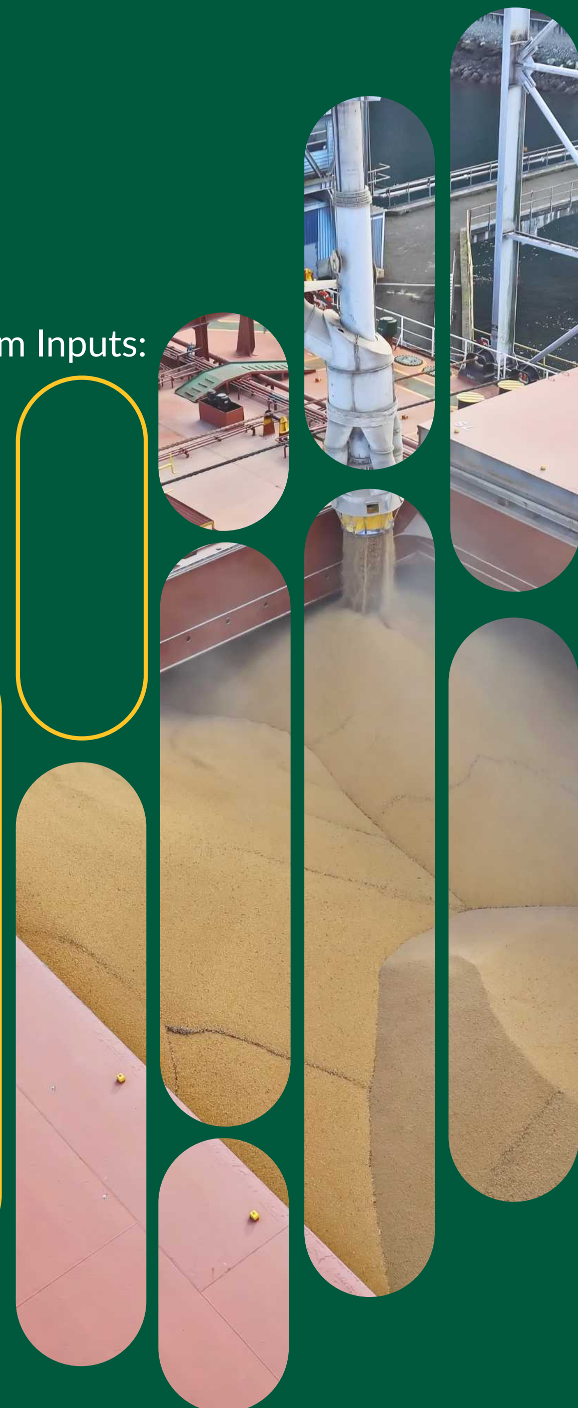
NDSU | CENTER FOR AGRICULTURAL POLICY AND TRADE STUDIES

NDSU Agricultural Trade Monitor

August 2026

Evolving U.S. Tariffs on Agri-Food Imports and Farm Inputs: From Broad Measures to Targeted Exemptions



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>>> Highlights

- **U.S. tariffs on agri-food imports and farm inputs have evolved under different regimes and product exclusions.** Tariffs initially rose under IEEPA; exclusions for selected agricultural products followed in November 2025. Following the Supreme Court's decision concerning tariff authority under IEEPA, those exclusions were carried into the temporary Section 122 surcharge and later expanded under the current Section 301 actions. The current regime applies more targeted tariff treatment by product and country of origin.
- **Expanded exemptions increased the share of agri-food imports receiving no additional duty.** The share rose from 56.7% under Section 122 to 62.7% under the current Section 301 measures. Additional duties on agri-food imports have fallen from 14.8% at their August 2025 peak to 4.2% under the current measures. USTR broadened the exemption list when finalizing the forced-labor action after receiving public comments and holding hearings. Unroasted coffee, cocoa beans, beef and beef products, bananas, and avocados faced additional tariffs ranging from 10.1% to 23.5% in August 2025; all five have received no additional duty since November 2025.
- **Fertilizers and seeds face little or no additional duty.** Nitrogen, potash, and phosphate fertilizers were broadly exempted from the IEEPA tariffs, and continue to face virtually no additional duty under the Section 301 measures. The additional tariff on seeds declined from 6.4% under Section 122 to 0.2%.
- **Average tariff exposure changed little between Section 122 and Section 301, although rates changed across products.** Current Section 301 measures add an average of 4.2% above the MFN U.S. tariff rate of 4.2%, compared with an additional 4.3% under Section 122. Expanded exemptions lowered rates for some products, while others rose because their imports came largely from economies in the higher Section 301 tiers.
- **A June proclamation lowered tariffs on specified agricultural machinery, while some Section 301 chemical exclusions depend on end use.** The proclamation set a temporary 15% Section 232 rate for specified machinery, subject to country-of-origin and metal-content provisions. Average machinery rates fell from their April 2026 levels but remain above Section 122 rates and account for most current tariff exposure on agricultural inputs. For certain chemicals, the Section 301 exclusions are limited to pharmaceutical uses.

- **A pending Section 301 proceeding could further alter agricultural tariff exposure.** USTR's investigation of structural excess capacity covers 16 economies that supply 54% of U.S. agri-food imports; no determination has been issued. Separately, proposed Section 338 duties on Canadian products including dairy and alcoholic beverages were suspended before taking effect and remained subject to ongoing negotiations at the time of writing. These duties are not included in this report.

>>> U.S. Ag Tariff Actions, 2025–26

U.S. tariff treatment of food and agricultural inputs changed substantially between 2025 and 2026. Tariffs were initially imposed under the International Emergency Economic Powers Act (IEEPA), followed by a temporary surcharge under Section 122 of the Trade Act of 1974 and, subsequently, actions under Sections 301 and 232.

Agricultural exemptions introduced in November 2025 were generally retained as tariff policy moved between statutory frameworks. Subsequent actions expanded the number of exempt tariff lines, introduced country- and agreement-specific provisions, capped tariffs for selected trading partners, and reduced the Section 232 rate on specified agricultural machinery.

As a result, additional tariff exposure declined or was eliminated for several major food products, seeds, and fertilizers. Agricultural machinery followed a different path: its tariff exposure increased when specified products became subject to Section 232, followed by a partial rate reduction in June 2026. Some food products also experienced higher rates under the current country-tier structure.

The aggregate figures therefore conceal substantial differences across products. The current Section 301 measures add an average of 4.2% to regular tariff rates on food and agricultural imports, compared with 4.3% under Section 122. At the same time, the share of those imports receiving zero additional duty increased from 56.7% to 62.7%.

Rates are reported on two bases. Exhibits 3, 4, and 5 report total effective rates, which combine the regular most-favored-nation (MFN) tariff with the applicable additional duties. Exhibits 6 and 7 report additional duties only, measured above the MFN tariff; on that basis a rate of zero indicates that the policy action added no duty beyond the tariff already applicable to the product. Rates given in the text are additional duties unless identified as total effective rates. The additional duties measured here are those imposed under IEEPA, Section 122, Section 301, and Section 232. Trade remedies such as antidumping and countervailing duties are not included in any rate reported here. The analysis measures statutory tariff exposure and does not estimate pass-through to consumer prices or agricultural input costs.

Tariff Policy Across Changing Statutory Frameworks

The initial IEEPA tariffs applied broadly across countries and products. Following the country-specific escalation in August 2025, food and agricultural imports faced an average additional tariff of 15%. Additional rates were particularly high for unroasted coffee, cocoa beans, beef, bananas, and avocados.

In November 2025, the administration modified the applicable product annexes to exclude several agricultural products. The November 14 action covered coffee and tea, cocoa and spices, bananas and other tropical fruit, fruit juices, oranges, tomatoes, and beef. A November 20 action removed specified Brazilian agricultural imports, including beef, coffee, and fertilizers, from the additional Brazil-related duty. The orders cited current domestic demand and current domestic capacity to produce certain products among the considerations.

Exhibit 1 summarizes the sequence of tariff actions. On February 20, 2026, the Supreme Court invalidated the IEEPA tariffs. The administration then imposed a temporary 10% surcharge under Section 122, effective February 24, 2026 through July 24, 2026. The surcharge retained the November agricultural exclusions, exempted qualifying USMCA trade, and excluded imports already subject to Section 232.

The forced-labor Section 301 action applies different treatment across 60 economies, including flat rates of 10% or 12.5% and capped treatment for selected trading partners. A separate Section 301 action applies to covered Brazilian products. Specified agricultural machinery is treated under Section 232 and is not also subject to these Section 301 tariffs.

Recent Tariff Measures, 2025–2026

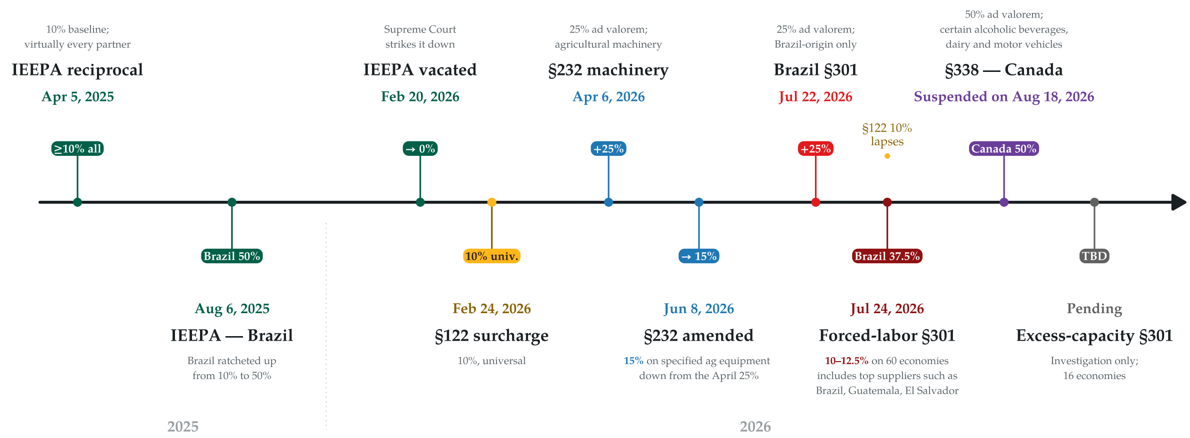


Exhibit 1: *2025–2026 U.S. Tariff Timeline.*

Note: The Brazil Section 301 tariff stacks with the applicable forced labor Section 301 tariff. Goods subject to Section 232 are excluded from the Section 301 tariffs. All tariff actions include product- and/or country-specific exemptions.

Source: NDSU using information from Federal Register notices and USTR.

Exhibit 2 shows the 60 economies covered by the forced-labor Section 301 action by tariff tier. The flat 10% tier covers 17 countries, including Canada, India, Indonesia, Mexico, and the United Kingdom. The flat 12.5% tier covers 38 countries, including Brazil, China, Australia, and Russia. Japan, South Korea, and Switzerland face a capped tariff that brings the combined MFN and forced-labor Section 301 rate up to 12.5%, while the European Union and Taiwan face the same type of capped tariff with a 10% ceiling. Brazil is also in the 12.5% forced-labor tier, and covered Brazilian imports may face the separate 25% Brazil Section 301 tariff, so the two actions can combine for a maximum additional Section 301 duty of 37.5%.

Section 301 Forced Labor and Brazil Tariff Rates.

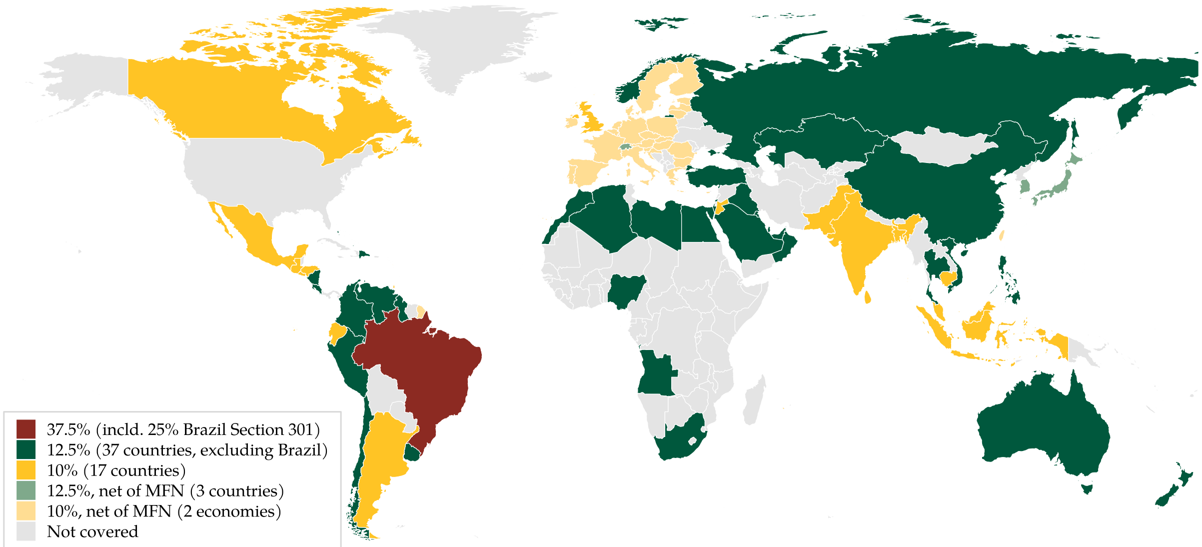


Exhibit 2: *Economies Covered by the Forced-Labor Section 301 Tariffs and Brazil Section 301 Rates.*

Source: NDSU using information from Federal Register notices and USTR.

Industry Comments and the Exemption Process

Various agricultural organizations publicly commented on tariff exposure for farm inputs from early 2025 onward. The American Farm Bureau Federation recommended a targeted approach over blanket tariffs, seeking exemptions for fertilizer and fuel. In early 2025, The Fertilizer Institute and the Agricultural Retailers Association jointly asked for a carveout for Canadian fertilizer imports and for critical minerals designation covering potash and phosphate. Both cited production costs and limited domestic substitutes.

Similar comments followed the shift to other statutory authorities in 2026. AFBF asked that agricultural inputs remain outside tariffs imposed under the new authorities, citing supply costs at or near record highs. The American Soybean Association and U.S. Soybean Export Council sought targeted remedies and exemptions for critical inputs. The National Pork Producers Council, National Corn Growers Association, American Seed Trade Association, and others pressed USTR to keep planting seed, fertilizer, and agricultural equipment outside Section 301 and related actions.

The forced-labor Section 301 proceeding left the fullest public record of how these comments entered the process. USTR received more than 1,600 written comments on the proposed action, and the Section 301 Committee heard more than 100 witnesses over three days. The final notice kept most of the proposed exemption list and added 471 products, among them planting seed, fertilizer and pesticide inputs, and certain animal products. The exemption criteria reach raw materials whose tariffing could produce domestic shortages, and products that cannot be grown or produced domestically in sufficient quantity or at reasonable prices, or obtained elsewhere. The notice does not attribute any particular exclusion to a specific filing.

Broadening Agricultural Exemptions

The share of food and agricultural imports receiving zero additional duty increased from 56.7% under Section 122 to 62.7% under the current Section 301 measures. The products receiving zero additional duty include beef and beef products, unroasted coffee, avocados, bananas, cocoa beans, and processed cocoa products. Product exclusions account for most of the increase in zero-duty coverage. Rates also vary by origin because economies are assigned to different Section 301 tiers and capped rates apply to selected economies. Some exclusions depend on end use, particularly for tariff classifications covering both pharmaceutical and agricultural-chemical uses. Determining the applicable rate therefore may require information about the product, its origin, and its intended use.

Exhibit 3 traces average total effective duties on food and agricultural imports and on agricultural inputs across the period. The two series moved together through 2025 and separated in 2026, when specified agricultural machinery became subject to Section 232.

Targeted Exemptions Lowered Tariffs on Food and Most Farm Inputs, while Agricultural Machinery Rates Rose under Section 232.

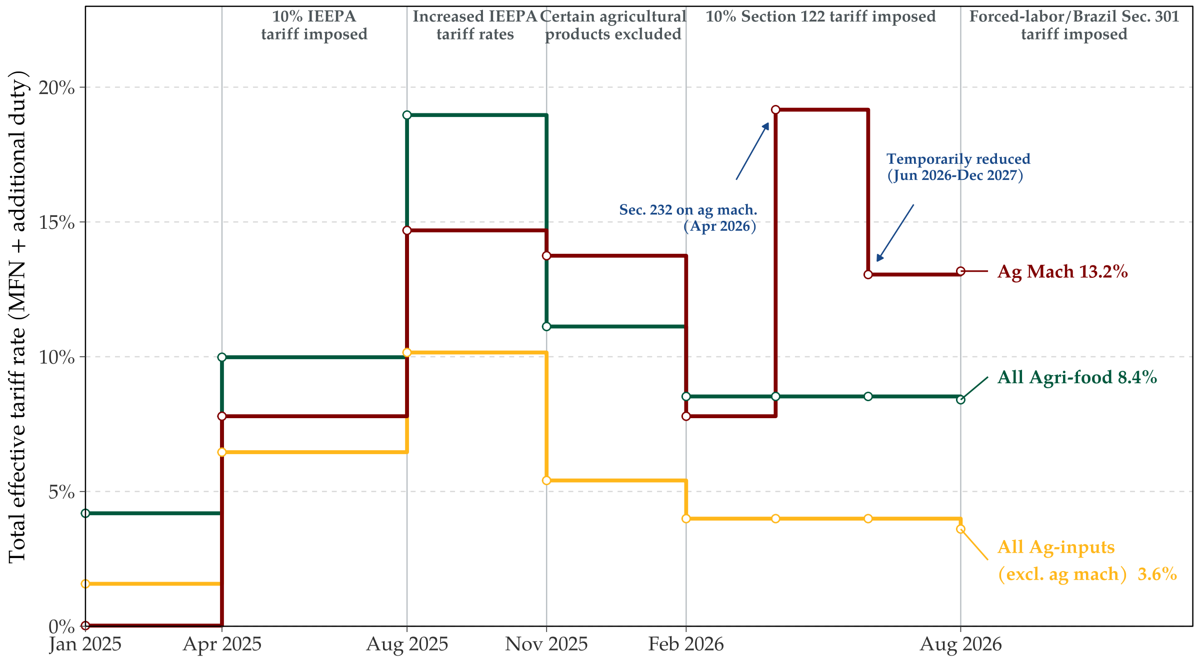


Exhibit 3: *Monthly Trade-Weighted Total Effective Tariff Rates on U.S. Imports of Agricultural and Food Products and Agricultural Inputs.*

Note: Rates are total effective rates, combining 2024 import-weighted additional duties with the regular MFN tariff.

Source: NDSU using information from Federal Register notices, USTR, and U.S. Census Bureau.

Total Effective (Trade-Weighted) Tariff Rates Across Food and Agricultural Products

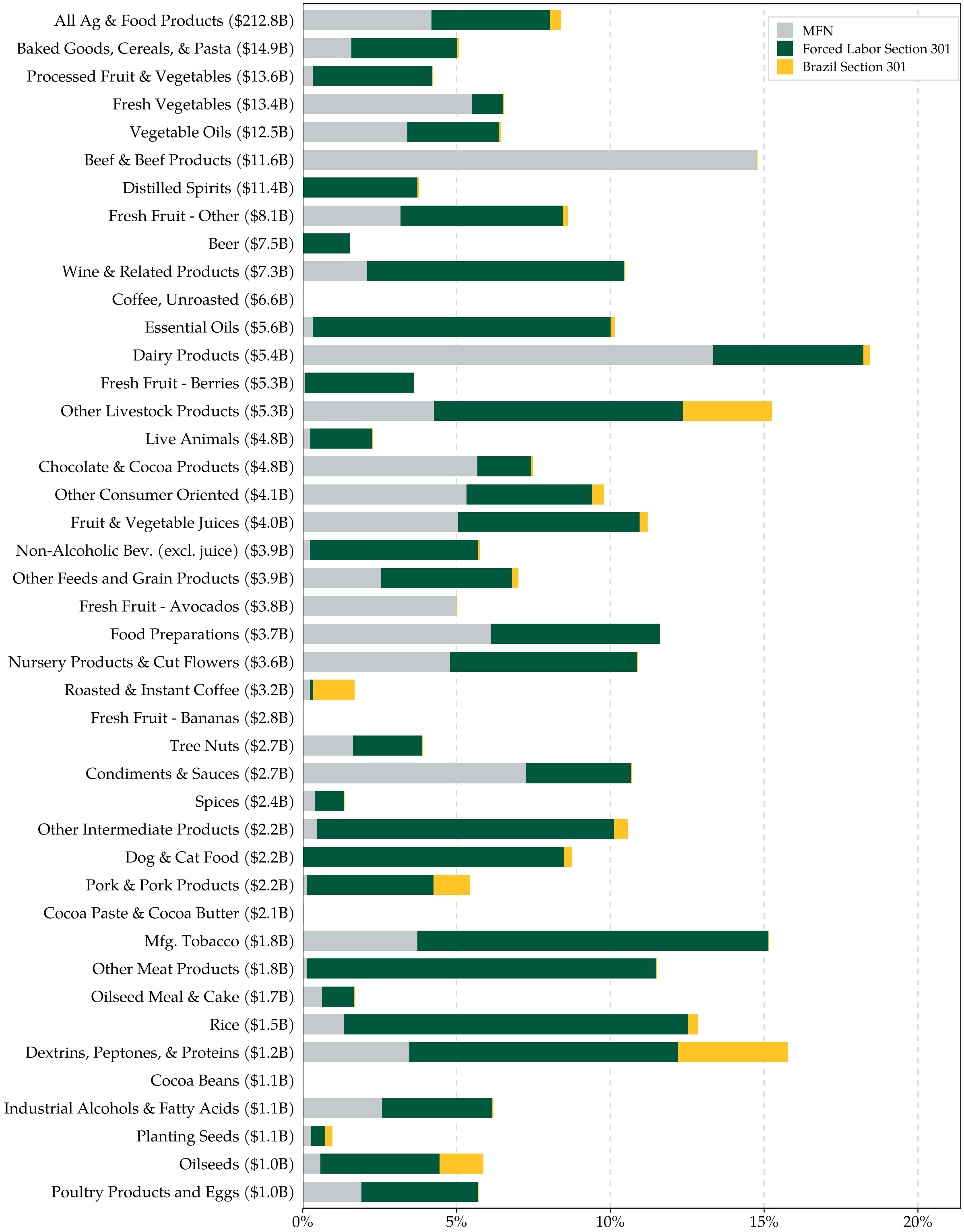


Exhibit 4: *Trade-Weighted Total Effective Tariff Rates: Agricultural and Food Products.*

Note: 2024 U.S. import values in parentheses in billion USD. Rates comprise the MFN tariff and the applicable additional duties; antidumping and countervailing duties are not included.

Source: NDSU using information from Federal Register notices, USTR, and U.S. Census Bureau.

Total Effective (Trade-Weighted) Tariff Rates Across Ag Inputs.

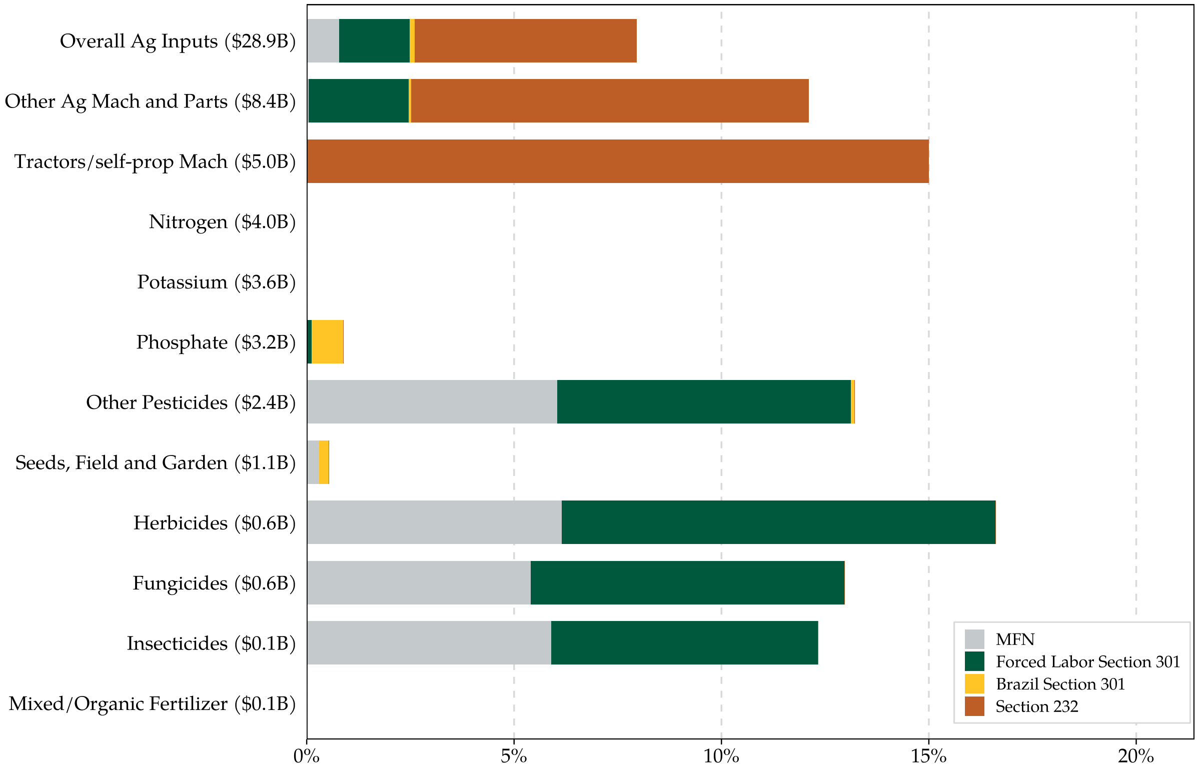


Exhibit 5: *Trade-Weighted Total Effective Tariff Rates: Agricultural Input Products.*

Note: 2024 U.S. import values in parentheses in billion USD. Rates comprise the MFN tariff and additional duties under Sections 232 and 301; antidumping and countervailing duties are not included.

Source: NDSU using information from Federal Register notices, USTR, and U.S. Census Bureau.

Food Imports: Broader Exemptions and Shifting Exposure

The average additional tariff on food and agricultural imports increased to about 15% in August 2025 and declined to approximately 7.0% following the November exclusions. It declined further under Section 122. Under the current Section 301 measures, the average additional rate is 4.2%, compared with 4.3% under Section 122. Exhibit 6 traces these changes for selected product categories across each policy event.

The largest reductions occurred among products that faced relatively high duties in August 2025. The additional tariff on unroasted coffee declined from 23.5% to zero. Rates on cocoa beans, beef and beef products, bananas, and avocados also declined to zero. Additional reductions occurred during the transition from Section 122 to Section 301. Capped treatment for products from some suppliers like the European Union reduced the additional tariff on products that already faced comparatively high MFN rates. The average additional tariff on dairy products declined from 8.4% to 5.1%, while expanded exclusions reduced the rate on vegetable oils from 5.3% to 3.0%.

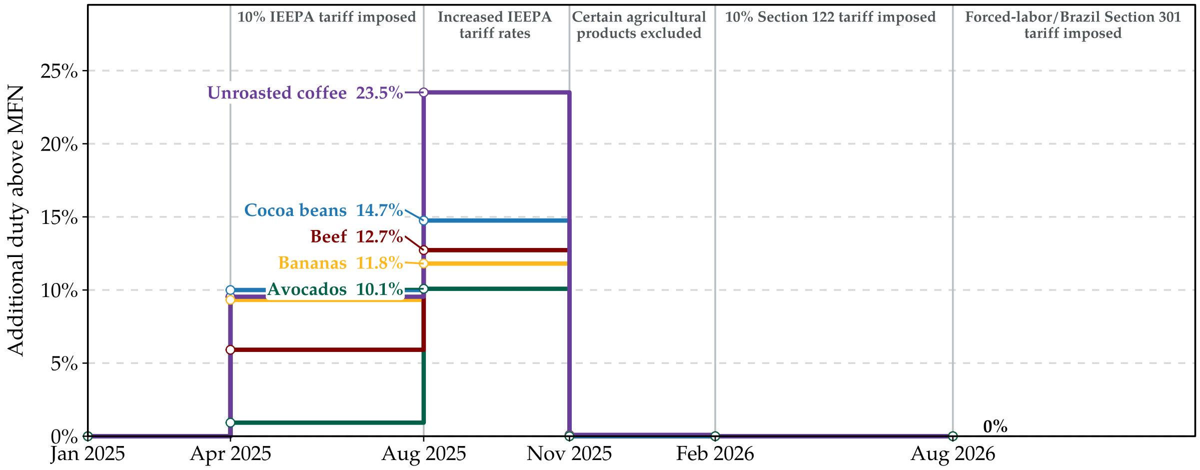
Measured across the full sequence of actions, additional duties on food and agricultural imports have declined substantially from their August 2025 peak. The 2024 import-weighted additional rate reached 14.8% under the escalated IEEPA tariffs, fell to 6.9% after the November exclusions, and stands at 4.2% under the current Section 301 measures. Total effective rates, which add the 4.2% MFN tariff already applicable to these products, followed the same path, declining from 19.0% in August 2025 to 8.4% today. Agricultural inputs other than machinery show a similar pattern, with additional duties falling from 8.6% at the peak to 2.0%.

Rates increased for several other products. Manufactured tobacco, rice, fresh berries, and poultry are sourced disproportionately from economies in the 12.5% tier. The Brazil-specific action also increased rates for some covered Brazilian products that were not excluded. Broader exemption coverage did not reduce tariffs for every agricultural product. These figures capture statutory tariff exposure; retail prices depend additionally on pass-through, exchange rates, supply responses, contracting arrangements, and market structure.

Successive Tariff Actions Expanded Exemptions and Lowered Rates for Most Food Products

Excluded November 2025, zero since

Five major food imports went from peak exposure to zero in November 2025 and stayed there.



Relieved at the Section 301 transition

Dairy and vegetable oils stayed dutiable through Section 122 and got relief only in July.

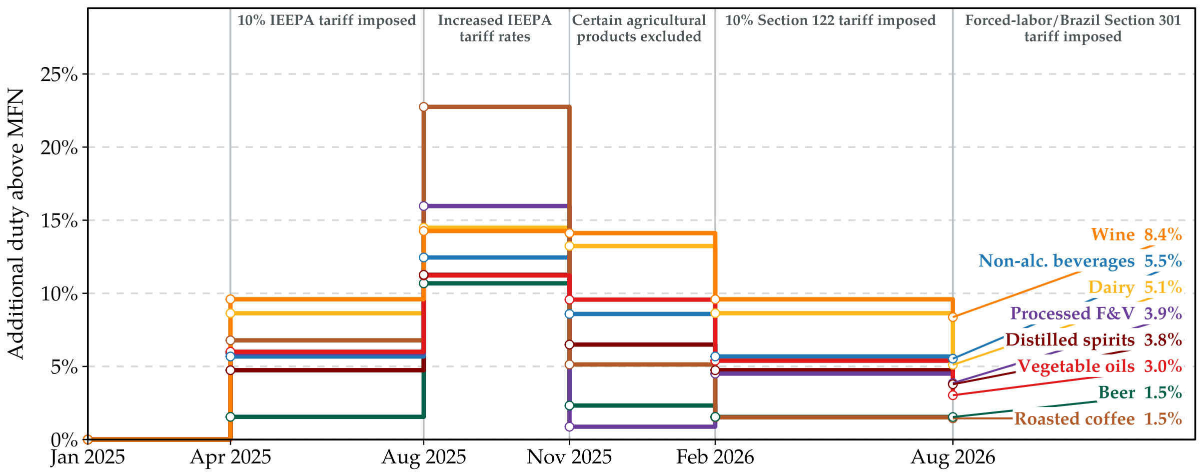
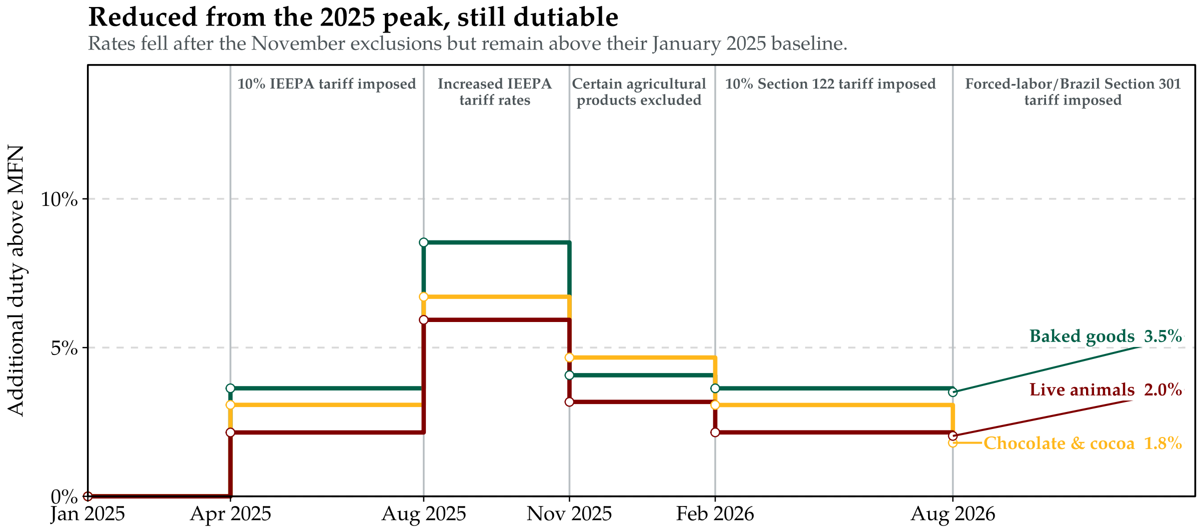


Exhibit 6: *Additional Tariff Rates Across Policy Events for Agricultural and Food Products.*



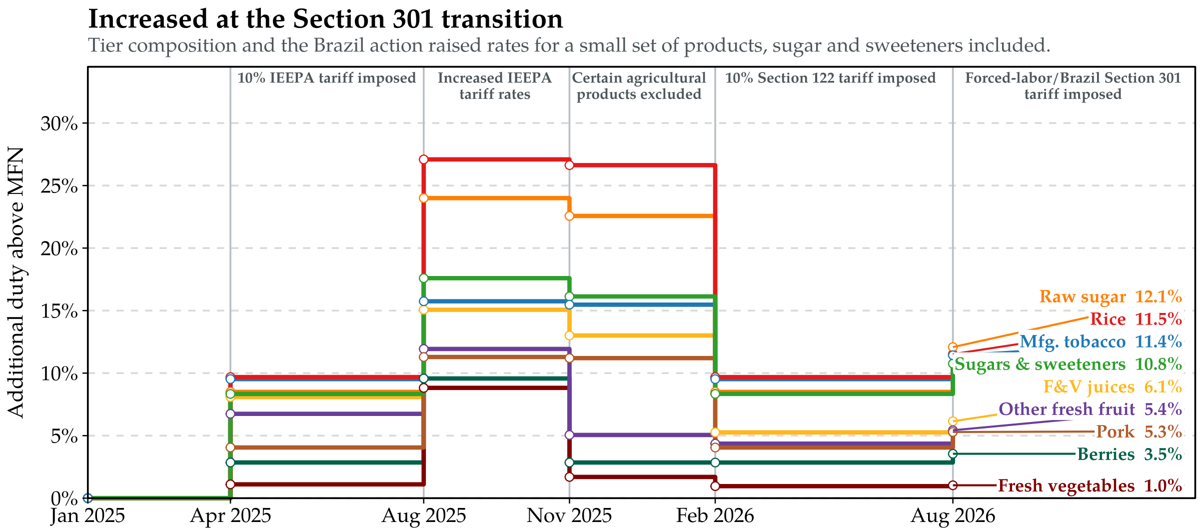


Exhibit 6: *Additional Tariff Rates Across Policy Events for Agricultural and Food Products (Continued).*

Note: Rates are additional duties above the MFN tariff and exclude the MFN tariff itself. The chart includes selected product categories with at least $1 billion in 2024 U.S. imports. Each point is the 2024 import-weighted additional tariff rate in effect at each policy event. End labels report the additional tariff rate in effect as of August 21, 2026.

Source: NDSU using data from White House, USTR, and U.S. Census Bureau.

Farm Inputs: Diverging Tariff Exposure

Changes in tariff exposure differ substantially across agricultural input categories (Exhibit 7). Seeds and fertilizers experienced the largest rate reductions, while machinery experienced an overall increase. The additional tariff on seeds declined from 6.4% under Section 122 to 0.2% under the current measures. Current additional rates are zero for nitrogen, potash, and mixed or organic fertilizers. Phosphate products face an average rate of 0.9%, arising entirely from phosphoric acid entered for non-pharmaceutical use; finished phosphate fertilizers face no additional duty. Phosphate imports from some origins are also subject to countervailing duties, which fall outside the tariff measures reported here. Nitrogen, potash, mixed or organic, and phosphate fertilizers also carry MFN rates of zero, so these categories now enter substantially free of duty. These exemptions remove most direct tariff exposure from the affected fertilizer categories. They do not address other determinants of fertilizer prices, including energy costs, global production conditions, freight rates, exchange rates, and geopolitical disruptions (Exhibit 10).

Treatment of agricultural chemicals depends on end use. Some tariff lines receive an exclusion only when imported for pharmaceutical use, although the same classifications may also include chemicals used in pesticide production. The affected codes accounted for 40.5% of agricultural chemical imports in 2024 (Exhibit 8). If pesticide uses qualify, the average additional tariff on herbicides remains near 2.9%. If they do not, it rises to approximately 10.5%.

Across all agricultural inputs, the current measures add an average of 7.2%, compared with 4.9% under Section 122. Section 232 machinery accounts for approximately 5.4 percentage points of current exposure. The forced-labor and Brazil Section 301 actions account for approximately 1.7 and 0.1 points, respectively. Inputs other than machinery carry an MFN rate of 1.6% and an additional 2.0%, for a total effective rate of 3.6%. Machinery entered at an MFN rate near zero, so its current exposure consists almost entirely of the Section 232 duty.

Exemptions Reduced Fertilizer and Seed Tariffs to Near Zero, While Machinery and Chemical Rates Increased

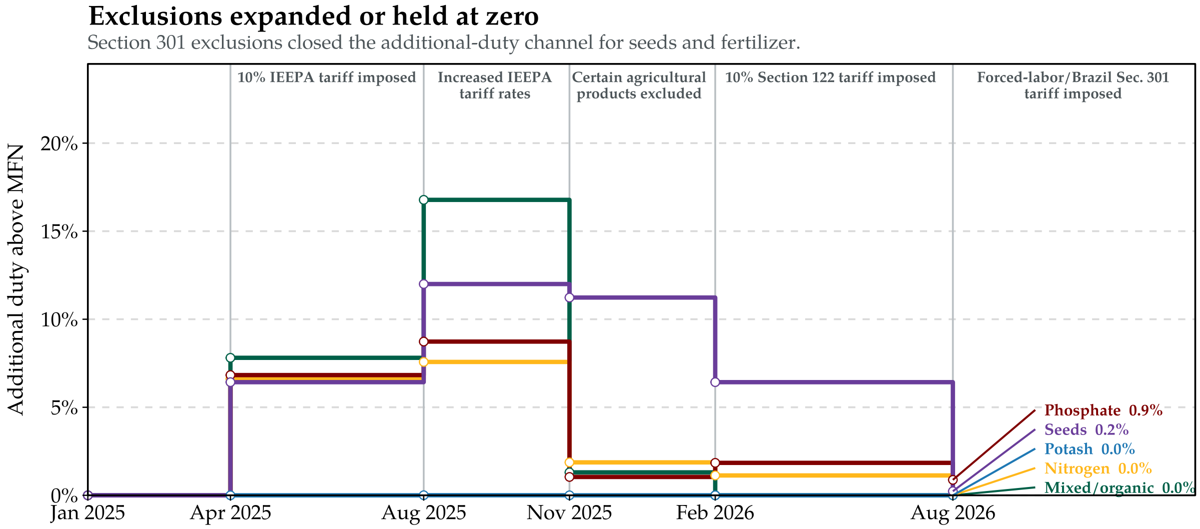
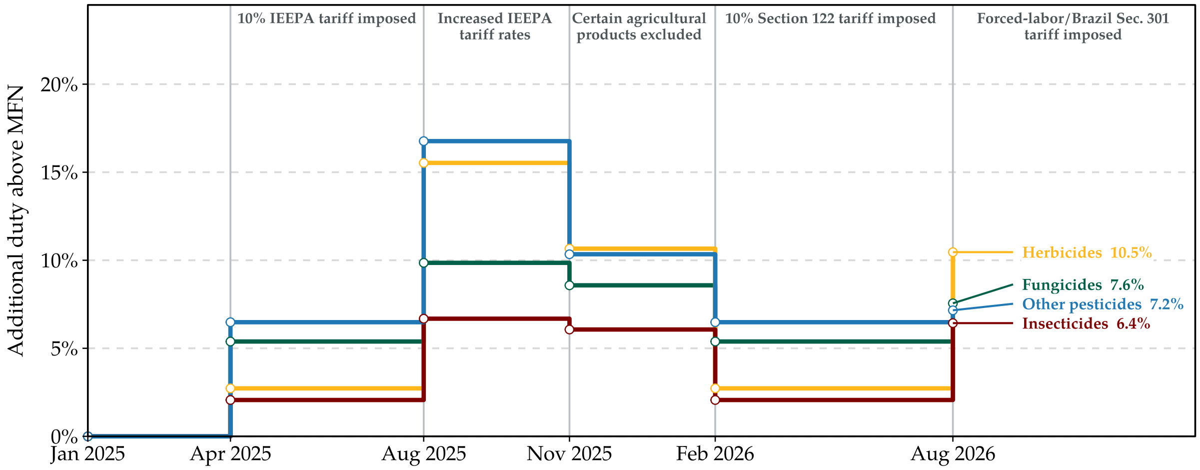


Exhibit 7: *Additional Tariff Rates by Agricultural Input Products.*

Conditional on end use

An end-use condition leaves herbicide rates ranging from 2.9% to 10.5%.



Section 232 machinery

Section 232 raised machinery rates in April; June reduced specified equipment to 15.0%.

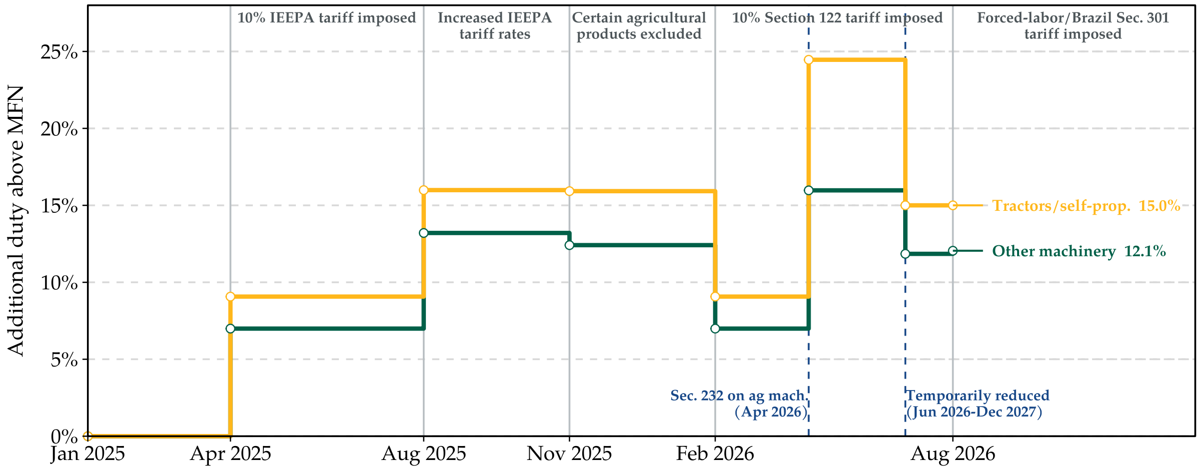


Exhibit 7: *Additional Tariff Rates by Agricultural Input Products (Continued).*

Note: Rates are additional duties above the MFN tariff and exclude the MFN tariff itself. Each point is the 2024 import-weighted additional tariff in effect at each policy event. The chemicals panel applies the pharmaceutical-use condition as described in the text. End labels report the additional tariff rate in effect as of August 21, 2026.

Source: NDSU using data from White House, USTR, and U.S. Census Bureau.

Ag Chemicals Exclusion Status Conditional on End Use

Exclusion Status	Additional duty	2024 imports (Mil. $)	Share (%)
Excluded only for pharmaceutical use (34 HTS8 lines)	0% or 10–12.5%	1,492.9	40.5
Excluded from the tariff (3 HTS8 lines)	0%	264.3	7.2
On no exclusion list (39 HTS8 lines)	10–12.5%	1,929.3	52.3
Total		**3,686.5**	**100.0**

Exhibit 8: *U.S. Agricultural Chemical Imports in 2024 by Exclusion Status Under the Forced-Labor Section 301 Action.*

Note: HTS8 products are eight-digit tariff lines, grouped by their exclusion status under Annex II to the forced-labor Section 301 action. Rates of 10% or 12.5% apply according to origin. For the first group, the duty is zero when the article is entered for pharmaceutical use; the annex does not address the same classifications entered as agricultural chemicals, so both outcomes are shown. Shares are of total 2024 U.S. agricultural chemical imports.

Source: NDSU using U.S. Census Bureau trade data and the Section 301 forced-labor annex.

Agricultural Machinery: A Partial Rate Reduction Under Section 232

Specified agricultural machinery became subject to Section 232 as a derivative of covered metal products. The April 2026 action increased the additional tariff on tractors and self-propelled machinery to 24.5%, compared with 9.1% under Section 122 (see Exhibit 7).

A June 2026 proclamation reduced the tariff on specified agricultural machinery from 25% to 15% through December 31, 2027. The reduction applies to 19 HS6 product groups representing $10.3 billion, or 77.1%, of U.S. agricultural machinery imports in 2024 (Exhibit 9). Two smaller groups, representing 0.1% of imports, remain subject to a 25% additional duty. The remaining 22.7% fall outside Section 232 coverage.

Under Section 122 and the Section 301 actions, qualifying Canadian and Mexican trade is exempt from the additional duty. Machinery covered by Section 232 is excluded from the Section 301 actions and does not receive that exemption; for Canada and Mexico, USMCA and U.S.-content rules instead condition how the Section 232 duty applies. Eligibility therefore depends on documentation of origin and content rather than on product classification alone, and identical equipment may face different rates depending on where its metal inputs originate.

Following the June adjustment, average additional rates are approximately 15.0% for tractors and self-propelled machinery and 12.1% for other machinery and parts. Both remain above the 9.1% that applied under Section 122.

Section 232 Coverage Varies Across Agricultural Machinery

Section 232 Status	Additional duty	2024 imports (Mil. $)	Share (%)
Temporary June treatment (19 HS6 lines)	15%	10,288.6	77.1
Standard Section 232 rate (2 HS6 lines)	25%	17.6	0.1
Outside Section 232 (39 HS6 lines)	Section 301 rates	3,031.2	22.7
Total		**13,337.4**	**100.0**

Exhibit 9: *U.S. Agricultural Machinery Imports by Section 232 Status After the June 8 Amendment.*
Note: HS6 subheadings are six-digit Harmonized System product groups, grouped by their June 8, 2026 Section 232 treatment for exporters receiving general MFN treatment. Machinery outside Section 232 is subject to the forced-labor Section 301 tariffs of 10% or 12.5% according to origin. Treatment within the temporary group varies with origin and metal-content provisions as described in the text. Shares are of total 2024 U.S. farm machinery imports and may not sum exactly due to rounding.
Source: NDSU using U.S. Census Bureau trade data and the White House Section 232 annexes.

Pending Actions Not Reflected in this Report

Two pending matters could affect agricultural tariff exposure. Proclamations issued on July 20, 2026 would apply an additional 50% duty under Section 338 of the Tariff Act of 1930 to 554 Canadian tariff lines, including dairy, alcoholic beverages, honey, planting seed, and processed foods. The duties were scheduled to take effect on August 19 and were suspended on August 18, with a revised effective date of August 22, while negotiations continued. Using 2024 trade values, the listed products represent $1.4 billion, or 3.5%, of U.S. agricultural and food imports from Canada; agricultural inputs on the lists total another $8 million. Fertilizers, energy products, and fish do not appear on the lists, and products already subject to Section 232 are carved out. The duties are not in effect as of the publication date.

The other pending matter is USTR's Section 301 investigation of structural excess capacity and production in manufacturing, initiated on March 11, 2026 and covering 16 economies that together supply 54% of U.S. agri-food imports. That share describes the origin of current imports rather than the coverage of any prospective action, as no product list has been announced. USTR held hearings in May. This is not the same proceeding as the forced-labor action already in effect, and no determination or proposed action has been released.

The numbers in this report describe the measures in effect as of August 21, 2026. They do not incorporate either of the pending actions described above.

>>> Latest Trade Figures and Tables

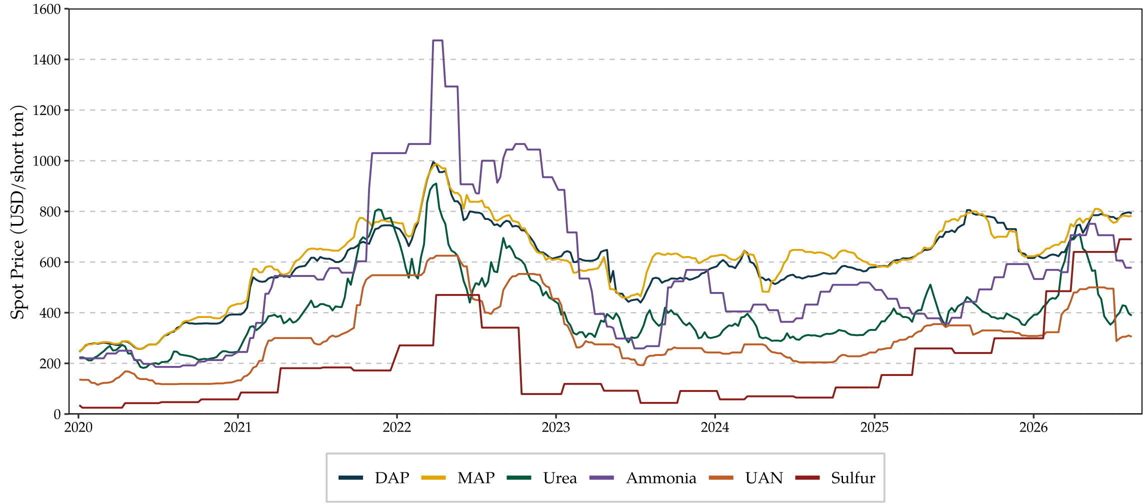


Exhibit 10: *Fertilizer Spot Prices on the U.S. Gulf Coast.*

Source: NDSU using data from Bloomberg.

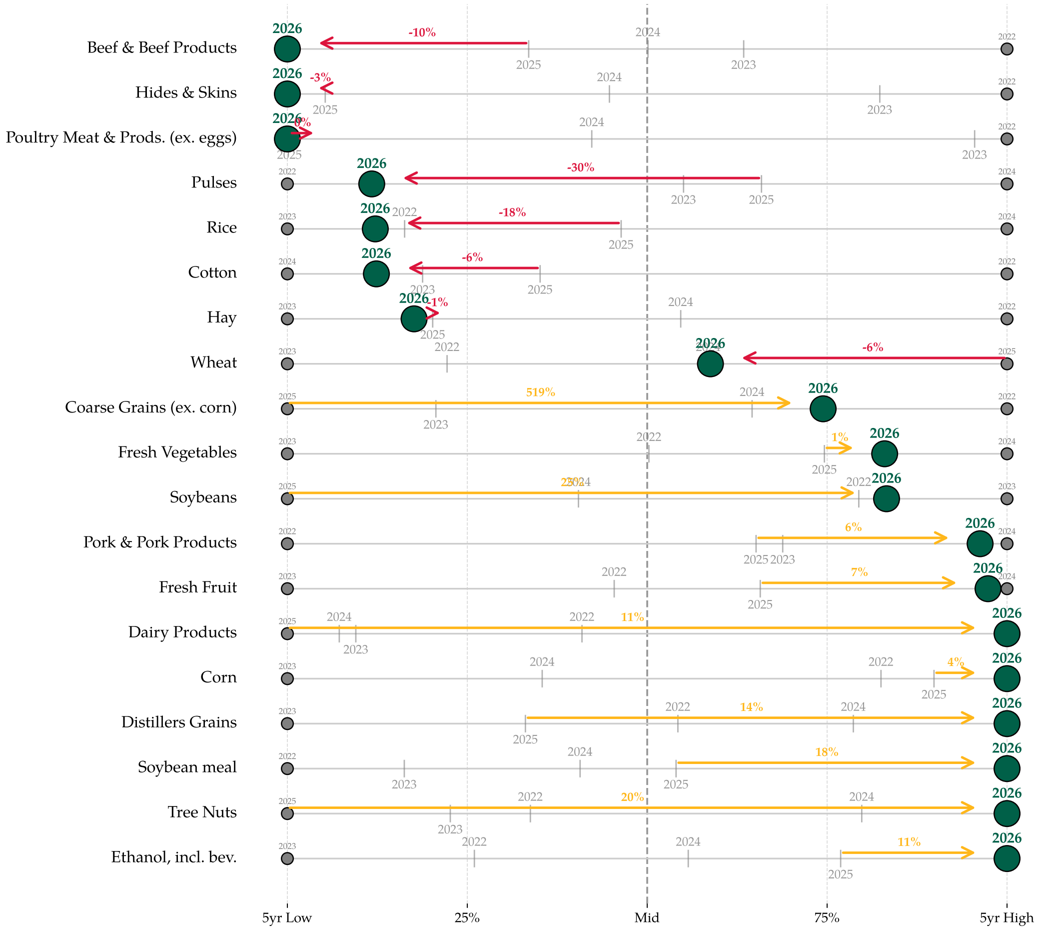


Exhibit 11: *US Commodity Export Performance: 2026 vs. 5-Year Range (in Volumes).*

Note: Data are year-to-date January–June.

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

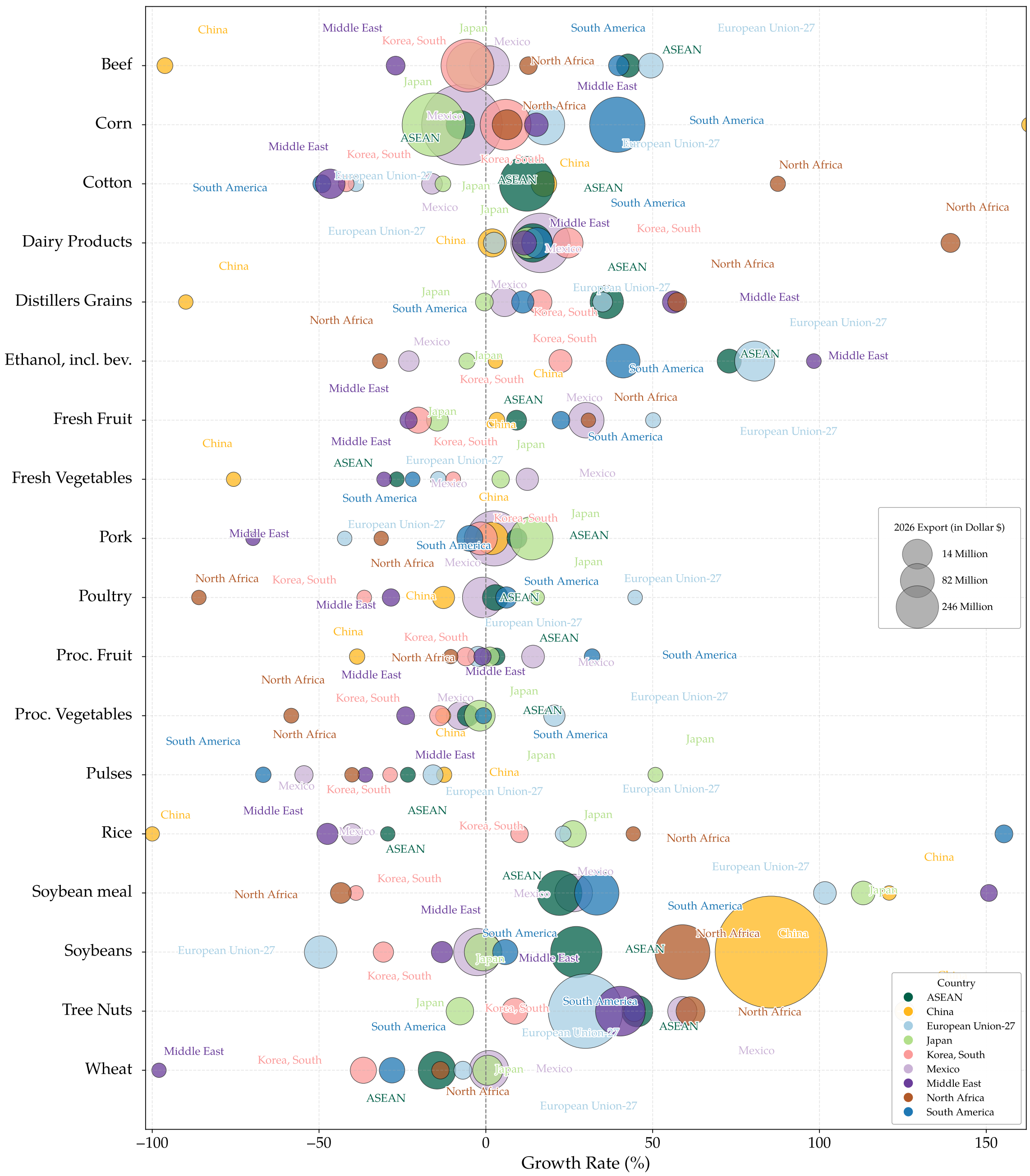


Exhibit 12: *U.S. Agricultural Export Growth Year-To-Date by Product Group and Country/Region.*

Note: Data are year-to-date January–June.

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

Region	May-25	May-26	May YoY Change	Jan to May, 2025	Jan to May, 2026	YTD change
Caribbean	$513	$533	4%	$2,564	$2,676	4%
South Asia	$420	$390	-7%	$2,493	$2,045	-18%
Middle East	$603	$555	-8%	$2,705	$2,521	-7%
Central America	$616	$629	2%	$3,123	$3,142	1%
South America	$813	$849	4%	$4,061	$4,594	13%
Southeast Asia	$1,173	$1,287	10%	$5,617	$6,269	12%
China	$212	$1,016	380%	$4,963	$7,423	50%
European Union-27	$1,042	$1,257	21%	$5,859	$6,540	12%
Canada	$2,352	$2,583	10%	$11,845	$11,791	0%
Mexico	$2,512	$2,532	1%	$12,277	$12,562	2%
East Asia ex China	$2,545	$2,577	1%	$12,426	$12,393	0%
Rest of the World	$887	$972	10%	$4,596	$4,949	8%

Exhibit 13: *U.S. Agricultural Exports by Region, in Million USD.*

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

Product	May 2025	May 2026	May YoY Change	Jan to May, 2025	Jan to May, 2026	YTD change
Other Coarse Grains	$46	$96	109%	$160	$851	430%
Pulses	$87	$64	-26%	$509	$332	-35%
Hay	$92	$101	10%	$509	$518	2%
Live Animals	$112	$140	25%	$528	$660	25%
Processed Fruit	$151	$166	10%	$766	$793	4%
Sugar/Sweeteners	$121	$121	0%	$633	$555	-12%
Rice	$175	$135	-23%	$908	$714	-21%
Fresh Vegetables	$236	$284	21%	$1,053	$1,156	10%
Distillers Grains	$212	$272	28%	$1,073	$1,260	17%
Proc. Vegetables	$287	$304	6%	$1,475	$1,430	-3%
Fresh Fruit	$387	$428	11%	$1,559	$1,728	11%
Other Feeds	$259	$293	13%	$1,394	$1,467	5%
Ethanol (incl. bev.)	$411	$456	11%	$1,946	$2,290	18%
Poultry	$397	$429	8%	$2,096	$2,081	-1%
Wheat	$562	$440	-22%	$2,430	$2,319	-5%
Soybean Meal	$453	$591	30%	$2,496	$2,975	19%
Cotton	$478	$567	19%	$2,802	$2,482	-11%
Pork & Pork Products	$627	$679	8%	$3,323	$3,465	4%
Dairy Products	$793	$925	17%	$3,803	$4,231	11%
Beef & Beef Products	$789	$803	2%	$4,083	$3,871	-5%
Tree Nuts	$924	$1,061	15%	$4,363	$5,609	29%
Soybeans	$660	$1,198	82%	$6,651	$8,846	33%
Corn	$1,641	$1,658	1%	$8,132	$8,173	1%
Other Products	$3,791	$3,970	5%	$19,836	$19,101	-4%
Total Ag Exports	$13,689	$15,181	11%	$72,527	$76,906	6%

Exhibit 14: *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	2025	-35%	-26%	-30%	-28%	-14%	-24%	-58%	-10%	-23%	-31%	-26%	-55%
All Wheat	2025	-4%	-6%	-9%	-18%	31%	18%	19%	21%	21%	45%	13%	45%
Beef	2025	-19%	-11%	4%	-1%	-17%	-16%	-21%	-19%	-20%	-20%	-11%	-7%
Corn	2025	34%	29%	24%	12%	31%	33%	29%	27%	56%	70%	100%	46%
Pork	2025	-3%	-9%	-4%	-26%	-22%	12%	-13%	-6%	-4%	-4%	-1%	3%
Sorghum	2025	-99%	-99%	-82%	-77%	-75%	-48%	-62%	-61%	-85%	33%	-55%	-14%
Soybean Cake & Meal	2025	-15%	-16%	10%	16%	13%	12%	47%	56%	19%	0%	3%	6%
Soybeans	2025	-1%	-30%	10%	42%	-9%	16%	15%	8%	23%	-47%	-58%	-45%
Upland Cotton (in bale)	2025	-23%	3%	9%	39%	53%	26%	52%	-12%	16%	46%	-10%	0%
Wheat - HRS	2025	-14%	-5%	7%	-46%	18%	9%	-9%	7%	-28%	53%	-23%	-5%
Wheat - HRW	2025	-1%	17%	9%	61%	69%	142%	90%	62%	173%	96%	65%	107%
Wheat - SRW	2025	-30%	-44%	-55%	-43%	-44%	12%	25%	11%	-4%	1%	40%	44%
Wheat - White	2025	16%	36%	98%	-15%	111%	-54%	-39%	-3%	12%	7%	2%	50%
All Rice	2026	8%	-44%	-34%	35%	-15%	72%	22%					
All Wheat	2026	0%	14%	-5%	-12%	-26%	6%	-40%					
Beef	2026	-4%	-7%	-12%	-11%	-4%	-3%	-2%					
Corn	2026	10%	23%	1%	0%	3%	11%	30%					
Pork	2026	18%	19%	17%	26%	23%	-4%	4%					
Sorghum	2026	904%	10032%	986%	557%	276%	312%	132%					
Soybean Cake & Meal	2026	39%	33%	11%	16%	23%	20%	2%					
Soybeans	2026	15%	21%	22%	19%	95%	25%	6%					
Upland Cotton (in bale)	2026	-2%	-28%	-9%	-3%	-1%	21%	18%					
Wheat - HRS	2026	2%	-32%	-5%	10%	-23%	7%	-36%					
Wheat - HRW	2026	21%	61%	34%	-44%	-31%	-28%	-65%					
Wheat - SRW	2026	-18%	5%	-11%	-10%	-11%	37%	-28%					
Wheat - White	2026	-18%	42%	-44%	-1%	-44%	83%	16%					

Exhibit 15: *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	2025	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0
All Wheat	2025	-100%	-100%	-100%	-100%	-100%	0→0	-100%	-100%	-100%	0→0	0→0	0→+
Beef	2025	-5%	-15%	3%	-63%	-96%	-83%	-96%	-100%	-100%	-100%	-100%	-98%
Corn	2025	-96%	86%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	0→0
Pork	2025	2%	-7%	-9%	-56%	-85%	39%	-23%	-3%	-23%	-1%	-5%	4%
Sorghum	2025	-98%	-100%	-100%	-99%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-40%
Soybean Cake & Meal	2025	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0
Soybeans	2025	-27%	-50%	3%	25%	-62%	-100%	-100%	-100%	-86%	-100%	-100%	-76%
Upland Cotton (in bale)	2025	-79%	-84%	-92%	-92%	-96%	-94%	-100%	-100%	-84%	122%	-37%	-74%
Wheat - HRS	2025	-100%	0→0	0→0	0→0	0→0	0→0	-100%	-100%	0→0	0→0	0→0	0→0
Wheat - HRW	2025	-100%	0→0	-100%	-100%	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0
Wheat - SRW	2025	-100%	-100%	-100%	-100%	-100%	0→0	-100%	-100%	-100%	0→0	0→0	0→0
Wheat - White	2025	-100%	0→0	-100%	-100%	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→+
All Rice	2026	0→0	0→0	0→0	0→0	0→0	0→0	0→0					
All Wheat	2026	0→0	0→+	0→+	0→0	0→0	0→0	0→0					
Beef	2026	-100%	-100%	-100%	-100%	-99%	-64%	238%					
Corn	2026	-100%	-100%	-100%	-100%	0→0	0→0	0→0					
Pork	2026	3%	3%	14%	108%	446%	-17%	-10%					
Sorghum	2026	560%	26742%	61652%	20515%	703104%	0→+	0→+					
Soybean Cake & Meal	2026	0→0	0→0	0→0	0→0	0→0	0→0	0→0					
Soybeans	2026	71%	57%	12%	87%	1369%	0→+	0→+					
Upland Cotton (in bale)	2026	-55%	-33%	49%	176%	587%	200%	13246%					
Wheat - HRS	2026	0→0	0→0	0→+	0→0	0→0	0→0	0→0					
Wheat - HRW	2026	0→0	0→0	0→0	0→0	0→0	0→0	0→0					
Wheat - SRW	2026	0→0	0→0	0→+	0→0	0→0	0→0	0→0					
Wheat - White	2026	0→0	0→+	0→+	0→0	0→0	0→0	0→0					

Exhibit 16: *U.S. Export 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	2025	-21%	14%	-52%	-33%	13%	-61%	-40%	6%	-47%	-27%	-21%	-53%
All Wheat	2025	-23%	46%	41%	-17%	80%	-24%	73%	35%	18%	26%	28%	-26%
Beef	2025	-21%	19%	-22%	-24%	-27%	-11%	-17%	-42%	-14%	-8%	-8%	-21%
Corn	2025	11%	14%	3%	54%	38%	41%	82%	58%	23%	-15%	23%	34%
Pork	2025	20%	-14%	-14%	-36%	5%	-22%	-12%	3%	-11%	19%	7%	36%
Sorghum	2025	-100%	-78%	-12%	16%	-38%	-2%	-84%	-52%	103%	223%	-2%	−→+
Soybean Cake & Meal	2025	-22%	-2%	-34%	11%	31%	24%	8%	-31%	15%	44%	-23%	20%
Soybeans	2025	41%	32%	28%	-19%	11%	16%	-10%	-45%	-47%	-39%	-45%	45%
Upland Cotton (in bale)	2025	-8%	142%	37%	-5%	-53%	-31%	-44%	38%	36%	-4%	-12%	-1%
Wheat - HRS	2025	-39%	7%	6%	-51%	12%	-22%	17%	-1%	-18%	-5%	21%	-38%
Wheat - HRW	2025	-23%	100%	59%	49%	180%	1%	193%	160%	184%	79%	0%	-1%
Wheat - SRW	2025	-15%	109%	−→+	200%	68%	-40%	37%	-46%	50%	-25%	68%	31%
Wheat - White	2025	9%	44%	-23%	-64%	96%	-51%	42%	11%	6%	47%	36%	-40%

All Rice	2026	4%	-16%	36%	53%	-24%	156%	-43%					
All Wheat	2026	6%	-27%	9%	-13%	-59%	8%	-55%					
Beef	2026	1%	-18%	23%	12%	-33%	15%	8%					
Corn	2026	36%	23%	8%	24%	4%	52%	-47%					
Pork	2026	14%	19%	18%	55%	-1%	-11%	1%					
Sorghum	2026	24951%	238%	146%	624%	63%	41%	-81%					
Soybean Cake & Meal	2026	22%	31%	122%	14%	-4%	2%	-22%					
Soybeans	2026	126%	29%	0%	-20%	13%	42%	85%					
Upland Cotton (in bale)	2026	6%	10%	59%	41%	63%	65%	-27%					
Wheat - HRS	2026	9%	-18%	8%	32%	-57%	-24%	-22%					
Wheat - HRW	2026	32%	-42%	-11%	-53%	-84%	-4%	-80%					
Wheat - SRW	2026	-43%	-29%	110%	-46%	-37%	-14%	-32%					
Wheat - White	2026	-14%	-25%	-5%	73%	-33%	140%	-46%					

Exhibit 17: *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	2025	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0
All Wheat	2025	-100%	-100%	–→0	–→0	-100%	-100%	-100%	–→0	–→0	0→0	0→+	0→–
Beef	2025	-19%	-3%	-51%	-94%	-146%	-117%	-103%	-100%	-100%	-100%	-98%	-100%
Corn	2025	-92%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	0→0
Pork	2025	7%	7%	67%	-191%	0%	-44%	13%	-79%	0%	-13%	-2%	56%
Sorghum	2025	-100%	-99%	-98%	-100%	-100%	-100%	-100%	-100%	-100%	-100%	-67%	2878%
Soybean Cake & Meal	2025	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0
Soybeans	2025	9%	-41%	-9%	-3%	-99%	-100%	-100%	-100%	-98%	-95%	-33%	46%
Upland Cotton (in bale)	2025	-94%	276%	-276%	-107%	-100%	-102%	-99%	54%	–→+	-8%	-84%	1853%
Wheat - HRS	2025	-100%	0→0	0→0	0→0	-100%	-100%	-100%	–→0	0→0	0→0	0→+	0→0
Wheat - HRW	2025	-100%	0→0	-100%	-100%	0→0	0→0	0→0	0→0	0→0	0→0	0→0	0→0
Wheat - SRW	2025	–→0	-100%	–→0	–→0	-100%	0→0	-100%	–→0	–→0	0→0	0→+	0→–
Wheat - White	2025	-100%	0→0	–→0	-100%	0→0	0→0	0→0	0→0	0→0	0→0	0→+	0→–
All Rice	2026	0→0	0→0	0→0	0→0	0→0	0→0	0→0					
All Wheat	2026	0→+	0→+	0→+	0→0	0→0	0→0	0→0					
Beef	2026	-99%	-100%	-100%	-100%	3%	–→+	–→+					
Corn	2026	-100%	0→0	0→0	–→0	0→0	0→0	0→0					
Pork	2026	60%	-83%	63%	–→+	-30%	80%	-60%					
Sorghum	2026	15434%	22839%	37841%	238542%	4123580%	0→+	0→+					
Soybean Cake & Meal	2026	0→0	0→0	0→0	0→0	0→0	0→0	0→0					
Soybeans	2026	118%	27%	-41%	-1%	–→+	0→+	0→+					
Upland Cotton (in bale)	2026	224%	-119%	–→+	–→+	266%	–→+	223%					
Wheat - HRS	2026	0→0	0→0	0→+	0→0	0→0	0→0	0→0					
Wheat - HRW	2026	0→0	0→0	0→0	0→0	0→0	0→0	0→0					
Wheat - SRW	2026	0→0	0→0	0→+	0→0	0→0	0→0	0→0					
Wheat - White	2026	0→+	0→+	0→+	0→0	0→0	0→0	0→0					

Exhibit 18: *U.S. Net Contract Export Sales to China, Year-Over-Year Change.*

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

Commodity	Jul-25	Jul-26	YoY change	Jan–Jul 2025	Jan–Jul 2026	YTD change
All Rice	183,751	224,197	22%	1,619,663	1,658,569	2%
All Wheat	2,605,541	1,565,068	-40%	13,053,739	11,509,388	-12%
Beef	63,180	62,232	-2%	430,305	404,590	-6%
Corn	6,666,265	8,668,326	30%	47,142,511	52,281,182	11%
Pork	139,165	145,196	4%	930,891	1,075,044	15%
Sorghum	95,711	221,938	132%	609,432	4,299,464	605%
Soybean Cake & Meal	1,548,328	1,574,860	2%	9,002,216	10,848,311	21%
Soybeans	2,037,731	2,163,830	6%	19,525,002	24,132,050	24%
Upland Cotton (in bale)	995,430	1,177,887	18%	8,523,451	8,298,222	-3%
Wheat - HRS	593,381	380,279	-36%	3,608,983	3,139,502	-13%
Wheat - HRW	1,098,442	387,089	-65%	4,236,422	3,307,903	-22%
Wheat - SRW	498,814	357,411	-28%	1,936,593	1,714,214	-11%
Wheat - White	333,181	386,809	16%	3,038,765	2,855,499	-6%

Exhibit 19: *U.S. Export Shipments to World, in Metric Tons.*

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

Commodity	Jul-25	Jul-26	YoY change	Jan–Jul 2025	Jan–Jul 2026	YTD change
All Rice	-	-	0→0	-	-	0→0
All Wheat	-	-	0→0	-	267,418	0→+
Beef	337	1,139	238%	36,575	1,635	-96%
Corn	-	-	0→0	16,399	-	-100%
Pork	13,985	12,591	-10%	78,574	98,077	25%
Sorghum	-	168,988	0→+	86,408	3,784,142	4279%
Soybean Cake & Meal	-	-	0→0	-	-	0→0
Soybeans	-	399,615	0→+	6,418,618	11,496,763	79%
Upland Cotton (in bale)	174	23,222	13246%	323,603	454,472	40%
Wheat - HRS	-	-	0→0	-	101,834	0→+
Wheat - HRW	-	-	0→0	-	-	0→0
Wheat - SRW	-	-	0→0	-	68,373	0→+
Wheat - White	-	-	0→0	-	97,211	0→+

Exhibit 20: *U.S. Export Shipments to China, in Metric Tons.*

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

Commodity	Jul-25	Jul-26	YoY change	Jan–Jul 2025	Jan–Jul 2026	YTD change
All Rice	390,687	224,227	-43%	1,634,913	1,628,647	0%
All Wheat	3,151,688	1,419,813	-55%	14,676,740	10,841,766	-26%
Beef	61,502	66,281	8%	451,227	454,393	1%
Corn	9,757,516	5,196,840	-47%	42,737,253	45,373,915	6%
Pork	128,952	130,646	1%	986,914	1,109,304	12%
Sorghum	97,720	18,896	-81%	651,023	3,016,071	363%
Soybean Cake & Meal	1,842,816	1,436,666	-22%	9,019,523	10,324,377	14%
Soybeans	3,559,598	6,585,625	85%	14,844,768	22,325,993	50%
Upland Cotton (in bale)	1,136,339	827,624	-27%	6,587,026	8,123,338	23%
Wheat - HRS	656,102	510,798	-22%	3,820,421	3,214,949	-16%
Wheat - HRW	1,393,452	281,576	-80%	5,554,775	2,794,349	-50%
Wheat - SRW	348,620	237,207	-32%	2,144,642	1,571,049	-27%
Wheat - White	685,977	369,102	-46%	2,977,133	2,746,697	-8%

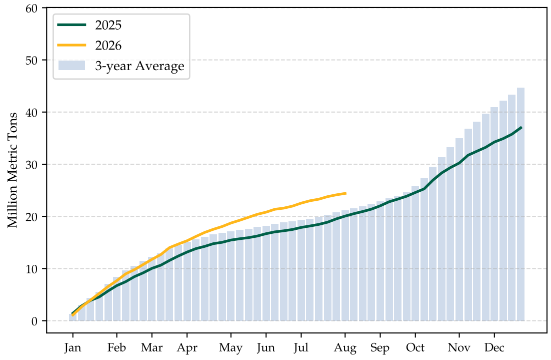
Exhibit 21: *U.S. Net Contract Export Sales to World, in Metric Tons.*

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

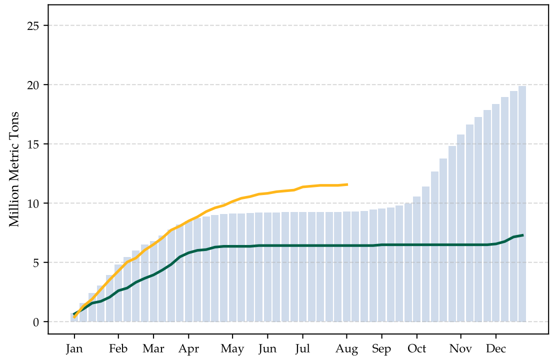
Commodity	Jul-25	Jul-26	YoY change	Jan–Jul 2025	Jan–Jul 2026	YTD change
All Rice	-	-	0→0	-	-	0→0
All Wheat	-	-	0→0	-	137,418	0→+
Beef	-320	1,195	−→+	25,706	2,797	-89%
Corn	-	-	0→0	6,399	-	-100%
Pork	22,654	9,128	-60%	83,935	103,686	24%
Sorghum	-	126,584	0→+	10,342	3,295,775	31768%
Soybean Cake & Meal	-	-	0→0	-	-	0→0
Soybeans	-	3,317,615	0→+	3,614,213	9,054,763	151%
Upland Cotton (in bale)	8,067	26,050	223%	28,745	396,729	1280%
Wheat - HRS	-	-	0→0	-	66,834	0→+
Wheat - HRW	-	-	0→0	-	-	0→0
Wheat - SRW	-	-	0→0	-	3,373	0→+
Wheat - White	-	-	0→0	-	67,211	0→+

Exhibit 22: *U.S. Net Contract Export Sales to China, in Metric Tons.*

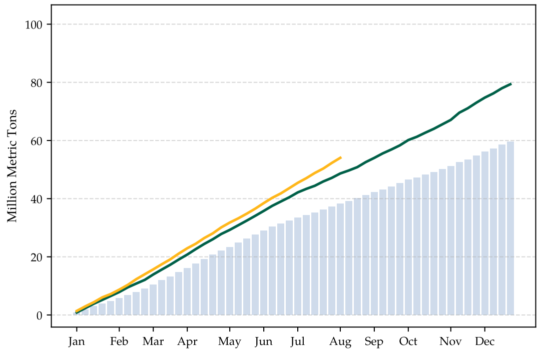
Source: NDSU using data from the USDA Foreign Agricultural Service.



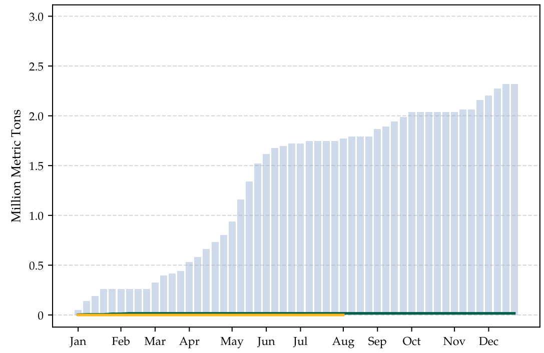
Accumulated Export Shipments – Soybeans to World



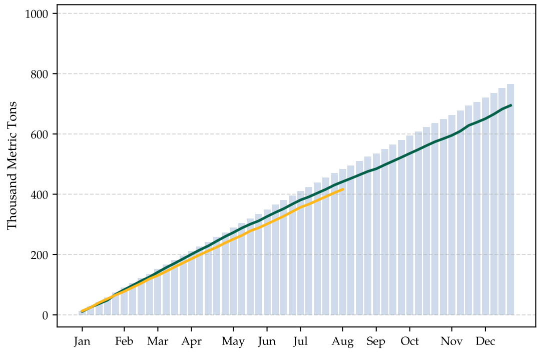
Accumulated Export Shipments – Soybeans to China



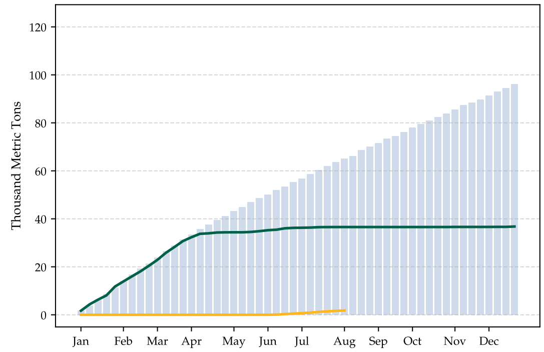
Accumulated Export Shipments – Corn to World



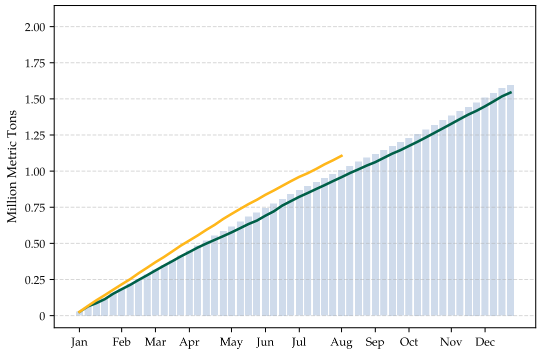
Accumulated Export Shipments – Corn to China



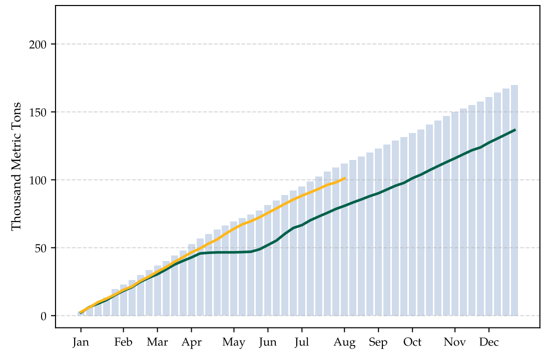
Accumulated Export Shipments – Beef to World



Accumulated Export Shipments – Beef to China



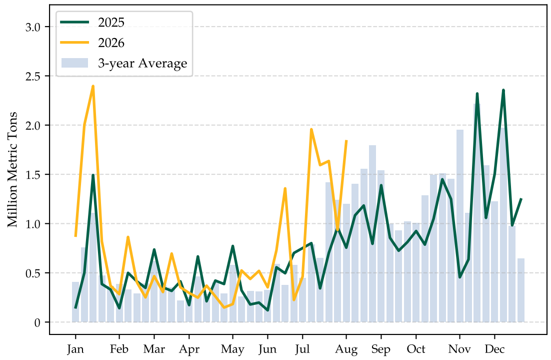
Accumulated Export Shipments – Pork to World



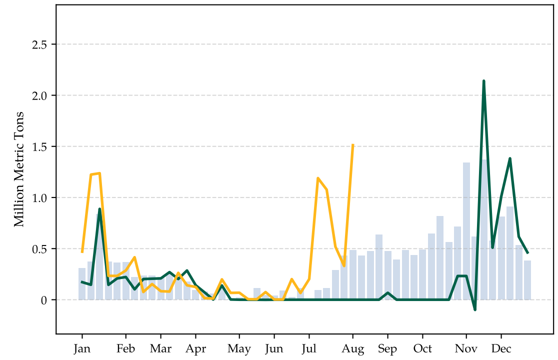
Accumulated Export Shipments – Pork to China

Exhibit 23: *Accumulated Export Shipments.*

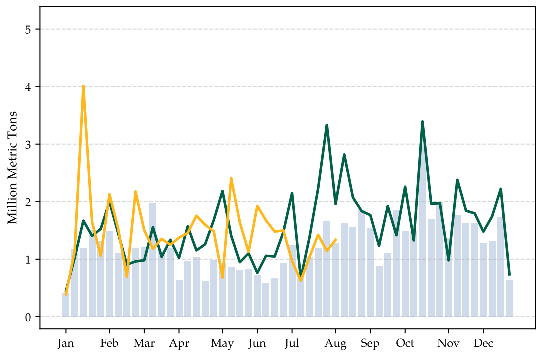
Source: NDSU using data from the USDA Foreign Agricultural Service.



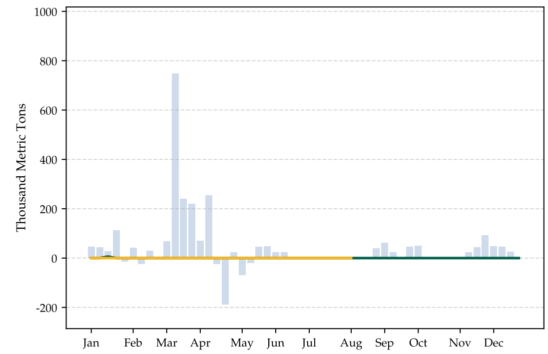
Weekly Net Contract Export Sales – Soybeans to World



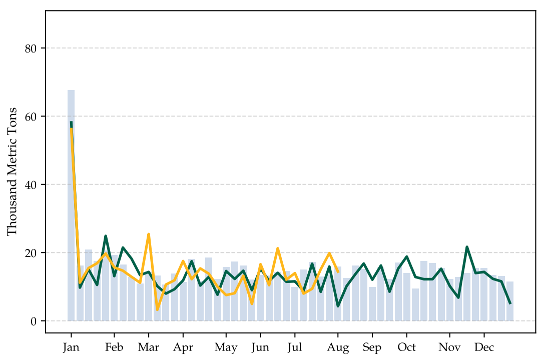
Weekly Net Contract Export Sales – Soybeans to China



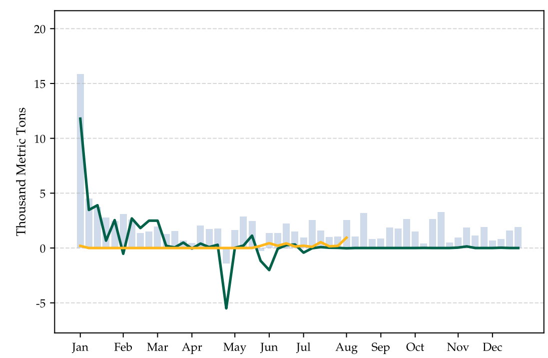
Weekly Net Contract Export Sales – Corn to World



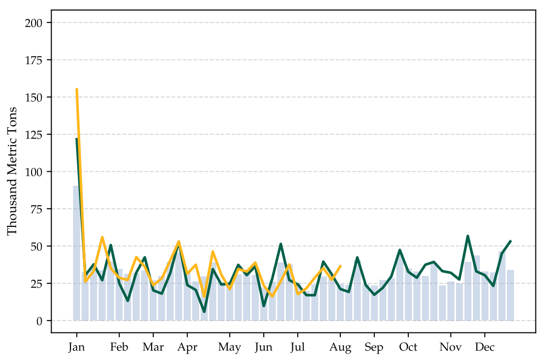
Weekly Net Contract Export Sales – Corn to China



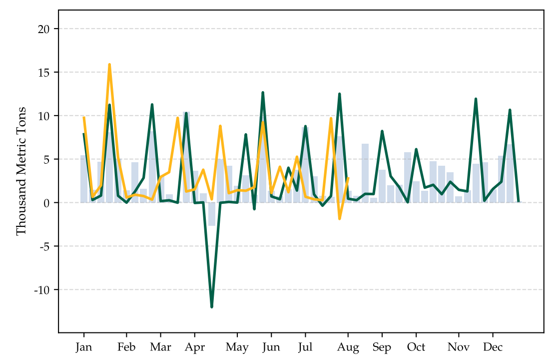
Weekly Net Contract Export Sales – Beef to World



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 24: *Weekly Net Export Sales.*

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

References

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Recommended Citation

Arita, S., Kim, J., and Steinbach, S. (2026). *Evolving U.S. Tariffs on Agri-Food Imports and Farm Inputs: From Broad Measures to Targeted Exemptions*. NDSU Agricultural Trade Monitor 2026-08. Center for Agricultural Policy and Trade Studies, North Dakota State University. August 21, 2026.

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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