

# Mapping

## SUMMARY OF MAPPING

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### DISCOVERIES

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The collective potential of agriculture across sectors is astounding. The county has at least 300 farms and 20,000 - 30,000 acres in use or available for production. For many of us the global importance of our seed industry was a revelation, as well as the knowledge that we possess one of the most ideal climates across the globe for vegetable seed production and cane berries. The complete sleeper was the number of fiber animals and the depth of the fiber industry potential.

### CLUSTER MATRIX

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The cluster matrix is organized by segment of the industry rather than by individual farm. Each segment has some particular issues, challenges and opportunities. However, most farms are diverse and cross over into other segments. The matrix is most complete for the vegetable, fiber and lavender sectors. We could add a miscellaneous category for Christmas Trees, Honey, etc.

### SUMMARY OF CLALLAM COUNTY PRODUCTION

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<b>Seed Crops - approx. 10 kinds</b> products	<b>Lavender/Other Herbs</b> & many value-added products
<b>Livestock - 7 kinds</b>	<b>Animal Fiber</b> and related value-added products
<b>Cow's Milk</b> catalogues	<b>Flowers and Plants</b> - direct sale, nurseries,
<b>Fresh vegetables &amp; herbs</b> Many Certified Organic Salad Mixes	<b>Grain/silage for livestock</b> eggs and honey Christmas Trees
<b>Berries (5 kinds) and Grapes</b> Wine Jam and Syrup	<b>Miscellaneous</b> eggs and honey Christmas Trees compost and manure
<b>Apples, Pears and Pear Apples</b>	

### MARKETS FOR THE SECTORS ARE VARIED

- Fresh food sectors can create local, regional and in-state demand for their products. Non-perishable items such as jam, syrup and wine can be marketed broadly. Some farmers sell seed and tubers to catalogue seed companies.
- Lavender and fiber sectors market broadly via the internet and have global potential.
- Seed industry farmers have contracts within the global market.
- Dairy farmers market to Darigold, which requires an exclusive contract.
- Livestock farmers forced to conduct private sales due to lack of USDA slaughtering, cut and wrap facilities. Some larger farmers sell animals at auction, where price competes with global market.

### SUPPLIERS AND SERVICES

- Many local business partially supported by farmers

- No good agricultural supply in the County. Very little equipment, seed, fertilizer purchased locally. Local business not competitive and will not deliver.
- Farmers provide services to one another where practical.
- Many value-added services not local.

## WHAT DOES CLALLAM COUNTY PRODUCE?

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### Seed crops

Cabbage  
Brussel Sprouts  
Cauliflower  
Beets  
Swiss Chard  
Spinach  
Kale  
Bent grass

### Small Fruit

Raspberries  
Blueberries  
Strawberries  
Blackberries  
Grapes  
Rhubarb  
Jam, syrup, wine

### Green vegetables

Root Crops  
Greens  
Garlic  
Basil, fresh herbs  
Eggs  
Seed  
Salad Mix  
Garlic Salt

### Lavender & Other Herbs

Lavender U-Pick  
Lavender plants & plugs  
Golden seal, etc. -fresh, dried  
Culinary Products  
Medicinal Products  
Essential Oils  
Bath/body products  
Greeting Cards  
Bath/body products  
Miscellaneous other products

### Fiber

Raw fleece - sheep, alpaca,  
goat, llama  
Fiber livestock  
Processed fiber  
Spun Yarn  
Knitted, crocheted items  
Woven Products  
Books, Patterns, Info kits  
Hand Spindles

### Livestock

Beef  
Chicken  
Hog  
Lamb  
Rabbit  
Ostrich  
Horses  
Painted Ostrich eggs  
Ostrich leather goods

### Dairy

Cow's milk  
Manure

### Tree Fruit

Apples  
Pears  
Pear Apples  
Cider

### Flowers and Plants

Fresh Flowers  
Floral bouquets  
Potted Plants  
Tubers, Rhizomes  
Dahlias, Iris, Lilies  
Bulbs  
Wreaths, Dried Flowers

### Grain

Hay/straw  
Barley

### Miscellaneous

Christmas Trees  
Compost

## CURRENT MARKETS AND PRIMARY COMPETITORS FOR WHAT IS PRODUCED

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SEED CROPS—

SMALL FRUIT—

VEGETABLES—

**MARKETS**

Novartis Seed Co. (Holland)  
 Other farmers  
 Territorial Seed Co. (Oregon)

**COMPETITORS**

Skagit County farmers

**DAIRY—****MARKETS**

Darigold  
 Other farmers  
 Households

**COMPETITORS**

Global producers

**LAVENDER & OTHER HERBS—****CUSTOMERS**

Tourists  
 Local Households  
 Internet customers  
 Restaurants & B&Bs  
 Wholesale Distributors  
 Catalogue Companies  
 Gift Basket Companies  
 Bakeries  
 QFC

**COMPETITORS**

Other Lavender farmers  
 People re-selling imported bundles  
 -Nurseries, regional greenhouses  
 Florists

**GRAIN—****MARKETS**

Other commercial farmers  
 Home gardeners  
 Feed stores  
 Hobby farmers

**COMPETITORS**

Hay Importers  
 Eastern WA Hay Co.

**MARKETS**

Local Households  
 Port Townsend Coop  
 Restaurants  
 Hegg & Hegg  
 Black Diamond Vineyard  
 Sequim Valley Syrup  
 Tourists

**COMPETITORS**

Imported fruit - Raspberries from Chile  
 Oregon machine-picked berries  
 California growers who dump fruit below cost on market during our season

**FIBER—****CUSTOMERS**

Local Residents  
 Tourists  
 City spinners  
 Internet customers  
 Participants at fairs, festivals  
 Trade show customers

**COMPETITORS**

Larger farms  
 Other internet companies  
 Woodland woolworks

**TREE FRUIT—****MARKETS**

Local households  
 Bonny's Bakery  
 Sunny Farms

**MARKETS**

Local Households  
 Puget Consumers Coop  
 Larry's Markets  
 Restaurants  
 Local independent food stores  
 Chain supermarkets  
 Charlie's Produce (broker)

**COMPETITORS**

Sysco Restaurant Supply  
 Food Service of America  
 Charlie's Produce  
 Sunny Farms  
 Unregistered local businesses  
 Home gardeners  
 Low cost importers

**LIVESTOCK—****CUSTOMERS**

Local Households  
 Internet customers  
 Sunny Farms - (Ostrich only)  
 Auctions

**COMPETITORS**

Imported meat  
 Factory raised livestock

**FLOWERS AND PLANTS—****MARKETS**

Local households  
 Territorial Seed Co.

**COMPETITORS**

Supermarket Greenhouses  
 Florists

## Key Indicators

### ECONOMIC VALUE

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Currently, agriculture provides \$6,000,000 - \$7,000,000 of Clallam County's economy as measured by the USDA agricultural census, 1997. Estimates of the potential for 3 sectors are given.

#### Summary of Potential:

	<b>CURRENT</b>	<b>POTENTIAL</b>
Food Sector	\$3,000,000	\$14,000,000
Fiber Sector	\$0	\$200,000
Lavender	\$80,000	\$150,000
Sub-total	\$3,080,000	\$14,350,000
Agri-tourism	Not Available	Not Available
Seed	Not Available	Not Available
Total	\$3,080,000	\$14,350,000