



# POLICY BRIEF

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## How U.S. trade disputes affect Washington state's agricultural communities

By Madi Clark,  
WPC Research Fellow, Initiative on Agriculture

January 2019

### Key Findings

1. For Washington state agriculture, maintaining good trade relationships is a top priority that is central to the incomes of farm families, farmworkers, and other agriculture-related employees across the state.
2. Washington is the third largest exporter of food and agricultural products in the nation. One of its top exports is fresh fruit, a commodity subjected to Chinese tariffs.
3. Washington exported \$76.4 billion worth of products in 2017. Products related to agriculture, forestry, fishing and hunting made up 16 percent of the state's exports.
4. Key agricultural trading partners for Washington state include China, the European Union, Canada and Mexico. All are affected by tariffs and discussion of new trade agreements, bringing uncertainty to our trade relationships.
5. In general, the Washington agricultural community and the nation's farming families are better off under policies that reduce tariffs and create free trade agreements with more partners.
6. Without a policy of access to new markets and strengthened trade relations, the U.S. risks being outpaced by countries that are eager to forge trade agreements that allow their farmers to compete in the global marketplace.

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# How U.S. trade disputes affect Washington state's agricultural communities

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## Introduction

For Washington agriculture, trade is a top priority that affects the pocketbooks of farmers, farmworkers, and other agricultural employees. Washington state is one of the most trade-dependent states in the nation, and national trade policy has the potential of either greatly hurting or helping the household incomes of the state's rural families.<sup>1</sup>

The long-term costs of the latest trade disruption, created by the unionized labor slowdown at West Coast ports in 2015, are still being felt by the farming community, as agricultural businesses attempt to restore access to lost markets. Unfortunately, instead of continuing to increase cooperation with trading partners and forge new trade deals, the United States has backed out of some existing trade deals and has engaged in negotiation tactics that put the incomes of Washington farmers and agricultural businesses at risk.

## The effect of trade disputes on Washington state

The current trade dispute with China and other trading partners threatens the foundation of Washington's export industry. Washington is the third largest exporter of food and agricultural products in the nation. One of its top exports is fresh fruit, a commodity subject to Chinese tariffs. In 2017, Washington shipped \$193 million worth of fresh cherries, apples and pears to China.<sup>2</sup> Among states, Washington ranked the highest in total value of exports to China and only two other states have a higher proportion of their exports bound for China (New Mexico and Alaska).<sup>3</sup>

A recent report estimates that Washington exports have already dropped by 28 percent from the current trade dispute.<sup>4</sup> Comparing the same time period from April through September to the previous year's exports, shows that Washington farmers and other export-dependent producers saw a decrease in exports estimated at between 20 and 28 percent. The most perishable products, including cherries, have been the hardest hit by the trade dispute.

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1 "International Trade and Washington," by Mia Jacobs, TDA Greater Seattle, December 6, 2016, at <https://www.seattletradealliance.com/blog/tda-blog/post/international-trade-and-washington>.

2 "Washington state apple, cherry industries wary of trade war," by Nicholas K. Geranios, Associated Press, *U.S. News and World Report*, April 2, 2018, at <https://www.usnews.com/news/business/articles/2018-04-02/washington-state-apple-cherry-industries-wary-of-trade-war>.

3 "Guest opinion: Washington taxpayers and farmers lose in Trump's trade war," by Madilynne Clark, op-ed, *Tri-City Herald*, 10 April 2018, at <https://www.tri-cityherald.com/opinion/editorials/article208473329.html>.

4 "Trade Disputes have cut Washington state exports by as much as 28 percent, report says," by Paul Roberts, *The Seattle Times*, November 14, 2018, at <https://www.seattletimes.com/business/trade-disputes-have-cut-washington-exports-by-as-much-as-28-percent-report-says/>.

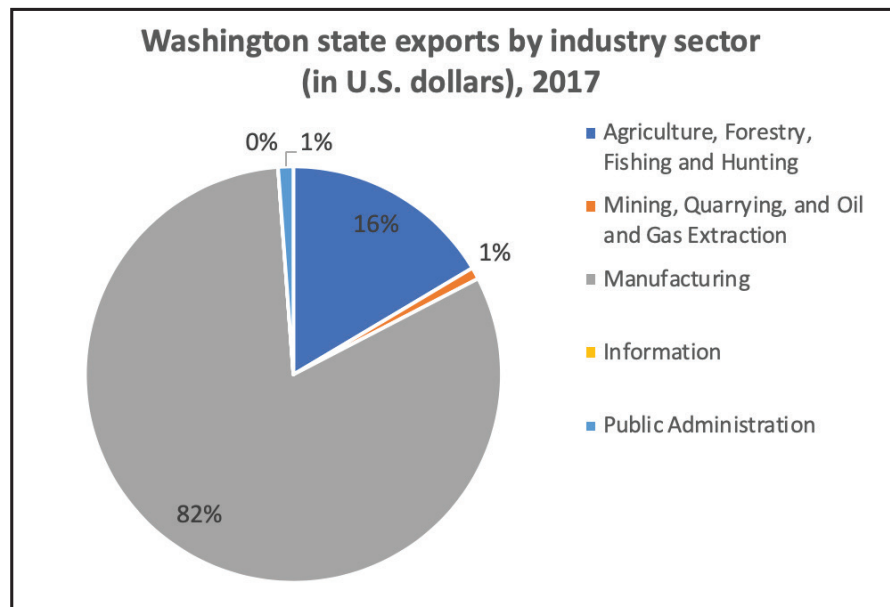
This Policy Brief provides an overview of the importance of agricultural trade for Washington state, looks at the historic and current value of our trade agreements with Canada and Mexico, and analyzes the potential cost of increasing tariffs imposed on Washington agriculture and farming communities. The intent of this publication is to show the importance of agricultural trade for Washington state and the interest farmers, workers and families have in increasing U.S. cooperation with international trading partners.

## Washington trade statistics

Overall, Washington exported \$76.4 billion worth of products in 2017. The state's natural resource industries made up the second-largest share of exports by value. Agriculture, forestry, fishing and hunting made up 16 percent of the state's exports, while manufacturing, particularly aviation and aerospace, accounted for 82 percent.

Two other industry sectors, public administration (government services), and mining, oil and gas, accounted for about one percent each. The economic value brought to Washington through trade supports 40 percent of the state's jobs, with 75 percent of these trade-dependent jobs tied to exports, and 25 percent directly related to imports.<sup>5</sup>

Percentages of Washington exports by industry sector are shown in the chart below.<sup>6</sup>

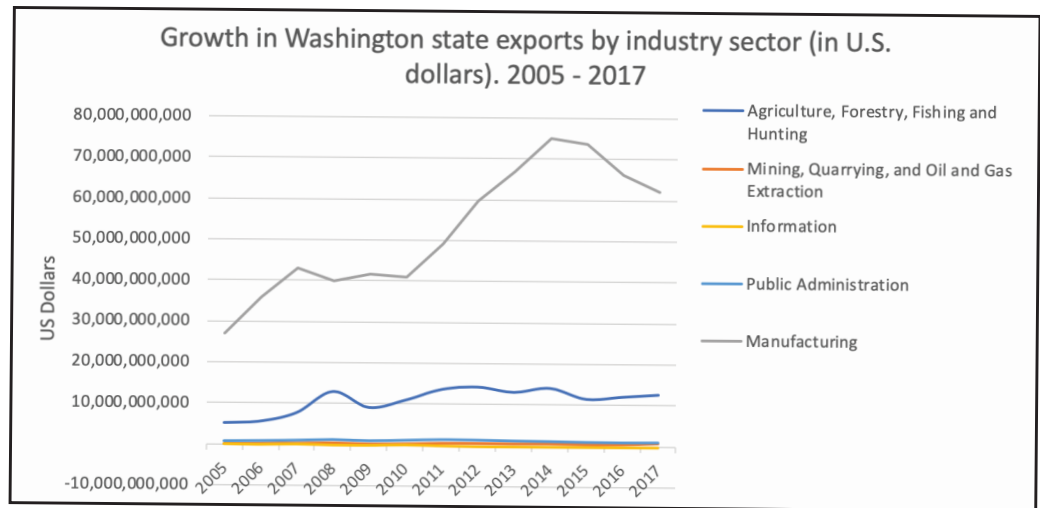


Export value has grown significantly, increasing by 47 percent over the last 10 years. The 2015 port labor slowdown, however, caused a severe downturn in total exports and the state has yet to make a full recovery.<sup>7</sup>

<sup>5</sup> "Trade Factsheet: Washington State," by Washington Council on International Trade, 2016, at <http://wcit.org/wp-content/uploads/2016/12/WASStateWeb1.pdf>.

<sup>6</sup> "U.S. Import and Export Merchandise trade statistics," by U.S. Census Bureau Economic Indicators Division, USA Trade Online, at <https://usatrade.census.gov/>, accessed November 2018.

<sup>7</sup> Ibid.



Many crops exported from Washington are shipped to Washington from other states. The top 15 products exported from Washington include many agricultural products, including crops sent from Midwest and Western states and crops grown in Washington state. The table below shows Washington’s main export products.

Washington state’s top 15 export products (in millions of dollars) - 2017 <sup>8</sup>			
Rank	Description	2017 value (in \$ U.S.)	Share of total (percent)
1	Civilian aircraft, engines, and parts	41,576	54.4
2	Soybeans	3,788	5
3	Wheat and meslin	2,135	2.8
4	Corn (maize), other than seed corn	1,880	2.5
5	Petrol oil bitum minera	938	1.2
6	Coniferous wood in the rough, not treated	760	1
7	Potatoes, prepared etc., no vinegar etc., frozen	753	1
8	Ultrasonic scanning apparatus	731	1
9	Apples, fresh	723	0.9
10	Light oils (70% petroleum)	609	0.8
11	Flours and meals of soybeans	503	0.7
12	Forage products	465	0.6
13	Passenger motor vehicles	460	0.6
14	Cherries, fresh	358	0.5
15	Ferrous waste and scrap metal	327	0.4

The unique geographic position of the ports of Tacoma and Seattle allows easy access to Pacific Rim countries,<sup>8</sup> and about two-thirds of state agricultural products are shipped to Asia. Shipments can arrive two days earlier at the markets of Tokyo and Busan compared to products sent from other West Coast ports. Airfreight can arrive in Beijing from Seattle in less than 15 hours, a very important consideration for highly perishable fresh crops like cherries.

Washington’s top 15 trading partners receive 75 percent of the state’s exports. The top destinations include some of the countries involved in ongoing trade disputes. These include China and the European Union and involve tensions with Canada and Mexico. Turkey and India are also involved in current trade disagreements, but they are not among the top 15 export-destination countries for Washington state.

<sup>8</sup> “Export Statistics,” by Washington State Department of Agriculture, June 1, 2017, at <https://agr.wa.gov/marketing/international/statistics.aspx>.

The table below shows the main destinations for Washington export products.<sup>9</sup>

Washington top 15 export countries, all industries (in millions of dollars) - 2017			
Rank	Country	2017 value (in \$ U.S.)	Share of total (percent)
1	China	17,967	23.5
2	Canada	7,712	10.1
3	Japan	5,415	7.1
4	United Arab Emirates	4,105	5.4
5	South Korea	3,286	4.3
6	Taiwan	2,580	3.4
7	Norway	2,154	2.8
8	Mexico	2,034	2.7
9	Saudi Arabia	1,980	2.6
10	Russia	1,846	2.4
11	Ireland	1,791	2.3
12	United Kingdom	1,775	2.3
13	Netherlands	1,631	2.1
14	Philippines	1,431	1.9
15	Australia	1,403	1.8
Total		57,110	75.00

Endangering relationships and agreements with trading partners threatens Washington state's economic stability and, if continued, will hurt agricultural employment. It also threatens the many highly-skilled, high-paid jobs involved in ensuring our ports are operational and efficient.

The chart below illustrates the top market destinations by natural resource industry sector.<sup>10</sup>

Washington top export destinations, by industry sector (\$ figures in thousands) – 2017						
Rank	111 agricultural products		112 livestock and livestock products		113 forestry products	
	Country	Value	Country	Value	Country	Value
1	China	\$4,396,492	China	\$51,132	China	\$361,557
2	Japan	\$1,623,693	Canada	\$33,062	Japan	\$335,875
3	South Korea	\$1,033,900	European Union	\$29,129	South Korea	\$58,172
4	Taiwan	\$671,975	South Korea	\$23,572	Canada	\$7,708
5	Canada	\$588,872	Hong Kong	\$14,812	European Union	\$2,763
6	Philippines	\$498,571	Cambodia	\$13,137	Taiwan	\$2,588
7	European Union	\$221,908	Vietnam	\$12,490	Pakistan	\$1,441
8	Mexico	\$171,843	Thailand	\$10,087	Vietnam	\$478
9	Thailand	\$159,232	Malaysia	\$2,749	United Kingdom	\$437
10	Indonesia	\$157,766	Taiwan	\$1,265	Jamaica	\$266
<b>World</b>	<b>\$10,480,573</b>		<b>\$195,204</b>		<b>\$ 771,514</b>	

For Washington state natural resource exports, agricultural products make up over 66 percent of the total value. Food and similar products rank second, followed by seafood, forestry, livestock, and beverages. Washington exported less than \$10,000 in tobacco products in 2017.<sup>11</sup>

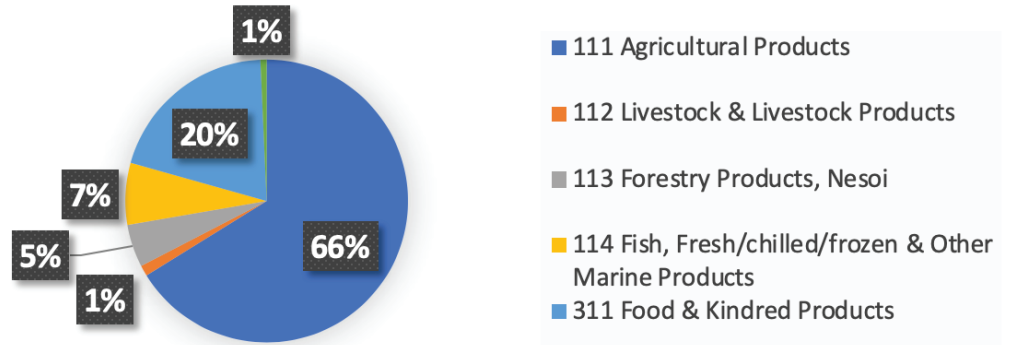
9 "U.S. Import and Export Merchandise trade statistics," by U.S. Census Bureau Economic Indicators Division, USA Trade Online, at <https://usatrade.census.gov/>, accessed November 2016.

10 Ibid.

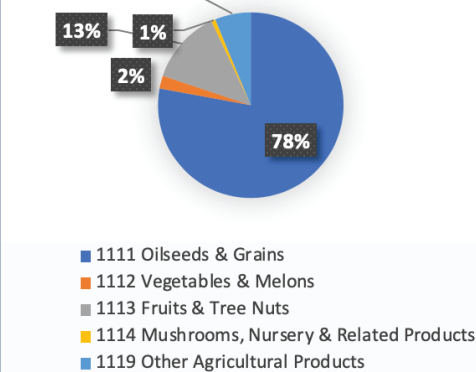
11 "U.S. Import and Export Merchandise trade statistics," by U.S. Census Bureau Economic Indicators Division USA, Trade Online, at <https://usatrade.census.gov/>, accessed November 2018.

Washington top export destination by industry sector (\$ figures in thousands) - 2017 <sup>12</sup>						
Rank	114 fish, fresh/chilled/frozen and other marine products		311 food and kindred products		3121 beverages <sup>13</sup>	
	Country	Value	Country	Value	Country	Value
1	EU	\$275,249	Japan	\$567,111	Canada	\$33,239
2	Canada	\$254,108	Philippines	\$537,788	Japan	\$24,5600
3	China	\$165,366	Canada	\$494,713	New Zealand	\$20,599
4	Japan	\$139,053	China	\$194,395	Korea, South	\$11,548
5	Hong Kong	\$85,751	Mexico	\$190,770	European Union	\$7,479
6	Ukraine	\$40,875	Hong Kong	\$148,607	China	\$2,196
7	Africa	\$33,963	South Korea	\$133,352	Taiwan	\$2,140
8	South Korea	\$30,564	Taiwan	\$110,351	Mexico	\$2,125
9	Vietnam	\$21,903	Thailand	\$104,375	Thailand	\$1,649
10	Thailand	\$18,235	European Union	\$94,999	Singapore	\$1,160
World	\$1,120,589		\$82,895		\$112,301	

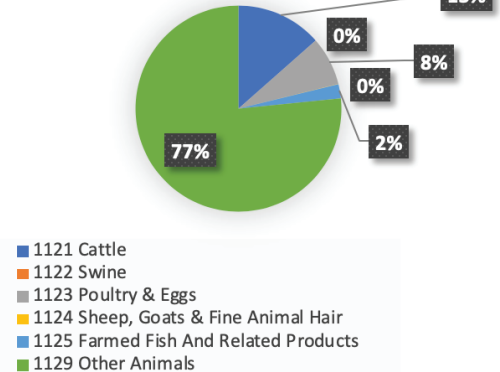
### Percentage of Washington natural resource exports by industry sector - 2017

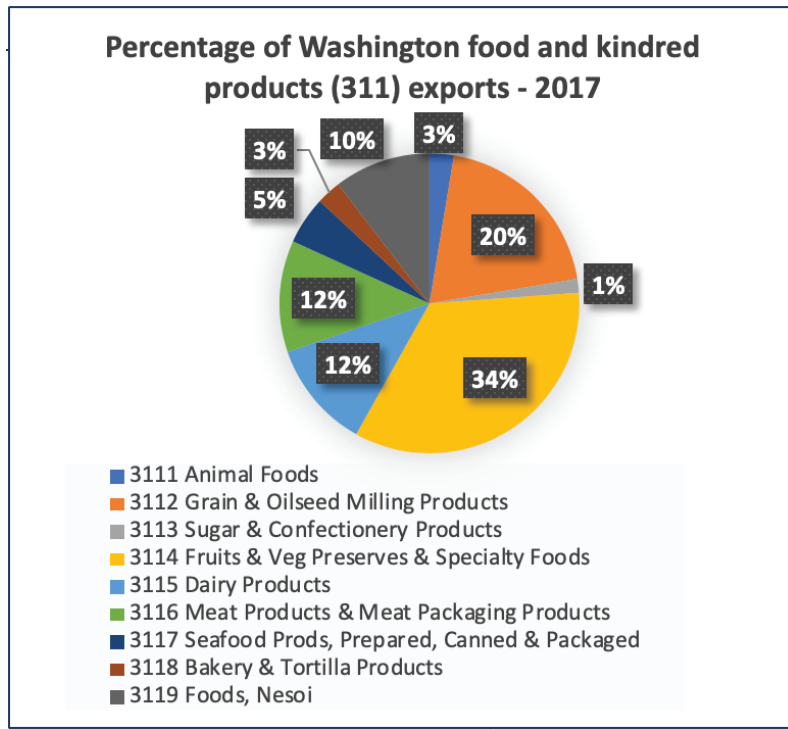


#### Percentage of Washington agricultural products (111) exports - 2017



#### Percentage of Washington livestock and livestock products (112) exports - 2017





### The cost of trade disruptions

The port unionized labor slowdown of 2014-2015 is still a recent memory for many Washington farmers. Experiencing another trade disruption would create further problems for farm communities.

Though historical export data helps in understanding the economic importance of exports in Washington agriculture, it is impossible to predict accurately what the cost of tariffs will be to Washington farmers. As a historical example, the port slowdown illustrates the severe and lasting consequences of trade disruptions for Washington agriculture.

### The port unionized labor slowdown

Members of the International Longshore and Warehouse Union and the Pacific Maritime Association began a contract dispute in late 2014, after their contract had expired on July 1, 2014. Over the winter and until the new contract was concluded in March 2015, the volume of products moving in and out of Washington ports fell by an estimated 14 percent for exports and 4.6 percent for imports.<sup>12</sup>

The Washington Council on International Trade estimates that the months-long labor dispute and resulting port slow-down led to a net loss of \$769.5 million.<sup>13</sup> Agricultural product exports dropped by 7.6 percent, though certain industries bore the brunt of the slow-down due to seasonality of the products and perishability of harvested crops.<sup>14</sup>

These estimates account for only the short-term costs. The long-term financial consequences of lost markets are difficult to estimate and are likely even larger.

<sup>12</sup> "The Economic Costs of the 2014-2015 West Coast Port Slowdown on Washington State," by Community Attributes Inc (CAI), for Washington Council on International Trade, 2016, at <http://wcit.org/wp-content/uploads/2016/12/WCIT-Port-Delays-Economic-Impacts-Report-FINAL1.pdf>.

<sup>13</sup> Ibid.

<sup>14</sup> Ibid.



Over 30 percent of Washington businesses were hurt in some way by the port slowdown.<sup>15</sup> Record harvests in 2014 and 2015 meant that a lot of spoilage occurred for apples, frozen French fries, and other frozen food products, as these foods sat in warehouses rather than being shipped to market. Losses totaled nearly \$170 million and hundreds of workers were laid-off.<sup>16</sup>

In August 2017, members of the ILWU union voted to extend their current contract by three years, until 2022, avoiding further port disruptions in the near term.<sup>17</sup>

## **The effect of current trade disputes**

Washington's trade outlook dimmed once again with recent problems that arose from trade disagreements with many of our trading partners. The United States entered into a trade dispute with China in January 2018, by placing tariffs on washing machines and solar cells. One point of contention was the theft of U.S. intellectual property, industry secrets and product patents by Chinese companies.

The U.S. subsequently announced 25 percent tariffs on March 9, 2018 on steel and aluminum imports from all countries, including China. On March 22, the U.S. escalated the pressure on China in an effort to stop the continued theft by the Chinese of U.S. intellectual property and other technological innovation.

## **Response by China**

China quickly responded by imposing \$3 billion in tariffs on U.S. imports, targeting fresh fruits, nuts, wine, and pork. Two days later, China added soybeans, automobiles, chemicals, and aircraft to the list of products subject to increased tariffs.<sup>18</sup> The first round of tariffs is likely to have a large impact on people living in rural Eastern Washington counties, rather than on people in the more urbanized Western part of the state.

Once the United States applied the announced tariff increases on June 1, other countries responded with their own tariffs imposed on U.S. goods, including Mexico, Turkey, India, the European Union, and Canada. China's tariffs went into effect the same day.<sup>19</sup>

## **Escalating trade dispute**

The trade dispute escalated further, with additional tariffs imposed by both China and the United States. Agricultural products were largely spared in the most recent round of tariff announcements by China.

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15 "Port slowdown will leave lasting mark," by Kris Johnson, *The Wenatchee World*, March 4, 2015, at <http://www.wenatchee-world.com/news/2015/mar/04/port-slowdown-will-leave-lasting-mark/>.

16 "The Economic Costs of the 2014-2015 West Coast Port Slowdown on Washington State," by Community Attributes Inc (CAI), for Washington Council on International Trade, 2016, at <http://wcit.org/wp-content/uploads/2016/12/WCIT-Port-Delays-Economic-Impacts-Report-FINAL1.pdf>.

17 "West Coast longshore workers ratify contract extension; New agreement will continue until July, 2022," statement by the International Longshore and Warehouse Union, August 4, 2017, at <https://www.ilwu.org/west-coast-longshore-workers-ratify-contract-extension-new-agreement-will-continue-until-july-2022/>.

18 "The trade war is on: A timeline," by Bloomberg News, Farm Futures, September 19, 2018, at <https://www.farmfutures.com/trade/trade-war-timeline>.

19 "Timeline Of A Trade War, The trade war, all on one page," Taxpayers for Common Sense, Data and Documents, August 29, 2018, at <https://www.taxpayer.net/agriculture/the-trump-trade-and-tariffs-timelines-and-trackers/>.

The earlier tariffs, however, continue to hurt the U.S. farm community and are creating downward pressure on farm incomes. Even if the trade dispute were resolved quickly, the costs incurred so far will likely be felt for years into the future due to lost markets and increased competition with other countries. Similar years-long negative effects occurred after the 2015 port slowdown.

### **Limited trade-impact relief**

In order to limit the effect of the trade dispute on U.S. farmers, President Trump announced \$12 billion in federal relief.<sup>20</sup> The package authorizes cash subsidies, government purchases of surplus crops and designates some funding for market expansion.<sup>21</sup> On December 17, 2018 President Trump announced that the second round of the aid package would be dispersed.<sup>22</sup> Additional tariffs had been announced in September by the U.S. and China. No agreement has been reached between the two countries so far (as of January 2019) and trade tensions continue.

### **Renegotiating NAFTA**

At the same time President Trump was engaged in an ongoing trade dispute with China, he was working on fulfilling another of his campaign promises; renegotiating and improving the 1990s North American Free Trade Agreement (NAFTA). On October 4th, the U.S. announced that a new agreement had been reached with two of its largest trading partners, Canada and Mexico.

The U.S.-Mexico-Canada Agreement (USMCA) will replace the 24-year-old North American Free Trade Agreement (NAFTA).<sup>23</sup> Most farmers and agriculturalists say preservation of NAFTA's established trade benefits was a top priority. The USMCA achieves this by maintaining the key agricultural agreements of NAFTA, while opening Canadian markets to more sales of U.S. poultry and dairy products.

The new agreement also eases the restrictions on U.S. sales of wheat to Canada. It protects agricultural producers' ability to use and share new biotechnology across national borders, and improves the status of some food safety restrictions.

### **Washington and the trade dispute with China**

Washington farmers were told that the latest set of retaliatory tariffs imposed by China do not target farmers. Unless a farmer is planning to buy an "agricultural self-loading or self-unloading trailer," the newest tariffs largely avoid farm-related products.

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20 "White House readies plan for \$12 billion in emergency aid to farmers caught in Trump's escalating trade war," by Damian Paletta and Caitlin Dewey, Business section, *The Washington Post*, July 25, 2018, at [https://www.washingtonpost.com/business/economy/white-house-readies-plan-for-12-billion-in-emergency-aid-to-farmers-caught-in-trumps-escalating-trade-war/2018/07/24/7bec9af4-8f4d-11e8-b769-e3fff17f0689\\_story.html?noredirect=on&utm\\_term=.bbe1160f29a0](https://www.washingtonpost.com/business/economy/white-house-readies-plan-for-12-billion-in-emergency-aid-to-farmers-caught-in-trumps-escalating-trade-war/2018/07/24/7bec9af4-8f4d-11e8-b769-e3fff17f0689_story.html?noredirect=on&utm_term=.bbe1160f29a0).

21 "USDA Assists Farmers Impacted by Unjustified Retaliation," United States Department of Agriculture, Press Release No. 0151.18, July 24, 2018, at <https://www.usda.gov/media/press-releases/2018/07/24/usda-assists-farmers-impacted-unjustified-retaliation>.

22 "Trump approves additional financial help for U.S. farmers hurt by ongoing trade war," by Michael Collins and John Fritze, *USA Today*, December 17, 2018, at <https://www.usatoday.com/story/news/politics/2018/12/17/donald-trump-trade-war-more-financial-aid-coming-farmers-hurt-tariffs/2341596002/>.

23 "USMCA will replace NAFTA," *American Agriculturalist*, October 1, 2018, at <https://www.americanagriculturist.com/farm-policy/usmca-will-replace-nafta>.

Still, Washington state and U.S. farmers bore a large brunt of the July 6 2018 announcement of tariffs on \$34 billion worth of products, consisting of 545 separate goods. The majority of Washington's top crops were included on the tariff list including apples, potatoes, wheat, cherries, pears, milk, beef, beans, corn, raspberries, carrots, peas, asparagus, lentils, peaches, nectarines, strawberries, and cranberries.

Washington State Department of Agriculture estimates that the trade dispute with China and other trading countries may cost Washington state one billion dollars in lost trade.<sup>24</sup> In addition, only a few producers of Washington state crops will receive compensation from the federal relief package administered by the USDA. For all producers and agriculture companies, the cost of losing overseas markets will likely be felt for years to come, either directly or indirectly.

## **USMCA agreement provides little overall improvement for Washington farmers**

Though it was called the “worst trade deal ever,” the original NAFTA agreement provided significant benefits to Washington farmers. State exports quadrupled from \$11 billion in 1993 to more than \$40 billion in 2017 and it is estimated that every \$1 that crosses the border generates \$1.27 in economic value.<sup>25</sup>

The trade improvements provided in the new U.S.-Mexico-Canada Agreement (USMCA), however, probably do not make up for the wider loss of overseas markets caused by the ongoing trade dispute with China and other countries.<sup>26</sup>

The changes in USMCA do little to enhance the overall position of most Washington farmers, though Washington dairy farmers can now compete with other American dairy farmers for 3.2% more of the Canadian market, about \$560 million worth of product. To put that in perspective, Washington state produced \$1.187 billion in milk products in 2017, ranking the state 10th in U.S. milk production.<sup>27</sup>

Washington farmers will still face problems from retaliatory tariffs. Additionally, USCMA does not resolve the long-standing complaint of U.S. cattlemen about country-of-origin labeling, under which meat packers are allowed to import Mexican-raised beef cattle, slaughter the animals in the U.S., and label the resulting beef product as U.S.-grown.

Further, the new North American trade agreement does little to mitigate or resolve the ongoing and costly trade disputes with China, Turkey, India, and the European Union.

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24 “Washington State Agriculture: Trade, Tariffs, and NAFTA – Senate Economic Development and International Trade Committee,” by Rianne Perry, work session, International Market Development, Washington State Department of Agriculture, September 26, 2018, at <http://app.leg.wa.gov/committeeschedules/Home/Document/185831#toolbar=0&navpanes=0>.

25 “US – Mexico Trade Agreement Report of the Agricultural Policy Advisory Committee,” United States Trade Representative, September 27, 2018, at <https://ustr.gov/sites/default/files/files/agreements/FTA/AdvisoryCommitteeReports/Agriculture%20Policy%20Advisory%20Committee.pdf>.

26 “NAFTA 2.0 creates few improvements for Washington agriculture,” by Madilynne Clark, blogpost, Washington Policy Center, October 5, 2018, at <https://www.washingtonpolicy.org/publications/detail/nafta-20-creates-few-improvements-for-washington-agriculture>.

27 “Milk Production, Disposition, and Income 2017 Summary,” National Agricultural Statistics Service, United States Department of Agriculture, April 2018, at <http://usda.mannlib.cornell.edu/usda/current/MilkProdDi/MilkProdDi-04-26-2018.pdf>.

## **Conclusion**

Supporters of current U.S. tariff and trade policies argue that the short-run cost of these strategies to U.S. exporters will be outweighed by the long-run benefits. These protectionist advocates believe that the costs borne in the form of layoffs, lost markets, and lost business will be worth the gains made to the overall U.S. economy. However, these gains are likely to benefit only a few industry sectors and not reach all farm families hurt by ongoing trade disputes.

History and current events illustrate that short-term national protectionist strategies do not work for producers in Washington state. The recent port labor slowdown is a reminder of the persistent financial losses that linger for years after trade disputes or labor disruptions end.

More currently, the results of the USMCA agreement show that threatening a stable trade relationship creates little to no net gain for Washington's agricultural sector. Only time will tell if protectionist trade policies will help in the long run or, as shown by historical experience, damage the state economy, hurting farms and many families in the process.

Instead of continuing international disputes and endangering trade agreements that have historically benefited our country, the Washington agricultural community would be better off under a national policy that reduces tariffs and creates free trade agreements with more partners, both in the Pacific Rim region and around the world.

Without a long-term national policy of low tariffs and free trade, the U.S. risks being outpaced by more cooperative countries which are eager to forge trade agreements that allow their farmers to compete in the global marketplace.

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Phone: (206) 937-9691

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**Madilynne Clark** is a research fellow and former Director for the Initiative on Agriculture at Washington Policy Center.

An Oregon native, Madilynne brings a lifetime of experience in agriculture policy. Her passion for agriculture grew as she helped her dad on veterinary calls and then became active in FFA.

Before joining WPC in 2016, she worked for Ag Association Management in Kennewick as an Account Manager and field rep for the Far West Spearmint Marketing Order. She worked with growers and industry across Washington, Oregon, and Idaho. She also spent two years as an associate of The Context Network. Her time involved working as a business analyst on various agriculture projects in production, wholesale, retail, and policy Ag sectors.

Madilynne holds a Master's Degree in Agricultural and Resource Economics from Colorado State University as well as a B.S. in Environmental Economics, Policy and Management from Oregon State University.