



GLOBAL COLD CHAIN ALLIANCE

2025 TARIFF INFORMATION & RESOURCE CENTER

REPORT & ARCHIVE

Significant and dynamic change is occurring across the global trade landscape. The **Global Cold Chain Alliance (GCCA)** is tracking developments and announcements across multiple regions and markets. The information below is organized by country, with key data and links to official sources. Information will be updated regularly. Questions? Please contact Shane Brennan, Senior Vice President, Strategy, Partnerships and Policy at sbrennan@gcca.org

UPDATES BY DATE

DECEMBER 19, 2025 UPDATE

China reduces anti-dumping tariffs on EU pork imports

China has issued its final ruling in an anti-dumping investigation into European Union pork, significantly reducing the duties applied to EU exports. From 17 December, China will impose tariffs ranging from 4.9% to 19.8% on EU pork imports for five years, down from the 15.6%–62.4% rates set in a preliminary decision in September. The revised measures apply to pork imports worth over US\$2 billion annually. Importers will receive refunds for the difference between the provisional and final rates paid since September.

The investigation, launched in June 2024, affects major EU exporters including Spain, the Netherlands and Denmark. In 2024, more than half of China's US\$4.8 billion pork imports came from the EU, with Spain the largest supplier by volume. Most Spanish exporters will face a tariff of 9.8%, with some firms receiving lower rates. The European Commission criticized the investigation as being based on insufficient evidence and stated it is assessing compliance with WTO rules, while reaffirming its intention to defend EU exporters. The duties are applied in addition to the existing most-favored-nation tariffs of around 12% for many pork products. China is also conducting an anti-subsidy investigation into EU dairy exports, due to conclude in February 2026, and has already imposed tariffs on EU brandy.



United Kingdom: UK–South Korea Trade Deal

In December 2025, the UK and South Korea concluded an upgraded Free Trade Agreement, securing long-term tariff certainty and improved market access for food and agri-food products. The agreement locks in zero tariffs on around 98% of tariff lines, including chilled and frozen seafood, meat, dairy, processed foods and beverages, removing the risk of duties re-emerging under post-Brexit continuity arrangements.

Of particular relevance to cold chain operators, the deal strengthens customs facilitation and digital trade provisions, supporting faster clearance processes and reduced administrative friction for time- and temperature-sensitive goods. Updated rules of origin provide greater flexibility for processed food products with multi-country inputs, increasing the likelihood that UK exports qualify for tariff-free treatment.

Enhanced cooperation on sanitary and phytosanitary (SPS) measures and biosecurity should help minimize inspection delays for animal-origin products, improving reliability for refrigerated and frozen supply chains.

NOVEMBER 11, 2025 UPDATE

The US and Chinese Governments have both taken action to suspend the port fees imposed as a result of the US action taken in response to the Section 301 ‘unfair trade practices’ investigation. Both suspensions took effect at 00:01(EST) on November 10th. This means that companies operating Chinese vessels calling at US Ports or US companies calling at Chinese ports will not face the levies that had taken effect on October 14th. The suspension was agreed by Presidents Trump and Xi at their Summit meeting on November 1st and allows time for ongoing trade negotiations between the two economic blocs. Read statement from the US Trade Representative Office [here](#).

OCTOBER 29, 2025 UPDATE

White House Statements on ASEAN Trade Negotiations: October 2025

OCTOBER 14, 2025 UPDATE

Recent Tariff Announcements Round Up

Over the course of 2025 the United States has made significant and ongoing changes to tariff policies – these are grouped into three categories:

1. Taxes imposed on imports from other countries – this includes a baseline 10% tariff, with a variety of ‘reciprocal’ tariff rate based on a calculation of net trade imbalance or other relevant factors as



set out by the US Administration (in some cases the US has reached bilateral trade accommodations, in others there are escalating political tensions)

2. Duties on specific products without regard to their origin, normally linked to supporting a domestic US industry (these include steel, aluminum, autos and auto parts, copper parts, timber and lumber, furniture, heavy duty trucks, with others under consideration)
3. Cold chain impacts - according to the USDA Foreign Agricultural Service in the first half of 2025 total U.S. exports across beef, pork, poultry, seafood, fresh & processed vegetables, and fresh & processed fruits total global exports decreased by 3% and imports increased by 4% compared to the same period in 2024.

Categories that have seen the biggest growth in imports in H1 2025 include beef and beef products (27%), poultry and eggs (10%) and seafood (10%)> all export categories have seen declines except seafood that saw a 10% increase

U.S and China impose fees on container ships landing at their ports

Actions announced earlier this year first by the United States to penalize shipping lines that own, operate and purchase Chinese bought container ships take full effect from today. China has imposed similar reciprocal measures. These policies have impacted on the routing and planning of the world's major container shipping lines and will have an inflationary impact on container rates for refrigerated cargo and therefore on the cost of importing and exporting goods.

U.S. port fees on Chinese-linked vessels (from 14 Oct 2025)

- Under a Section 301 action, the U.S. will impose “special service fees” on vessels built, owned or operated by Chinese entities calling at U.S. ports.
- The finally adopted rate is US \$46 per net ton (reduced from earlier proposals) for affected vessels.
- Each vessel will be charged no more than five times per calendar year, on a per-voyage basis.
- Some concessions have been made: exemptions for certain categories (e.g. smaller vessels, or voyages in ballast) and adjustments in rates for vehicle carriers.

Chinese countermeasures (also effective 14 Oct 2025)

- China announced reciprocal “special port fees” on vessels with U.S. links: those built, owned, operated, flagged in the U.S., or entities with ≥ 25 % U.S. equity/control.
- The initial rate is RMB 400 per net ton, to rise gradually (to RMB 1,120 by 2028).
- China exempts vessels built in China, even if they meet U.S. nexus criteria otherwise.
- The fee is collected at the first Chinese port of call per voyage and capped at five voyages per year.



- Declaring ownership and control (with U.S. equity thresholds) prior to port calls will be required, and failure to pay may block cargo operations.
- In addition, China has sanctioned five U.S.- linked units of South Korea's Hanwha Ocean for alleged involvement in U.S. maritime investigations.

Ecuador

Update 9th September

Ecuador And South Korea agree trade accord that will allow 98.8% of Ecuador's exportable products to enter South Korea tariff free – this is seen as a likely boost to this major shrimp exporting industry and positive news following a recent decline in Chinese demand.

European Union

Update 10th October

The United States Department of Commerce has concluded an investigation into two major Italian produces that allegedly sold pasta at unfairly low prices – known as dumping – between July 2023 and July 2024. It has recommended an additional tariff duty on imported Italian pasta of 91.74%, which would be on top of the 15% general import duty imposed earlier this year. If it proceeds they will take effect in 2026.

The US currently imports more than \$800m in pasta from Italy every year and is one of the top three export markets for the product. The EU is supporting the Italian government in contesting the decision.

India

Update 27th August

The United States has increased the total effective import tariff on Indian goods to 50% - an increase on the 25% imposed in April 2025. This has been justified as a response to the continued purchase on onward sale of Russian oil. Trade talks between the two countries will continue

Africa

Update 30th September

As widely predicted the Africa Growth and Opportunity Act (AGOA) that facilitated tariff free access to the United States market for exports from countries in sub-Saharan Africa has expired. The end of this agreement follows the range of reciprocal and sectoral tariffs imposed by the Trump administration in 2025.

Despite the expiration there have been indications of political support for an extension or renewal of the agreement from within Congress and the Trump administration. However, it is not clear if that will now come to pass, especially in light of the current government shutdown in the United States.



AUGUST 1, 2025 UPDATE (U.S. TARIFF DEADLINE OVERVIEW)

Update: August 1, 2025

On Thursday, July 31, President Trump formally announced higher tariffs against more than 60 U.S. trading partners — just hours before the administration's self-imposed midnight deadline. An executive order listed out tariff rates for imports from dozens of countries, including a handful that have cut trade deals with the administration and dozens that haven't reached a deal yet. The duties range as high as 41% for Syria and 40% for Laos and Myanmar, while almost no country's imports will face tariffs below 10%. The tariff rate on U.S. imports from Canada raised to 35% from 25%, effective today.

Also of note, on 7/31 President Trump postponed higher tariffs on Mexico, writing on social media that he had agreed to a 90-day extension with President Claudia Sheinbaum to provide more time to cut a trade deal.

See the list of additional reciprocal tariffs [here](#).

Update: July 30, 2025

President Donald Trump delayed the implementation of 50% tariffs on Brazilian exports by seven days while exempting many products from the levy. The order would apply an additional 40% tariff on the baseline 10% tariff from April 2nd. But not all goods imported from Brazil would face the 40% tariff: Orange juice, civil aircraft and parts, aluminum, tin, wood pulp, energy products and fertilizers are among the products being excluded.

Update: July 14, 2025

On August 1, 2025, a sweeping set of new U.S. tariffs is scheduled to take effect. Over the past three weeks, the U.S. administration has issued formal tariff warnings to more than 23 countries, triggering one of the broadest trade confrontations in recent memory.

With so many shifting developments, please read below a summary overview from GCCA, commencing Monday July 14, 2025.

What is Happening?

Since late June, the Trump administration has issued a wave of tariff warning letters, notifying trading partners that import duties ranging from 20% to 50% will be imposed unless new bilateral agreements are reached. The deadline: August 1.

The measures target major U.S. trading partners, including the EU, Canada, Mexico, Brazil, Japan, India, and more than a dozen others across Asia, Africa, and Latin America.



Cold Chain Implications (Key Countries)

Mexico / Canada*

Goods covered by the USMCA free trade agreement were initially included in the generalized tariff imposed on March 4 but were later excluded by an Executive Order on March 6. As a result, major cold chain categories—animal proteins, seafood, fruits, and vegetables—were exempted. Pharmaceutical products are also excluded.

The assumption, though not officially confirmed, is that these goods will remain exempt (i.e., 0% tariff) after August 1 if the new generalized tariff is enacted.

Nonetheless, existing tariffs on steel and new tariffs on materials critical to cold storage construction, refrigeration components, and other cold chain operations could lead to inflationary pressures.

European Union (updated July 28)

The Presidents of the United States and the European Commission have announced a new 'framework trade deal'. Under the agreement, the U.S. will apply a 15% universal tariff on most goods imported from the EU, with some exemptions still to be finalized. In return, the EU will cut most tariffs on U.S. goods to zero.

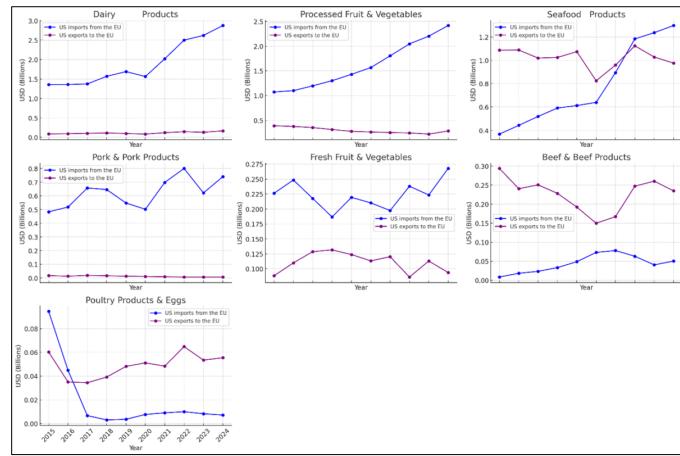
This marks a sharp increase from the pre-2024 average U.S. tariff of 4% on EU goods and is up from the 10% rate imposed since March. While the 15% tariff is lower than the 30% threatened recently, it's higher than the 10% rate currently applied to the UK.

The framework signals future talks on agricultural tariffs, with a goal of eliminating duties in some categories — though not on sensitive items like beef and poultry.

Importantly, the deal does little to address non-tariff barriers that continue to block key U.S. exports, including hormone-treated beef and chlorine-washed chicken, due to strict EU food regulations.

The likely outcome: higher costs for U.S. importers and consumers, especially across cold chain categories like dairy, seafood, and processed produce. However, with similar tariffs now in place across multiple trade partners, the broader impact on demand remains uncertain.

Trade Flow Highlights (USD, billions) - Charts below show the U.S. remains a net importer from the EU in several key sectors.

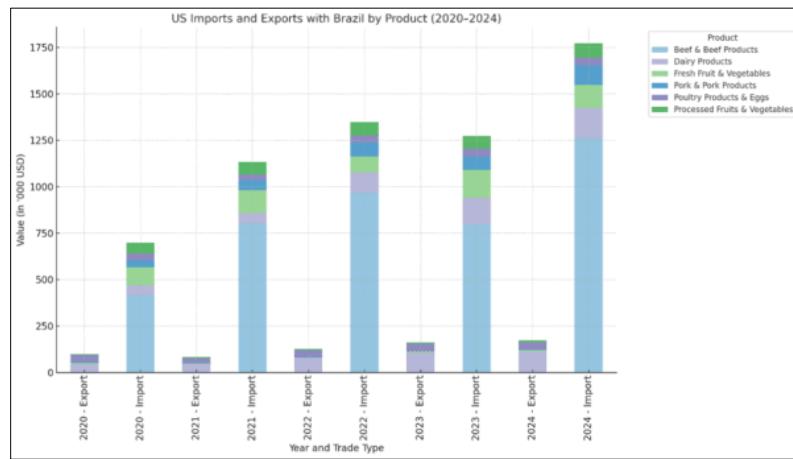


- Read the United States Statement on the Deal [Here](#)
- Read the European Union Statement on the Deal [Here](#)

Brazil

The U.S. recently proposed a higher tariff on Brazilian goods, prompting a strong retaliatory response. Despite both countries being major agricultural exporters, bilateral trade is relatively modest, with a trade deficit favoring Brazilian exports.

The more significant implication for cold chain is a prolonged dispute between these two major exporters, which may result in rivalry for growth in third-country export markets where the two compete. Both nations are actively pursuing new trade alliances, particularly in China and ASEAN countries, aiming to expand market share for their agricultural exports.



India



There is growing speculation that the U.S. and India will reach a deal that would substantially reduce or eliminate the proposed tariffs — originally set as high as 20% — on U.S. imports from India. The U.S. has long aimed to open the Indian market to its agricultural goods by lowering average applied tariffs (currently around 39%) and easing non-tariff barriers like dairy certifications and GMO restrictions.

In the cold chain space, potential U.S. export growth lies in dairy and poultry. However, India has historically resisted market liberalization in agriculture due to strong domestic opposition, national food security concerns, and regulatory standards.

India's export growth potential includes basmati rice, seasonal fresh fruits (especially mangoes, pomegranates, and bananas), and seafood such as shrimp. A trade deal could significantly benefit these sectors, particularly if high tariff barriers remain in place for seafood export competitors like Japan, Thailand, Vietnam, and South Korea.

Japan - (updated July 23rd)

Announcements made on July 23 suggest that the United States and Japan have reached a framework agreement that will see tariffs on goods imported from Japan into the United States being subject to a 15% general tariff. This is an increase from the 10% in place since March 2025, and a significant increase from the ~3% effective tariff rate imposed pre 2025, but less than the 25% threatened as part of the so-called 'reciprocal tariffs' scheduled to be enacted by the United States on 1st August.

Whilst the general agreement will see a number of existing tariffs on goods imported from the United States into Japan reduced to zero, the Japanese Prime Minister has stated that this will not include agricultural products which will continue to implement the tariffs and quotas agreed in the United States/Japan trade agreement (USJTA) that came into effect on the 1st January 2020.

The only adjustment referenced in the media announcement related to agriculture will be in the tariff-free quota entitlement for US rice exports.

EXPLAINER - Agricultural Trade Provisions in the 2020 USJTA

Beef exports saw one of the most meaningful changes. Japan's previous 38.5% tariff on fresh and frozen U.S. beef is being reduced gradually to just 9% over 15 years. Although a safeguard mechanism still applies if import volumes spike, the overall trajectory is one of greater access and lower costs. Similarly, tariffs on pork are being phased out, with muscle cuts becoming duty-free by year nine and processed pork products by year five. Variable levies and "gate price" systems that previously complicated trade are also being scaled back.

In the poultry sector, Japan is eliminating tariffs over a 10-year period. Seafood exporters are also benefiting from progressive reductions. Tariffs on many fresh and processed seafood products are being phased out, with full duty-free access expected within 5–10 years, depending on the product category.



Fresh and processed fruit and vegetable exports from the U.S. have received a major boost. Items like almonds, walnuts, cranberries, sweet corn, and broccoli entered duty-free immediately under the agreement. Others, such as fresh cherries, oranges, and processed tomato products, are moving toward zero tariffs under scheduled reductions over five to nine years.

By 2024, over 90% of U.S. agricultural exports to Japan qualified for either immediate tariff-free access or had clear reduction schedules in place.

South Korea

President Trump also sent a similar letter to South Korea on July 7. The key distinction in trade terms is that South Korea is a major importer of U.S. agri-food products, including beef, pork, dairy, and fruits. The U.S. is South Korea's largest food supplier, benefiting from a zero-tariff agreement.

The existing trade deficit is driven by unrelated sectors, particularly automotive and electronics.

Negotiations are ongoing to reach a new arrangement before the August 1 deadline.

Indonesia

On July 15–16, 2025, the United States and Indonesia publicly announced that a landmark trade agreement had been reached. The U.S. agreed to reduce planned tariffs on Indonesian exports from 32% to 19%. In return, the general tariff on goods imported into Indonesia from the United States will be reduced to 0%. Indonesia also committed to major purchases of American goods, including \$4.5 billion in agricultural imports.

Reports indicate that the \$4.5 billion consists primarily of commitments to purchase U.S. wheat, corn, soybeans, and cotton, with no specific commitments related to cold chain products. Indonesia is not currently a large-scale importer of any cold chain food commodity; the largest category is dairy, valued at approximately \$200–300 million annually.

A big tariff increase - it is important to note that while this agreement is framed as a major reduction in tariffs for Indonesian exports to the United States, it is only relative to the previously threatened higher rate. The U.S. imports approximately \$2 billion worth of seafood (mainly shrimp and tuna) from Indonesia annually—these goods were subject to a 0% tariff until March 2025.

Regional Imbalance - Further to the update provided on July 8 (see “United States” section below), this means that three of the four largest Asian seafood exporters to the U.S. are now subject to tariffs in the 19–20% range. Thailand remains the exception, still facing the threat of a higher rate.

The Philippines (updated July 23)



On July 22nd the U.S. and the Philippines announced a trade agreement that suggests significant changes in the balance of bilateral agricultural trade across key cold chain categories. The deal appears to deliver zero tariffs on all U.S. exports to the Philippines—including traditionally protected cold chain categories like beef, pork, poultry, seafood, and fresh fruits and vegetables.

Historically, these sensitive U.S. exports faced tariffs of 30–50% or more under quota systems and safeguard rules. Assuming these barriers are fully removed, this opens up one of Southeast Asia's fastest-growing consumer markets for US exporters with immediate, duty-free access for temperature-controlled meats, seafood, and produce.

The agreement is likely to have an opposite and negative impact on Filipino exports to the U.S. across the same categories. This mostly affects seafood, particularly tuna, shrimp, and processed fish, which is the Philippines' largest cold chain export by volume to the U.S., valued at over \$550 million annually. These exports will now face a 19% U.S. tariff, up from near-zero under previous MFN terms.

Other Philippine cold chain exports—such as frozen tropical fruit, processed pineapple, and prepared vegetables—may also be affected, though less severely given smaller volumes. Filipino exporters will need to absorb these new costs or pass them along, potentially impacting competitiveness against regional rivals.

UPDATES BY COUNTRY/REGION

UNITED STATES

November 17, 2025 Update:

White House Announces Carveouts for Agricultural Products Under Reciprocal Tariff Program

The White House has [announced](#) a series of targeted exemptions for agricultural goods and key farm inputs as part of President Donald Trump's modifications to the administration's reciprocal tariff program. The changes, by executive order and effective retroactively from Thursday, create broad carveouts for products the United States does not produce domestically and expand tariff relief for fertilizer and other essential inputs.



According to the administration, the exclusions apply to a range of imported ag commodities, including certain beef products, coffee, tropical fruits, specific nuts, cocoa powder, tea, spices, coconuts, and select tomato products.

The move builds on earlier work by USTR to identify goods not produced in the United States that could qualify for tariff adjustments. Over the summer, USTR began compiling a comprehensive list of non-domestically produced commodities for potential relief. That effort culminated in a September 5 White House notice outlining products that could receive tariff flexibility for “aligned partners.”

The new carveouts mark a significant shift in how the administration is approaching its reciprocal tariff strategy, continuing to leverage duties for broader trade negotiations while providing targeted relief designed to protect U.S. consumers, strengthen supply chains, and ease pressure on agricultural producers facing rising input costs.

November 11, 2025 Update:

The US and Chinese Governments have both taken action to suspend the port fees imposed as a result of the US action taken in response to the Section 301 ‘unfair trade practices’ investigation. Both suspensions took effect at 00:01(EST) on November 10th. This means that companies operating Chinese vessels calling at US Ports or US companies calling at Chinese ports will not face the levies that had taken effect on October 14th. The suspension was agreed by Presidents Trump and Xi at their Summit meeting on November 1st and allows time for ongoing trade negotiations between the two economic blocs. Read statement from the US Trade Representative Office [here](#).

July 8, 2025 Update - Reciprocal Tariffs:

The United States has taken action to extend the ‘pause’ in the imposition of ‘reciprocal’ tariffs on a range of countries around the world until 1st August.

The higher tariffs initially announced on April 2nd (what the US Administration called ‘Liberation Day’) were subsequently revised to a blanket imposition of a 10% tariff for 90 days from April 9th - to allow time for negotiations – that deadline has now been extended by a further three weeks to 1st August.

At the same time, the US administration wrote to 14 countries, setting out the tariff levels that will be imposed on goods imported from each of those countries. Some of these tariffs have been changed, including increases and decreases from previously announced rates. It is not clear why these 14 countries were selected or why the subtle changes in tariff levels were deemed necessary. They include:



| COUNTRY | April 2 Statement | July 7 Statement |
|-------------------------------|---------------------------------|------------------------------|
| | (paused on April 9 for 90 days) | (to take effect on August 1) |
| Japan | 24 % | 25 % |
| South Korea | 25 % | 25 % |
| Malaysia | 24 % | 25 % |
| Kazakhstan | 10% | 25 % |
| Tunisia | 28 % | 25 % |
| Cambodia | 49 % | 36 % |
| Thailand | 36 % | 36 % |
| Indonesia | 32 % | 32 % |
| Bangladesh | 37 % | 35 % |
| Serbia | 37 % | 35 % |
| South Africa | 30 % | 30 % |
| Bosnia and Herzegovina | 30 % | 30 % |
| Laos | 48 % | 40 % |
| Myanmar | 44 % | 40 % |

The US administration has also promised to send further communications to other countries in the coming days. The Statement and Executive Order issued by the White House include a provision promising further action to adjust these tariff levels in response to the actions of affected countries.

Since the April announcements, the United States has announced bilateral agreements (or frameworks) with three countries (the United Kingdom, Vietnam and China). It is expected that more such bilateral agreements will be announced in the coming days and weeks.

Key Information:

- Statement from the White House (July 7th) [here](#)
- Executive Order as published (July 7th) [here](#)

Cold Chain Implications – Spotlight US Imports of Seafood from East and Southeast Asia

Food-based imports into the United States from East and Southeast Asian countries are limited in volume and value across most categories, with the notable exception of seafood.

The United States imports significant amounts of key seafood categories (shrimp, crab and tuna) by volume and value from the region.

If these tariffs were to take effect in this highly varied country-by-country approach, there is scope for significant market disruption and trade volume shifts. The four largest exporting countries dominate the seafood import volumes, but they are split into two categories, China and Vietnam (revised tariffs agreed) and Indonesia and Thailand (threatened with higher tariffs). Whilst further developments should be expected, it is clear that this amortized approach will likely create uncertainty and dislocation in established trade patterns.

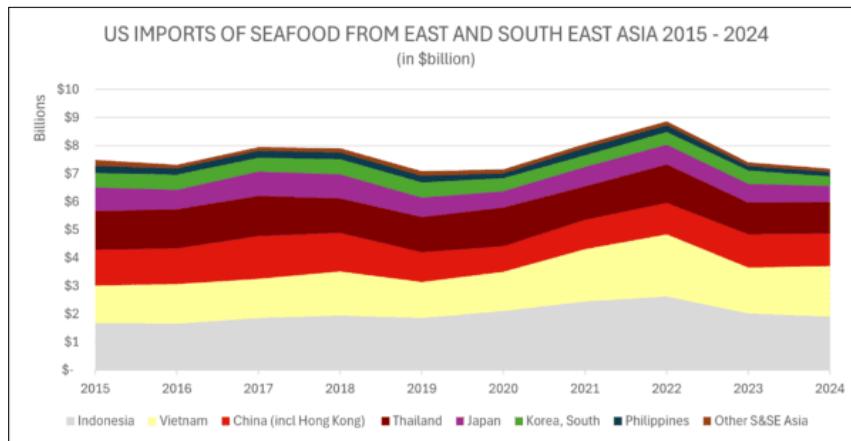


Chart produced by GCCA from data taken from <https://apps.fas.usda.gov/gats/default.aspx>

May 29th Update: US Court of International Trade Ruling

On 28 May, a panel of three judges in the US Court of International Trade ruled that some of US President Donald Trump's tariffs were 'illegal' and instructed the administration to remove the tariffs imposed. The ruling gives the administration 10 days to "effectuate" the order.

The order applies to the tariffs initially imposed on April 2nd, the so-called 'liberation day'. These varied rates for imports from a range of countries but were reverted to a 10% flat tariff rate on April 9th for all countries except China.



It also applies to all separate actions taken against China, Canada and Mexico, justified because of the alleged failure to address the illegal smuggling of fentanyl. Other tariffs imposed under different powers, such as the tariffs on steel, aluminum and automobiles.

The Justice Department has already filed a notice of appeal with the US Court of Appeals for the Federal Circuit, and assuming the litigation continues through all relevant stages, it will ultimately be a matter for the US Supreme Court.

This ongoing legal action will likely result in a delay in the US administration's response to the original court judgement, and therefore, the relevant tariffs will remain in place.

May 11, 2025 Update - US and China Announcement on Tariffs:

On May 11th, representatives from the US and China announced that negotiators had reached an agreement to reduce current tariff rates for a 90-day period. Under the agreement, the United States will reinstate the country-specific tariff rate of 20% on China imposed on 1st February and the 10% 'baseline reciprocal tariff' that applies to all countries. China will remove tariffs imposed in response to US actions, reducing tariffs on US imported goods to 10%.

The United States tariff rate changes apply to goods entered for consumption or withdrawn from the warehouse for consumption on or after 12:01 a.m. Eastern daylight time on May 14, 2025. A significant increase in US China shipping volumes is expected as a result of this change, a reversal of recent declines in shipping volumes.

The White House and the Chinese Ministry of Commerce have issued a [joint statement](#) with more details on the agreement and the full [Executive Order](#).

April 30, 2025 Update:

The President has signed Executive Orders that amend previous actions to mitigate the impact of 'tariff stacking' where specific sectoral tariffs end up having a cumulative effect on especially finished products. The primary focus of the initiative is preventing unintended effects on the US automotive sector. It is, however, an indication of further action to reduce the consumer impact of tariffs on US consumers. [Read Here](#)

There is speculation of movement towards further trade accommodations and agreements by the White House before the July 9th deadline for 'the 90-day pause', but as yet, no specific actions have been announced.

April 17, 2025 Update:



(NOTE: These measures have since been suspended for one year. See November 11 update above.)

The US Trade Representative released details of new US port fees aimed at Chinese-owned and Chinese-built ships ([see here](#)). The fees will begin in October 2025, aiming to challenge China's dominance in shipbuilding and shipping and bolster the US maritime industry.

Under the finalized proposals, Chinese ship owners and operators face charges starting at \$120 per container when calling at US ports. The fees increase annually to reach \$250 per container by 2028. For container ships, the fee is based on the number of containers carried rather than the ship's tonnage.

Non-Chinese carriers operating Chinese-built ships will also be subject to container-based fees, at an initial \$120 per container, rising to \$153 in 2026 and up to \$250 by 2028, aligning with the fee structure for Chinese carriers over time. This convergence means that while initial impacts differ, the long-term cost burden will become comparable. Each affected vessel will be charged once per US port call, capped at a maximum of five charges per year. Ships arriving empty to collect bulk exports such as coal or grain are exempt.

The financial burden remains significant despite being less severe than the \$1M+ per port call initially proposed. Analysts estimate large Chinese container ships could face fees of approximately \$300 to \$600 per container, depending on ship size and cargo load. Initially, the financial pressure on Chinese carriers will be three times higher for non-Chinese carriers.

Carriers are expected to respond with increased charges and some reshuffling of service networks that will have some impact on cold chain operations.

April 15, 2025 Update:

The United States Commerce Department has announced its intention to reinstate anti-dumping measures enacted and then suspended in 2019. These measures will impose a 21% tariff on tomatoes imported into the United States by Mexico, taking effect on July 14, 2025.

April 9, 2025 Update:

Announcements made at 1:25 PM on April 9th by the US administration include a '90-day pause' in tariffs announced on April 2nd. The announcement is that all countries listed in the reciprocal tariff announcements made on April 2nd will now face a 'minimum 10% tariff'.

The US administration has also changed its tariff policy on goods imported to the US from China, raising the tariff rate to 125%.

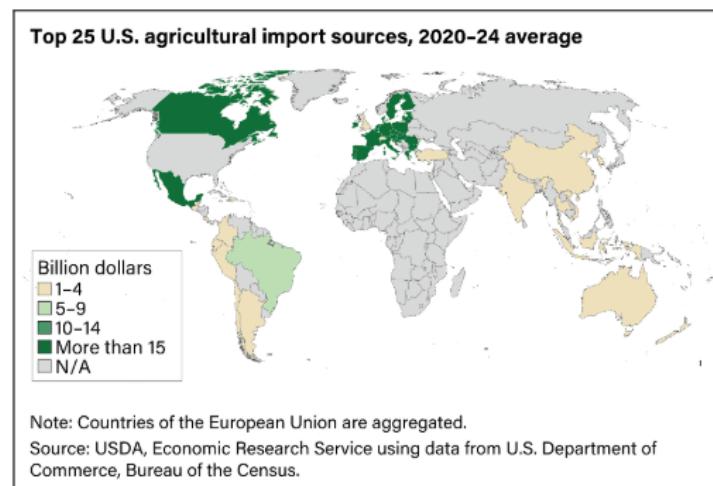


On April 2nd, the President of the United States of America, Donald Trump, announced a broad reaching set of new tariffs.

As part of the announcement, Trump declared a national emergency and invoked the [International Emergency Economic Powers Act \(IEEPA\)](#) to impose responsive tariffs to address the absence of reciprocity in US bilateral trade relationships. Trump cited “large and persistent annual US goods trade deficits that have led to the hollowing out of our manufacturing base; resulted in a lack of incentive to increase advanced domestic manufacturing capacity; undermined critical supply chains; and rendered our defense-industrial base dependent on foreign adversaries.”

The new tariffs set a baseline level of 10% for all countries and higher levels of tariffs for other markets, particularly those where the US has a large trade deficit. The 10% baseline tariffs went into effect on April 5th, while the reciprocal tariffs hitting targeted countries went into effect on April 9th. Some notable examples include China – 54%, Vietnam – 46%, India – 26%, Japan – 24%, European Union – 20%. The new tariffs are in addition to the tariffs already announced related to Canada and Mexico, as well as those being imposed on steel and aluminum.

Canada, Mexico and EU are the three largest exporters of food to the US – together accounting for 60% of the volume imported. The April 2nd announcements will not affect previous policy decisions to exempt products imported under the [USMCA trade agreement](#), thereby exempting most foods imported from Mexico and Canada for now.





Data

- [USDA – Statistics and Insights articles](#)
- [Major Exporters to the UK by Product Type \(2023\)](#)

Sources

- [U.S. Department of Commerce Announces Intent to Withdraw From 2019 Suspension Agreement on Fresh Tomatoes from Mexico](#)
- [Executive Order: Regulating Imports with a Reciprocal Tariff to Rectify Trade Practices that Contribute to Large and Persistent Annual United States Goods Trade Deficits](#)
- [Federal Register Notice of Executive Order](#)
- [Federal Register Notice of Executive Order](#)
- [Annex 1 – List of Reciprocal Tariffs by Country](#)
- [Annex 2 – Harmonized Tariff Schedule](#)
- [CBP Guidance: 10% Reciprocal Tariffs effective April 5, 2025](#)
- [Fact Sheet: President Donald J. Trump Declares National Emergency to Increase our Competitive Edge, Protect our Sovereignty, and Strengthen our National and Economic Security](#)
- [2025 National Trade Estimate Report on FOREIGN TRADE BARRIERS of the President of the United States on the Trade Agreements Program](#)
- [US / China Agreement - White House Fact Sheet - May 11th](#)

BRAZIL

July 30, 2025 Update:

President Donald Trump delayed the implementation of 50% tariffs on Brazilian exports by seven days while exempting many products from the levy. The order would apply an additional 40% tariff on the baseline 10% tariff from April 2nd. But not all goods imported from Brazil would face the 40% tariff: Orange juice, civil aircraft and parts, aluminum, tin, wood pulp, energy products and fertilizers are among the products being excluded.

April 2, 2025:



The United States imposed the minimum 10% tariff rate on Brazilian imports on April 2nd.

The Brazilian Congress has passed legislation granting the President the authority to respond in kind to any tariff measures imposed on Brazilian exporters. However, at this stage, there is no indication whether President Lula will exercise these powers.

It is important to note that Brazil, like many economies, is well-positioned to take advantage of opportunities for import substitution from markets that reciprocate against high tariff barriers in the US, especially China. This is especially the case for Brazilian Beef exports, which may see a further increase despite of a longstanding 12% tariff for frozen cuts.

Additionally, in the past month, President Lula announced a "breakthrough" trade arrangement with Vietnam, which includes a new permission to sell up to 300,000 tons of beef annually in the Vietnamese market as part of a wider trade engagement mission in East Asia.

Data

- [Brazilian Beef exports – ABIEC](#)
- [Brazilian Chicken](#)

Sources

- [Trade Measures Adopted by the United States Government on April 2, 2025 - Joint MRE/MDIC Press Release — Ministério das Relações Exteriores](#)
- [President Lula announces opening of Vietnam's market to Brazilian beef — Planalto](#)

CANADA

August 1, 2025 Update:

President Trump announced Thursday that the U.S. would raise tariffs on certain Canadian goods from 25 percent to 35 percent beginning Friday. Goods that are covered under the 2020 United States-Mexico-Canada Agreement will be exempt from the tariff rate, the White House said.

April 15, 2025 Update:

[Canada announces new support for Canadian businesses affected by U.S. tariffs](#)

The tariff disputes between the United States and Canada started in early March, and a series of countermeasures were announced due to interventions before April 2nd.



An initial wave of 25% tariffs on US food products, including poultry, dairy, tomatoes, citrus, chocolate, pasta, bread, and baked goods, took effect on March 4th. These tariffs were not altered even in response to the US administration's policy change to exempt all goods covered by the [USMCA agreement](#).

The US is the source of c.80% of Canadian poultry imports, and in 2023 Canada imported c.\$813m by value.

Data

- A report on overall food imports and exports from Canada can be found [here](#)
- A detailed breakdown of food imported by Canadians from the United States by States is available [here](#)

Sources

- [Canada's Response to U.S. Tariffs on Canadian Goods](#)
- [LETL Overview | Canada Enterprise Emergency Funding Corporation | Canada Enterprise Emergency Funding Corporation](#)

CHINA

May 11, 2025 Update: US and China Announcement on Tariffs

On May 11th, representatives from the US and China announced that negotiators had reached an agreement to reduce current tariff rates for a 90-day period. Under the agreement, the United States will reinstate the country-specific tariff rate of 20% on China imposed on 1st February and the 10% 'baseline reciprocal tariff' that applies to all countries. China will remove tariffs imposed in response to US actions, reducing tariffs on US imported goods to 10%.

The United States tariff rate changes apply to goods entered for consumption or withdrawn from the warehouse for consumption on or after 12:01 a.m. Eastern daylight time on May 14, 2025. A significant increase in US China shipping volumes is expected as a result of this change, a reversal of recent declines in shipping volumes.

The White House and the Chinese Ministry of Commerce have issued a [joint statement](#) with more details on the agreement and the full [Executive Order](#).



April 11, 2025 Update:

On Friday April 11, China raised tariffs on US imports to 125%, but signaled it would apply no further measures in the future.

With less than 10% of the world's arable land, China produces one fourth of the world's grain and feeds one fifth of the world's population. China ranks first globally in producing cereals, vegetables, meat, poultry, eggs and fishery products; yet it is a net importer of agricultural products and has been since 2004.

China's self-sufficiency ratio has declined from 93.6% to 65.8%. Significant focus continues to be placed in increasing the productivity of Chinese agriculture, and in diversifying the Chinese access to imported food.

Brazil overtook the US as the largest agrifood exporter to China following the trade wars of the first Trump administration, and growth in trade with the 'BRIC' countries continues.

China has responded in stages to a series of escalating tariff actions taken by the United States since February.

On March 10th, a tariff increase of 15% on some US agricultural products including chicken, corn, cotton and wheat took effect.

On April 2nd the Chinese government announced a planned additional tariff of 34% on all imports from the US, and on April 9th this was increased to 84% in response to the further escalation by the United States.

China / Canada – On March 20th, China imposed a 100% tariff on imports of Canadian rapeseed oil, oil, cakes and peas and a 25% tariff on aquatic products and pork. This was cited as a response to previous action by Canadian government to impose a 100% tariff on Chinese electric vehicles imported to Canada.

Data

- [Chinese Import Statistics](#)

Sources

- [Custom Tariff Announcement - April 4th](#)



EQUADOR

Update 9th September

Ecuador And South Korea agree trade accord that will allow 98.8% of Ecuador's exportable products to enter South Korea tariff free – this is seen as a likely boost to this major shrimp exporting industry and positive news following a recent decline in Chinese demand.

Like Brazil, Ecuador is a country that is faced with a new 'minimum' tariff of 10% on exports to the United States and is well-positioned to take advantage of volatility and change in global markets, including the market for shrimp.

In 2024 total exports of shrimp totaled 1.2bn MT, with China being the main destination market at 656,000 MT.

Days before the US announcement of new tariffs, the Ecuadorian Government announced a temporary reduction in import tariffs on US shrimp imports, reducing them from 30% to 0%.

Sources

- [Ecuador's National Aquaculture Association – Shrimp Market Data](#)

EUROPEAN UNION

Update 10th October

The United States Department of Commerce has concluded an investigation into two major Italian producers that allegedly sold pasta at unfairly low prices – known as dumping – between July 2023 and July 2024. It has recommended an additional tariff duty on imported Italian pasta of 91.74%, which would be on top of the 15% general import duty imposed earlier this year. If it proceeds they will take effect in 2026.

The US currently imports more than \$800m in pasta from Italy every year and is one of the top three export markets for the product. The EU is supporting the Italian government in contesting the decision.

July 28 Update

U.S. and EU Announce Framework Trade Deal

The Presidents of the United States and the European Commission have announced a new framework trade deal. Under the agreement, the U.S. will apply a 15% universal tariff on most goods imported from the EU, with some exemptions still to be finalized. In return, the EU will cut most tariffs on U.S. goods to zero.



This marks a sharp increase from the pre-2024 average U.S. tariff of 4% on EU goods and is up from the 10% rate imposed since March. While the 15% tariff is lower than the 30% threatened recently, it's higher than the 10% rate currently applied to the UK.

The framework signals future talks on agricultural tariffs, with a goal of eliminating duties in some categories — though not on sensitive items like beef and poultry.

Importantly, the deal does little to address non-tariff barriers that continue to block key U.S. exports, including hormone-treated beef and chlorine-washed chicken, due to strict EU food regulations.

The likely outcome: higher costs for U.S. importers and consumers, especially across cold chain categories like dairy, seafood, and processed produce. However, with similar tariffs now in place across multiple trade partners, the broader impact on demand remains uncertain.

Update May 20th, 2025

UK / EU Trade Agreement

The Summit that took place between the UK and the EU on 19 May occurred just over five years after the post-Brexit Trade and Cooperation Agreement (TCA) was signed between the two. The TCA included a provision mandating a review of arrangements after 5 years. However, it should be primarily seen as the culmination of an initial wave of discussion and negotiation between the EU and the new UK Government elected in July 2024. The agreement is extensive in scope and ambitious in its stated objectives, and there is a clear intention from both sides to signal a new direction.

The elements of direct relevance to cold chain operators in the UK and Europe are:

- **Seafood Market** - An agreement, within a month, to allow reciprocal access to each other's waters for commercial fishing, managed by a common framework of quotas negotiated annually
- **Sanitary and Phytosanitary (SPS) Agreement** – an agreement to work towards an SPS agreement that would lead to 'the vast majority of movements of animal products, plants, and plant products' to move between the markets 'without SPS certificates and checks.'

The breakthrough in both areas results from a fundamental change in the UK's position on these issues and will not be without controversy.

The UK had previously resisted any agreement that would allow non-UK fishermen to catch stocks in UK territorial waters, which could reduce the number of fish landed in UK ports to be processed through the UK supply chain. Still, it will mean a return to an arrangement more like what operated in these waters under the Common Fisheries Policy and will likely provide greater certainty to all parties regarding the volumes and supply chains serving these producers and their customers.



It is the SPS agreement that has the potential to transform some of the worst disruptions of the post-Brexit period. It also involves a massive concession from the UK, as they have indicated a willingness to commit to 'dynamically align' their food standards with EU rules, thereby removing the requirement for load-by-load certificates and border inspections at EU ports of entry. There was a dramatic decline in the volume and variety of businesses that were willing or able to sell goods from the UK into the EU when these requirements were first imposed in December 2021. The worst-hit supply chains were the groupage models, and small businesses struggled to find ways to access the EU market. There were also impacts on goods entering the UK from the EU, but these were less pronounced because the UK waited a lot longer to implement a regime and already undertakes far fewer border inspections.

Assuming an agreement is reached, it will also further simplify the existing arrangements for goods crossing from the UK mainland into Northern Ireland. Under the so-called Windsor Agreement, UK businesses are managing a two-track supply chain that allows for reduced certification and inspection on goods destined for Northern Ireland only, as opposed to goods that cross the Northern Ireland / Republic of Ireland border. A dynamic alignment arrangement would remove these requirements for twin track entry procedures for things like 'not for the EU' labelling on goods on market.

The decision to 'dynamically align' the UK to EU food standards has major implications for non-EU exporters to the UK in two ways.

1. Under the new SPS border arrangements that came into force in the UK in early 2024, the UK created a new classification of high, medium, and low-risk goods. The classifications were based on an assessment of the risks inherent to the product and the market from which it originates. This has resulted in a significant reduction in the frequency of certification and inspection applied to goods imported from a range of markets outside the EU. Assuming that the dynamic alignment rules are finalized and implemented, we could expect the removal of these significant innovations and facilitation for goods entering the UK from outside the EU, a step backwards for many countries, especially those with which the UK has struck trade deals in recent months.
2. The 'dynamic alignment' requirement will severely limit the UK's ability to make concessions on its food standards and inspection requirements for any trading partner with whom it might seek to strike a comprehensive free trade agreement. For example, in the recent announcement of the UK/US trade deal the US made clear its desire to see further concessions in this area from the UK. For major agricultural exporting markets like the US, Australia, and Brazil/MERCOSUR, the closure of this area of negotiation will likely severely limit their appetite for future new or improved trade deals with the UK. This is a major win for the EU that has from the very first days of the Brexit negotiations prioritized closing down any risk of the UK being a backdoor into its market for non-EU food rules compliant goods from other major markets.

There are no concrete timeframes for the completion of negotiation and implementation of the SPS changes. We will monitor ongoing developments closely and look for opportunities to ensure that the



facilitations agreed by the UK and the EU provide maximum benefit to GCCA members that are handling cross-border movements between the UK and the EU.

Further Reading

- [UK Statement on the agreement](#)
- [EU Statement on the agreement](#)
- UK Food and Drink Trade summary
 - [UK Food and Drink Federation](#)
 - [UK Agricultural and Horticultural Trade Board](#)
 - [EU Eurostat Monitoring Report](#)

Update April 10th

The US has taken unilateral action to reduce the general tariff on goods imported from the EU to 10% ([link](#)) This will last for 90 days until July 8th.

Update March 2025

The EU announced a series of countermeasures to the US tariff announcement of April 2nd. These were outlined to take effect in three stages—the goods listed included rice, orange juice, and maize, followed by a range of cold chain products such as poultry, beef, and fruit. They would be subject to a 25% tariff. However, it has subsequently announced that these will be paused for the same 90-day period as the delay announced by the Trump administration on April 9th.

The EU benefits from a trade deficit with the US, being a significant net exporter of high value agricultural goods like wine, premium cheese and salmon. The US is the second largest trade partner for the EU 13% (after the UK).

Generally, the EU imports less food, having a high level of self-sufficiency in all goods other than those it does not grow (for example, coffee). Its main agricultural import from the US is soybeans, especially used in animal feed. However, soy imports from Brazil are also significant and growing.

This trade imbalance is impacted by regulatory divergences that see Europe not allowing a number of US-produced goods, like beef and poultry, to be sold on EU markets because of welfare and processing concerns.

Data

- Rabobank Analysis – [Trump's Tariffs, impact on EU Food and Agriculture.](#)

Sources



- [Statement by President von der Leyen on the announcement of universal tariffs by the US](#)
- [Statement on countermeasures 9th April](#)

INDIA

Update 27th August

The United States has increased the total effective import tariff on Indian goods to 50% - an increase on the 25% imposed in April 2025. This has been justified as a response to the continued purchase on onward sale of Russian oil. Trade talks between the two countries will continue

Update, April 10th 2025

The US has taken unilateral action to reduce the general tariff on goods imported from India to 10% ([link](#)). This will last for 90 days until July 8th.

Update April 2025

India has not yet taken action to counter the 26% tariff imposed on all Indian exports to the United States. Trade talks and recent changes to Indian import tariffs on certain US goods have led to speculation that they are well positioned to secure an early trade deal.

India is a significant agricultural exporter, with a notably large trade in frozen seafood totaling over 1.36million MT. India was the source of over [\\$1.2bn of shrimp imported to the USA](#), but India also supplies in large volumes to China and the European Union.

Data

- [India Ministry of Commerce - Export Products](#)

INDONESIA

July 16 Update

U.S.-Indonesia Trade Agreement Announced

On July 15–16, 2025, the United States and Indonesia publicly announced that a landmark trade agreement had been reached. The U.S. agreed to reduce planned tariffs on Indonesian exports from 32% to 19%. In return, the general tariff on goods imported into Indonesia from the United States will be reduced to 0%.



Indonesia also committed to major purchases of American goods, including \$4.5 billion in agricultural imports.

Reports indicate that the \$4.5 billion consists primarily of commitments to purchase U.S. wheat, corn, soybeans, and cotton, with no specific commitments related to cold chain products. Indonesia is not currently a large-scale importer of any cold chain food commodity; the largest category is dairy, valued at approximately \$200–300 million annually.

A Major Tariff Increase

It is important to note that while this agreement is framed as a major reduction in tariffs for Indonesian exports to the United States, it is only relative to the previously threatened higher rate. The U.S. imports approximately \$2 billion worth of seafood (mainly shrimp and tuna) from Indonesia annually—these goods were subject to a 0% tariff until March 2025.

Regional Imbalance

Further to the update provided on July 8 (see “United States” section below), this means that three of the four largest Asian seafood exporters to the U.S. are now subject to tariffs in the 19–20% range. Thailand remains the exception, still facing the threat of a higher rate.

- Joint Statement United States / Indonesia ([click here](#))

JAPAN

July 23 Update

Announcements made on July 23 suggest that the United States and Japan have reached a framework agreement that will see tariffs on goods imported from Japan into the United States being subject to a 15% general tariff. This is an increase from the 10% in place since March 2025, and a significant increase from the ~3% effective tariff rate imposed pre 2025, but less than the 25% threatened as part of the so-called ‘reciprocal tariffs’ scheduled to be enacted by the United States on 1st August.

Whilst the general agreement will see a number of existing tariffs on goods imported from the United States into Japan reduced to zero, the Japanese Prime Minister has stated that this will not include agricultural products which will continue to implement the tariffs and quotas agreed in the United States/Japan trade agreement (USJTA) that came into effect on the 1st January 2020.

The only adjustment referenced in the media announcement related to agriculture will be in the tariff-free quota entitlement for US rice exports.

EXPLAINER - Agricultural Trade Provisions in the 2020 USJTA



Beef exports saw one of the most meaningful changes. Japan's previous 38.5% tariff on fresh and frozen U.S. beef is being reduced gradually to just 9% over 15 years. Although a safeguard mechanism still applies if import volumes spike, the overall trajectory is one of greater access and lower costs. Similarly, tariffs on pork are being phased out, with muscle cuts becoming duty-free by year nine and processed pork products by year five. Variable levies and "gate price" systems that previously complicated trade are also being scaled back.

In the poultry sector, Japan is eliminating tariffs over a 10-year period. Seafood exporters are also benefiting from progressive reductions. Tariffs on many fresh and processed seafood products are being phased out, with full duty-free access expected within 5–10 years, depending on the product category.

Fresh and processed fruit and vegetable exports from the U.S. have received a major boost. Items like almonds, walnuts, cranberries, sweet corn, and broccoli entered duty-free immediately under the agreement. Others, such as fresh cherries, oranges, and processed tomato products, are moving toward zero tariffs under scheduled reductions over five to nine years.

By 2024, over 90% of U.S. agricultural exports to Japan qualified for either immediate tariff-free access or had clear reduction schedules in place.

MEXICO

Update August 1, 2025:

President Trump on 7/31 said he is giving Mexico an additional 90 days to strike a trade deal, with the announcement coming a day before his administration's Aug. 1 deadline to impose 30% tariffs on imports from the nation. The President said earlier this month that the 30% import duties would begin on Friday 8/1 for Mexican imports. In a social media post, the president said he agreed to a 90-day extension during a phone conversation with Mexico President Claudia Sheinbaum, which he described as "very successful."

Update April 10, 2025

The US has taken unilateral action to reduce the general tariff on goods imported from Mexico, not qualifying for 0% tariffs under the USMCA, to 10% ([link](#)). This will last for 90 days until July 8th.

Update April 2025

The United States has imposed a 25% tariff on all products not covered by the [United States-Mexico-Canada Agreement \(USMCA\)](#). Most food exported from Mexico to the US is covered by the 0% tariff agreements contained in the USMCA.

Mexico has not announced any counter measures or other changes to trade policy at the stage.

Mexico is a major exporter of fruits and vegetables to the US – the dramatic growth in ‘protected’ greenhouse and polytunnel growing has led to a large-scale, year-round supply of key fruits and vegetables targeted for export and the US in particular.



Data

- [USDA Growth in Horticultural Imports from Mexico](#)

MIDDLE EAST AND NORTH AFRICA

GCCA is closely monitoring changes in the Middle East and North Africa and will update our members and stakeholders on trade impacts.



The primary risks of disruption from a conflict-caused closure of the Strait of Hormuz involve the export of oil and fertilizers from the region to major global markets, as well as the import of all food commodities to key countries in the region, notably Qatar, Kuwait, and Oman.

Further Information

- [The American Farm Bureau provides a summary of the key agricultural trade issues related to potential disruption in the Strait of Hormuz](#)

EAST, WEST, and SOUTHERN AFRICA

Update 30th September

As widely predicted the Africa Growth and Opportunity Act (AGOA) that facilitated tariff free access to the United States market for exports from countries in sub-Saharan Africa has expired. The end of this agreements follows the range of reciprocal and sectoral tariffs imposed by the Trump administration in 2025.

Despite the expiration there have been indications of political support for an extension of renewal of the agreement from within Congress and the Trump administration. However it is not clear if that will now come to pass, especially in light of the current government shutdown in the United States.

Update, June 25th 2025

A summit between the Chinese Government and representatives of 56 African states took place in Changsha held from 12 to 15 June 2025. At the meeting, the parties agreed to conduct further negotiations towards a trade agreement that would allow tariff-free trade access to the Chinese market for exports from the 56 States.

This would be the latest step in an economic policy from China to reduce tariffs on food imports from the region. African countries classified as 'least developed countries' already benefit from tariff free policies. The intent is to extend the policy to larger countries notably South Africa and Kenya,

Whilst the announcement was one of intent, not a finalized agreement, it is a strong signal of further economic cooperation between the two regions and is widely seen as an alternative to the US African Growth and Opportunity Act, which is widely expected to end in September of this year.

Update, April 10th 2025

The US has taken unilateral action to reduce the general tariff on goods imported from the EU to 10% ([link](#)) This will last for 90 days until July 8th.



Update April 3rd 2025

On April 2nd, the United States announced it would impose a blanket 31% tariff on imports from South Africa.

Other African countries accounted for 42% of all agricultural products exported by South Africa during quarter one (1) of 2024, followed by EU-28 (30%), Asia & Middle East (19%), America (6%), and Oceania (1%). The US accounts explicitly for c.4% of South African agriculture exports with main export categories citrus, grapes, avocados, berries, apples and pears, as well as wine and fruit juices.

US food exports to South Africa (totaling c \$239m in 2024) have experienced a significant decline since 2022, caused mainly by economic difficulties in country resulting from power shortages and other factors.

The imposition of tariffs on countries across the African continent marks a significant departure from the intent and policy approach set out in the [Africa Growth and Opportunity Act](#) enacted in the 1990s, giving African countries preferential low tariff access to the US market. Although this act was not directly referenced in the April 2nd announcement, discussions have been ongoing regarding the possibility of renewing the legislation and initiative, which officially ends in September of 2025.

While the possibility of bilateral and regional deals remains, the shift in US policy will likely accelerate the already significant diversification of trade alliances and market strategies of South Africa and its neighboring economies.

Data

- [South Africa Agricultural Trade Performance](#)

Sources

- [Joint Media Statement by the Ministers of International Relations and Cooperation and Trade Industry and Competition - DIRCO](#)

UNITED KINGDOM

May 20th Update

See the update on the UK/EU Trade agreement under the European Union.

May 12th Update

UNITED KINGDOM / UNITED STATES TRADE DEAL



On 8th May, the UK and the United States announced a series of changes to bilateral trade relations. Despite the pronouncement of the US President that this was 'a comprehensive agreement', the deal is targeted and limited.

The tradeable goods of most value and volume included in the deal are bioethanol exports for the US and a reduction in the tariffs on steel and cars for the UK into the US. The deal does not include the removal of the 'reciprocal' 10% baseline tariff on goods entering the United States for UK exporters.

[Joint Statement Here](#)

[White House Fact Sheet Here](#)

Beef Tariffs

The deal does cover a small number of agri-food product categories, including some reliant on a temperature-controlled supply chain.

The most notable is the UK agreeing to a new tariff quota of up to 13,000 metric tons of US beef at 0% tariff, a significant improvement from the previous quota of 1000 metric tons at 20% tariff. In return, the United States will allocate the equivalent of 13,000 tons of quota-free access to the United Kingdom (from within its existing quota allocated to 'other countries').

13,000 tons is not a large quantity. It accounts for less than 1% of UK consumption and compares to nearly 241,000 metric tons exported to the UK by Ireland in 2024. Potential to export up to 13,000 metric tons from the UK, is a statistical irrelevance to US consumption, and for comparison the US allocates Australia a tariff rate quota in excess of 378,000.

Food Regulations

Whilst reciprocal beef concessions are highlighted there is a big question over whether there is an intent to go further on other tariff lines and in particular on the different regulatory standards that prohibit many US food products from being sold in the UK.

Even though the UK is no longer a part of the European Union, it has not made substantial changes to its food regulations and continues to prohibit imports made to certain production practices common in the United States. The most notable of these is the use of hormones in US beef production and the chlorinated washing of chicken.

The White House communication about the deal emphasizes the longstanding dissatisfaction with these discriminatory rules – calling for further reductions in tariffs and an end to 'non-science-based standards'. However, UK Ministers have emphasized numerous times in the days since the announcement that the deal includes no concessions or changes to the UK's food regulations. These regulations remain a major barrier to the United Kingdom being a more substantial destination for US agrifood, especially proteins.



As the UK continues to seek improvements in its post-Brexit trade relations with the European Union, improving the flow of food goods between the two markets is a core priority, with hopes for a regulatory equivalence arrangement or so called 'veterinary deal' that would align standards on proteins. The EU is highly suspicious of the implications of allowing greater access for UK food, for fear of the potential that the UK will diverge from EU production standards, or allows greater import access for markets like the United States, which would create a potential 'backdoor' to its market.

The joint US/UK communication does state that 'both countries positively support future discussion to strengthen bilateral trade' and 'commit to working together to improve market access for agricultural products, to highlight concerns, and to increase [] cooperation.' However it is convoluted and lacking in clarity on details.

Given these dynamics, is unclear as to how much further scope there is for movement on the non-tariff barriers that dominate the friction between the UK and US agrifood markets.

What's Next?

The US administration has made clear its intention and ambition to achieve a series of other deals of this kind, and it is not clear how much time or focus there will be to turn these initial limited concessions into a full-fledged trade agreement in coming weeks.

The UK is in discussions with the EU and is likely to prioritize outcomes on that before seeking to go further with the US. What the UK believes in can achieve with the EU will set some of the parameters for how much the UK will entertain bigger concessions to the US on its 'non-science-based standards.' Similarly for the US, it will likely be considering the potential and value of a 'deal' with the European Union that may or may not cover agri-food tariffs and rules.

May 5th Update

United Kingdom / India Trade Agreement

The UK and India have announced the intent to finalize a comprehensive Free Trade Agreement. The agreement includes significant reductions in tariffs for both countries' exporters.

Agrifood and cold chain transported agri-food, in particular, are not traded in significant quantities between the two countries. UK beef exporters for example, are not permitted to sell their beef into India, even though the majority Hindu company has a potential 220 million beef consumers among the Christian and Muslim minority. The main protein opportunity for UK exporters is sheep meat, a popular and universally consumed protein and the trade deal dramatically reduces tariffs on this.

It is also notable that pork meat has been excluded from the tariff reductions for goods imported from India into the UK, this is a response to concerns among UK Producers about unfair competition.



See details [here](#)

10th April Update

The United Kingdom (UK) is subject to the 'minimum' 10% tariff imposition for goods exported to the United States, aside from specific tariffs on automotive and steel exports. A reflection of relative parity in the trade balance between the UK and the US.

Having recently exited the European Union trading bloc, the UK is uniquely positioned compared to most medium-sized Western European countries. Its agricultural exports are valued at £24 bn.

Given its proximity and high regulatory alignment, EU member states are the principal destination of UK food exports. Still, the US is a significant market for UK goods, especially high-end specialist products like scotch whisky.

The UK is a significant importer of foods from around the world, again with imports from European neighbors dominating the mix.

There is speculation that the UK could be one of the countries with which the US administration reaches an early 'deal' on a revised tariff approach. Historically the major impediment to such an agreement has been the UK's choice to align with the EU regulations on food safety and product standards. These are prohibitive to major US agriculture exports like poultry and beef. The UK is now free to change its regulations and import standards as part of a trade deal with the US, but any choices on this would likely impact its ongoing goal to reduce post-Brexit trade frictions with the EU.

Data

- [UK Food imports and exports](#)

Sources

- [UK seeks business views on response to US tariffs - GOV.UK](#)

VIETNAM

3rd July Update

Late on 2 July, President Donald Trump announced via his Truth Social platform that a trade agreement has been reached between the United States and Vietnam. There has not been an official statement from either country, therefore full details are pending. The preliminary deal outline includes the following:



Vietnamese Exports to the United States

A flat 20% tariff will apply to all goods entering the U.S. from Vietnam. This is lower than the 46% rate announced on 2 April, but higher than the general “Most-Favored Nation” (MFN) tariff rate of 9.4%.

Previously, the MFN rate consisted of a range of tariffs on agricultural imports, with some as high as approximately 17.1%. However, those were offset by various exemptions and tariff rate quotas — particularly for poultry, sugar, and dairy products.

The largest category of cold chain goods imported from Vietnam to the U.S. is seafood — especially shrimp and catfish. Both have been subject to specific trade restrictions in recent years, primarily due to concerns over dumping and the potential distortion of domestic markets.

Although full details are expected in “a few weeks,” this broad change is likely to raise the cost of cold chain goods imported from Vietnam.

The most controversial aspect of the announcement is a proposed 40% tariff on goods determined to have been “transshipped” through Vietnam from third countries. This is widely seen as a targeted measure to prevent China from circumventing direct U.S. tariffs by routing exports through intermediaries. It remains unclear to what extent this practice affects cold chain or agricultural imports.

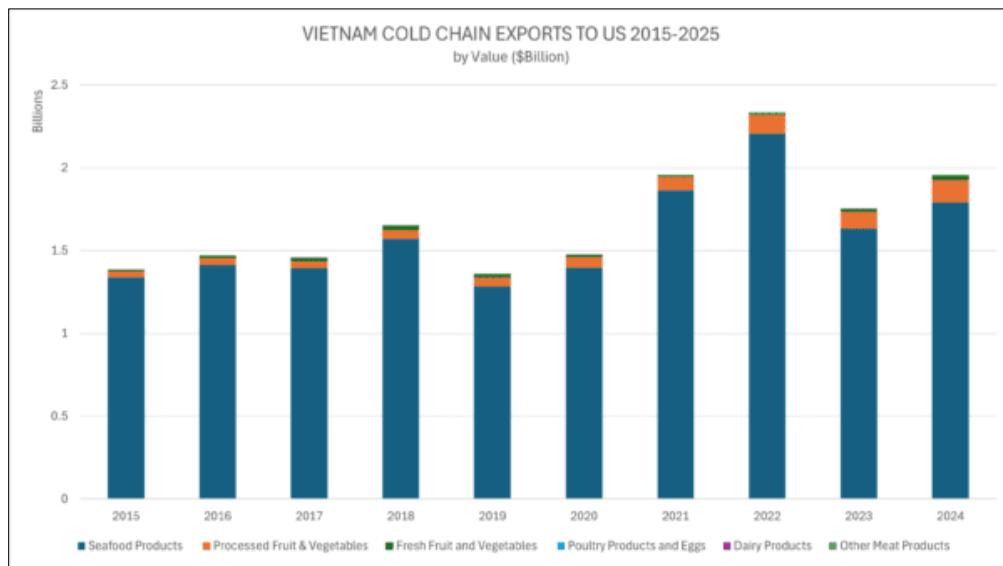


Chart produced by the GCCA based on data from [USDA FAS](#)

U.S. Exports to Vietnam

Initial reports indicate that Vietnam has agreed to reduce or eliminate a range of tariffs and restrictions on U.S. exports, including agricultural products. While details have yet to be released, this may create new opportunities for cold chain exports to Vietnam especially in the key protein categories.

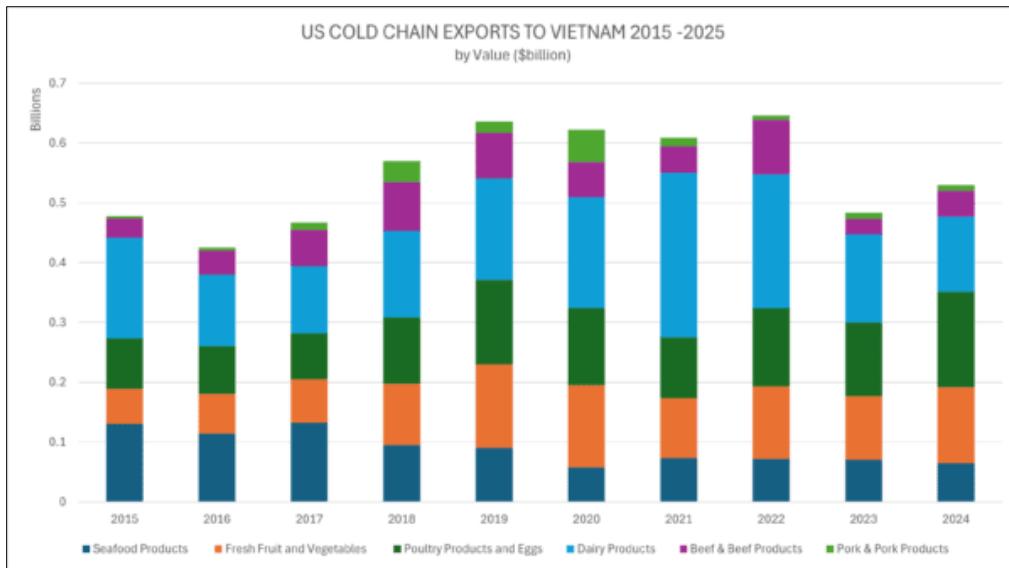


Chart produced by the GCCA based on data from [USDA FAS](#)

Previous GCCA Tariff Briefings

- March 11, 2025: [Update on Tariff Developments](#)
- March 5, 2025: [New US Tariffs on Canada, China, Mexico](#)
- February 10, 2025: [Webinar Recording - Tariff Implications for the Cold Chain](#)
- December 1, 2024: [Trump Signals Tariff Plans](#)