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IEEPA Tariff Escalation: What It Means for U.S. Food and Ag-Input Imports

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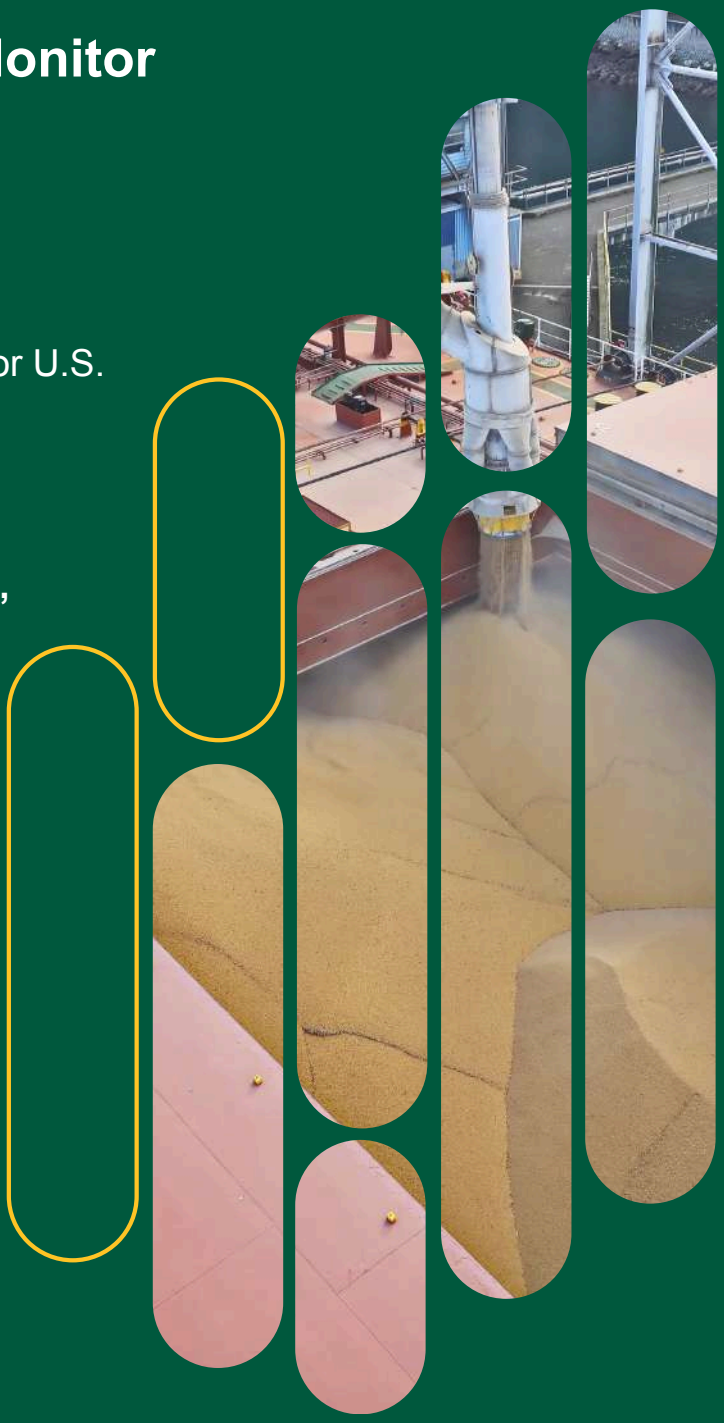

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>>> Highlights

- **U.S. Raises International Emergency Economic Powers Act (IEEPA) Tariffs Across Major Trading Partners.** The U.S. has implemented the most comprehensive tariff escalation in decades, with rates ranging from 10% baseline to 50% for targeted countries.
- **Overall Effective Tariffs on Agri-food Products Increase nearly Four-Fold.** The average effective overall (trade-weighted) tariff on U.S. agri-food products increased from 4% most-favoured-nation (MFN) rate to 15%, with new effective IEEPA tariffs varying significantly across products depending upon country sourcing.
- **Current Exemptions Mitigate Overall (Trade-Weighted) Tariffs.** Agri-food products from the top two suppliers (Mexico and Canada) are currently largely exempt under USMCA. The third largest supplier, the EU, secured negotiated arrangements that avoid tariff stacking.
- **Agri-food Products from Non-Exempt Countries Face Significant Tariff Increases.** Coffee and beef products from Brazil increase 50%, coffee and bottled water from Switzerland by 39%, and packaged food from China by 30%.
- **Agricultural Inputs Tariffs Rise from very low MFN Rate to much Higher Levels.** The U.S. imports over 30 billion USD of agricultural inputs globally. Under IEEPA, the overall effective tariff rate on inputs increases from 1% to 12%.
- **Pesticides, Tractors, and Machinery Face Highest Increases.** Pesticides face an effective tariff rate of 25%, tractors and parts up to 13–16%, while fertilizers see more modest increases due to USMCA exemptions for Canadian suppliers.
- **China Pauses Planned Withdrawal of Section 301-Related Retaliatory Tariff Exemptions.** On August 1, the reported suspension was extended, allowing applications until October 30 and maintaining approved exclusions until December 13.
- **Mixed Export Performance.** U.S. agricultural export value rose 3% year-over-year in June but remains down 2% on a year-to-date basis. Corn and ethanol exports continue to be strong spots, while soybeans, beef, poultry, and other products are at 5-year lows. Exports to China are down by 53% year-to-date, with tepid export sales.

>>> Focus Article

IEEPA Tariff Escalation: What It Means for U.S. Food and Ag-Input Imports

This month's *NDSU Agricultural Trade Monitor* examines the implications of increased U.S. import tariffs on food and agricultural inputs following the August 2025 implementation of the measures under the International Emergency Economic Powers Act (IEEPA). In January 2025, two rounds of action imposed a 10% baseline tariff on nearly all imports and higher, country-specific rates tied to border security and trade-deficit concerns. Many partners, including the U.K., China, the EU, Vietnam, South Korea, Japan, the Philippines, and Indonesia, negotiated lower rates.

The White House's revised reciprocal schedule took effect on August 7, and Canada saw new 35% duties over border and fentanyl disputes. Additional punitive tariff measures raised Brazil's rate to 50% and India's to 50%, while Switzerland faces 39% and China 30%. USMCA exemptions leave most Mexican and Canadian products at minimal rates, creating a highly differentiated tariff landscape. On August 12, the U.S. and China extended their tariff truce for 90 days.

Overview of 2025 U.S. Tariff Actions and Their Current Standing.

Tariff Authority	Actions	Countries Affected	Current Tariffs
IEEPA	Fentanyl and immigration	Canada	35% on most goods and 10% on energy imports (USMCA exceptions)
		China	20% on all goods
		Mexico	25% on most goods (USMCA exceptions)
	Venezuela sanctions	Countries that import Venezuelan oil	25% on all goods
	Russia sanctions	India for purchasing oil from Russia	25% on most goods (with exceptions)
	Brazil sanctions	Brazil	40% on most goods (with exceptions)
	Trade deficits (baseline)	All (except Canada and Mexico)	10% on most goods (with exceptions)
	Trade deficits (reciprocal)	Countries with large trade deficits with the US	Country-specific rates on most goods (with exceptions)
Section 232	Steel and aluminum	All	50% globally; 25% for imports from the UK
	Autos and auto parts	All	25% globally; 10% on parts from the UK and 10% tariff-rate quota (TRQ) on vehicles from the UK
	Copper	All	50% globally

Exhibit 1: *IEEPA Tariff Rates by Country as of August 12, 2025.*

Source: NDSU using information from White House Executive Orders.

Country-specific IEEPA Tariff Rates as of August 12, 2025.

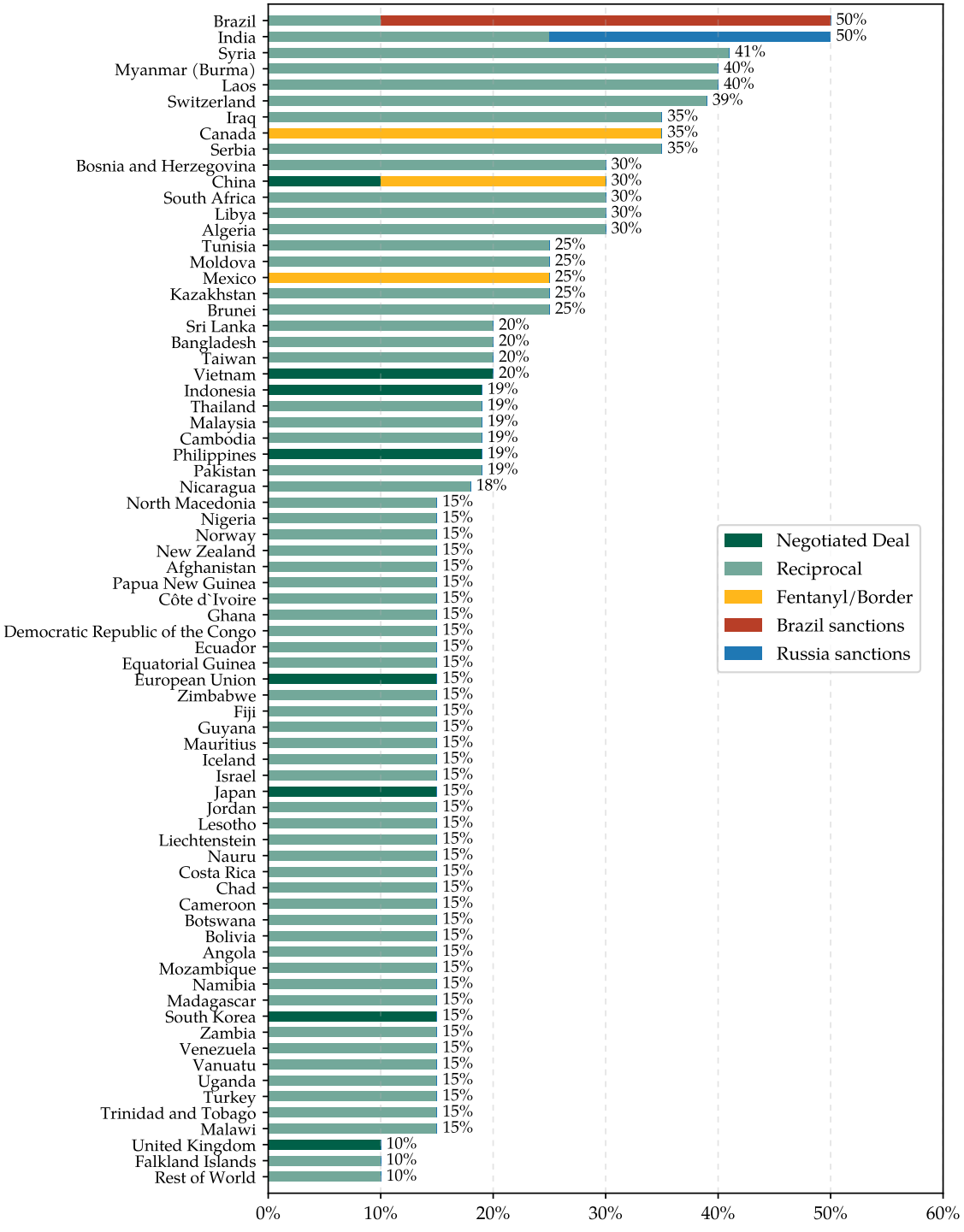


Exhibit 2: *Summary of 2025 U.S. Tariff Actions and Their Status/*

Note: Status as of August 12, 2025.

Source: NDSU using information from White House Executive Orders.

Implemented IEEPA Tariff Increases and U.S. Agri-food Imports.

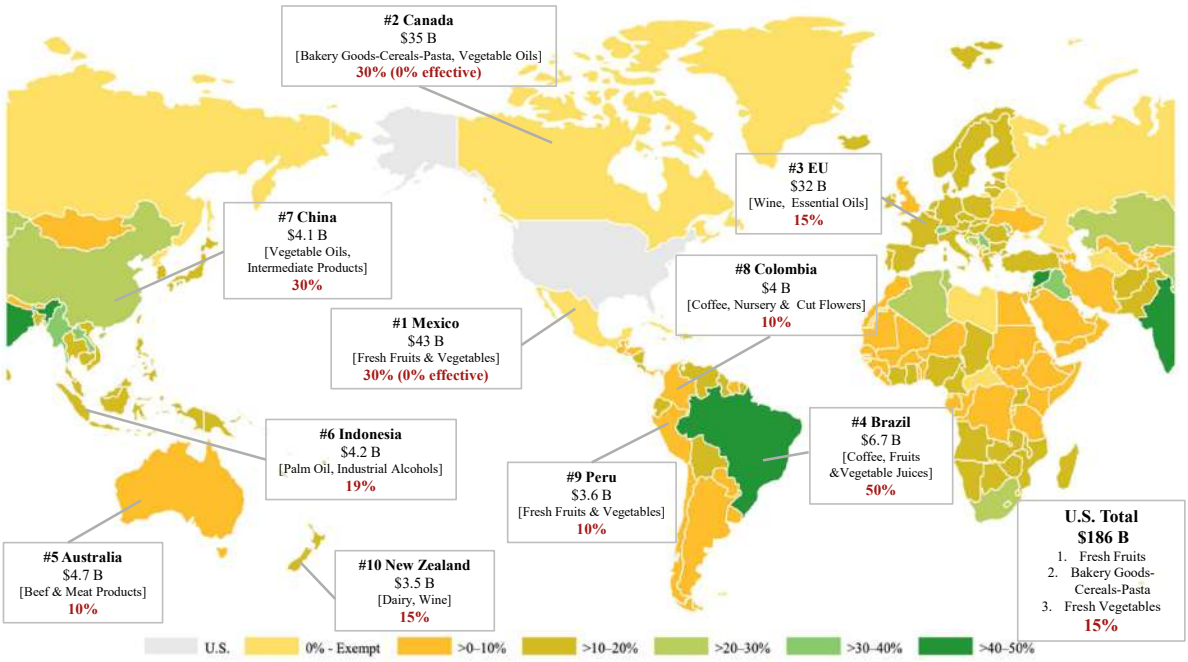


Exhibit 3: *Top 10 Countries Supplying Agricultural and Food Products to U.S. Domestic Consumption.*

Note: Below each country label are the 3-year average U.S. import values. Square brackets indicate the main agricultural and food products. The announced IEEPA tariff and the effective IEEPA tariff (including exceptions) are shown in red and in parentheses. The effective IEEPA tariff is the trade-weighted average based on 2022–2024 U.S. import data.

Source: NDSU using information from the White House Executive Orders and the Global Trade Atlas by S&P Global.

While headline IEEPA tariff rates have surged across key trading partners, the practical impact on U.S. agricultural and food imports is tempered by expansive exemptions built into trade agreements. Most notable is the United States-Mexico-Canada Agreement (USMCA), and additional negotiated arrangements with major supplying countries. These mechanisms carve out substantial portions of import flows from the steepest tariffs, meaning the actual import-cost shock is far less severe than the nominal rates imply. Our analysis uses trade-weighted effective tariff rates that factor in these exemptions and bilateral deals, providing a measure of the effective tariff burden facing the U.S. agri-food sector.

Between 2022 and 2024, the United States imported an average of 186 billion USD in agricultural and food products per year. The largest country suppliers highlight how exemptions shape outcomes:

Mexico accounts for 23% of U.S. agri-food imports. Although subject to a headline 25% IEEPA tariff, USMCA-eligible tariff products may enter the U.S. duty-free, resulting in a negligible effective tariff for most products. Following talks with President Claudia Sheinbaum, the United States announced on July 31, 2025, that it would extend existing tariffs on Mexican goods for 90 days.

Canada, the second largest supplier at 20%, faces a nominal 35% IEEPA tariff. However, just as with Mexico, most Canadian agricultural and food exports are shielded by the USMCA exemption. Current trade discussions between the U.S. and Canada are ongoing.

European Union, which supplies 17% of U.S. agri-food imports, is subject to a 15% IEEPA tariff ceiling under negotiated terms. The IEEPA tariff is applied on a non-stacking basis with existing MFN tariffs, meaning the MFN rate is deducted from the 15% IEEPA rate. As a result, EU products already facing relatively high MFN duties, such as certain wines and cheeses, are largely shielded from the full additional tariff.

Consequently, while products from countries like Brazil, India, and China are now exposed to tariffs ranging from 30% up to 50%, the bulk of U.S. agricultural imports are largely insulated from the full effect of IEEPA increases due to these negotiated exemptions. These exemptions and carve-outs play a dominant role in tempering overall food price impacts for American consumers.

Effective (Trade Weighted) Tariff Rate with IEEPA Escalation by Agri-food Product Group.

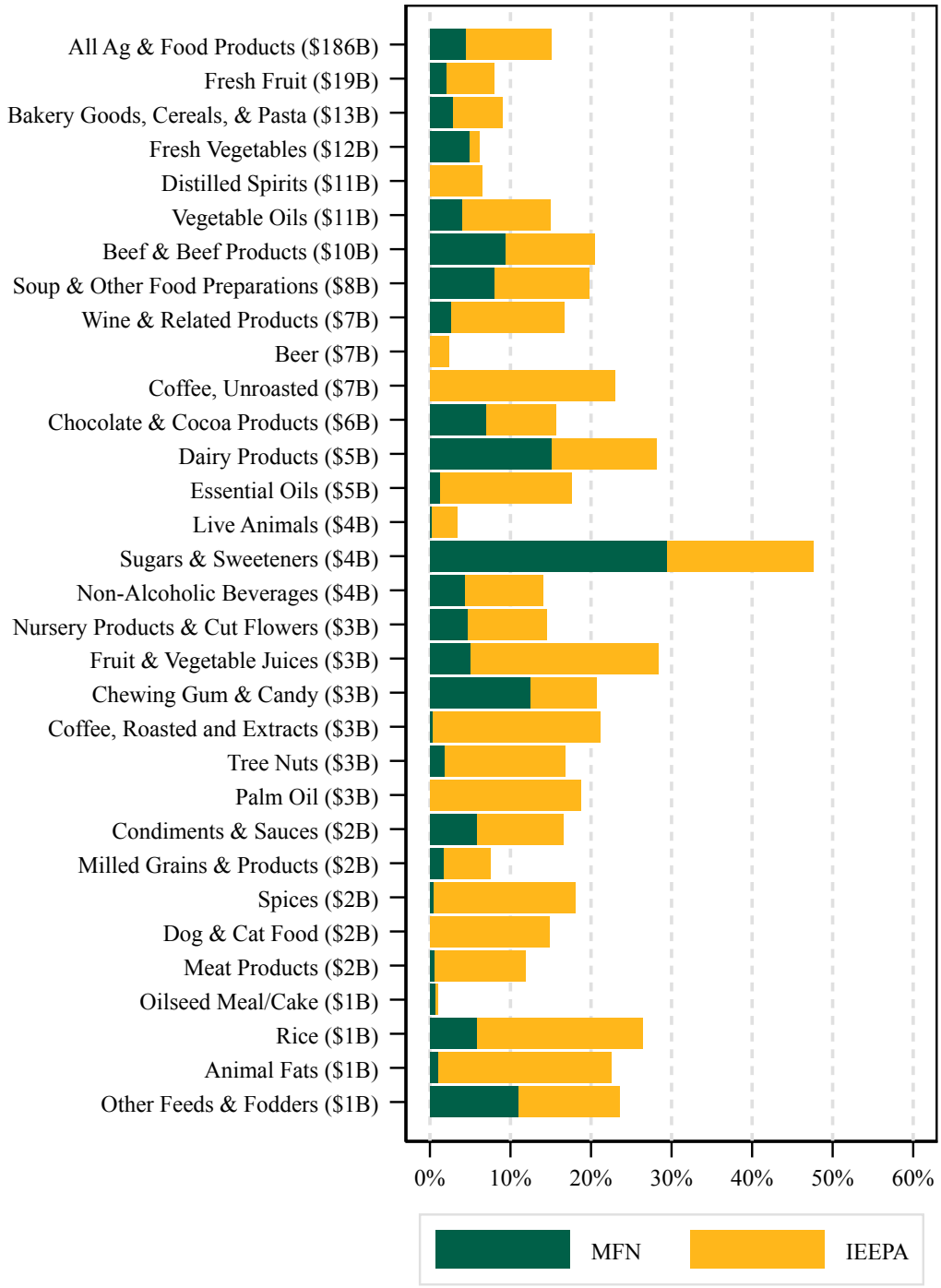


Exhibit 4: *Effective Tariff Rates (Trade Weighted) by Agricultural and Food Products.*

Note: Rates reflect trade-weighted averages based on 2022–2024 U.S. import data by country of origin. Import values in parentheses represent 3-year average annual imports (2022–2024) in billion USD. Source: NDSU using information from the White House Executive Orders and the Global Trade Atlas by S&P Global.

The exhibit above shows the stark contrast between historically low MFN tariffs and the new IEEPA rates. Although the IEEPA measures dramatically raise nominal import duties, the actual tariff exposure for U.S. importers varies sharply across product groups depending on their country of origin. By calculating trade-weighted tariffs that reflect each supplier's share, the chart reveals how these exemptions drive the effective rate lower for much of the food basket. For example, coffee tariffs average much higher because most imports originate from Brazil (subject to a 40-50% rate) or Switzerland (39%), while fresh fruits and vegetables, primarily sourced from Mexico, continue to flow in at minimal tariffs. Similarly, processed foods and bakery items are little affected thanks to Canada's USMCA coverage, and high-value European products like wine and cheese are buffered by negotiated carve-outs.

Tariffs on Selected Products facing Significant Escalation of IEEPA Tariffs.

Supplier	HS code	Description	3-Year avg trade value (million USD)	MFN rate	IEEPA tariffs
Brazil	090111	Coffee, Not Roasted	$6,187	0%	50%
China	151800	Animal/Veg/Microbial Fats & Oils, Other	$2,392	5%	30%
Switzerland	090121	Coffee, Not Roasted	$2,061	0%	39%
Brazil	170114	Solid Cane Sugar, Other	$1,870	50%	50%
India	130219	Vegetable Saps & Extracts, Other	$1,115	0%	50%
Brazil	150210	Tallow	$943	1%	50%
Brazil	051199	Inedible Animal Products (incl. Genetics, excl. Fish)	$772	1%	50%
Brazil	350400	Peptones & Proteins, Other	$719	5%	50%
Brazil	170199	Refined Sugar, Other	$659	37%	50%
India	040900	Natural Honey	$616	1%	50%
Brazil	160250	Bovine Meat (Prepared/Preocessed)	$606	2%	50%
Brazil	240120	Tobacco (Unmanufactured, Stripped)	$518	65%	50%
India	121190	Plants & Parts for Medicaments	$506	2%	50%
India	090422	Peppers or Allspice (Crush/ground)	$329	1%	50%
Brazil	220710	Ethyl Alcohol (Undenatured, >80%)	$322	3%	50%
Brazil	330112	Essential Oils of Orange	$311	3%	50%
Brazil	350300	Glues, Gelatin & Derivatives	$307	4%	50%
China	070320	Garlic (Fresh,Chilled)	$290	0%	30%
Brazil	210220	Yeasts,Inactive	$200	3%	50%
Brazil	170310	Cane Molasses	$190	0%	50%
India	130232	Mucilage from Locust Bean/Seed, Guar Seed	$177	0%	50%
India	090230	Black Tea (fermented <= 3kg)	$170	0%	50%
India	330190	Concentrates of Essential Oils, Other	$146	2%	50%
Switzerland	090122	Coffee, Not Roasted, Decaf.	$133	0%	39%
China	210310	Soy Sauce	$124	3%	30%
China	050510	Cleaned Down for Stuffing	$118	0%	30%
India	151530	Castor Oil	$115	0%	50%

Exhibit 5: *Selected Major Agri-food Products (more than $100 million in imports) Facing High Tariffs From Non-exempt Countries.*

Note: Status as of August 12, 2025.

Source: NDSU using information from the White House Executive Orders and the Global Trade Atlas by S&P Global.

The steepest increases in grocery-store prices will materialize for those products sourced from countries and categories that lack meaningful exemptions. Brazilian coffee and beef products now face an extraordinary 50% tariff; Swiss bottled water and roasted coffee approach 39%; and Chinese packaged foods commonly pay an additional 30%. Citrus fruits from China and honey from India also see double-digit increases. Because these are differentiated goods, often without close domestic alternatives, consumers can expect substantial price rises on these imported items, while more generic staples supplied chiefly by Mexico, Canada, or the EU remain shielded.

It is important to note that tariffs are applied at the border, not directly at the retail level. The percentage increase in import cost will not translate one-to-one into retail prices. Studies of previous U.S. tariff episodes suggest that while border-level tariff pass-through is high, retail price pass-through tends to be much more modest. Pass-through rates will depend on retail markups, the intensity of domestic competition, and the extent to which costs are absorbed along the supply chain, including by exporters.

The flow diagram above reveals the dramatic restructuring of U.S. import tariffs following the implementation of IEEPA measures. Under the traditional MFN schedule, the vast majority of agricultural and food imports, represented by the widest flows, entered the United States at very low duty rates, with most products falling into the 0-5% category. The relatively narrow flows into higher MFN rate categories demonstrate that only specialized products, such as certain processed foods and protected agricultural commodities, faced substantial border taxes under the pre-IEEPA regime.

The transformation shown on the right side of the diagram illustrates how IEEPA tariffs have fundamentally altered this landscape, redistributing trade flows across a much broader spectrum of effective tariff rates. While some imports, primarily those protected by USMCA exemptions and negotiated carve-outs, remain in low tariff categories, substantial volumes have shifted into the 15-30% range and beyond. The diagram's link widths reveal that trade flows are now more evenly distributed across tariff brackets, suggesting that the new tariff architecture affects a broader range of products than the previous system. This redistribution means that while the aggregate trade-weighted average has increased from 4% to 15%, the actual impact varies dramatically depending on product category and country of origin, creating a more complex and differentiated tariff structure for U.S. importers.

IEEPA Tariffs Shift U.S. Agri-food Imports to Higher Cost Distribution.

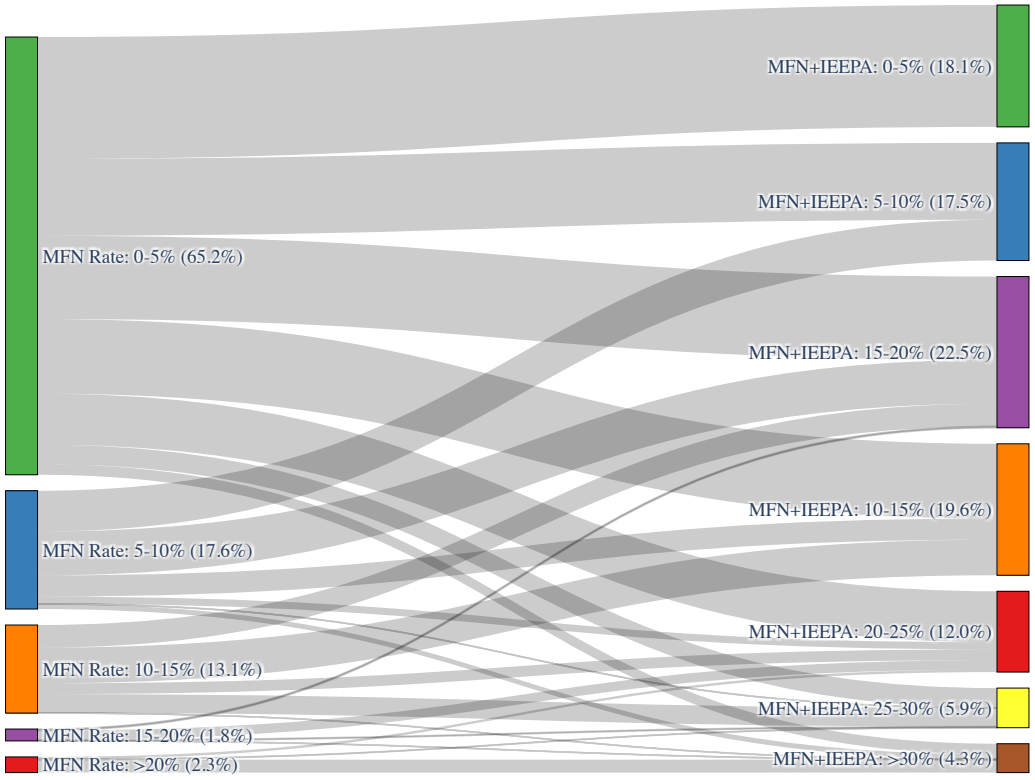


Exhibit 6: *Change of Tariff Distribution of U.S. Agri-food Imports Under New IEEPA Rates.*

Note: The left-hand nodes represent tariff rate bins for the MFN schedule. The right-hand nodes represent total effective tariff bins, defined as the sum of MFN duties and additional duties imposed under IEEPA. Link widths are proportional to the total 2024 import value corresponding to each MFN–total tariff bin combination, with wider links indicating larger trade flows. Percentage labels shown in parentheses for each bin indicate the share of the total 2024 U.S. import value.

Source: NDSU using information from the Global Trade Atlas by S&P Global and MacMaps.

Beyond the grocery store, the IEEPA tariffs extend their reach deeper into the agricultural supply chain, affecting the machinery, chemicals, and fertilizers that U.S. farmers depend upon for production. The United States imports approximately 33 billion USD worth of agricultural inputs annually from a diverse but concentrated set of global suppliers, with Canada and the European Union leading at over 7 billion USD each.

Implemented IEEPA Tariff Increases and U.S. Ag Input Imports.

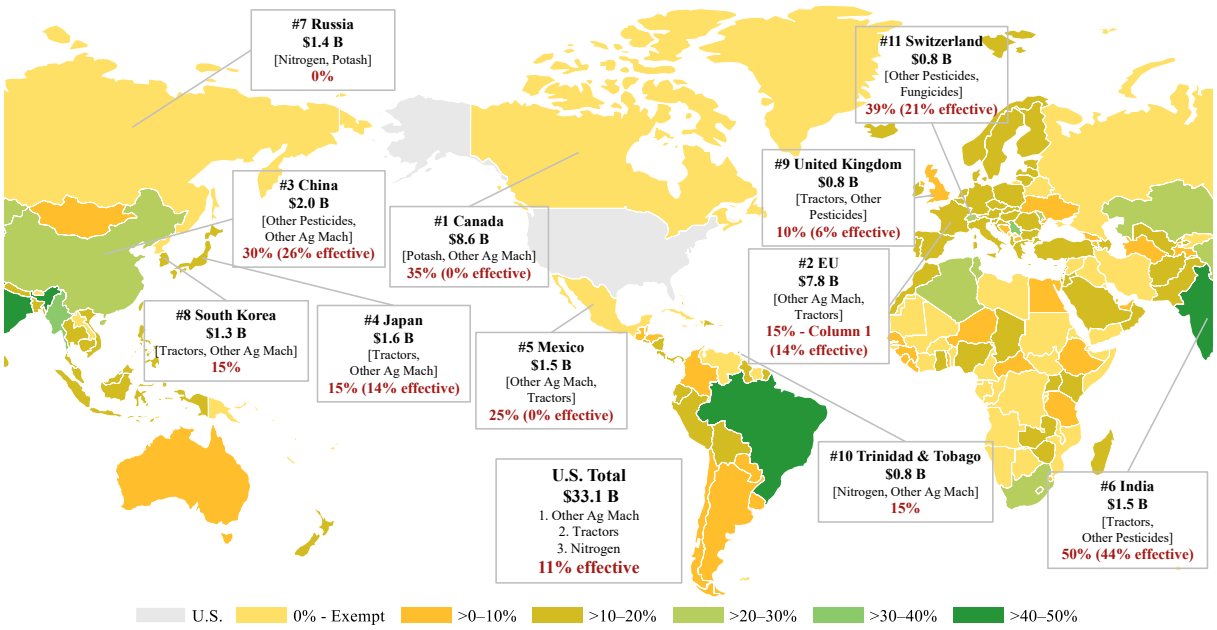


Exhibit 7: *Top Countries Supplying U.S. Agricultural Inputs.*

Note: The map highlights the top 11 countries supplying U.S. agricultural inputs in 2022-2024. Below each country name is the U.S. total agricultural input import value from that country for the same period. Square brackets indicate the leading agricultural input commodities. The announced IEEPA tariff and the effective IEEPA tariff (including exceptions) are shown in red and in parentheses. The effective IEEPA tariff is a trade-weighted average based on 2024 U.S. import data.

Source: NDSU using information from the White House Executive Orders and the Global Trade Atlas by S&P Global.

The new IEEPA tariffs create a highly uneven impact across these suppliers, with USMCA partners Canada and Mexico benefiting from exemptions despite their substantial market share. Canada dominates fertilizer imports, particularly potash, while the EU leads in agricultural machinery and equipment exports to the U.S. The geographic concentration of specific inputs is striking: nitrogen fertilizers flow primarily from Canada and Russia, phosphate from Saudi Arabia, and specialized pesticides from Switzerland and India. The tariff structure reveals clear strategic priorities, with the highest effective rates targeting India (44% average) and China (26% average), reflecting broader geopolitical tensions beyond agricultural trade. Meanwhile, key allBies like the United Kingdom face relatively modest increases (6% average), and established agricultural machinery suppliers from Japan and South Korea encounter moderate tariffs around 14-15%. This differentiated approach means that while U.S.

farmers and agribusinesses will face higher costs for inputs from certain countries, particularly for specialized pesticides and chemicals. However, the exemption of North American suppliers helps mitigate some of the overall price impact on critical inputs.

Effective Tariffs on Ag Inputs rise to 12%, with Pesticides facing the Highest Escalation.

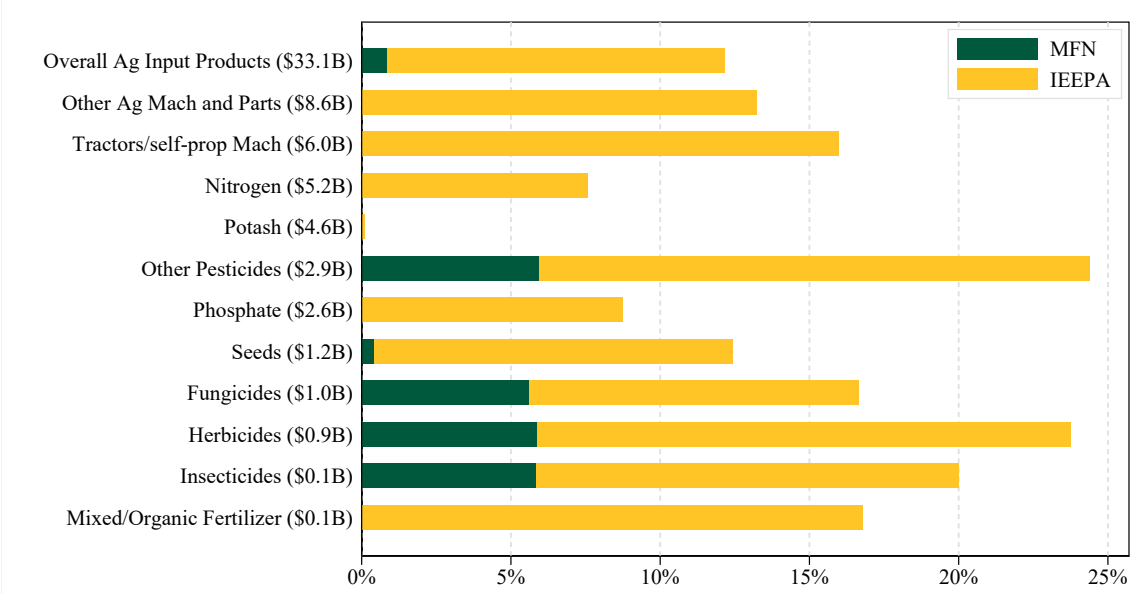


Exhibit 8: *Effective Tariff Rates (Trade Weighted) by Agricultural Inputs.*

Note: Status as of August 8, 2025. Trade-weighted tariffs at the FATUS commodity level are calculated by aggregating across all tariff line codes within each commodity group using U.S. import values in 2024 at the tariff line level as weights.

Source: NDSU using information from the White House Executive Orders and the Global Trade Atlas by S&P Global.

The IEEPA tariffs create an uneven cost structure across agricultural inputs, with pesticides and chemicals bearing the highest increases. While U.S. farmers previously enjoyed relatively low tariff rates averaging just less than 1% (overall effective rate) under MFN status, the new trade-weighted IEEPA tariffs push effective rates to 12% and double-digit levels across nearly all categories. Pesticides face the most severe impact, with herbicides and other pesticides jumping from around 5-6% to nearly 25%, representing increases of nearly 20 percentage points. Farm machinery and equipment see more moderate increases, with tractors and agricultural machinery parts rising from minimal MFN rates to 13-16%. The modest impact of fertilizers reflects the dominant role of USMCA-exempt suppliers, particularly Canada's control of potash and nitrogen markets, which helps shield U.S. farmers from the full weight of tariff escalation despite the overall ag input tariff burden rising tenfold from 1% to 12%.

Tariffs on Major Ag Input Imports by Foreign Supplier.

Supplier	HS code	Description	3-Year avg trade value (million USD)	MFN rate	IEEPA tariffs
Canada	31042000	Potassium chloride	$3,792	0%	0%
Germany	87019410	Other tractors of engine power => 75kW but < 130kW, for agricultural use	$1,198	0%	15%
Canada	28141000	Anhydrous ammonia	$855	0%	0%
Germany	87019510	Other tractors of engine power >130kW, for agricultural use	$782	0%	15%
Trinidad & Tobago	28141000	Anhydrous ammonia	$722	0%	15%
Korea, South	87019210	Other tractors of engine power => 18kW but < 37kW, for agricultural use	$461	0%	15%
Canada	84339050	Parts for machinery of heading 8433, nesoi	$456	0%	0%
Qatar	31021000	Urea, whether or not in aqueous solution	$455	0%	10%
Russia	31042000	Potassium chloride	$455	0%	0%
Japan	87019310	Other tractors of engine power => 37kW but < 75kW, for agricultural use	$452	0%	15%
Russia	31021000	Urea, whether or not in aqueous solution	$416	0%	0%
Saudi Arabia	31053000	Diammonium hydrogenorthophosphate (Diammonium phosphate)	$366	0%	10%
Switzerland	29331923	Aromatic or modified aromatic pesticides containing an unfused pyrazole ring (whether or not hydrogenated) in the structure	$343	6%	39%
Canada	84283900	Continuous-action elevators and conveyors, for goods or materials, nesoi	$328	0%	0%
Canada	31021000	Urea, whether or not in aqueous solution	$313	0%	0%
Japan	87019210	Other tractors of engine power => 18kW but < 37kW, for agricultural use	$300	0%	15%
Russia	31028000	Mixtures of urea and ammonium nitrate in aqueous or ammoniacal solution	$282	0%	0%
Switzerland	29349912	Aromatic or modified aromatic fungicides of other heterocyclic compounds, nesoi	$279	6%	0%
Korea, South	87019310	Other tractors of engine power => 37kW but < 75kW, for agricultural use	$258	0%	15%
Germany	84335900	Harvesting machinery or threshing machinery, nesoi	$255	0%	15%
Germany	84339050	Parts for machinery of heading 8433, nesoi	$244	0%	15%
Saudi Arabia	31021000	Urea, whether or not in aqueous solution	$235	0%	10%
Oman	31021000	Urea, whether or not in aqueous solution	$233	0%	10%
Türkiye/Turkey	87019310	Other tractors of engine power => 37kW but < 75kW, for agricultural use	$226	0%	15%
India	87019310	Other tractors of engine power => 37kW but < 75kW, for agricultural use	$226	0%	50%
Germany	84283900	Continuous-action elevators and conveyors, for goods or materials, nesoi	$222	0%	15%
Canada	87019510	Other tractors of engine power >130kW, for agricultural use	$217	0%	0%
United Kingdom	87019410	Other tractors of engine power => 75kW but < 130kW, for agricultural use	$209	0%	10%
Belgium	84335100	Combine harvester-threshers	$206	0%	15%
Austria	84283900	Continuous-action elevators and conveyors, for goods or materials, nesoi	$205	0%	15%

Exhibit 9: *Top U.S. Agricultural Input Imports by Supplier and IEEPA and MFN Tariffs.*

Note: Status as of August 8, 2025. Trade-weighted tariffs at the product group are calculated by aggregating across all tariff line codes within each commodity using U.S. import values in 2024 at the tariff line level as weights.

Source: NDSU using information from the White House Executive Orders and the Global Trade Atlas by S&P Global.

>>> Retaliatory Tariff Update

China currently applies tariffs on U.S. agricultural products that combine its MFN rate with retaliatory measures under Section 232, Section 301, and the IEEPA. Certain products receive temporary exemptions from Section 301 retaliatory tariffs through a market-based application process; however, in July 2025, the Ministry of Finance indicated it would suspend new applications for most U.S. agricultural products as of August 1, with approved exclusions expiring September 14. On August 1, the reported suspension was extended, allowing applications until October 30 and maintaining approved exclusions until December 13. The following presents trade-weighted average tariff rates at the agri-food commodity level, along with estimated rates assuming no Section 301-related retaliatory tariff exemptions.

China's Stack of Retaliatory Tariffs on U.S. Agricultural Exports.

Commodity	3-Year avg Chinese imports (million USD)	MFN rate	Retaliation to Section 232	Retaliation to Section 301	Retaliation to IEEPA tariffs	Total tariffs as of August 2025	Tariffs without Section 301 exemptions
Soybeans	$15,066	3%	0%	28%	20%	23%	50%
Corn	$2,819	1%	0%	25%	25%	26%	51%
Cotton	$2,188	1%	0%	25%	25%	26%	51%
Coarse Grains (ex. corn)	$1,663	2%	0%	25%	20%	22%	47%
Beef & Beef Products	$1,603	12%	0%	30%	20%	32%	62%
Soup & Other Food Preparations	$1,230	0%	0%	10%	10%	10%	20%
Hay	$1,050	6%	0%	25%	10%	16%	40%
Tree Nuts	$966	7%	11%	28%	20%	37%	66%
Pork & Pork Products	$951	12%	25%	30%	20%	56%	86%
Poultry Meat & Prods. (ex. eggs)	$834	0%	0%	28%	25%	25%	53%
Dairy Products	$675	5%	0%	19%	14%	19%	37%
Hides & Skins	$499	5%	0%	5%	10%	15%	20%
Other Feeds & Fodders	$439	3%	0%	10%	10%	13%	23%
Meat Products NESOI	$406	20%	0%	29%	10%	30%	59%
Wheat	$395	1%	0%	25%	25%	26%	51%
Dog & Cat Food	$355	10%	0%	25%	10%	20%	45%
Tobacco	$230	10%	0%	25%	10%	20%	45%
Essential Oils	$163	12%	0%	7%	10%	22%	29%
Dextrins, Peptones, & Proteins	$106	6%	0%	11%	10%	16%	27%
Fresh Fruit	$105	10%	15%	30%	20%	45%	75%
Processed Fruit	$85	11%	3%	24%	20%	34%	58%
Vegetable Oils NESOI	$80	22%	0%	24%	10%	32%	55%
Peanuts	$77	15%	0%	10%	10%	25%	35%
Non-Alcoholic Bev. (ex. juices, coffee, tea)	$74	5%	0%	27%	10%	15%	42%
Chewing Gum & Candy	$62	10%	0%	25%	10%	20%	45%
Other Intermediate Products	$52	8%	0%	19%	10%	18%	37%
Wine & Related Products	$51	15%	15%	24%	10%	40%	63%
Rice	$0	1%	0%	25%	10%	11%	36%

Exhibit 10: *China's Tariffs on U.S. Agricultural Products as of August 12, 2025.*

Source: NDSU using data from the USDA FAS GAIN report CH2025-0153 and the Global Trade Atlas by S&P Global.

>>> Latest Trade Figures and Tables

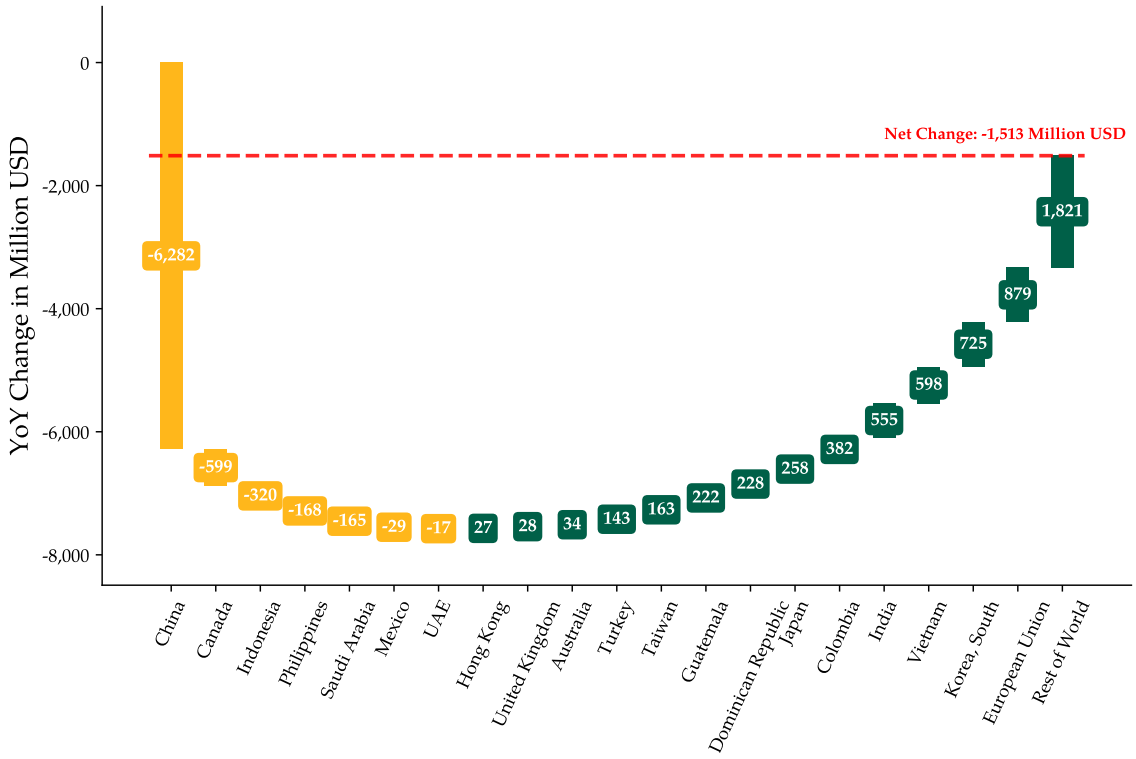


Exhibit 11: *Year-to-Date (Jan-Jun) Net Change in U.S. Agricultural Exports in Million USD.*

Source: NDSU using data from the U.S. Census Bureau.

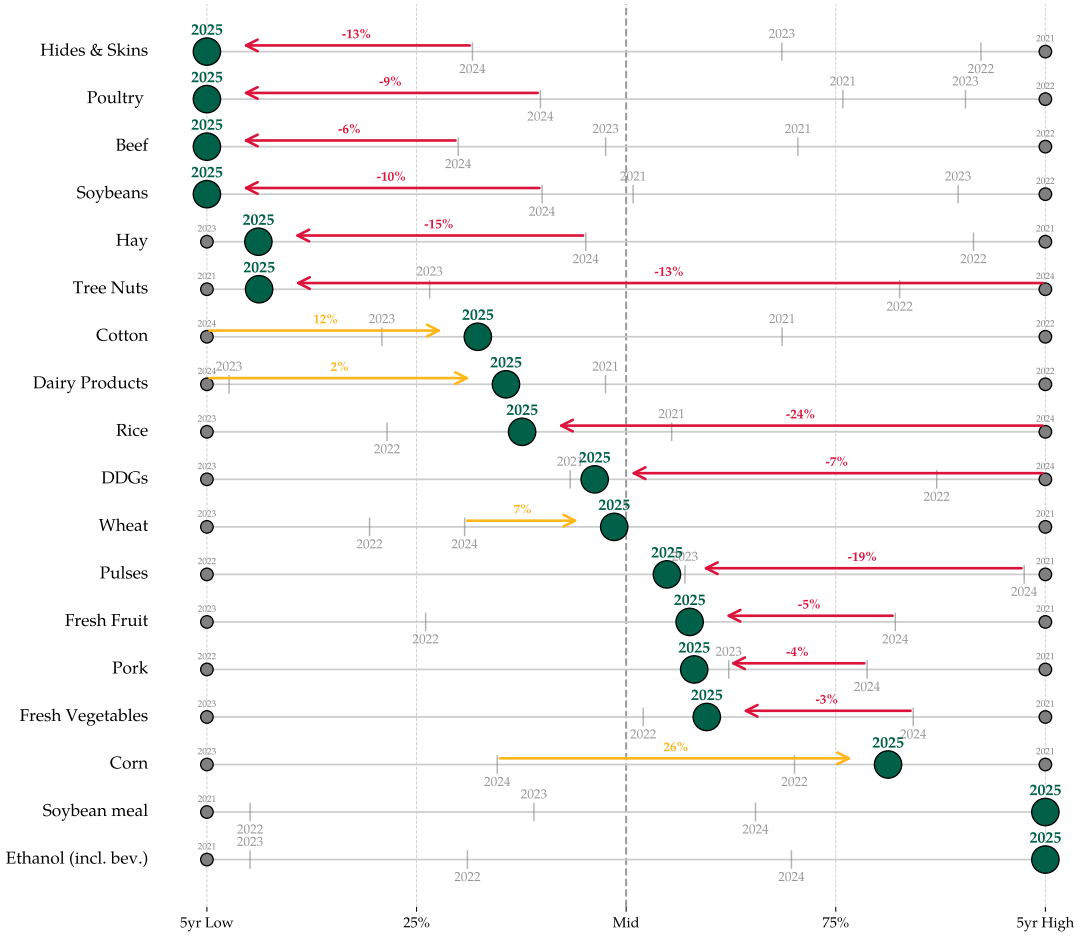


Exhibit 12: *US Commodity Export Performance: 2025 vs. 5-Year Range (in Volumes).*

Source: NDSU using data from the U.S. Census Bureau.

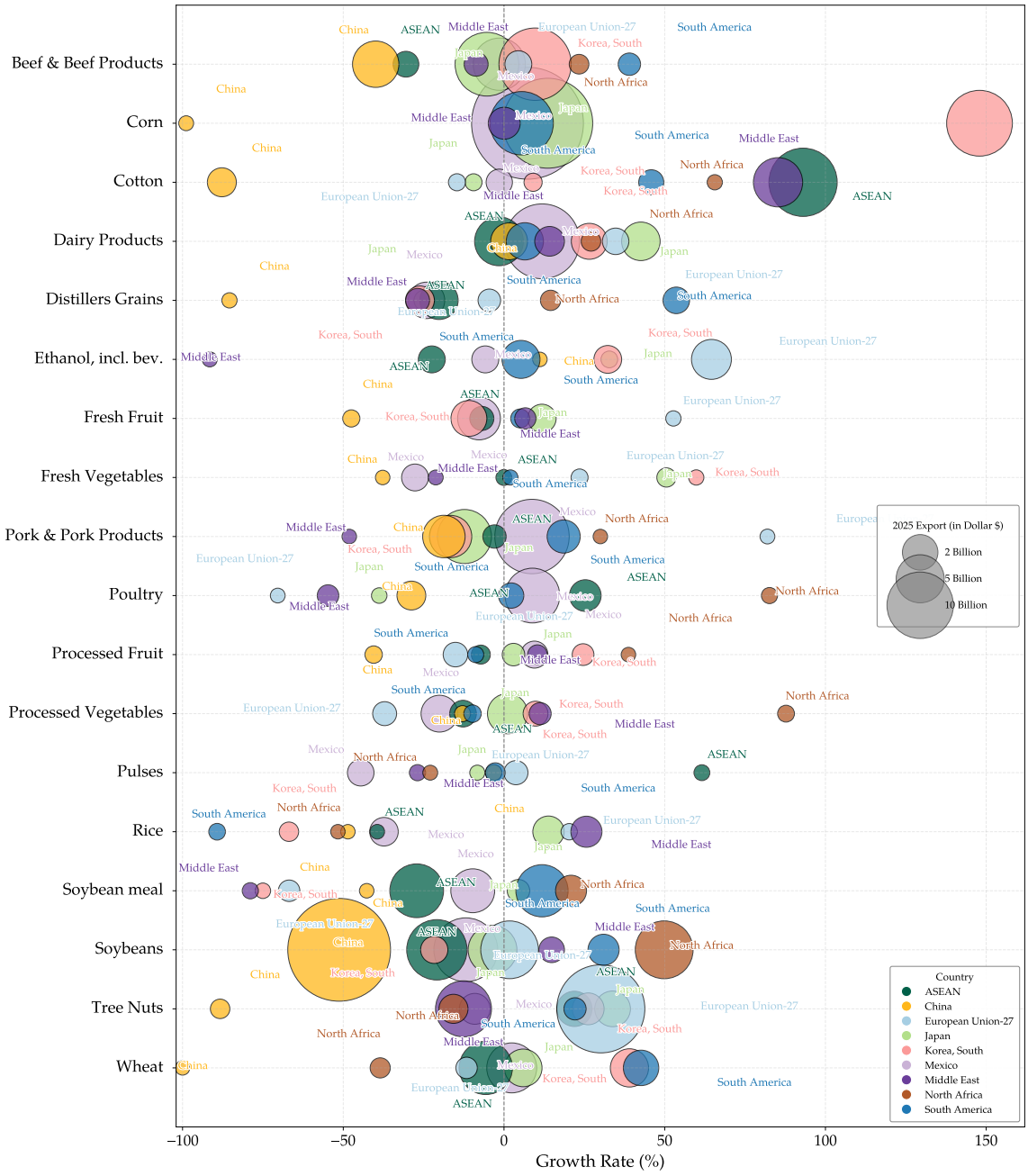


Exhibit 13: *U.S. Agricultural Export Growth Year-to-Date by Product Group and Country/Region.*

Source: NDSU using data from the U.S. Census Bureau.

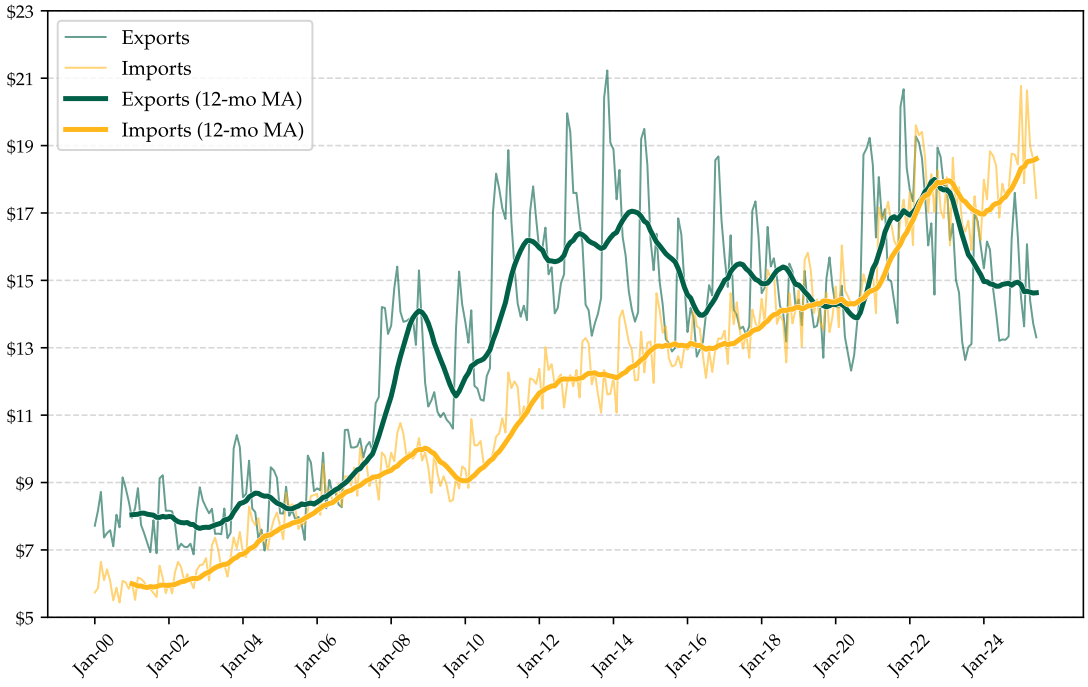


Exhibit 14: *Value of U.S. Agricultural Exports and Imports in Billion USD, Inflation Adjusted.*

Source: NDSU using data from the U.S. Census Bureau.

Region	June-24	June-25	June YoY Change	Jan to June, 2024	Jan to June, 2025	YTD change
Caribbean	$443	$470	6%	$2,721	$3,030	11%
South Asia	$269	$401	49%	$2,020	$2,931	45%
Middle East	$420	$487	16%	$3,217	$3,198	-1%
Central America	$555	$572	3%	$3,220	$3,699	15%
South America	$666	$733	10%	$4,274	$4,801	12%
Southeast Asia	$1,047	$1,128	8%	$6,608	$6,747	2%
China	$731	$538	-26%	$11,806	$5,523	-53%
European Union-27	$933	$1,026	10%	$5,999	$6,879	15%
Canada	$2,580	$2,364	-8%	$14,554	$13,954	-4%
Mexico	$2,209	$2,397	8%	$14,681	$14,651	0%
East Asia ex China	$2,150	$2,273	6%	$13,508	$14,669	9%
Rest of the World	$873	$922	6%	$4,468	$5,479	23%

Exhibit 15: *U.S. Agricultural Exports by Region, in Million USD.*

Source: NDSU using data from the U.S. Census Bureau.

Product	June-2024	June-2025	June YoY Change	Jan to June, 2024	Jan to June, 2025	YTD change
Other Coarse Grains	$32	$48	49%	$874	$207	-76%
Pulses	$87	$60	-31%	$688	$563	-18%
Hay	$98	$92	-6%	$713	$588	-18%
Live Animals	$80	$103	29%	$593	$578	-2%
Processed Fruit	$150	$151	0%	$901	$916	2%
Sugar/Sweeteners	$142	$126	-12%	$891	$758	-15%
Rice	$195	$131	-33%	$1,395	$1,035	-26%
Fresh Vegetables	$258	$222	-14%	$1,469	$1,275	-13%
Distillers Grains	$238	$220	-8%	$1,576	$1,302	-17%
Proc. Vegetables	$310	$284	-8%	$1,869	$1,751	-6%
Fresh Fruit	$520	$523	1%	$2,193	$2,090	-5%
Other Feeds	$266	$302	14%	$1,718	$1,706	-1%
Ethanol (incl. bev.)	$324	$396	22%	$2,195	$2,365	8%
Poultry	$425	$431	1%	$2,490	$2,531	2%
Wheat	$398	$453	14%	$2,899	$2,857	-1%
Soybean Meal	$466	$471	1%	$3,369	$2,984	-11%
Cotton	$359	$388	8%	$3,279	$3,204	-2%
Pork & Pork Products	$639	$662	4%	$4,123	$3,988	-3%
Dairy Products	$658	$833	27%	$4,043	$4,643	15%
Beef & Beef Products	$921	$758	-18%	$5,129	$4,843	-6%
Tree Nuts	$647	$803	24%	$4,737	$5,152	9%
Soybeans	$701	$654	-7%	$9,711	$7,303	-25%
Corn	$1,198	$1,513	26%	$7,496	$9,578	28%
Other Products	$3,765	$3,687	-2%	$22,726	$23,347	3%
Total Ag Exports	$12,877	$13,310	3%	$87,076	$85,563	-2%

Exhibit 16: *Value of U.S. Agricultural Exports by Commodity, in Million USD.*

Source: NDSU using data from the U.S. Census Bureau.

Commodity	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All Rice	2024	86%	211%	58%	64%	143%	34%	102%	121%	37%	105%	20%	-22%
All Wheat	2024	12%	0%	37%	104%	50%	50%	7%	62%	43%	57%	10%	9%
Beef	2024	-6%	23%	-2%	-12%	23%	3%	-2%	-8%	0%	35%	9%	-3%
Corn	2024	48%	110%	34%	24%	19%	29%	121%	116%	38%	84%	41%	19%
Pork	2024	-4%	51%	10%	4%	18%	-1%	33%	4%	6%	41%	-2%	1%
Sorghum	2024	828%	395%	19%	58%	104%	43%	-45%	48%	1%	-29%	-14%	-74%
Soybean Cake & Meal	2024	-10%	64%	13%	20%	15%	-11%	-13%	-10%	1%	83%	21%	7%
Soybeans	2024	-38%	7%	-3%	-17%	51%	11%	12%	15%	-2%	36%	27%	52%
Upland Cotton (in bale)	2024	42%	73%	21%	-32%	-16%	-31%	-36%	22%	-25%	20%	48%	-36%
Wheat - HRS	2024	12%	0%	39%	113%	41%	50%	6%	31%	29%	40%	1%	6%
Wheat - HRW	2024	11%	-38%	23%	71%	41%	34%	100%	94%	71%	89%	120%	39%
Wheat - SRW	2024	291%	94%	204%	152%	195%	-18%	-47%	55%	4%	39%	19%	-8%
Wheat - White	2024	-17%	-15%	-47%	106%	15%	121%	58%	69%	122%	98%	-22%	22%
All Rice	2025	-11%	-22%	-30%	-28%	-14%	-24%	-24%					
All Wheat	2025	15%	-3%	-9%	-18%	31%	-84%	0%					
Beef	2025	14%	-11%	4%	-1%	-17%	-16%	1%					
Corn	2025	68%	41%	24%	12%	31%	33%	58%					
Pork	2025	28%	-15%	-4%	-26%	-22%	12%	9%					
Sorghum	2025	-88%	-99%	-82%	-77%	-75%	-48%	-61%					
Soybean Cake & Meal	2025	29%	-8%	10%	16%	13%	12%	84%					
Soybeans	2025	24%	-31%	10%	42%	-9%	22%	71%					
Upland Cotton (in bale)	2025	-1%	11%	9%	39%	53%	26%	86%					
Wheat - HRS	2025	3%	-5%	7%	-46%	18%	-88%	0%					
Wheat - HRW	2025	18%	39%	9%	61%	69%	-63%	0%					
Wheat - SRW	2025	-12%	-39%	-55%	-43%	-44%	-84%	0%					
Wheat - White	2025	36%	26%	98%	-15%	111%	-95%	0%					

Exhibit 17: *U.S. Export Shipments to World, Year-over-Year Change.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All Rice	2024	0%	0%	0%	0%	0%	-100%	0%	0%	0%	0%	0%	0%
All Wheat	2024	144%	240%	174%	25149%	151%	0%	-54%	2577%	-100%	-100%	-100%	-100%
Beef	2024	-10%	14%	6%	-17%	25%	-15%	-12%	-23%	-6%	38%	-4%	10%
Corn	2024	-78%	947%	-65%	-62%	-58%	-81%	-95%	-98%	-99%	-98%	-86%	-100%
Pork	2024	-35%	51%	-17%	-44%	-26%	-36%	-8%	-25%	0%	31%	3%	3%
Sorghum	2024	818%	402%	19%	58%	134%	18%	-45%	62%	-13%	-29%	-21%	-73%
Soybean Cake & Meal	2024	0%	0%	0%	0%	-100%	-100%	0%	0%	0%	0%	0%	0%
Soybeans	2024	-54%	16%	24%	-34%	277%	-66%	-26%	52%	-50%	15%	10%	60%
Upland Cotton (in bale)	2024	139%	262%	200%	13%	76%	44%	-54%	-42%	-78%	-92%	-42%	-77%
Wheat - HRS	2024	0%	0%	0%	0%	0%	0%	0%	0%	-100%	0%	0%	0%
Wheat - HRW	2024	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Wheat - SRW	2024	0%	0%	104744%	16434%	0%	0%	-98%	9%	-100%	-100%	0%	0%
Wheat - White	2024	0%	-100%	-84%	0%	-100%	0%	0%	0%	0%	0%	-100%	-100%
All Rice	2025	0%	0%	0%	0%	0%	0%	0%					
All Wheat	2025	-100%	-100%	-100%	-100%	-100%	0%	0%					
Beef	2025	39%	-18%	3%	-63%	-96%	-83%	-96%					
Corn	2025	-91%	86%	-100%	-100%	-100%	-100%	-100%					
Pork	2025	34%	-37%	-9%	-56%	-85%	39%	-3%					
Sorghum	2025	-88%	-100%	-100%	-99%	-100%	-100%	-100%					
Soybean Cake & Meal	2025	0%	0%	0%	0%	0%	0%	0%					
Soybeans	2025	-12%	-53%	3%	25%	-62%	-100%	-100%					
Upland Cotton (in bale)	2025	-74%	-83%	-92%	-92%	-96%	-94%	-100%					
Wheat - HRS	2025	-100%	0%	0%	0%	0%	0%	0%					
Wheat - HRW	2025	-100%	0%	-100%	-100%	0%	0%	0%					
Wheat - SRW	2025	-100%	-100%	-100%	-100%	-100%	0%	0%					
Wheat - White	2025	-100%	0%	-100%	-100%	0%	0%	0%					

Exhibit 18: *U.S. Exports Shipments to China, Year-over-Year Change.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All Rice	2024	88%	96%	79%	15%	90%	256%	387%	-30%	9%	35%	-24%	-11%
All Wheat	2024	27%	54%	8%	-2%	60%	181%	13%	-8%	-17%	15%	23%	-34%
Beef	2024	-11%	12%	1%	20%	13%	15%	-16%	23%	16%	56%	1%	-12%
Corn	2024	-2%	57%	-33%	122%	864%	336%	27%	38%	-6%	219%	-10%	14%
Pork	2024	-47%	9%	13%	-21%	29%	40%	29%	-10%	5%	27%	7%	-35%
Sorghum	2024	-22%	66%	-79%	-50%	8%	-57%	-70%	1%	-64%	-84%	-28%	-110%
Soybean Cake & Meal	2024	34%	82%	-20%	13%	-9%	39%	20%	-12%	-29%	28%	122%	37%
Soybeans	2024	-54%	-41%	-6%	96%	31%	-14%	-35%	13%	202%	91%	5%	0%
Upland Cotton (in bale)	2024	81%	-34%	-33%	-1%	48%	-17%	155%	-216%	-11%	0%	-28%	11%
Wheat - HRS	2024	124%	87%	64%	6%	73%	129%	-17%	-45%	-11%	39%	12%	24%
Wheat - HRW	2024	-2%	38%	50%	12%	89%	210%	64%	43%	-44%	24%	25%	123%
Wheat - SRW	2024	-33%	12%	-165%	-71%	42%	55%	-27%	30%	-15%	-39%	-18%	-94%
Wheat - White	2024	3%	78%	180%	58%	10%	1663%	73%	10%	-5%	56%	79%	80%
All Rice	2025	-14%	5%	-52%	-33%	13%	-61%	5%					
All Wheat	2025	6%	41%	41%	-17%	80%	-84%	0%					
Beef	2025	-16%	7%	-22%	-24%	-27%	-11%	12%					
Corn	2025	48%	11%	3%	54%	38%	41%	176%					
Pork	2025	200%	-16%	-14%	-36%	5%	-22%	15%					
Sorghum	2025	-98%	-77%	-12%	16%	-38%	-2%	-75%					
Soybean Cake & Meal	2025	24%	-8%	-34%	11%	31%	24%	28%					
Soybeans	2025	60%	135%	28%	-19%	11%	20%	25%					
Upland Cotton (in bale)	2025	8%	59%	37%	-5%	-53%	-31%	-33%					
Wheat - HRS	2025	-27%	4%	6%	-51%	12%	-90%	0%					
Wheat - HRW	2025	37%	92%	59%	49%	180%	-76%	0%					
Wheat - SRW	2025	76%	72%	-166%	200%	68%	-87%	0%					
Wheat - White	2025	26%	51%	-23%	-64%	96%	-91%	0%					

Exhibit 19: *U.S. Net Contract Export Sales to World, Year-over-Year Change.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All Rice	2024	0%	0%	0%	0%	0%	-100%	0%	0%	0%	0%	0%	0%
All Wheat	2024	94%	12%	-247%	-4790%	-12%	0%	-47%	-102%	-100%	-100%	-100%	-100%
Beef	2024	-20%	-24%	8%	109%	20%	-27%	34%	-20%	28%	62%	20%	-16%
Corn	2024	-87%	-135%	-93%	-35%	-216%	-2%	62%	-97%	-102%	-87%	-100%	-100%
Pork	2024	-21%	24%	-11%	-34%	60%	-3%	-56%	31%	-11%	106%	-10%	-43%
Sorghum	2024	-9%	73%	-75%	-35%	-12%	95%	-67%	-8%	-82%	-82%	-48%	-96%
Soybean Cake & Meal	2024	0%	0%	0%	-100%	0%	0%	0%	-100%	0%	0%	0%	-100%
Soybeans	2024	-60%	-2%	32%	14%	-75%	113%	-85%	6%	168%	21%	-17%	15%
Upland Cotton (in bale)	2024	132%	-44%	-67%	43%	23%	-51%	-39%	-288%	-107%	-79%	-89%	-98%
Wheat - HRS	2024	0%	0%	0%	0%	0%	0%	0%	0%	-100%	-100%	0%	0%
Wheat - HRW	2024	0%	0%	0%	0%	0%	0%	0%	0%	0%	-100%	-100%	0%
Wheat - SRW	2024	0%	0%	-5211%	-11754%	-4133%	-100%	-99%	-100%	-102%	-100%	-100%	-100%
Wheat - White	2024	1%	-52%	-100%	0%	-100%	0%	0%	0%	0%	0%	-100%	-100%
All Rice	2025	0%	0%	0%	0%	0%	0%	0%					
All Wheat	2025	-100%	-100%	-100%	-100%	-100%	-100%	0%					
Beef	2025	-29%	-25%	-51%	-94%	-146%	-117%	-103%					
Corn	2025	-92%	-100%	-100%	-100%	-100%	-100%	-100%					
Pork	2025	3%	21%	67%	-191%	0%	-44%	151%					
Sorghum	2025	-98%	-99%	-98%	-100%	-100%	-100%	-100%					
Soybean Cake & Meal	2025	0%	0%	0%	0%	0%	0%	0%					
Soybeans	2025	25%	-42%	-9%	-3%	-99%	-100%	-100%					
Upland Cotton (in bale)	2025	-92%	-27%	-276%	-107%	-100%	-102%	-99%					
Wheat - HRS	2025	-100%	0%	0%	0%	-100%	-100%	0%					
Wheat - HRW	2025	-100%	-100%	-100%	-100%	0%	0%	0%					
Wheat - SRW	2025	-100%	-100%	-100%	-100%	-100%	0%	0%					
Wheat - White	2025	-100%	-100%	-100%	-100%	0%	0%	0%					

Exhibit 20: *U.S. Net Contract Export Sales to China, Year-over-Year Change.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Jul-24	Jul-25	YoY change	Jan–Jul 2024	Jan–Jul 2025	YTD change
All Rice	171,058	171,969	1%	2,264,212	1,619,663	-28%
All Wheat	1,356,554	-	0%	12,493,865	9,159,069	-27%
Beef	48,083	49,129	2%	480,803	430,305	-11%
Corn	3,348,729	4,987,248	49%	37,321,140	47,142,511	26%
Pork	94,991	109,072	15%	1,041,087	930,891	-11%
Sorghum	187,200	81,113	-57%	3,586,427	609,432	-83%
Soybean Cake & Meal	569,918	1,254,020	120%	8,185,115	9,002,216	10%
Soybeans	1,010,521	1,693,211	68%	19,932,778	19,634,635	-1%
Upland Cotton (in bale)	374,345	754,531	102%	7,820,433	8,523,451	9%
Wheat - HRS	399,384	-	0%	3,973,500	2,606,846	-34%
Wheat - HRW	350,220	-	0%	2,575,592	2,555,756	-1%
Wheat - SRW	290,940	-	0%	2,913,211	1,322,516	-55%
Wheat - White	316,010	-	0%	2,746,469	2,526,223	-8%

Exhibit 21: *U.S. Export Shipments to World, in Metric Tons.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Jul-24	Jul-25	YoY change	Jan–Jul 2024	Jan–Jul 2025	YTD change
All Rice	-	-	0%	-	-	0%
All Wheat	69,847	-	0%	1,747,145	-	-100%
Beef	7,101	292	-96%	74,193	36,575	-51%
Corn	3,205	-	-100%	1,247,780	16,399	-99%
Pork	10,189	11,929	17%	107,351	78,574	-27%
Sorghum	187,180	-	-100%	3,511,222	86,408	-98%
Soybean Cake & Meal	-	-	0%	-	-	0%
Soybeans	11,175	-	-100%	9,526,042	6,418,618	-33%
Upland Cotton (in bale)	94,982	174	-100%	3,141,639	323,603	-90%
Wheat - HRS	67,300	-	0%	98,617	-	-100%
Wheat - HRW	-	-	0%	267,220	-	-100%
Wheat - SRW	2,547	-	0%	1,148,504	-	-100%
Wheat - White	-	-	0%	232,804	-	-100%

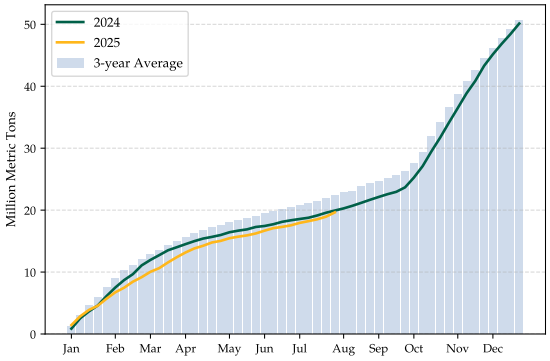
Exhibit 22: *U.S. Export Shipments to China, in Metric Tons.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Jul-24	Jul-25	YoY change	Jan–Jul 2024	Jan–Jul 2025	YTD change
All Rice	191,625	211,713	10%	2,067,935	1,505,570	-27%
All Wheat	1,174,419	-	0%	11,905,959	10,072,648	-15%
Beef	46,579	49,936	7%	485,945	403,423	-17%
Corn	2,878,846	7,606,878	164%	30,667,361	42,737,253	39%
Pork	85,338	104,672	23%	961,736	940,188	-2%
Sorghum	275,417	80,730	-71%	1,880,179	651,023	-65%
Soybean Cake & Meal	1,363,815	1,264,288	-7%	8,570,240	9,019,523	5%
Soybeans	2,537,635	2,859,523	13%	13,757,638	14,954,401	9%
Upland Cotton (in bale)	674,428	381,314	-43%	4,966,837	5,988,633	21%
Wheat - HRS	381,001	-	0%	4,429,744	2,593,561	-41%
Wheat - HRW	282,020	-	0%	2,958,062	3,691,191	25%
Wheat - SRW	174,815	-	0%	1,270,916	1,598,307	26%
Wheat - White	325,083	-	0%	2,986,504	2,085,882	-30%

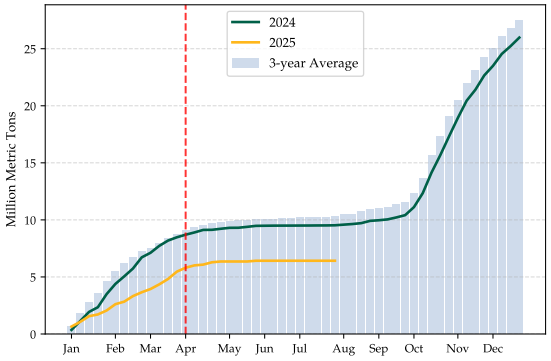
Exhibit 23: *U.S. Net Contract Export Sales to World, in Metric Tons.*
Source: NDSU using data from the USDA Foreign Agricultural Service.

Commodity	Jul-24	Jul-25	YoY change	Jan–Jul 2024	Jan–Jul 2025	YTD change
All Rice	-	-	0%	-	-	0%
All Wheat	72,214	-	0%	-1,607	-	-100%
Beef	8,681	104	-99%	76,049	14,786	-81%
Corn	-1,000	-	-100%	1,060,388	6,399	-99%
Pork	5,608	13,868	147%	106,492	77,281	-27%
Sorghum	275,417	-	-100%	2,056,453	10,342	-99%
Soybean Cake & Meal	-	-	0%	-	-	0%
Soybeans	171,453	-	-100%	5,497,449	3,614,213	-34%
Upland Cotton (in bale)	105,301	-129	-100%	1,190,289	21,710	-98%
Wheat - HRS	72,300	-	0%	141,509	-	-100%
Wheat - HRW	-	-	0%	169,220	-	-100%
Wheat - SRW	-86	-	0%	-480,140	-	-100%
Wheat - White	-	-	0%	167,804	-	-100%

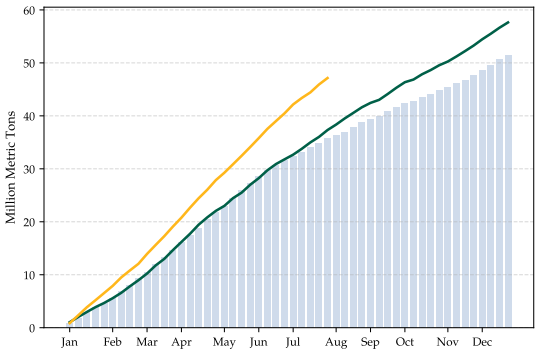
Exhibit 24: *U.S. Net Contract Export Sales to China, in Metric Tons.*
Source: NDSU using data from the USDA Foreign Agricultural Service.



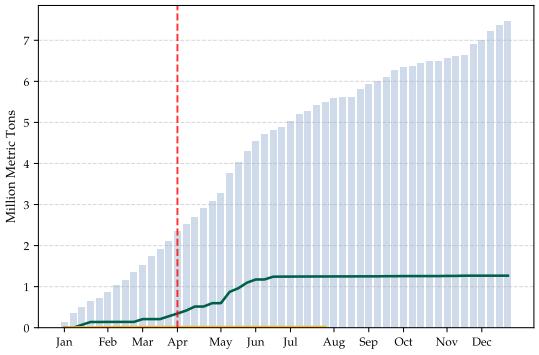
Accumulated Export Shipments – Soybeans to World



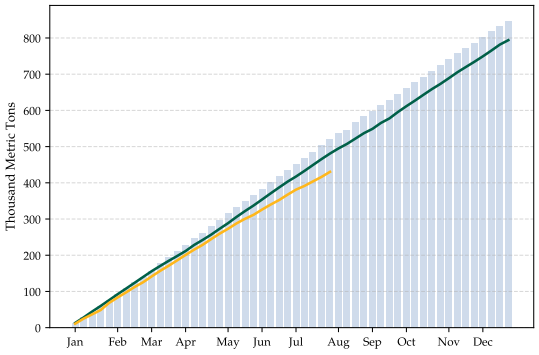
Accumulated Export Shipments – Soybeans to China



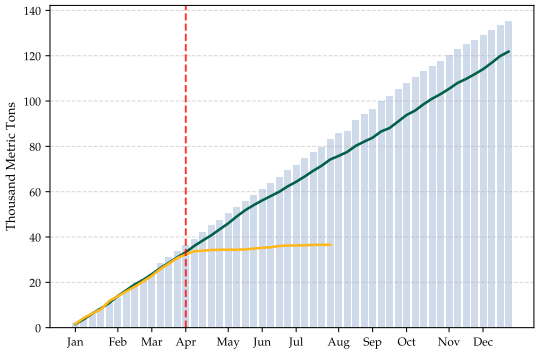
Accumulated Export Shipments – Corn to World



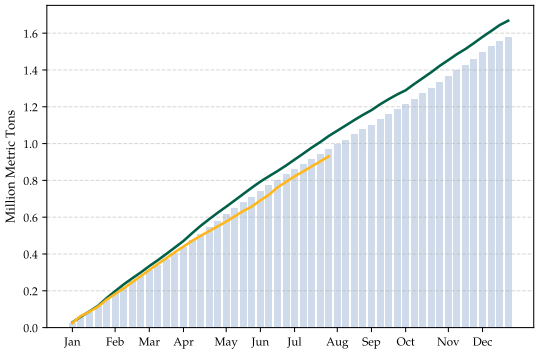
Accumulated Export Shipments – Corn to China



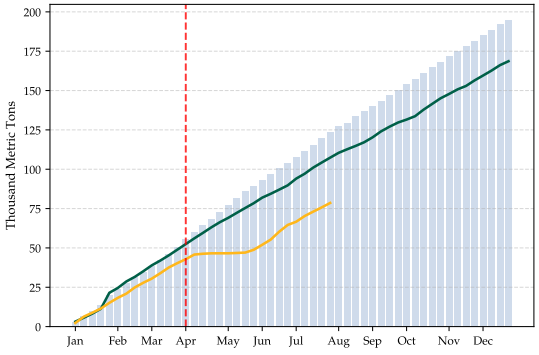
Accumulated Export Shipments – Beef to World



Accumulated Export Shipments – Beef to China



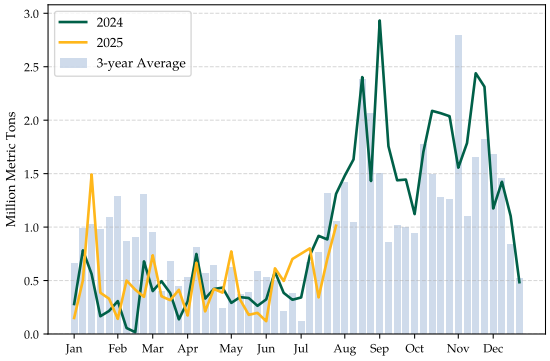
Accumulated Export Shipments – Pork to World



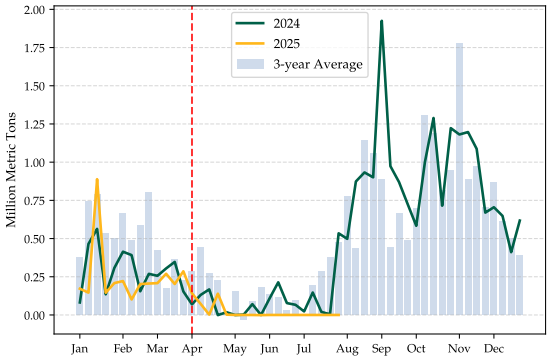
Accumulated Export Shipments – Pork to China

Exhibit 25: *Accumulated Export Shipments.*

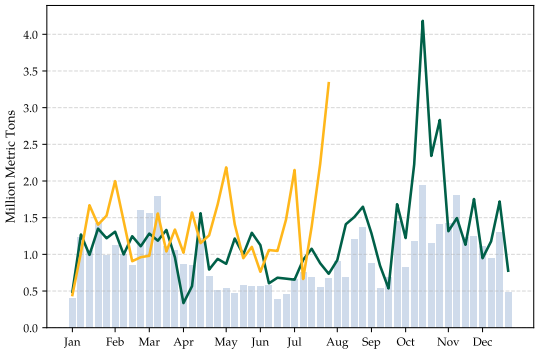
Source: NDSU using data from the USDA Foreign Agricultural Service.



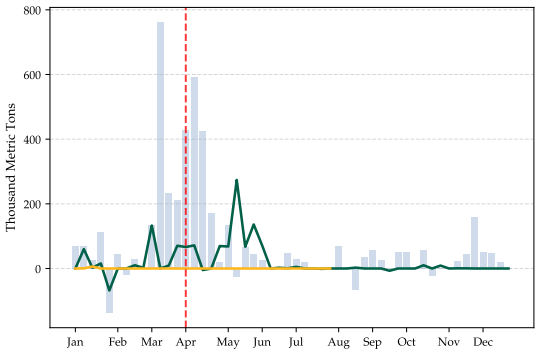
Weekly Net Contract Export Sales – Soybeans to World



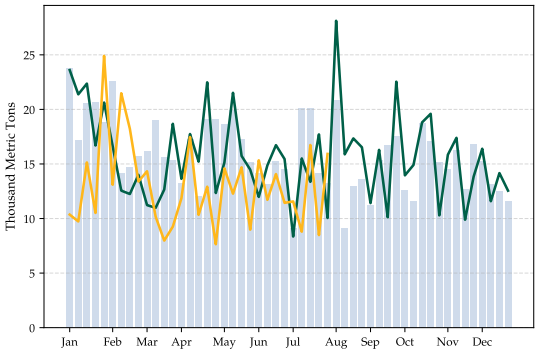
Weekly Net Contract Export Sales – Soybeans to China



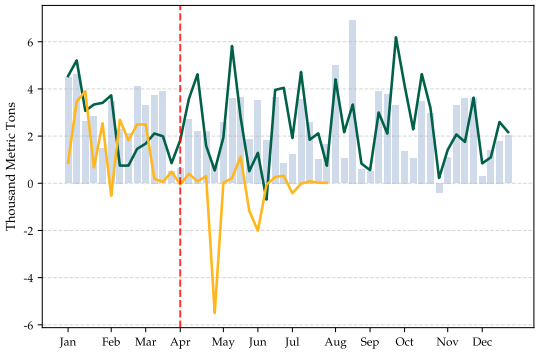
Weekly Net Contract Export Sales – Corn to World



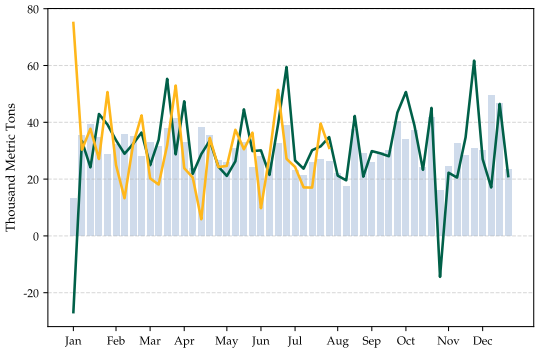
Weekly Net Contract Export Sales – Corn to China



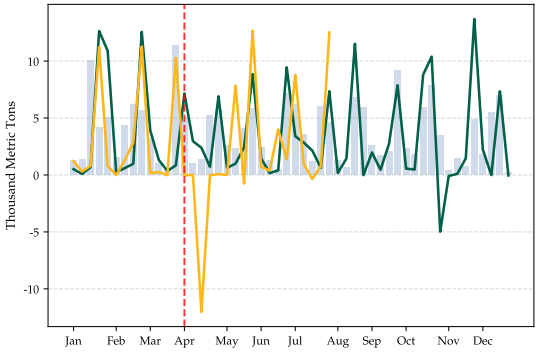
Weekly Net Contract Export Sales – Beef to World



Weekly Net Contract Export Sales – Beef to China



Weekly Net Contract Export Sales – Pork to World



Weekly Net Contract Export Sales – Pork to China

Exhibit 26: *Weekly Net Contracted Export Sales.*

Source: NDSU using data from the USDA Foreign Agricultural Service.

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NDSU Agricultural Trade Monitor

About the Center for Agricultural Policy and Trade Studies

The Center for Agricultural Policy and Trade Studies at North Dakota State University is the premier hub for applied economic research on agricultural trade, policy, and risk management in North Dakota and the Upper Midwest. Through its flagship products like the *NDSU Agricultural Trade Monitor*, the Center provides timely insights for producers, agribusinesses, and policymakers on evolving agricultural trade and policy developments.

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