



Collateral Damage:

How Global Disputes are Disrupting Trade in
Washington State

June 2019



wcit.org



[@washingtontrade](https://twitter.com/washingtontrade)



[facebook.com/
washingtontrade](https://facebook.com/washingtontrade)

Contents

1. Overview	2
2. Notable Export Activities and Assets by Congressional District	2
3. Beyond Apples and Airplanes: Other Leading Washington State Trade	3
Food and Agriculture	3
i. Frozen Potatoes and other Food Stuffs	3
ii. Hops	3
iii. Coffee	4
Software, Cloud Services, and Video Games	4
Medical Devices	4
Architecture and Engineering	5
Higher Education	5
4. Where Does it Go? Washington's Largest Foreign Markets for Goods and Services	6
China	6
European Union	6
Canada and Mexico	6
Countries of the CPTPP	7
5. Well Connected: Washington as a Hub for Global Commerce	8
Washington's Ports	8
i. The Ports of Seattle and Tacoma and The Northwest Seaport Alliance	9
ii. The Ports of Longview, Vancouver, and Olympia	9
iii. Grays Harbor	10
iv. Columbia Snake River System	10
Kent Valley	10
Foreign-owned Firms Engaged in Trade	10
6. Conclusion	11

1. Overview

The last two years have been tumultuous for trade. Friction between the U.S. and its trading partners has soared, from the contentious negotiations with Canada and Mexico on the USMCA to the ongoing disputes with China. The consequences of these tensions are far-reaching, including for the many workers, companies, and communities in Washington state that rely on robust global trade.

Washington is the most trade-dependent state in the nation with approximately 40% of all jobs tied to international commerce. Though best known for apples and airplanes, trade in Washington is incredibly diverse. It encompasses importers, exporters, manufacturers, software developers, ranchers, farmers, architects, retailers, ports and logistics, and supply chain managers. Trade is critical for our well-known, outdoor consumer brands like REI and Outdoor Research, as well as high-value manufacturers not normally associated with Washington state such as BMW, which has a parts plant in Moses Lake, or Philips, which manufactures ultrasound devices in Bothell.

Washington state also has a long history as a gateway—first to the gold and seafood of Alaska, and later to the consumers and manufacturing supply chains of Asia—and the state remains a critical hub for international commerce.

In this briefing, we highlight some of the lesser known impacts of trade on Washington's economy by product, service, and geography. Trade impacts every town, county, and congressional district in Washington. We hope these stories will shine a light on what's at stake from prolonged trade disputes both statewide and in specific communities.

2. Notable Export Activities and Assets by Congressional District

- **District 1:** Software sales and royalties
- **District 2:** Medical device design and manufacturing
- **District 3:** Ports of Longview and Vancouver
- **District 4:** Frozen French fries
- **District 5:** Potato farming
- **District 6:** Automobile exports
- **District 7:** Coffee and higher education
- **District 8:** Agriculture and the Kent Valley industrial center
- **District 9:** Port of Tacoma and the Kent Valley industrial center
- **District 10:** Port of Olympia

3. BEYOND APPLES AND AIRPLANES: OTHER LEADING WASHINGTON STATE TRADE

Washington is a primary global source for many goods and services, from agricultural commodities to high-tech manufactured goods and software. Discussed in this report are various Washington grown foodstuffs, imported value-added agriculture, consumer goods, and electronics. In addition to exporting commodities, software and services, Washington state is a destination for higher education. The educational services provided by Washington institutions of higher learning are bringing revenue into the state from thousands of international students each year.

Trade promoting industries are found across the state. Eastern Washington is an important source of various agricultural products, both in absolute terms and relative to total U.S. and global supplies. The Puget Sound region is home to many manufacturers and services providers, and in every area of the state, international students are enrolled in Washington's schools.

Food and Agriculture

i. Frozen Potatoes and other Food Stuffs

Washington is well known as a major provider of a wide variety of food products to the world. In addition to fresh salmon, apples, cherries, and pears, Washington exported \$798 million worth of frozen potatoes in 2018, much of it in the form of French fries, hash browns, and tater tots.¹ This is nearly the value of all apples, pears, and quinces exported from Washington in the same year. Asia is the largest consumer of frozen potatoes, and Japan imported the most of any single nation at \$206 million. In addition to Japan, other countries such as Malaysia, Mexico, and Singapore are among the top ten importers by value. Potatoes are grown in Eastern and Southern Washington in Districts 3, 4, 5, and 8.² Over half of the frozen French fry production takes place in Benton, Franklin and Yakima counties, in District 4.³ In addition to potatoes, Washington's exports of frozen vegetables, leguminous vegetables, and concentrated or sweetened milk and cream are each worth more than \$100 million a year. Washington grows 67% of all U.S. apples, and accounts for 90% of U.S. apple exports. Trade barriers that restrict apple imports, whether high duties, retaliatory tariffs, or sanitary and phytosanitary policies, disproportionately harm Washington apple growers.⁴

ii. Hops

Washington is the nation's largest producer of hops, representing three quarters of all U.S. production in 2017 and 25% of global production. Nearly 30% of Washington's hops harvest by value is exported, equal to 82% by value of all U.S. hops exports in 2017.⁵ A large share of the global beer industry depends on the harvest and export of hops grown in Central Washington, in District 4's Yakima Valley. In 2017, Washington exported \$140 million in hops to beer producers around the world. Top destinations for Washington hops were the UK, Belgium, Canada, and Germany.⁶ In addition to the large global export market for Washington hops, the state's hops farmers support domestic beer production of all sizes, from Washington's thriving craft beer industry to major national corporate producers.

iii. Coffee

Washington has long been known for its pioneering coffee sector. The state is at the center of a global coffee supply chain. Coffee beans are purchased from around the world, including Central and South America, East Africa, and South East Asia, and are then roasted in Washington, and shipped out again to the coffee consuming countries of the world. The largest coffee exporters to Washington in 2018 were Brazil, Colombia, Nicaragua, Peru, and Indonesia, accounting for 65% by value of coffee imports. The state imported \$353 million worth of coffee and exported \$131 million, indicating a large domestic market for the state's coffee.

Washington is responsible for the critical and value-adding roasting process; 95% of imported coffee was unroasted, while 95% of exported coffee was roasted. Besides roasting, packaging, and serving, the coffee industry supports jobs in advanced manufacturing,⁷ marketing, technology, and the supply chain management sector. In addition to global brands like Starbucks, there are numerous specialty coffee roasters and coffee shops throughout the state.

Software, Cloud Services, and Video Games

Approximately \$10 billion of computer software was exported from Washington in 2016, based on a report by the Business Roundtable.⁸ Major developers include Microsoft in Redmond, Inrix in Kirkland (District 1), and Tableau in Seattle (District 7). Microsoft alone employs more than 40,000 workers in the Puget Sound region, many of whom work on software products exported in the form of licensing around the world. Another major aspect of digital trade is Washington state's cloud providers. Amazon Web Services (AWS) and Microsoft Azure are the most popular, over Google, IBM, Oracle, and China's Alibaba. According to RightScale's 2019 Cloud Report, 61% of businesses used AWS, 52% used Azure and 19% used Google Cloud.

Today, a major aspect of the software industry is video game design. Video game sales generated \$43.4 billion in the U.S. in 2018. The industry is rapidly growing, posting 18% sales growth over 2017. Washington is home to over 240 video game companies, the 3rd highest of any state.⁹ The industry is concentrated in the Puget Sound area, in Districts 1, 7, and 9, but is present in every district in the state.¹⁰ The largest firms are Big Fish Games, Bungie, Wizards of the Coast, and Valve Corporation, employing a collective 1,800 people in Washington.¹¹ Washington's video game industry includes some of the most important game design firms in the world and employs skilled computer programmers, writers, and marketers to sell these high-value, global products.

Medical Devices

Medical devices are another advanced manufacturing product not commonly associated with the state. In 2018, Washington exported \$871 million in ultrasound equipment, representing 72.4% of all ultrasound exports from the U.S.¹² China is the largest single consumer, importing \$364 million from Washington in 2018. The European Union imported \$208 million. Major companies include Philips, Physio-Control Inc., Spacelabs Healthcare, NanoString Technologies Inc., and Ekos Corp.¹³ The majority are designed or manufactured in Districts 1 and 2.

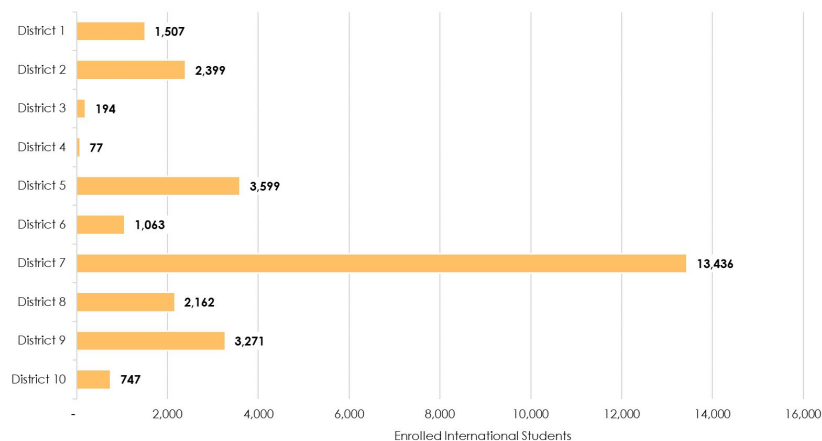
Architecture and Engineering

Several Washington architecture and engineering firms have done significant overseas work in recent years, particularly in Asia. Many of these projects integrate cutting edge sustainability features. In Shanghai, NBBJ designed the first ever LEED HC Gold certified hospital in the country.¹⁴ Elsewhere, they designed an office building from a repurposed airport in Fornebu, Norway that utilizes the surrounding landscape to cut carbon emissions by 80%.¹⁵ Other examples include CallisonRTKL's design for Shanghai's metro station to reduce reliance on cars by encouraging walking and mass transit,¹⁶ the Ningbo Eco-Corridor project by Herrera Environmental Consultants to create a living filter for habitat restoration,¹⁷ and an office tower in Fushou designed by MG2 that uses a variety of features for energy efficiency.¹⁸ Washington has a large and long-lasting impact around the world through these highly specialized and sought-after services. In 2018, there were an estimated 585 firms in Washington state, employing a collective 6,248 people with an average annual salary of \$82,000.¹⁹

Higher Education

During the 2017-2018 school year, there were 28,450 foreign students living and studying in Washington state in 2-year, 4-year, postgraduate, ESL, and certificate programs. Washington had the 11th highest foreign enrollment of any state and enrollment grew by 2% over the previous school year. Spending by international students on tuition, housing expenses, and purchasing various goods and services in Washington is a form of export. Across Washington, international students spent \$917.3 million. Every congressional district in the state has institutions of higher learning that enroll international students (**Exhibit 1**). In order of congressional district, these include Cascadia Community College, WWU, Clark College, Yakima Valley CC, WSU, University of Puget Sound, UW, Central Washington, Seattle University, and Pacific Lutheran University. Combined, the financial contributions by these students supported 8,311 jobs in Washington in 2017, based on a recent study by NAFSA: Association of International Educators.²⁰

Exhibit 1. International Students Enrolled in Washington Schools, 2017-2018 Academic Year



Sources: NAFSA, 2019; Community Attributes Inc., 2019.

4. WHERE DOES IT GO? WASHINGTON'S LARGEST FOREIGN MARKETS FOR GOODS AND SERVICES

Every year, Washington state exports over \$10 billion worth of goods to each of the major trading blocs in the world (**Exhibit 2**). These include:

China

China is our largest trade partner, due in part to Washington's geographic position, large ports, and longstanding business relationships with China. In 2018, Washington had \$32.4 billion in two-way trade with China, \$16 billion of exports, and \$16.4 billion of imports. Controlling for oilseed and automobile exports, which are primarily grown and manufactured outside the state, Washington entities exported \$14.2 billion worth of goods to China.²¹ Historically, Washington has been the state with the most trade by value with China, accounting for 14% of all U.S. exports there. In 2018, Washington exports to China fell below those from California and Texas for the first time since 2012. Washington also exports services to China in the form of financial services, technical and professional services, royalties and license fees, and many others. In 2017, Washington state exported \$1.4 billion worth of services to China.

European Union

In 2018, Washington exported \$12.2 billion worth of goods to the EU, the second highest after China. The EU is the largest importer of Washington state services, totaling \$8.1 billion in 2017, including \$1.8 billion in services to the United Kingdom.²² The U.S. and EU combined represent 46.6% of the world's economy (China represents approximately 15%).²³ The U.S. is currently in the early stages of trade talks with the EU. The EU recently released its negotiation directives which lay out reductions to industrial tariffs but does not include agriculture and food standards.²⁴ Another possible topic of negotiations is improving the rules of international trade, particularly over subsidies and state-owned enterprises. The Trump administration announced in May that it would delay imposing Section 232 national security tariffs on autos and auto parts from the EU, Japan, and other nations for 180 days to allow time for negotiations. This pushes potential auto tariffs back to November 2019.²⁵ The U.S. is also pursuing separate negotiations with the United Kingdom, which will soon leave the European Union and its trade agreements.²⁶

Canada and Mexico

Washington exported \$11.2 billion worth of goods to Canada and Mexico in 2018 in the midst of tariffs and retaliatory tariffs from each party. In addition, the two nations combined imported \$2.7 billion worth of services from Washington state businesses in 2017.²⁷ The new NAFTA, the United States-Mexico-Canada Agreement (USMCA) is currently awaiting ratification. On May 17, 2019 a major barrier to ratification was removed when the U.S. agreed to lift steel and aluminum tariffs from Canada and Mexico in exchange for ending the retaliatory tariffs. The three countries also agreed to enact measures to prevent transshipment of steel and aluminum.²⁸ Most recently, trade between the U.S. and Mexico was disrupted by President

Trump's threat of a 5% tariff on all Mexican goods, to be raised to 25% by October 2019 unless Mexico makes changes to its immigration policies. In early June, President Trump backed off of his tariff threat after reaching an agreement with Mexico on immigration.

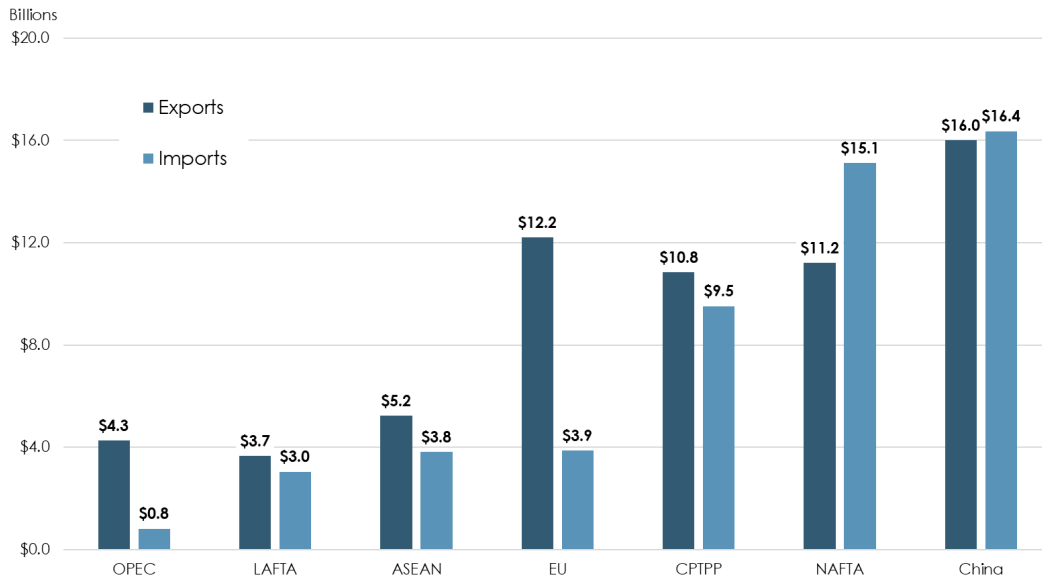
Countries of the CPTPP

The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) consists of 11 Pacific countries; Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, and Vietnam. The U.S. was a founding member of this agreement until withdrawing in January 2017 under President Trump. The remaining members continued with the agreement and it went into effect January 1, 2019. Currently, it has been ratified by 7 of its members. Many of the rules and disciplines provisions of the CPTTP are included in USMCA, notably the digital chapters of USMCA.

These nations represent important destinations for Washington trade. The nine member countries other than Canada and Mexico represent nearly as much Washington trade as NAFTA/USMCA (**Exhibit 2**). Trade with the CPTPP nations is two-way. In addition to being consumers of Washington goods, these nations are important manufacturing centers that form the supply chains for many Washington state businesses. In terms of market access, Washington state competitors will face barriers to trade in the region that leading agricultural exporters like Canada, Australia, and New Zealand will not face, for example, wheat and apple exports to Japan. The U.S. will still face tariff rates on a most-favored nation (MFN) basis, but others will have preferential access agreed as part of the CPTPP.

Exhibit 2 shows Washington's two-way trade in goods with major political and economic blocs around the world. Besides the groups discussed above, the chart displays trade with ASEAN, the Association of Southeast Asian Nations, LAFTA, the Latin American Free Trade Association, and OPEC, the Organization of the Petroleum Exporting Countries. Note, the CPTPP total does not include trade with Canada and Mexico, although they are members of that agreement. Washington's trade with these two nations are captured under NAFTA.

Exhibit 2. Value of Washington state Trade with Major Trading Blocs, 2018 (Billions 2018 \$)



Sources: United States Census Bureau, 2019; Community Attributes Inc., 2019.

5. WELL CONNECTED: WASHINGTON AS A HUB FOR GLOBAL COMMERCE

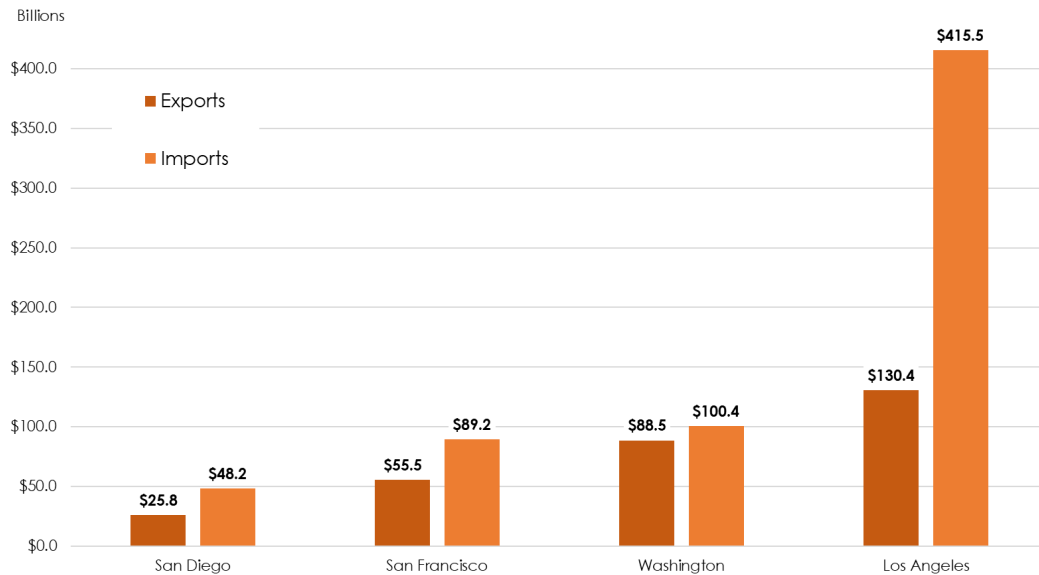
Washington’s airports, railways, and seaports facilitate the movement of billions of dollars’ worth of imports and exports each year. While a large share of this cargo is either originating from or destined for locations outside the state, the handling of this cargo is a major source of employment and wealth creation. Businesses, farmers, and ranchers from as far away as the Midwest rely on Washington ports to connect them with goods and producers. In 2017, an estimated 94,200 workers were employed by businesses and operations directly engaged in the handling or movement of marine cargo, including longshoremen, stevedoring companies, long and short-haul trucking and drayage, intermodal operations, warehousing, and freight forwarding and logistics. An additional 50,400 workers were employed in positions supporting supply chain management and trade within manufacturers, retailers, and various other businesses across the state.

Washington’s Ports

In 2018, \$183.45 billion in merchandise and commodities imports and exports were handled at Washington state ports.

The Census Bureau organizes ports into customs districts. The Seattle District includes almost all of Washington’s ports, seaports and airports from Aberdeen-Hoquiam to Yakima Air Terminal. These ports, and the ports of Longview, Vancouver, and Kalama (in the Columbia-Snake River District), export more by value than the San Diego port district and the San Francisco port district (**Exhibit 3**). On the West Coast, only Los Angeles has a larger two-way trade value.

Exhibit 3. Value of Exports and Imports from Major West Coast Ports Districts, 2018 (Billions 2018 \$)



Sources: United States Census Bureau, 2019; Community Attributes Inc., 2019.

i. The Ports of Seattle and Tacoma and The Northwest Seaport Alliance

The Ports of Seattle and Tacoma and joint operations under The Northwest Seaport Alliance, in districts 7 and 9, constitute one of the largest maritime shipping and port systems in the U.S. These ports handle containerized cargo, breakbulk, automobiles, logs, and liquid bulk and support various non-shipping industries and jobs, including cruise ships and fishing. These include 832,900 containers from China and 219,100 containers to China. The next highest country, Japan, had a two-way trade total of 289,200 containers.²⁹ The NWSA is one of the largest marine cargo gateways in the country, and the majority of its cargo is international. An estimated 20,100 jobs and \$5.86 billion in business output in 2017 were directly supported by these ports. Including indirect impacts from upstream business activities and consumer spending, the ports supported 58,400 jobs and \$12.38 billion in business output.³⁰

ii. The Ports of Longview, Vancouver, and Olympia

Along the Oregon border in District 3, the Ports of Longview and Vancouver imported a combined \$2.5 billion worth of goods in 2018 and exported \$5.1 billion. These ports imported 42% of the state’s iron and steel, 24% of the fertilizer, and 19% of automobiles. On the export side, District 3 accounts for 69% of the ores, slag, and ash exported from Washington, as well as 38% of cereals, 30% of iron and steel, and 27% of wood.

The Port of Olympia (District 10) facilitated the export of \$130.6 million in 2018, of which \$129.9 million was to Asia.

iii. Grays Harbor

In the 6th District, Grays Harbor is Washington's primary automobile export gateway, exporting \$995 million worth of vehicles, almost entirely to Asia. \$637.6 million worth went to China alone in 2017.³¹ Auto exports from Grays Harbor were down considerably in 2018, \$534 million in total and \$160 million to China.³² The Port of Tacoma, in District 9, also handles automobile imports. Tacoma handled 146,900 automobiles in 2017. In that year, automobile imports directly supported 1,330 jobs.³³

iv. Columbia Snake River System

Another critical piece of infrastructure for Washington trade is the Columbia Snake River System connecting the far eastern side of the state with the Pacific. In 2017, over 52 million tons of international cargo was transported on the Columbia-Snake, equaling \$21 billion in value and supporting 40,000 local jobs. This waterway is an important route for bulk goods, autos, and logs. It is the largest wheat export gateway in the nation, and the second largest for soy. The river system is the top exporter of logs on the West Coast, many of which are exported through the Port of Longview. The Columbia-Snake is also used for two-way auto trade, importing Subaru, Honda, Toyota, and Hyundai vehicles through the Ports of Vancouver in Washington and the Port of Portland on the Oregon side of the river. The river is also the main export gateway for bulk mineral goods, 3.6 million tons of which were exported in 2016. These mineral products are inputs for a wide variety of products, from fertilizer to glass.³⁴

Kent Valley

Sea and airports play the starring role in international shipping but cannot function without the support of the global trade and supply chain management sector. This industry is made up of service providers, logistics operators, transportation professionals, and government officials. The Kent Valley, in Districts 8 and 9, is the largest trade region in the state. An estimated 6.5% of all imports and exports by value moving through the ports of Seattle, Tacoma, and Sea-Tac are handled at some point by facilities there. In 2017, an estimated 41,900 workers were wholly or primarily engaged in global trade and supply chain management in Kent Valley. That number has been steadily growing since 2010. These jobs are diverse in their duties and required qualifications. Four of the nine core global trade and supply chain management occupations required a high school diploma or equivalent and paid \$50,000 or more a year.³⁵

Foreign-owned Firms Engaged in Trade

Washington is home to many foreign enterprises engaged in trade that choose to locate here because of supply chain linkages and access to human capital. According to the Bureau of Economic Analysis, in 2016 there were 115,000 workers in Washington employed by majority-foreign owned U.S. affiliates. Since 2007, employment has grown at a 2.5% compound annual growth rate. Companies from the United Kingdom, Canada, and Japan were responsible for the highest employment. In 2016, 59% of this employment was in European-owned firms while 22% was in Asian companies. Manufacturing was the industry with the highest employment, accounting for 28% of all foreign-company employment.³⁶ Examples of

foreign-owned firms include Toray Composites, North Pacific Seafoods, Nintendo, Daimler, Glencore Agriculture, and Holland America, among many others.

6. CONCLUSION

The Trump administration's commitment to disrupting international trade is upending norms and traditions around the world, and the ripple effects are spreading far and wide. Whether the results will ultimately prove advantageous or harmful for the U.S. remains to be seen; critical negotiations remain underway with China, the USMCA awaits congressional approval, and talks on potential new agreements are in early stages with Japan, the U.K., and other countries.

In this time of unprecedented change, all of these disruptions are creating uncertainty and risk for the incredibly diverse industries, businesses, and workers in Washington state who are dependent on robust international trade for their success. As a result, Washington producers of everything from frozen French fries to ultrasound equipment and video games will continue to watch closely until the many on-going disputes are resolved.

Endnotes

1. Anna King. "Northwest's Late-Winter Snow Means Nation's French Fries Could Be In Danger." *NW News Network*. March 28, 2019.
2. USDA NASS. Washington Agricultural Census. 2012.
3. U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages.
4. Washington State Congressional Delegation letter to Ambassador Lighthizer. March 5, 2019.
<https://www.cantwell.senate.gov/imo/media/doc/03052019%20Lighthizer%20Japan%20apple%20letter.pdf>
5. Washington Beer Commission. March 2019.
6. U.S. Census Bureau.
7. Starbucks.
<https://stories.starbucks.com/stories/2008/starbucks-coffee-company-to-acquire-the-coffee-equipment-company-and-its-re/>
8. Business Round Table. 2016. https://s3.amazonaws.com/brt.org/BRT_General_Trade_WA.pdf
9. Thomas Wilde. "U.S. Video game sales climb 18% in past year; Washington state third with 242 active studios." *GeekWire*. January 26, 2019.
<https://www.geekwire.com/2019/u-s-video-game-sales-climb-18-annually-washington-state-third-242-active-studios/>
10. Entertainment Software Association. <https://www.eweinyourstate.org/states/WA>
11. Melissa Crowe. "Largest Game Developers in the Puget Sound Region." *Puget Sound Business Journal*. February 5, 2016.
<https://www.bizjournals.com/seattle/subscriber-only/2016/02/05/game-developers.html>
12. U.S. Census Bureau.
13. Melissa Crowe. "Ultrasound manufacturer tops Medical Device Manufacturers list." *Puget Sound Business Journal*. May 16, 2016.
<https://www.bizjournals.com/seattle/news/2016/05/16/the-list-ultrasound-manufacturer-tops-medical.html>
14. NBBJ. Shanghai Jiahui International Hospital.
15. NBBJ. Telenor World Headquarters. <http://www.nbbj.com/work/telenor-world-headquarters/#next>
16. CallisonRTKL. Shanghai Metro 17 Cao Ying Road Station.
<https://www.callisonrtkl.com/projects/shanghai-metro-17-cao-ying-road-station17/>
17. Herrera Environmental Consultants. Ningbo Eco-Corridor. <https://www.herrerainc.com/blog-post/>
18. MG2. Fujian Provincial Electric and Power Company Headquarters.
<https://mg2.com/work/fujian-provincial-electric-power-company-headquarters/>
19. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2018.
20. NAFSA. International Student Economic Value Tool.
http://www.nafsa.org/Policy_and_Advocacy/Policy_Resources/Policy_Trends_and_Data/NAFSA_International_Student_Economic_Value_Tool/#distData
21. U.S. Census Bureau.
22. Coalition of Services Industries. 2019.
https://servicescoalition.org/images/Exports_project/2019_State_Exports/CSI_State_Report_WA.pdf
23. Ferdinando Giugliano. "Keep an Eye on Trump's Other Trade War." Opinion. *Bloomberg*. April 3, 2019.
<https://www.bloomberg.com/opinion/articles/2019-04-04/potential-for-europe-us-trade-war-should-concern-markets>
24. Hans von der Burchard, "EU-US trade talks move forward, but problems remain." *POLITICO*. May 16, 2019.
<https://www.politico.eu/article/eu-us-trade-talks-move-forward-but-problems-remain/>

25. Jenny Leonard and Shawn Donnan, "Trump Delays EU, Japan Auto Tariffs for 180 Days for Talks." *Bloomberg*. May 17, 2018.
<https://www.bloomberg.com/news/articles/2019-05-17/trump-delays-auto-tariffs-on-eu-japan-for-180-days-to-negotiate?srnd=premium>
26. Hans von der Burchard and Adam Behsudi. "The great transatlantic trade charade." *POLITICO*. February 7, 2019.
<https://www.politico.eu/article/the-great-transatlantic-trade-charade-european-union-us-donald-trump-tariffs-cars/>
27. Coalition of Services Industries. 2019.
https://servicescoalition.org/images/Exports_project/2019_State_Exports/CSI_State_Report_WA.pdf
28. Kayla Tausche and Jacob Pramuk, "US reaches deal to lift steel and aluminum tariffs on Canada and Mexico." *CNBC*. May 17, 2019.
29. Northwest Seaport Alliance. March 2019
30. Port of Seattle, Port of Tacoma, and The Northwest Seaport Alliance. April 2019.
31. Washington Council on International Trade. January 2019.
32. U.S. Census Bureau.
33. Port of Seattle, Port of Tacoma, and The Northwest Seaport Alliance. April 2019.
34. "Columbia Snake River System Facts." Pacific Northwest Waterways Association.
35. City of Kent. March 2019.
36. U.S. Bureau of Economic Analysis.