



# WSDA International Marketing Program FY 2011 Annual Report



Building Economic Vitality Through Exports



**Washington State Department of Agriculture**  
International Marketing Program  
Annual Report

State Fiscal Year 2011

(July 1, 2010 – June 30, 2011)



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## A Message from Governor Chris Gregoire

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Agriculture is one of Washington's most important industries, and the export of this bounty is critical to the vitality of our state's economy. **In 2010, agricultural exports from Washington reached \$12.9 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 nearly \$860 million of food and agricultural products.

**My Administration continues to work hard to strengthen our state's food industry.** Expanding agricultural sales contributes enormously to a strong economic future for Washington. 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.

**In order to be globally competitive, we must think of Washington not as a state, but as a small nation.** Our strategy must take into consideration both the potential opportunities and the real challenges faced by the agricultural industry. 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,

A handwritten signature in cursive script that reads "Chris Gregoire". The ink is dark and the signature is fluid and legible.

Chris Gregoire  
Governor





## A Message from Director Dan Newhouse

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I am pleased to present the fiscal year 2011 Annual Report of the Washington State Department of Agriculture's (WSDA) International Marketing program. **WSDA's International Marketing program helps our food and agricultural companies — large and small — find new markets and opportunities in the increasingly globalized economy.** 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 Eastern and Western Washington 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 a critical 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. Our efforts particularly benefit rural Washington where food and agriculture are the core private-sector employers.

**Washington's food and agriculture industry contributed an estimated \$40 billion to the state's economy in 2009.** 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.

**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,

A handwritten signature in black ink that reads "Dan Newhouse". The signature is written in a cursive, flowing style.

Dan Newhouse  
Director

# Executive Summary

Washington’s vast food industry is a vital element of the state’s economy. About 12% of the gross state product comes from the food and agriculture industry. Each year, agriculture contributes an estimated \$40 billion to the state’s economy and supports an estimated 160,000 jobs, mostly in rural communities.

Exports are critical to this industry and to the state of Washington. In 2010, Washington was the third largest exporter of food products among US states. Based on per capita exports, Washington is among the most trade dependent US states.<sup>1</sup>

WSDA’s International Marketing program works in partnership with Washington’s food and agriculture industry to help producers and companies sell their products internationally. 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.

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 2011 period, the program reported \$94.3 million of assisted sales.**

FY 2011 assisted sales generated an estimated \$3.78 million in tax revenue to Washington<sup>2</sup> – \$2.79 million more than the program’s state-funded budget.<sup>3</sup> **These sales also supported an estimated 754 jobs.**<sup>4</sup>

The long-term value of the program’s work is not fully reported because higher-value repeat sales often occur well after a WSDA-led activity. 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.<sup>5</sup>

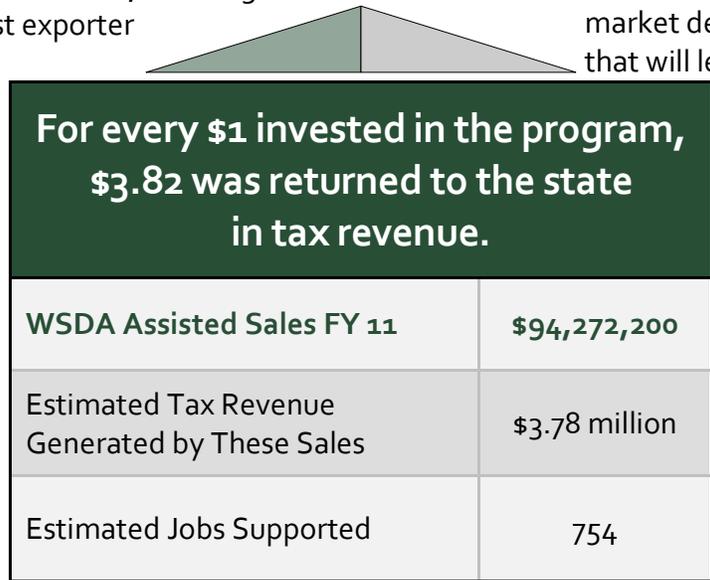
During fiscal year 2011 (July 2010 – June 2011), the International Marketing program consisted of a program manager, three trade specialists and contract representatives in Japan, Taiwan and China. Program staff and core operations

were supported by an FY 2011 state general fund appropriation of \$990,000.

**For more information, please contact:**

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See endnotes on page 22 for details.



## Exceptional Export 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 does this by helping Washington companies become successful exporters. Performance is measured through *assisted sales*, as reported to us by customers.

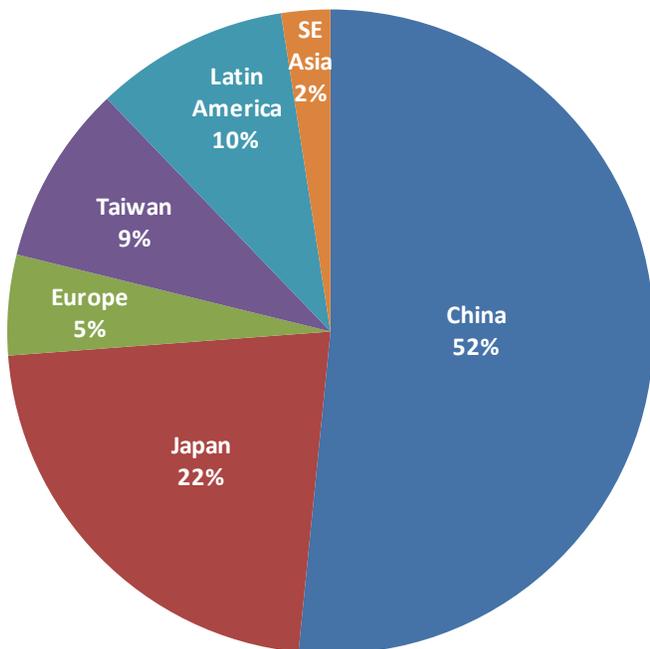
Assisted sales are those in which WSDA's assistance was essential to the successful transaction. Each December and June, staff collects sales data, which is aggregated to ensure confidentiality. The program only includes assisted sales that have resulted from projects that occurred within the previous 18 months. Significant and consistent sales may occur many months or years after a WSDA-led activity.

WSDA staff and overseas representatives worked with several hundred Washington companies in FY 2011. Of these, 72 reported sales totaling \$94.3 million. The average transaction value per assisted sale was \$265,618.

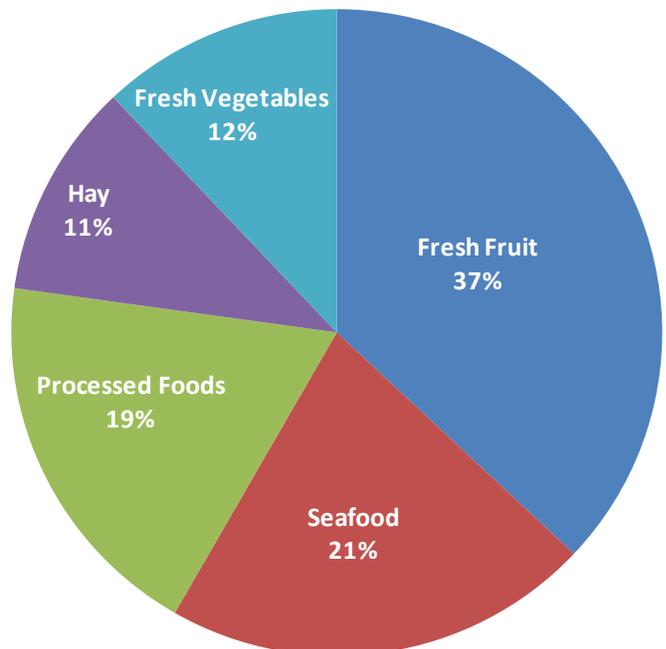
Most sales were of fresh fruits, processed foods, seafood and fresh vegetables. Eighty three percent of sales occurred in markets where WSDA has in-country representatives: Japan, China and Taiwan.

Because program efforts are concentrated in the early stages of market development, our sales results generally *underestimate* the value of the program's work and the benefits to the Washington economy. Larger, longer-term sales have the greatest benefit to the state and the food industry.

ASSISTED SALES BY MARKET  
(FY 2011)



ASSISTED SALES BY PRODUCT  
(FY 2011)



## Government Trade Missions

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An important component of the International Marketing Program is to organize and assist in government-led trade missions.

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### DIRECTOR LED MISSION TO SOUTHEAST ASIA

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In October 2011 Director Dan Newhouse co-  
led a trade mission to Singapore, Vietnam,  
Hong Kong and Macau. International Market-  
ing was awarded a USDA Specialty Crop grant  
to fund this first of three Director-led mis-  
sions. The Washington State Potato Commission, the  
Oregon Potato Commission and the Oregon  
Department of Agriculture joined Director  
Newhouse.

The delegates met with key importers and  
toured wholesale and retail markets. Expert  
potato Chef Leif Benson demonstrated differ-  
ent techniques for cooking fresh potatoes to  
chefs and consumers in each of the four mar-  
kets.

Vietnam is a new market for fresh potatoes.  
The first direct retail shipment was made during

this mission for demonstrations at two METRO  
supermarkets. Our growers had the unique op-  
portunity to tell consumers directly about how  
their families produce the best, quality potatoes  
to send to Vietnam. The delegation's recommen-  
dation is to continue to develop the Vietnam  
market where they see significant potential for  
growth.

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### FOREIGN OFFICIALS SEE PACIFIC NORTHWEST AGRICULTURE

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An agricultural orientation tour sponsored by  
the U.S. Department of Agriculture in Septem-  
ber 2011 highlighted the diversity of Wash-  
ington and Oregon agriculture to 21 trade repre-  
sentatives of foreign embassies located in Wash-  
ington D.C. The delegation, including agricul-  
tural minister-counselors attaches and econo-  
mists represented long-time Washington state  
trade partners such as Mexico, China and Japan.  
It also included representatives from emerging  
markets such as Israel, Malaysia and Morocco.

International Marketing did the groundwork for  
scheduling visits to farms, processors and agri-  
cultural groups, coordinating with counterparts  
in Oregon. In Washington, the delegation toured  
both sides of the Cascades in a three-day tour,  
visiting Smith & Morrison Farms, Sakuma Broth-  
ers Farms, Taylor Shellfish, Bryant Christie, Inc.,  
the Northwest Horticultural Council, Ocean  
Beauty Seafoods, Rainier Fruit Co., Tree Top and  
Windy Point Vineyards.

These programs provide foreign officials an op-  
portunity to meet Washington producers. It is  
valuable for trade policy and market access deci-  
sion-makers to meet our growers, shippers and  
food processors to see first-hand the safe, quality  
products our state has to offer their countries'  
consumers.



Katsuhiro Saka of Japan (left) thanks Steve Sakuma (right) of Sakuma Brothers for hosting the USDA tour at his fruit operation.

## Sustaining Mature Markets, Accelerating Emerging Opportunities

**This is an overview of significant program activities.** For a complete list of export activities in FY 2011 see Appendix B on page 24.

### CHINA

**China Office Introduces Washington Products and Companies to New Buyers:** This year, the WSDA China representative has introduced a wide variety of Washington export companies and products to buyers in the market. Over the past 5 years assisted sales to China have grown 74%, from \$18.9 million to \$32.9 million FY 2011.

Li Haidong, WSDA's representative in Shanghai, plays a pivotal role in gaining access to networks of buyers for specific product offerings from our state. Mr. Li accompanies WA export executives to meetings that he has arranged, creating sale opportunities for their companies in the market. Mr. Li also arranges meetings for executives on Governor's and Directors trade missions. He introduces WA products through his own efforts as well. Examples of both include executive meetings for

consideration of apple or cherry imports, hay, seafood, wine, food or baking ingredients, hops, snack or confection items, canned goods and frozen vegetables.

**WSDA China team efforts open new markets and new opportunities:** Over the past fiscal year, 36 different Washington exporters have benefitted from participating in trade shows or trade missions managed by IM staff related to China. The WSDA China representative has worked with an additional 24 companies in the last year. Altogether, more than 60 companies have worked with the IM program directly related to China. Many of these companies have benefitted from the teamwork between the US based staff and China representative in climbing the ladder to export success. Taken together, this team effort produced \$53 million in assisted export sales.

**China Food Ingredients Show sees ongoing sales top \$2.6 million:** The Chinese market for food ingredients is enormous with \$265.3 billion in sales by over 26,000 food processing companies. The increasing appetite for Western-style food products is boosting demand and sales. Approximately 40,000 buyers, and 1,250 exhibitors (211 were non-Chinese), attended the 20th International Exhibition for Food Ingredients in China in 2010. Four Washington companies from Spokane, Bellingham, Bellevue and Yakima joined the growing U.S. pavilion for the Shanghai event. Their range of products varied from dried and frozen fruits to cheese powders and nutraceuticals. To add value to the trip, a trade mission to Beijing provided additional buyer meetings for show participants. Ongoing sales topped \$2.6 million, generated from 117 total buyer meetings between the two cities for these exporters from Washington.



China Food Ingredients: Project manager, Bill Dallas with Peter and Michael Gilmartin of Commercial Creamery, Spokane, WA

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## INDIA & MIDDLE EAST

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**India Retail Buyers Visit Washington:** In September 2010 a delegation of retail buyers from India visited Seattle to meet with processed food exporters. The delegation included four importers from India who are focused on importing high quality products to India. During their visit they were able to meet with Washington exporters of processed food items. The group was very interested in the items presented and export sales should result in the near future from this event. Five Washington companies new to the India market participated in this event.

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## JAPAN

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**Japan Onion Mission Continues to Achieve Results:** WSDA continues to working to increase the export of fresh onions from Washington to Japan. During the fall of 2010 a group of onion buyers from Japan visited eastern WA onion packing facilities. Through follow-up efforts after the event by Scott Hitchman, WSDA's contractor in Japan, the companies dramatically increased their purchases from previous years. In FY11 over \$9.0



Buyers from Japan admire onion storage in eastern Washington

million in onion sales to Japan resulted from these efforts.

**Japan Food Safety Delegation visits Washington Companies:** WSDA in conjunction with the Oregon Department of Agriculture hosted a group of Japanese professionals interested in learning about Washington exporters' food safety standards and protocols. One of the members of the group represented the largest retail chain in Japan. As a result of this activity the Japanese retailer plans on increasing their purchases of fresh cherries and blueberries by 50 percent in the coming year.

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## MEXICO & LATIN AMERICA

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**Produce Mission from Latin America and Mexico provide new opportunities for Washington Exporters:** During September 2010, WSDA organized a delegation of top produce buyers from Mexico and Latin America to meet with suppliers of fresh produce. These buyers represented some of the largest retail and import companies in all of Mexico and Latin America. Latin America continues to grow as a market for fresh produce products from Washington State. Four Washington exporters who participated in this activity are new to the markets of Latin America and Mexico.

**Mexico Foodservice Promotions introduce new products and companies to the Mexico market:** WSDA continues to introduce new companies and products to the growing foodservice sector in Mexico. Through two activities, an inbound mission and a foodservice promotion in Mexico, WSDA was able to introduce 12 companies to foodservice buyers and industry members in Mexico. As a result of these activities, products from Washington State are now being featured on the menus of the top restaurants in Mexico.

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## EUROPE

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**Washington companies participated in four major EU tradeshow events in FY 11:** SIAL is Europe's largest food show and is held in Paris alternating with Cologne, Germany. World Food Moscow is the largest Russian food show including fruit, retail and seafood pavilions. The Conxemar Seafood show is the second largest such show in the EU held in Vigo, Spain. Overall completed sales of \$2.15 million were reported by all participants.

**Spain Seafood Show Opens the door to the EU Market:** Three companies in total participated with combined sales contracts at the show of \$850,000 and \$1.7 million projected in the next twelve months. The companies had very different products, from red caviar to pacific cod to anchovies to wild salmon. Over 45 serious importer companies were met, and eight product types were introduced. It was helpful to the companies that they had Spanish speaking representation as part of their companies along with the interpreters. There is also potential for eight new distributorships. The show was focused on visiting buyers only and was very international with a local emphasis. Spain is the highest per capita consumer of seafood in Europe at 45kg/person, so the local market is very active along with the strong international interest.



Buyers look at Washington seafood in Vigo, Spain

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## SOUTHEAST ASIA

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In Southeast Asia, WSDA targets both emerging and more established markets in the countries of Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam. While each market has some unique characteristics, we have seen success in targeting the retail, food service and ingredient sectors within the region.

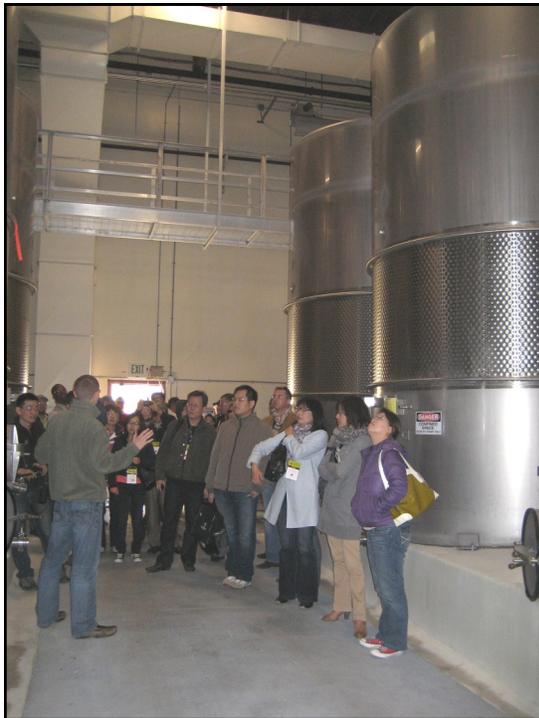


A consumer looks through Washington potatoes in a Vietnamese supermarket

**Foodservice Buyers from Malaysia and Singapore Meet With 17 Washington Companies:** We targeted buyers and importers focusing on foodservice applications in Malaysia and Singapore by bringing buyers to the state as part of an inbound mission in September 2010. Seventeen Washington companies met with the buyers. Products of interest included seafood, seasonings, wine, produce, gourmet products, meats and processed vegetables. Buyers were also able to attend the Food Services of America vendor show to interact with additional companies and observe new products and food service trends.

**Ingredient Buyers from Indonesia and the Philippines Come to Washington:** As populations within the Southeast Asia region expand, so does local food manufacturing, creating opportunities for imported food ingredients. We targeted this sector in December

2010 by hosting an inbound buying mission comprised of six delegates from Indonesia and the Philippines. Delegates were importers/distributors of food manufacturing and foodservice ingredients with emphasis on fruit, vegetable, pulses, dairy, natural and other ingredients. Nine Washington companies met with the delegates and trade leads distributed to four additional companies.



Asian buyers tour Washington winery

In September 2010, we connected three Taiwan importer/distributor companies with eight Washington supplier companies through a series of meetings focused on high value and direct market strategies. Products of interest included organic and gourmet products, smoked salmon, wines, retail items, and fruit ingredients.

IM has successfully worked with our in-market partners to leverage our funding and facilitate buyer-supplier contacts leading to expanded sales for our companies. Prior to the Produce Marketing Association national trade show held in October 2010, we worked with the Taiwan USDA office to coordinate meetings in Washington for nine Taiwan produce buyers representing seven companies. The buyers covered their own travel costs to visit Yakima, Prosser and Seattle where they visited fruit and vegetable production facilities and made one-on-one contacts with suppliers. Eleven Washington companies showcased conventional and organic produce items including apples, stone fruits, onions, potatoes and blueberries. Additional companies and commission representatives had the opportunity to interface with the buyers during the show.

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## TAIWAN

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**Inbound Buying Missions Connect 19 Washington Companies with New Opportunities:** Taiwan is a fairly developed market, but due to their high standard of living, and health conscious population, niche opportunities exist that are well matched with Washington state products. Key targets within the country are foodservice ingredients, high-value products and fruits and vegetables. In addition to direct assistance provided to companies through Chris Lin, our Washington State Trade Representative, in FY 2011, we hosted two inbound missions creating opportunities.

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## TRADE BARRIER ASSISTANCE

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IM works with individual companies to overcome documentation issues and other non-tariff trade barriers. IM also works on broader issues such as Free Trade Agreements and punitive tariffs. As an example, in May 2009, Mexico announced higher tariffs on \$2.4 billion worth of imports from the US in retaliation for the US government's decision to stop allowing some Mexican trucks on American highways. These tariffs cost Washington State millions of dollars in lost sales. WSDA worked closely with industry to help resolve this national dispute and the tariffs were lifted in July 2011.

# How WSDA Helps Washington Companies Start and Expand Their Food & Agricultural Exports

As recommended by industry, the International Marketing 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:

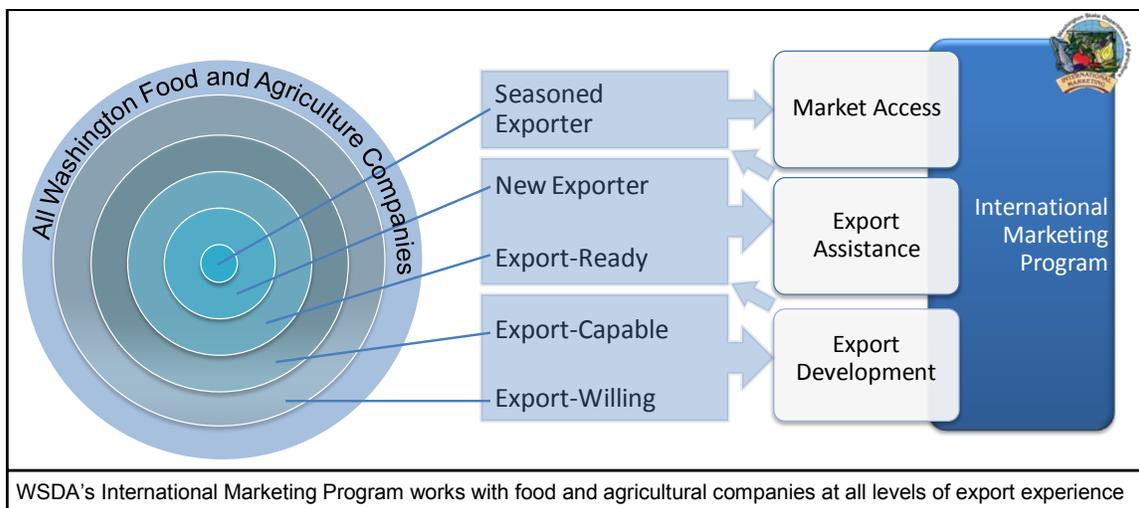
- That are vital to the state's economy
- Where the program can have an impact
- Where industry needs and requests our assistance

WSDA's International Marketing Program provides Washington food and agricultural companies different types of export support depending upon the individual company's experience. Within the 39,500 farms and nearly 3,000 food processing companies in Washington, there are varying degrees of export knowledge and experience. The goal is to provide the appropriate level of assistance to encourage as many Washington food and agricultural companies to participate in exporting as possible.

## EXPORT DEVELOPMENT

WSDA staff members are working with partners throughout the state in order to enhance the Export Development component of IM's offering. The International Marketing Program identified a need within the food and agricultural industry for helping export interested and capable companies become export-ready companies. The Export Development portion of the IM program is responsible for doing this. IM is working with partners such as WSU's IMPACT Center, Small Business Development Centers (SBDC), trade organizations and our state's colleges and universities in order to prepare companies that are considering entering the world of exporting. Key services provided to export-willing and export capable companies are:

- Organizing export readiness consultations for agricultural firms
- Identifying appropriate export training and enrolling companies
- Helping companies determine which markets are appropriate for their products and financial situation.



WSDA's International Marketing Program works with food and agricultural companies at all levels of export experience

## EXPORT ASSISTANCE

WSDA's International Marketing program works with Washington's export-ready and newly exporting companies to increase export sales by:

- Introducing Washington companies to qualified foreign buyers through trade missions, trade shows, trade leads, in-store promotions and showcases of Washington products.
- 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 and/or content of the product.
- 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.
- Maintaining a searchable database of Washington food and agricultural suppliers to help connect buyers and sellers.  
Website address: [www.impact.wsu.edu/WASuppliers/](http://www.impact.wsu.edu/WASuppliers/)

## MARKET ACCESS

International Marketing also assists companies that have considerable export experience. While these companies may not need export training or buyer introductions, they will have ongoing needs for technical assistance and trade barrier mitigation. This is done in the form of promotion, advocacy and outreach efforts and includes:

- Partnering on Governor's trade missions to promote Washington agriculture and advocate for open markets
- Resolving trade barrier and phytosanitary issues, in partnership with the Governor's Office, commodity commissions, industry organizations, federal agencies and foreign officials.

## PROGRAM RESOURCES

**Trade Specialists** — Program staff is balanced between eastern and western Washington. Trade specialists in Yakima and Tri-Cities cover eastern Washington, while trade specialists in Olympia 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 indus-



try 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 foreign buyers 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
- Assisting with Governor’s trade missions

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.

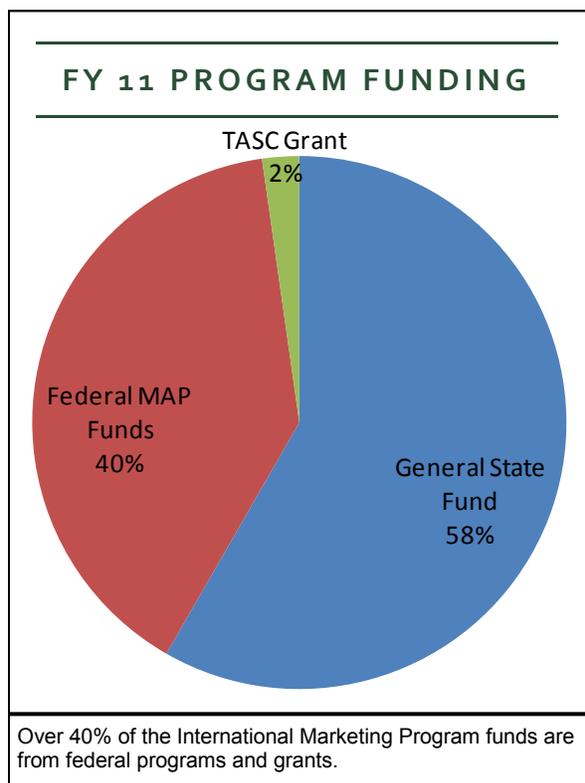
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### PROGRAM FUNDING

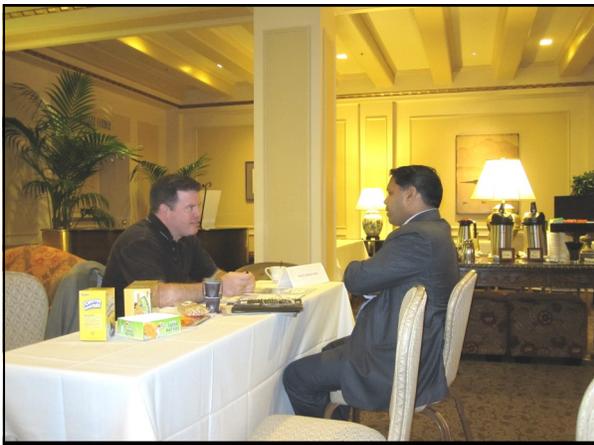
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Primary funding for the International Marketing program comes from the state general fund. WSDA also pursues funds to perform promotional activities and provide enhanced services to Washington companies. In CY 2011, WSDA leveraged over \$700,000 in federal funds to help Washington companies and associations promote food and agricultural exports.

**State General Fund —** In FY 2011 the program budget was \$990,000. International Marketing’s funding by the state supports WSDA staff salaries and benefits. It also pays for our overseas representatives. The next biggest share of the budget goes to domestic office space, supplies, phone calls, support costs, WUSATA dues and fees, etc. Travel is a minor portion of the general fund budget. This travel assumes one Governor’s overseas trade mission a year and domestic travel for meetings with companies, commissions and presentations to stakeholders.



**MAP Generic Program** — Because of the limited general fund budget, IM relies on other forms of funding to support travel and promotional expenses. The primary source of this funding is through the USDA’s Market Access Program (MAP). These MAP funds are administered through the Western US Agricultural Trade Association (WUSATA) which is made up of 13 western states’ Departments of Agriculture. For every dollar Washington spends on international marketing, \$.60-\$.70 in federal funding is leveraged by IM for Washington business to participate in inbound/outbound trade missions, tradeshow, etc. Each year, IM directly administers \$250,000-\$350,000 of these funds in Washington led events.



Indian buyer sits down with Washington company at a MAP funded event

**MAP Branded Program**—In addition to the MAP Generic Program, USDA offers a branded program to assist companies that are trying to promote their brands abroad. While the International Marketing program does not administer these funds, we recruit Washington companies for participation in this program. These funds provide an additional \$800-\$900,000 in federal assistance to Washington companies each year.

**Other Grants**—In FY11, WSDA’s IM program was awarded a TASC (Technical Assistance

for Specialty Crops) grant. The grant was to assist in the removal of a non-tariff trade barrier (restrictive chemical residue tolerances) for raspberry exports into Japan. In FY12, the IM program has been awarded two grants: a State Trade and Export Promotion grant (STEP), administered by the Small Business Administration for \$199,000; and a Specialty Crop grant administered by the USDA for \$169,000.

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## WASHINGTON’S INTERNATIONAL TRADE TEAM

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**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 the Washington State Department of Commerce. Commerce undertakes all non-food related export promotion.

WSDA’s International Marketing program is part of an integrated international system for



food export promotion. Food and agricultural promotion is separate 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.

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## KEY STAKEHOLDERS

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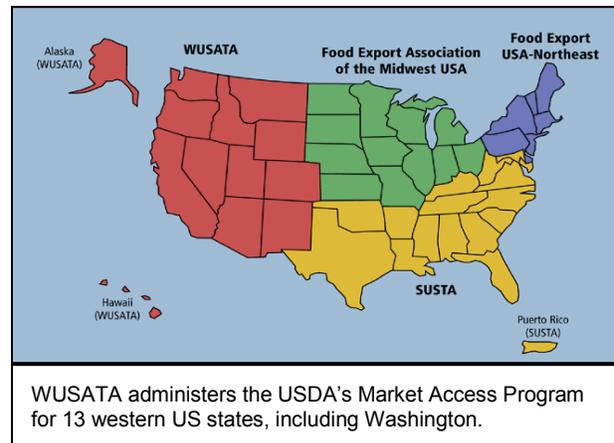
The International Marketing staff works closely with partners such as the state's agricultural commodity commissions, industry organizations, other states, the US Department of Agriculture (USDA) and the Western US Agricultural Trade Association (WUSATA) in order to identify priorities and targets. Key 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 23 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 represent the department at the Asparagus, Red Raspberry, Fruit, Apple, Beer and Potato Commissions. See Appendix D for a complete list of Washington agricultural commodity commissions.

**WUSATA** — The Western United States Agricultural Trade Association, known as WUSATA, administers the USDA's Market Access Program for the western US. 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. They may also participate in Generic Program promotions such as trade shows, buying missions and menu promotions. Visit WUSATA online at [www.wusata.org](http://www.wusata.org).



**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 Agriculture — Dependent on Trade

## FOOD & AGRICULTURE EXPORTS REACH \$12.9 BILLION IN 2010

Washington is one of the most trade dependent states in the nation. In 2010 (the most recent full year of data available) Washington exported \$12.88 billion in food and agriculture products, up 17.8% over 2009. This is the third largest total among US states.

Many products that 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 are mostly corn and soybeans destined for Asian markets. In 2010, pass-through products represented just over 50% (\$6.7 billion) of Washington agricultural exports. When pass-through products are excluded, exports of food products that originated in Washington were valued at \$6.2 billion in 2010.



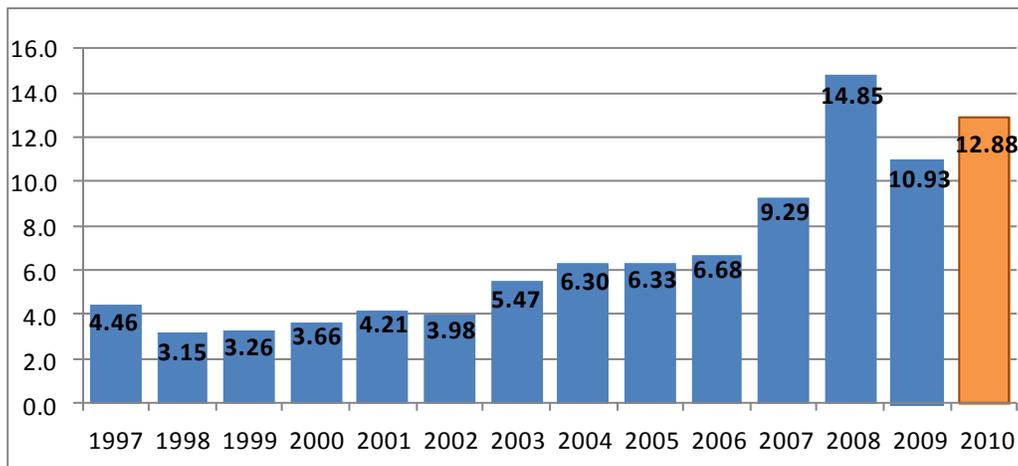
Apple exports to India were very strong in the first half 2011

Ag exports remain a success story in difficult economic times. They have maintained steady growth over the last decade. These gains may continue due primarily to economic growth in Asia.

## EXPORTS BY PRODUCT

In the first half of 2011, nine of Washington's top ten export categories increased. The strongest growth was seen in the value of

Washington's Food & Ag Exports Have Tripled Since 2000



Washington's total food and agricultural exports continue their decade-long upward trend.

<b>Most Top Export Categories Show Growth in First Half of 2011</b>				
Rank	Products (excluding pass-through corn & soybeans)	1st half 2010 US\$ millions	1st half 2011 US\$ millions	% Change
1	Wheat And Meslin	540	1,570	+190.9
2	Fresh Fruit And Nuts	412	540	+31.1
3	Processed Food	371	409	+10.1
4	Fish And Seafood	262	304	+15.9
5	Forage Products	182	223	+22.4
6	Fresh Vegetables	152	214	+40.9
7	Dairy, Eggs, Honey, Etc	178	211	+18.3
8	Processed Meat, Fish	95	120	+27.1
9	Lactose, Veg Sap, Extracts	98	79	-19.1
10	Meat	61	76	+24.5

wheat exports which was partially due to high prices. Fresh vegetables posted a 40% gain year on year, led by increased exports of potatoes to Canada and Japan. Fresh fruits enjoyed export increases of over 30%. This was primarily due to apple and pear exports to India. Processed meat and fish, meat, and forage products all had gains over 20%. The only decrease seen in top ten products was for lactose, vegetable sap and extracts. This decrease was led by Mexico which had levied punitive tariffs on US exports in retaliation for a trucking ban instituted by the US. The trucking dispute was resolved, but the tariffs were not lifted until July 2011. We expect to see this category of exports rebound in FY12.

## EXPORTS BY MARKET

Japan continues to be the top importer of Washington agricultural products. Exports increased despite weak growth and a declining population. The devastating earthquake and ensuing tsunami caused supply chain disruptions which also hampered exports. Ex-

ports to Canada grew by over 20%, led by strong apple sales and sharp increases in seafood and vegetable imports. The Philippines and Indonesia were the third and fourth largest export markets for Washington. This is primarily due to tremendous growth in wheat imports for both countries.

Mexico expanded by over 10%, even with the tariffs instituted against US imports. This is the weakest growth we see in our top ten markets, and we expect Mexico to grow even more strongly and quickly in FY12.

Taiwan, Korea and China all grew over 30%. Korea almost reached 50% growth and with the Free Trade Agreement signed, agricultural products to Korea could continue to see growth outpacing China. Indonesia, Hong Kong and Thailand round out the top ten.

Saudi Arabia is new to the top ten, growing 8-fold over 2010. This is due to their government reducing production of water intensive crops, causing a jump from \$0 of wheat imports in the first half of 2010 to over \$100million in the first half of 2011.

<b>Ten of Top Ten Markets Grow In First Half of 2011</b>				
Rank	Country (excludes pass-through corn & soybeans)	1st half 2010 US\$ millions	1st half 2011 US\$ millions	% Change
1	Japan	594	953	+60.4
2	Canada	516	621	+20.5
3	Philippines	131	245	+87.6
4	Indonesia	85	197	+132.7
5	Mexico	174	193	+10.8
6	Taiwan	148	192	+30.0
7	Korea	110	165	+49.7
8	China	107	139	+30.5
9	Saudi Arabia	14	126	+823.1
10	Hong Kong	82	102	+24.9

## The Road Forward

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Washington agriculture faces fierce competition at home and abroad. The weak global economy, trade barriers which limit market access and changing consumer preferences are just three 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.

**State and Federal Budget Turmoil** — As the economy recovers slowly, the risk of losing state funding grows. Funding declines could result in a significant reduction to WSDA's International Marketing program budget. **State budget cuts would severely impact our ability to assist agricultural exporters, particularly small and medium sized companies.** Additionally, budget cuts would severely impact our ability to leverage and manage federal funds that come to the state. Savings to the state general fund would be more than offset by loss of federal funds to the state if WSDA's marketing program were cut or eliminated. At the federal level, concerns about the growing budget deficit could result in cuts to funding that WSDA relies upon to undertake export promotion activities.

**The Global Economy** — Goldman Sachs' outlook for global economy in 2012 and 2013 is for slower growth than in 2011 and 2010. About 3% global GDP growth is predicted in 2012 and 4% in 2013, with wider disparities between the world's strongest performers and the weakest per-

formers emerging. US economic growth is expected to slow, but Goldman Sachs does not see a recession coming. Their biggest concern is with Europe and the possible spillover effects to emerging markets such as China if Europe does not solve its capital flow disruptions.

**Korea Free Trade Agreement**— According to the American Farm Bureau Federation, American farmers' and ranchers' exports to South Korea will increase by as much as \$1.8 billion every year under the U.S.-South Korea trade agreement, thanks to expected increases in sales of major grain, oilseed, fiber, fruit, vegetable, and livestock products. The United States is already Korea's top supplier of agriculture products, including of a broad variety of farm products such as almonds, fresh cherries, hides and skins and corn. The U.S.-Korea trade agreement creates new opportunities for U.S. farmers, ranchers and food processors seeking to export to Korea's 49 million consumers, giving American agricultural producers more market access in two ways – by getting rid of tariffs charged when U.S. exports come into Korea, and by laying out a framework to tackle other barriers to U.S. exports –even those that might arise in the future.



Potatoes and dehydrated potatoes are just two of the products that will benefit from the Korea-US Free Trade Agreement

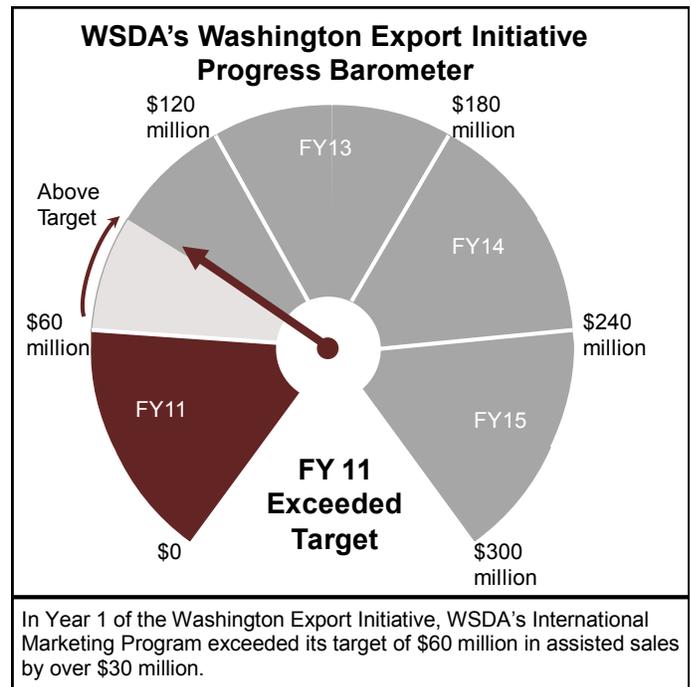
# Washington Export Initiative

**WSDA's Lead Role in Washington's Export Initiative:** WSDA has a central role in the Washington Export Initiative (WEI). The WEI is the state's planned contribution toward achieving export goals outlined under the National Export Initiative (NEI). WSDA's five-year goals are to (1) assist 1,000 exporters and (2) deliver \$300 million in assisted export sales. These sales represent 50% of the state's overall goal for assisted sales.

Agriculture exports from Washington have reached an all-time high, and overseas sales translate into real job growth at home. The Washington State Department of Agriculture helped 199 businesses make \$94 million in new sales in FY11, supporting an estimated 754 jobs. The International Marketing Program is well underway toward meeting their Washington Export Initiative targets.

**Washington's STEP Program**—In the fall of 2011, the Washington State Department of Commerce launched the Export Washington

WSDA's STEP goal is to help 50 companies achieve a combined \$8 million in sales to our target markets of China, Japan, Taiwan and Mexico.



program. The program represents a \$1.6 million investment in Washington's small businesses, making it possible for them to expand into high-potential overseas markets. It is funded by the U.S. Small Business Administration's State Trade and Export Promotion (STEP) grant program.

WSDA's International Marketing Program will manage one component of the STEP grant. Agriculturally-focused businesses will have direct access to trade representatives from key target markets including China, Japan, Mexico and Taiwan, along with training on food and beverage-specific requirements for exports to these target markets. They will also receive help with developing export marketing plans. Businesses participating in the export training clinics will then have the opportunity to meet with buyers from their target market. WSDA's goal is to engage 50 new-to-export and new-to-market food and agricultural companies and assist in \$8million of sales.

## Notes and References

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- 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. For every \$10 of state GDP, \$1.46 came from exports, the fifth highest total among states. Source: FTDWebMaster, Foreign Trade Division, US Census Bureau, Washington, D.C. 20233 via StateMaster <[http://www.statemaster.com/graph/tra\\_exp\\_tot\\_ove\\_val\\_percap-totals-overall-value-per-capita](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 \$94,272,200 generated \$3,780,315 in general fund tax revenue.
- 3 The net income of \$2,790,315 to the state is calculated by subtracting the program budget (\$990,000) from the tax revenue generated (\$3,780,315).
- 4 According to the United States Department of Agriculture, every \$1 billion of food and agricultural sales represents 8,000 jobs (2010), a ratio of 8 jobs for every \$1 million in ag exports. Therefore export sales of \$94,272,200 supported an estimated 754 jobs in Washington.
- 5 The International Marketing program has tracked assisted sales since FY 1998. Including FY 2011, cumulative assisted sales were \$859,947,102.

"U.S. and Mexico Sign Trucking Deal", NY Times, July 7, 2011, <http://www.nytimes.com/2011/07/07/business/us-and-mexico-sign-trucking-agreement.html>

Goldman Sachs, December 2, 2011 global economic outlook, [http://www2.goldmansachs.com/our-thinking/global-economic-outlook/outlook-2012/index.html?cid=PS\\_02\\_20\\_06\\_99\\_01\\_03](http://www2.goldmansachs.com/our-thinking/global-economic-outlook/outlook-2012/index.html?cid=PS_02_20_06_99_01_03)

Korea US Free Trade Agreement Fact Sheet: <http://www.ustr.gov/trade-agreements/free-trade-agreements/korus-fta>

# 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](mailto:ag-export@agr.wa.gov)

Website: <http://agr.wa.gov/Marketing> Suppliers Database: [www.impact.wsu.edu/wasuppliers](http://www.impact.wsu.edu/wasuppliers)

For further information, please phone Janet Leister at 360-902-1931.

<b>Administration</b>	
<p><b>Janet LEISTER</b>, Managing Director                      Ph: 360-902-1931                      Fax: 360-902-2089                      Mobile: 360-561-4521                      Email: <a href="mailto:jleister@agr.wa.gov">jleister@agr.wa.gov</a></p>	
<b>International Trade Specialists</b>	
<p><b>David ANDERSON - Yakima</b>                      Ph: 509-457-7137                      Fax: 509-453-4880                      Mobile: 509-952-0617                      Email: <a href="mailto:danderson@agr.wa.gov">danderson@agr.wa.gov</a></p> <p><b>Rebecca WEBER - Kennewick</b>                      Ph: 509-735-3666                      Fax: 509-735-6609                      Mobile: 509-727-8302                      Email: <a href="mailto:rweber@agr.wa.gov">rweber@agr.wa.gov</a></p>	<p><b>Bill DALLAS - Olympia</b>                      Ph: 360-902-1925                      Fax: 360-902-2089                      Mobile: 360-561-1456                      Email: <a href="mailto:bdallas@agr.wa.gov">bdallas@agr.wa.gov</a></p> <p><b>Cameron CRUMP - Olympia</b>                      Ph: 360-902-1940                      Fax: 360-902-2089                      Mobile: 360-791-3457                      Email: <a href="mailto:ccrump@agr.wa.gov">ccrump@agr.wa.gov</a></p>
<b>Overseas Contract Representatives</b>	
<p style="text-align: center;"><b>JAPAN</b></p> <p><b>Mr. Scott HITCHMAN</b>                      9-1-7-581 Akasaka                      Minato-ku, Tokyo 107-0052, Japan                      Ph: (011-81-3) 5770-7533                      Fax: (011-81-50) 3488-4172                      Cell Phone: (011-81-80) 5058-6487                      Email: <a href="mailto:sch@gol.com">sch@gol.com</a></p>	<p style="text-align: center;"><b>TAIWAN</b></p> <p><b>Mr. LIN Gau-Shieng (Chris)</b>                      F3, #12, Lane 147, Hsiu-Shan Rd, Si-Jhih City                      Taipei County 22199, Taiwan                      Ph: (011-886-2) 2691-2360                      Fax: (011-886-2) 2691-2357                      Cell Phone: (011-886-9) 3528-4685                      Email: <a href="mailto:charityc@seed.net.tw">charityc@seed.net.tw</a></p>
<p><b>CHINA</b></p> <p><b>Mr. LI Haidong</b>                      Room 2301, Bldg. No. 4, No. 588 Jiao Zhou Road                      Shanghai, 200040, China                      Ph: (011-86-21) 5228-0659 - Fax: (011-86-21) 5228-2891                      Cell Phone: (011-86-137) 0186-9509                      Email: <a href="mailto:lhaidong@163.net">lhaidong@163.net</a></p>	

## Appendix B — Export Promotion Activities

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### TRADE SHOWS, PRODUCT SHOWCASES, IN-STORE PROMOTIONS

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World Food Moscow – Retail, Produce, Seafood, Moscow, September 2010

Conxemar Seafood Show, Vigo Spain, October 2010

China Seafood Show, Qingdao, November 2010

Food and Hotel China, Shanghai, November 2010

Food Ingredient China, Shanghai, March 2011

SIAL Food Show – Foodservice and Retail, Shanghai, May 2011

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### OUTBOUND SALES MISSIONS, INBOUND BUYERS MISSIONS

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Mexico Foodservice Inbound Mission, July 2010

Central America and Mexico Inbound Produce Mission, August 2010

Japan Food Safety Delegation, September 2010

India Retail Inbound Delegation, September 2010

Governor’s Trade Mission, September 2010

Taiwan Inbound Consumer Oriented Trade Mission, September 2010

Southeast Asia Food Service Inbound Mission, September 2010

Taiwan Pre-PMA Inbound Mission to Washington, October 2010

Japan Processed Onion Mission, October 2010

Mexico Foodservice Promotion, November 2010

Southeast Asia Ingredient Inbound Mission, December 2010

Moldovan Wine Delegation, May 2011

Washington State Wine Experience, June 2011

China Inbound Retail Trade Mission, June 2011

Mexico and Central America Inbound Mission, June 2011

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### AGRICULTURAL COMMODITY COMMISSIONS

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

Northwest Fruit Commission meeting, July 2010

Washington Commission on Pesticide Registration Crop Tour, August 2010

Washington Asparagus Commission (WAC) Quarterly Meeting, October 2010

Northwest Fruit Commission Cherry Institute Meeting, January 2011

Asparagus Annual Meeting and Board Meeting, January 2011

Washington Oregon Potato Conference, January 2011

Northwest Canned Pear Association meeting, February 2011

Washington State Potato Commission Quarterly Meeting, March 2011

Washington Asparagus Commission Quarterly Meeting, April 2011

Washington Wine Commission Export Committee Meeting, May 2011

Northwest Fruit Commission Board meeting, May 2011

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## OUTREACH TO STAKEHOLDERS

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Pacific Northwest Vegetable Association (PNVA) annual conference, Nov, 2010

Pasco Ag Show, January 2011

USDA outreach meeting, February 2011

U.S. Saudi Arabia Business Council, February 2011

Japan Ministry of Forestry and Fisheries, February 2011

TRIDEC Annual Meeting, March 2011.

TRIDEC Ag Committee meeting at Port of Pasco, June 2011

Tri-City Regional Chamber of Commerce, June 2011

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## PRESENTATIONS, PUBLICATIONS, EXPORT SEMINARS

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Legislative Committee on Economic Development and International Relations, Yakima, September 2, 2010

IM/EX Wine Export Seminar, Walla Walla, February 17, 2011.

Columbia Basin College Agricultural Program Presentation, March 7 & 8, 2011.

Exporting in the Flat World, May 2011

Branded Program Seminar, June 2011

## Appendix C — Advisory Committee Members

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Mark Anderson, President & CEO  
*Anderson Hay & Grain Co., Inc.*

Robin Pollard, Executive Director  
*Washington Wine Commission*

Bill Bryant, Chairman  
*Bryant Christie Inc.*

Mark Powers, Vice President  
*Northwest Horticultural Council*

Jeff Correa, Director of Intl. Marketing  
*Pear Bureau Northwest*

BJ Thurlby, Executive Director  
*Washington State Fruit Commission*

Todd Fryhover, President  
*Washington Apple Commission*

Chris Voigt, Executive Director  
*Washington State Potato Commission*

Susan Hannah, Vice President, Marketing  
*Pacific Valley Foods*

Charles Witzleben, President  
*SUPERVALU International*

Michael McGinley, Export Sales  
*Ocean Beauty Seafoods*

## Appendix D — Washington Agricultural Commodity Commissions

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**Alfalfa Seed Commission** (RCW 15.65)  
Shane Johnson, Executive Director  
100 N Fruitland, Suite B, Kennewick WA 99336  
Phone: (509) 585-5460 / Fax: (509) 585-2671  
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**Apple Commission** (RCW 15.24)  
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Web: www.bestapples.com

**Asparagus Commission** (RCW 15.65)  
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**Beef Commission** (RCW 16.67)  
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**Beer Commission** (RCW 15.89)  
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**Blueberry Commission** (RCW 15.65)  
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**Cranberry Commission** (RCW 15.65)  
Karla Kelley, Chair  
1151 Gould Rd, Grayland, WA 98547  
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**Dairy Products Commission** (RCW 15.44)  
Steve Matzen, Gen. Manager  
4201 198th St SW #101, Lynnwood, WA 98036  
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**Dry Pea & Lentil Commission** (RCW 15.65)  
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Web: www.washingtongrainalliance.com

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**Potato Commission** (RCW 15.66)  
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Web: www.potatoes.com

**Puget Sound Salmon Commission (RCW 15.65)**

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Seattle, WA 98119  
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**Red Raspberry Commission (RCW 15.65)**

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Web: www.red-raspberry.org

**Seed Potato Commission (RCW 15.66)**

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400 Fifth Street, Lynden, WA 98264  
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Web: www.waseedpotato.com

**Strawberry Commission (RCW 15.65)**

Walter Swenson, Manager  
PO Box 2423, Olympia, WA 98507-2423  
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**Tree Fruit Research Commission (RCW 15.26)**

Jim McFerson, Manager  
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**Turfgrass Seed Commission (RCW 15.65)**

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**Wine Commission (RCW 15.88)**

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