 resulted in **sales of over $300,000** for Washington honey, fruit and vegetable companies. WSDA also sponsored three Washington companies to exhibit at Food Taipei 2008. WSDA's in-country contractor assisted in setting meetings and worked closely with companies at the show. These meetings and other activities resulted in an additional **$250,000 in sales**. WSDA also provided financial support to the Washington Cattlemen's Association exhibit at the show.

Planting The Seeds Of Organic Growth In Taiwan – Thanks in part to International Marketing's efforts, Washington's organic and natural foods industry has found great success in health-conscious Taiwan. A fourteen-member mission from Taiwan traveled here following the Natural Foods Expo-West Show. While in Washington, delegates connected with exporters of a wide variety of products including produce, meat, dried fruit, processed snack foods, wine, organic oils and specialty chocolate. WSDA's Organic Program provided information on the organic system and certification processes. One of the participants, the editor-in-chief of Taiwan's *Organic Lifestyle* magazine, will highlight Washington organic food and beverages in an upcoming issue.

Trade Policy and Trade Barrier Assistance

WSDA's Trade Access Assistance — WSDA staff and overseas contractors assist companies on a wide variety of trade access issues. Smaller companies generally lack the on-the-ground contacts to facilitate resolution of these time-sensitive issues. To name just a few, we:

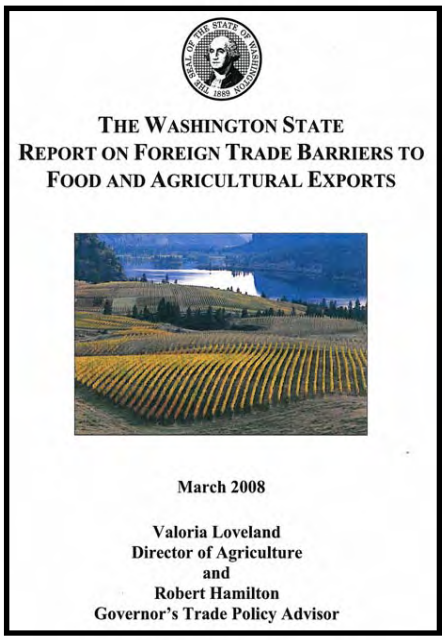
- Worked with a Washington onion company on issues in Australia,
- Assisted a processed food company on export documentation for China, and
- Helped resolve customs issues for frozen sweet corn to China.

Staff partnered with the Governor's Office, Northwest Fruit Exporters (NFE) and the Washington Apple Commission to work to resolve the anti-dumping issue between Washington and Mexico.

WSDA Acting Director Bob Gore meets with Bowen Chen, head of inspection and quarantine in Zhuhai, China.

New Logistics Center in Zhuhai Smooths Product Entry Into China — In June 2008, IM staff and WSDA Acting Director Bob Gore joined agriculture directors from across the western United States for a groundbreaking foreign trade mission to China. Representatives from eleven states traveled to Zhuhai, near Hong Kong in southern China, to open an 800,000 square-foot logistics center to ensure the quality of agricultural products bound for America and to celebrate a reciprocal arrangement and a parallel logistics center in the United States.

These centers will help reduce the barriers to expanding international trade. This new trading arrangement is an exciting development for our growers who continue to find export opportunities absolutely critical to maintaining profitability.


THE WASHINGTON STATE
REPORT ON FOREIGN TRADE BARRIERS TO
FOOD AND AGRICULTURAL EXPORTS

March 2008

Valoria Loveland
Director of Agriculture
and
Robert Hamilton
Governor's Trade Policy Advisor

The Washington State Report on Foreign Trade Barriers to Food and Agricultural Exports summarizes over 290 measures maintained by 42 countries to prevent or limit the import of agricultural products.

Report Outlines Trade Barriers — In March 2008, the Governor's Advisor on Trade Policy wrote, with WSDA International Marketing program input, the annual Washington State Report on Foreign Trade Barriers to Food and Agricultural Exports. The report was submitted to the US Department of Agriculture, the US Trade Representative and Washington's congressional delegation. USDA officials have been particularly appreciative of the report, which helps them better communicate the challenges facing Washington exporters to federal trade officials.

WSDA Grant Programs

WSDA Awards 15 Market Promotion And Trade Barrier Grants — WSDA administers $250,000 in matching grant funds to enhance access to markets that are growth areas for industry. The goal of the program is to expose buyers to Washington's diverse agricultural products. In FY 2008, 15 grants were awarded. Projects included promotion of fruit, nursery, vegetables, beef, beer and wine, as well as support for farmers markets.

Central America Chipping And Table Stock Potato Technical And Marketing Program — In February 2008, through a grant from USDA's Federal State Marketing Improvement Program (FSMIP), IM partnered with the potato commissions of Washington, Oregon and Idaho to conduct fresh and chipping potato technical seminars in Central America. Over 100 importers, distributors, retail managers, foodservice managers and snack processors attended the seminars, which provided technical information on variety characteristics, uses,

Success Stories

Using WSDA and USDA grant funding, the Washington Asparagus Commission (WAC) and Skagit Potato Growers exhibited at the Washington Produce Pavilion at the Produce Marketing Association trade show, the largest produce show in the US. Alan Schreiber, Executive Director of the Washington Asparagus Commission said, "The WAC's participation is one of the clear times when I felt that both the WSDA's and WAC's time, money and efforts were very well spent."

shipping, handling, and maintaining quality from export to the end user. The program effectively demonstrated the high quality and benefits of Northwest potato varieties. By carrying product higher in quality than local varieties, importers will reduce losses and increase returns. This translates to increased demand for imports. Full implementation of the Central American Free Trade Agreement (CAFTA) is expected to position Northwest potatoes more favorably in Central America. Sales and growth are expected to increase — particularly during the months of December through March when local product is not available.

Chef Billy Marinelli, president of Marinelli Shellfish (right) and WSDA's Bill Dallas demonstrate how to match Washington wine with seafood at the Food Taipei trade show. The safety, quality and value of Washington food products was also presented to the audience at the demonstration kitchen in the US pavilion.

Farewell To Jon Sonen, Our Colleague And Friend

For nearly nine years, Jon Sonen served Washington agriculture as International Trade Specialist in Yakima. Jon brought optimism, a contagious enthusiasm and an entrepreneurial spirit to his work. Jon collaborated with people from all parts of the world, navigated cross-cultural issues and embraced the nuances of global business with good humor and ease.

Jon organized many promotions, led trade visits to Washington and abroad, and provided personalized service to a host of Washington companies. His cultural understanding and fluent Spanish were particularly valuable in his work in Mexico and Latin America. His extensive knowledge of the fruit industry and of the markets he covered helped bring many millions of dollars in sales to Washington exporters.

Most importantly, Jon was a generous friend and wonderful colleague. We know Jon will find great success in all his future endeavors and we wish him only the best.

Success Stories

A Wenatchee-based fruit exporter writes:

Dear Jon,

I wanted to thank you for all your work on behalf of [our company], our growers and our industry over the years. A significant portion of the success our cherry growers have enjoyed and the success our apple growers have experienced these last two years is the result of government officials working to lower trade barriers and build market demand. You and your program have played an important role in this process.

You don't have the benefit of seeing the direct financial benefit your work produces for our growers. I do and it is fun. [We] will ship over 60% of our apples overseas this year…a company record and one that dates back to 1928. These are the strongest apple returns we have ever had.

As a relatively small fish in the pond, we appreciate you bringing many tours of buyers and officials to [our company].

Thanks again on behalf of everyone at [our company].

How WSDA Helps Washington Companies Expand Food and Agricultural Exports

WSDA's International Marketing program works with Washington's food and agriculture industry to increase export sales by:

- Matching sellers with qualified buyers
- Removing market access barriers to open or expand a market
- Partnering on Governor's trade missions to promote Washington agriculture and advocate for open markets

International Marketing partners with Washington's food and agriculture industry to help producers and companies sell their products internationally.

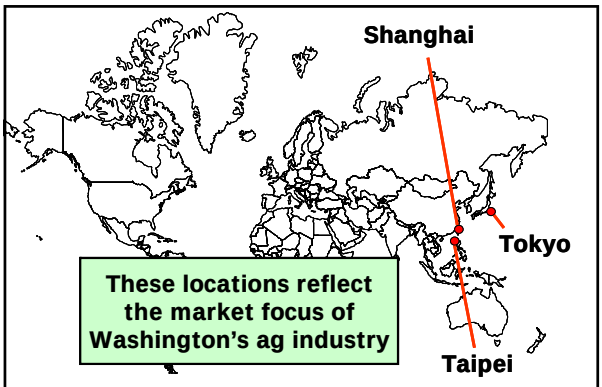
As recommended by industry, the program targets markets where Washington producers have competitive advantages and where the resources of other organizations with similar goals can be leveraged. To maximize the effectiveness of scarce resources, the program focuses on industries and product sectors:

- That are vital to the state's economy
- Where the program can have an impact
- Where industry needs and requests our assistance

The International Marketing program seeks to balance the need for short-term sales results with longer-term market development efforts that will lead to larger, enduring sales. Staff works closely with partners such as the state's agricultural commodity commissions, industry organizations, other states, the US Department of Agriculture (USDA) and the Western US Agricultural Trade Association (WUSATA).

Key Services We Provide

- Introducing Washington companies to qualified foreign buyers through trade missions, trade shows, trade leads, in-store promotions and showcases of Washington products.
- Connecting companies to USDA's export assistance resources, including Agricultural Trade Offices worldwide, Market Access Program (MAP) funding and other export finance and marketing resources.
- Providing timely market intelligence, introductions to local buyers and government officials and other in-country assistance when Washington sellers travel to export markets.
- Assisting companies with the many detailed documents required for export transactions that are unique to agriculture. For food products, the importing country often requires special documents regarding the origin, safety or content of the product.
- Organizing export readiness consultations for agricultural firms that are new to exporting or looking to enter a new export market.
- Resolving trade barrier and phytosanitary issues, in partnership with the Governor's Office, commodity commissions, industry organizations, federal agencies and foreign officials.
- Maintaining a searchable database of Washington food and agricultural suppliers to help connect buyers and sellers, as pictured. Website address: *www.impact.wsu.edu/WAsuppliers/*



WSDA maintains three overseas contractors whose locations reflect the market focus of Washington's ag industry and where industry has asked for help.

Program Resources

Trade Specialists — Program staff is balanced between eastern and western Washington. Trade specialists in Yakima and Kennewick cover eastern Washington, while trade specialists in Olympia and Seattle are responsible for western Washington. By maintaining staff near growing centers and companies, the program remains responsive to the unique needs and challenges facing agricultural exporters.

On the recommendation of companies, each staff member is responsible for specific industry sectors. This allows them to build relationships with industry leaders and companies and focus on industry-specific trade issues. To further tailor program services, trade specialists are also assigned to specific country or regional markets as well as key USDA trade programs.

International Contract Representatives — WSDA has in-country contract representatives in Japan, Taiwan and China. These representatives work closely with domestic staff to assist Washington food and agriculture companies in their respective markets. They do so by:

- Arranging and accompanying Washington companies on in-country appointments
- Bringing buyers from their country markets to Washington on inbound buying missions
- Hosting outbound sales missions of Washington companies in their country markets
- Organizing trade shows and seminars
- Assisting with shipments that encounter problems after arriving at their destination
- Providing market intelligence and timely information on changes to import procedures

To maximize promotional resources, each international representative may also contract separately with Washington agricultural commodity commissions or associations. For example, WSDA's contractor in Japan contracts with the Washington State Fruit Commission to conduct cherry promotions in Japan. These connections provide strong, ongoing industry links and are practical mechanisms for cross-selling Washington products abroad.

Program Funding

Primary funding for the International Marketing program comes from the state general fund. WSDA also pursues funds to perform promotional activities and provide enhanced services to Washington companies. In FY 2008, WSDA leveraged $1.98 million in federal funds (as detailed below) to help Washington companies and associations promote food and agricultural exports.

State General Fund — In FY 2008 the program budget was $987,148. These funds support WSDA staff, overseas representatives and basic program costs. The Washington constitution forbids lending state funds for the direct benefit of private companies and individuals, so WSDA relies on federal funds to conduct most of its promotional activities.

MAP Generic Program — In 2008 WSDA administered $402,358 in USDA Market Access Program (MAP) project funding. These funds provide for extensive promotional activities and some overseas travel. These funds can not be used for WSDA staff salaries or benefits. WSDA partners with other Western states on a variety of export promotion activities.

MAP Branded Program — Because of WSDA's participation in WUSATA, Washington companies are eligible for USDA funds to help offset some of their export marketing costs. In 2008, 34 Washington companies were allocated $1.53 million in USDA Branded Program funds. These funds can be used to defray export expenses including overseas trade show fees, international travel, foreign language labeling costs and other promotional expenses.

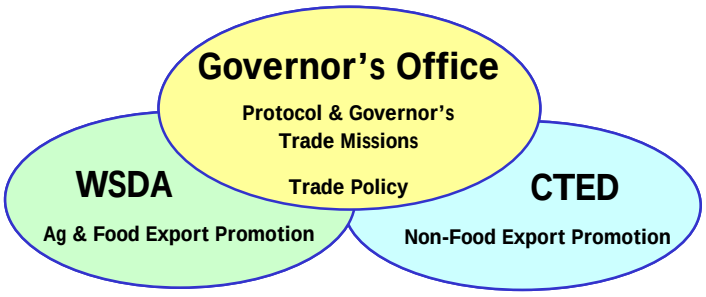
Other USDA Funds — The USDA's Federal-State Marketing Improvement Program (FSMIP) provides grants to states to improve the marketing and distribution of agricultural products. WSDA's International Marketing staff supported $55,740 in FSMIP funding awarded to the Washington Asparagus Commission.

Washington's International Trade Team

WSDA's International Marketing program is a key part of Washington's international trade team. As illustrated below, each partner has different responsibilities with occasional overlap. The Governor's Office is responsible for protocol, trade policy and trade missions with the support of WSDA and CTED, the Department of Community, Trade and Economic Development. CTED undertakes, among other responsibilities, all non-food related export promotion.

WSDA's International Marketing program is part of an integrated international system for food export promotion. Food and ag promotion is distinct from promotion of other exports because:

- Food products are perishable
- Complex transport and inspection systems are required
- Ag markets can be highly volatile
- Ag exports are essential to the state's economy



WSDA's International Marketing program is a key component of the state's global trade team.

Key Stakeholders

WSDA works closely with the food and agriculture industry to identify priorities and targets. Key stakeholders include:

International Marketing Program Advisory Committee — Consisting of food exporters and industry representatives, the Advisory Committee makes certain that the International Marketing program addresses industry marketing needs and emerging opportunities. Committee members bring intimate market and industry knowledge. They help clarify market trends, guide promotional efforts and recommend the location of contract representatives. Their advice ensures that limited resources are efficiently and effectively utilized. See Appendix C for a list of Advisory Committee members.

Agricultural Commodity Commissions — The state's 25 agricultural commodity commissions are self-funded state agencies. Generally speaking, WSDA funds multi-product promotions while commissions fund commodity-specific education and promotional activities. Many commissions manage complex export promotion programs and work closely with WSDA. The Apple, Fruit, Potato and Wine Commissions are particularly active in joint promotional efforts. Program staff represents the department at the Asparagus, Red Raspberry, Fruit, Apple, Potato and Beer Commissions. See Appendix D for a complete list of Washington agricultural commodity commis-

WSDA's International Marketing program works with a variety of industry and government partners to leverage resources and provide synergy to the program's activities.

sions.

WUSATA — The Western United States Agricultural Trade Association, known as WUSATA, administers the USDA's Market Access Program for western US states. This program annually distributes federal funds for both branded and generic agricultural export promotions and activities. Washington companies may use Branded Program funds to support their individual marketing efforts and participate in WSDA-led Generic Program promotions such as trade shows, buying missions and menu promotions.

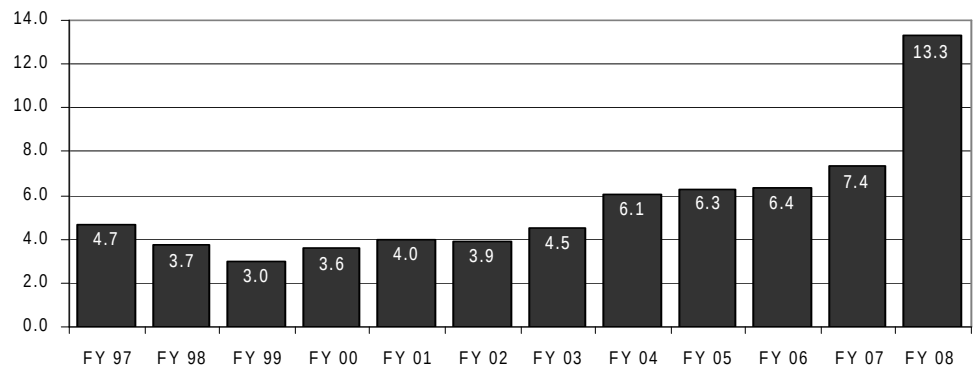
United States Department of Agriculture — The USDA's Foreign Agricultural Service has many export promotion programs and resources. Their extensive network of overseas offices expands WSDA's access to markets, and their export promotion grant programs are available to Washington companies. WSDA's International Marketing program leads many promotions funded by USDA.

Washington: Dependent on Trade

Food and Agriculture Exports Tops $13.3 Billion in FY 2008

Washington is one of the most trade dependent states in the nation. In FY 2008 (July 2007 – June 2008) Washington exported $13.36 billion in food and agriculture products. This is the third largest total in the US. This record amount represented a 204% increase over FY 2007 exports.

Many products which are exported via Washington's dynamic port system do not originate here. While not grown or produced locally, these exports nonetheless benefit the economy in terms of transportation and port jobs. These "pass-through" products (mostly corn and soybeans) have historically represented roughly 40% of all Washington food and agricultural exports. In FY 2008, however, corn and soybeans represented nearly 50% ($6.51 billion) of Washington ag exports. When pass-through products are excluded, exports of food products that originated in Washington were $6.50 billion in FY 2008.



Washington state's total food and agricultural exports grew to a record $13.3 billion in FY 2008. Note: these figures, based on the state fiscal year not the calendar year, are the latest available at publication.

Throughout FY 2008 food commodity prices remained high and production steady. Surging demand for biofuels sparked shortages and sharply higher prices in many food markets. World growth began to slow due to record high energy prices, higher inflation, and the spillover of the US and European real-estate crises into world financial markets. The sharply weaker dollar partially offset the impact of slower growth and higher inflation.

Exports by Product

Many Washington export product categories experienced double-digit growth in FY 2008. Wheat, fresh fruits, processed foods and seafood topped the list. Wheat prices hit record highs in early 2008 due to strong global demand. If wheat is excluded, the growth of Washington's top ten product categories falls from 43% to 27%.

Dairy exports of condensed and evaporated milk (which include both whole milk powder and nonfat dry milk) nearly doubled. Meat and pork exports also doubled, continuing the recovery from market closures earlier this decade. Frozen French fries and fresh cherries also saw strong growth, as did hay and coffee.

Exports by Market

Japan remained the largest single buyer of Washington food and agriculture exports, followed by Canada, the Philippines, Indonesia and Mexico. Among the top ten country markets only two were outside of Asia: Canada (#2) and Mexico (#5).

Japan purchased 30% of Washington's ag exports. Most of the 54% increase was due to tight markets and higher prices for wheat. Excluding wheat, exports to Japan were up 18.5%, led by increases in hay, frozen French fries and seafood. Though the Japanese population began contracting in 2005, demand for Washington products should remain solid. Japanese buyers are returning to safe, high quality Washington products following a series of high-profile food safety scares.

Top Ten Food and Agricultural Exports of Washington Origin, FY 2008

Rank	Description	US$ millions	Change FY07 to FY 08
1	Wheat and Meslin	1,983	+ 89%
2	Edible Fruit and Nuts	821	+ 10%
3	Processed Food	639	+ 31%
4	Fish and Seafood	638	+ 8%
5	Dairy, Eggs, Honey	483	+ 98%
6	Forage Products	319	+ 16%
7	Vegetables	241	+ 15%
8	Processed Meat and Fish	234	+ 17%
9	Meat	230	+ 107%
10	Spices, Coffee, Tea	151	+ 56%

Canada remained Washington's second largest export market, thanks in part to the weak US dollar, a solid Canadian economy and the ongoing impact of NAFTA. Sales of apples, cherries, seafood, frozen French fries and coffee were strong. Though geography and long-standing relationships benefit Washington exporters, Canada can be a challenging export market due to similar growing seasons and strict market entry barriers such a bilingual labeling requirements.

Top Ten Buyers of Food and Agricultural Products of Washington Origin, FY 2008

Rank	Country	US$ millions	Change FY07 to FY 08
1	Japan	1,528	+ 54%
2	Canada	1,038	+ 18%
3	Philippines	374	+ 45%
4	Indonesia	358	+ 92%
5	Mexico	320	+ 39%
6	Korea	288	+ 55%
7	Taiwan	264	+ 25%
8	China	245	+ 46%
9	Thailand	155	+ 43%
10	Hong Kong	144	+ 49%

The Philippines and Indonesia were the third and fourth largest buyers of Washington ag exports, respectively. Both are very large importers of Washington wheat, which represent about 70% of Washington's total exports there. Other key products include powdered milk, meat and frozen French fries.

Washington's fifth largest export buyer, Mexico, is the largest buyer of Washington apples. Economic liberalization, retail consolidation and NAFTA have helped make Mexico a more accessible and profitable market. Other key exports include pears, dairy products and frozen French fries.

Exports to Korea, Taiwan, China, Thailand and Hong Kong all grew by one quarter to one half in FY 2008.

The Challenges Ahead

Washington agriculture faces fierce competition at home and abroad. Rising input costs, farm consolidation, trade barriers which limit market access and changing consumer preferences are just a few of the forces at work. With these challenges in mind, WSDA's International Marketing program strives to help producers find profitable new opportunities to sell their products and be more competitive in the international marketplace.

Program Challenges and Opportunities

Budget Concerns, Both Federal and State — Several years ago, federal export promotion funding for Washington's largest product categories (seafood and produce) was all but eliminated. The result was lower assisted sales in FY 2006 for Washington companies due to the cancellation of several proven promotions. As the economy weakens, the risk of lost federal and state funding grows. Funding declines would damage the economic vitality of one of the state's most vibrant and essential industries.

Market Challenges and Opportunities

Worldwide Economic Slowdown — By some measures Washington agriculture may be in the best financial shape it's been in many years. But there are dark storm clouds on the horizon. The current economic climate is much less buoyant than a year ago. Falling home prices, rising unemployment and tightening credit in the US may lead the world into recession. Slowing demand is expected to bring lower energy costs for producers while at the same time bringing lower commodity prices.

Exchange Rates: A Short-Term Strength? — Underlying the historic peak in food commodity prices in 2008 was the general depreciation of the US dollar. Its lower value meant that Washington exports were more competitive vis-à-vis other exports. It also meant that importers with stronger currencies had more buying power. The increased demand for US food commodities from importers resulted in larger US exports and contributed to higher prices in dollar terms. It appears that the dollar is strengthening, which may make US exports less appealing.

Fluctuating Energy Prices — Higher energy costs result in higher production costs, lower margins and lower profitability for Washington farmers, processors and exporters alike. The dollar's depreciation also contributed to higher dollar prices for crude oil. At the same time, farmer demand for fertilizer, fuels, and pesticides rose sharply, raising agricultural production costs and adding to the high price of food commodities.

Critics contend that using food to produce energy could raise global food prices, potentially offsetting many of biofuels environmental benefits.

Biofuels — Use of biofuels—fuels, like ethanol and biodiesel, made from plant material—had been modest for several decades, but in recent years production rose rapidly in the US and Europe. Output increased in response to concerns about rising petroleum prices, the availability of oil supplies, and the environmental impacts of fossil fuels. This growth in worldwide biofuels demand has contributed to higher prices for biofuel feedstocks. The US, Brazil, and the European Union are the largest manufacturers of biofuels. Biofuel

Washington's vibrant port system has made it an ideal gateway for exports, particularly to Asia.

feedstocks like grains, sugarcane, soybeans, and rapeseed now have new uses beyond food and feed.

Short-term Fads vs. Long-term Trends — Consumer demands add pressure on producers. In a slowing economy, how durable is the current interest in sustainable agriculture? Many producers have invested heavily in costly organic production and certification, which generally yields higher prices. High gas and food prices appear to be nibbling away at the high growth rates long enjoyed by organic and natural food makers and sellers.

Slowing Growth in Emerging Markets — Many emerging Asian markets, including China and India, are well on their way to becoming classic growth markets for food. This growth model has been the dominant push behind US agriculture's export success over the past 50 years. In most developing economies, improving diets is the number one priority of consumers. As incomes rise, an increasing share of every new dollar of income is spent on better food. This typically means buying more processed foods and substituting meat products for cereal-based subsistence foods. Slowing growth hampers this progress and may slow food exports from Washington to these markets.

Demand in China has already spurred increases in food imports. Washington value-added producers will certainly find opportunities to export to these growing markets, especially in China. Conversely, Washington commodity producers will face mounting competition from countries with lower production costs.

Due to government restrictions, India's food imports have been modest and trade tends to be limited to selected commodities. Recent trade liberalization measures in India, however, will ultimately benefit US food exporters.

Globalization and Retail Consolidation — Consolidation within the food industry is reducing the number of exporters that have headquarters in Washington. WSDA undertakes promotions that help small- and medium-sized Washington producers access distribution through multinational retailers.

Notes and References

1 Among US states, Washington consistently has one of the highest levels of exports per capita. For example in 2005, Washington exported $6,035 per person, second only to Vermont. Source: FTDWebMaster, Foreign Trade Division, U.S. Census Bureau, Washington, D.C. 20233 via StateMaster <http://www.statemaster.com/graph/tra_exp_tot_ove_val_percap-totals-overall-value-per-capita>

2 According to the Washington State Department of Revenue, the total state sales tax on food and agricultural exports is 4.01% (2004). Therefore export sales of $53,107,770 generated $2,129,622 in general fund tax revenue.

3 The net income of $1,142,474 to the state is calculated by subtracting the program budget ($987,148) from the tax revenue generated ($2,129,622).

4 According to the United States Department of Agriculture, $1 million of food and agricultural sales represents 14.9 jobs (2002). Therefore export sales of $53,107,770 supported an estimated 791 jobs in Washington.

5 The International Marketing program has tracked assisted sales since FY 1998. Including FY 2008, cumulative assisted sales were $607,076,908.

6 According to the Washington State Department of Revenue, the total state sales tax on food and agricultural exports is 4.01% (2004). Therefore assisted sales from FY 1998 to FY 2008 of $607,076,908 generated $24,343,784 in general fund tax revenue.

7 Washington companies were allotted $1,527,150 in the MAP Branded Program. WSDA utilized $402,358 in WUSATA Generic Program promotional funds and FSMIP grant funds valued at $55,740.

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Appendix A — Program Contacts

Washington State Department of Agriculture
International Marketing Program
PO Box 42560, Olympia, WA 98504-2560
Email: ag-export@agr.wa.gov

Website: http://agr.wa.gov/Marketing Suppliers Database: www.impact.wsu.edu/wasuppliers

For updated contact information, please phone Leisa Schumaker at 360-902-1926

Administration	
Janet LEISTER, Managing Director Ph: 360-902-1931 Fax: 360-902-2089 Mobile: 360-561-4521 Email: jleister@agr.wa.gov	Leisa SCHUMAKER, Program Assistant Ph: 360-902-1926 Fax: 360-902-2089 Mobile: 360-481-7141 Email: lschumaker@agr.wa.gov

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Overseas Contract Representatives	
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China Mr. LI Haidong Room 2301, Building No. 4, No. 588 Jiao Zhou Road, Shanghai 200040 China Ph: (011-86-21) 5228-0659 Fax: (011-86-21) 6217-9038 Cell Phone: 86-137-0186-9509 Email: lhaidong@163.net	

Appendix B — Export Promotion Activities

Trade Shows, Product Showcases, In-Store Promotions

World Food Moscow, September 2007

Southeast Asia Product Showcase, September 2007

Taiwan Chefs' Competition, October 2007

Korea Menu Seminar and Promotion, October 2007

China Fisheries and Seafood Expo, November 2007

Food and Hotel China Show and In-Store Retail Promotion Meetings, November 2007

Mexican TV Cooking Show, December 2007

Boston Seafood Show, February 2008

Natural Products Expo West show, March 2008

Taste Washington, Seattle, April 2008

Food and Hotel Asia/Singapore Trade Show, April 2008

European Seafood Exposition, Brussels, April 2008

Washington Wine Experience, May 2008

Seoul Food and Hotel Trade Show, May 2008

Taiwan Food Taipei Trade Show, June 2008

Outbound Sales Missions, Inbound Buyers Missions

Russian Seafood Inbound Mission, July 2007

Korea Foodservice Inbound Mission, July 2007

South America Food Ingredients Outbound Mission, August 2007

Japan Onion Inbound Mission, September 2007

Japan Food Ingredients Inbound Mission, September 2007

Mexico Supermarket Buyers Inbound Mission, September 2007

Southeast Asia Outbound Mission, September 2007

China Produce Inbound Mission, October 2007

India Apple Buyers Inbound Mission, October 2007

Korea Foodservice Inbound Mission, November 2007

Southeast Asia Foodservice Inbound Mission, November 2007

China Retail Inbound Mission, December 2007

Vietnam Fresh Retail Inbound Mission, December 2007

Taiwan Organic and Natural Foods Inbound Mission, March 2008

Korea Foodservice Inbound Mission, April 2008

Indonesia Outbound Mission, April 2008

Philippines Outbound Mission, April 2008

Guangzhou and Beijing Retail Inbound Mission, April 2008

Shanghai Retail Inbound Mission, May 2008

Malaysia Retail Inbound Mission, May 2008

Taiwan Retail Inbound Mission, May 2008

South China Foodservice Inbound Mission, May 2008

Zhuhai (China) Outbound Mission, June 2008

Taiwan Foodservice Inbound Mission, June 2008

Government Delegations

Governor's Trade Mission to Mexico, July 2007

Argentina Government Ag Delegation, November 2007

New Zealand Minister of Trade visit, November 2007

Oregon Department of Agriculture to discuss potential Market Access Program (MAP) partnerships, August 2007

Agricultural Commodity Commissions

IM staff participates in a variety of agricultural commission meetings and events, including those for the Fruit, Asparagus, Red Raspberry, Potato, Apple and Beer Commissions.

Trade Barrier Assistance

Met with Dr. Javier Trujillo (Mexico) and the Washington potato and fruit industry to discuss exports to Mexico; follow-up from Governor's previous trade mission to Mexico, August 2007

Partnered with Governor's Office, Northwest Fruit Exporters (NFE) and the Washington Apple Commission to work to resolve the anti-dumping issue between Washington and Mexico, September 2007

Worked with a Washington onion company on the Australian onion issue, October 2007

Assisted with export documentation for China, October 2007

Assisted a Washington company to resolve customs issues for frozen sweet corn to Qingdao (China), January 2008

Pursued cold storage issues addressed during previous Governor's trade mission to China, January 2008

Organized Central America Chipping and Table Stock Potato Technical Seminars, February 2008

Helped resolve a documentation & labeling issue for Washington processed food company in Asia, April 2008

Supported Washington company on processed food issues in Hong Kong and China, June 2008

Coordinated Trade Leads

Disseminated 60+ trade leads during FY 2007

Presentations, Publications, Export Seminars

Contributed to article on the Washington processed foods industry for inclusion in the Smartmap Expo show guide, July 2007

Organized media tour which culminated in *China Women's Day* and *Cosmopolitan* magazine articles on Washington food and wine, July 2007

Joined panel discussion on trade and transportation issues during the Pasco Ag Show, January 2008

Helped author the article "Produce Without Borders: Washington State Growers Produce Some Darned Tasty Fruits and Veggies. Just Ask Canadians.", April 2008

Outreach to Stakeholders

Eastern Washington Outreach Meetings, July 2007

NAAMO Conference, July 2007

Washington Council on International Trade (WCIT) Senators' conference, July 2007

World Trade Club Port Tour, September 2007

USPB Dehy Industry Meeting, October 2007

Vietnam Seminar & Board Meeting, October 2007

Met with CTED's new Korea trade representative, November 2007

WSDA Organic Program Advisory Committee meeting in Yakima, November 2007

IM overseas representatives meet with 30+ Washington companies statewide, April 2008

Co-sponsored export seminar in Spokane: "Exporting in the Flat World", April 2008

Pear Bureau Northwest Meeting, May 2008

Appendix C — Advisory Committee Members

Ron Anderson, Chairman

Anderson Hay & Grain Co., Inc.

Bill Bryant, Chairman

Bryant Christie Inc.

Susan Hannah, Vice President, Marketing

Pacific Valley Foods

Michael McGinley, Export Sales

Ocean Beauty Seafoods

Robin Pollard, Executive Director

Washington Wine Commission

Mark Powers, Vice President

Northwest Horticultural Council

BJ Thurlby, Executive Director

Washington State Fruit Commission

Chris Voigt, Executive Director

Washington State Potato Commission

Charles Witzleben, President

SUPERVALU International

Appendix D — Washington Agricultural Commodity Commissions

Alfalfa Seed Commission (RCW 15.65)
Rod Christensen, Executive Director
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Ken Severn, Interim President
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Asparagus Commission (RCW 15.65)
Alan Schreiber, Administrator
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Barley Commission (RCW 15.66)
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Beef Commission (RCW 16.67)
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Beer Commission (RCW 15.89)
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Canola Commission (RCW 15.65)
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Cranberry Commission (RCW 15.65)
Karla Kelley, Chair
1151 Gould Rd, Grayland, WA 98547
Phone: (360) 532-4527
E-mail: sandhillfarms@comcast.net

Dairy Products Commission (RCW 15.44)
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Dry Pea & Lentil Commission (RCW 15.65)
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Fruit Commission (RCW 15.28)
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Fryer Commission (RCW 15.66)
Sue Broderick, Administrator
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Hop Commission (RCW 15.65)
Ann George, Administrator
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Puget Sound Salmon Commission (RCW 15.65)
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Red Raspberry Commission (RCW 15.65)
Henry Bierlink, Executive Director
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Seed Potato Commission (RCW 15.66)
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Strawberry Commission (RCW 15.65)
Walter Swenson, Manager
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Tree Fruit Research Commission (RCW 15.26)
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Turfgrass Seed Commission (RCW 15.65)
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