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The world's largest agricultural importer: the United States spares its plate, but not all of it

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Coffee and cocoa spared, meat, fish and beverages taxed: U.S. agricultural protection picks and chooses. At the end of September 2026, the average tariff on agricultural products stands at 12.7%. That is twice its January 2025 level, but well below the rate on other products. In agriculture, most of the rise in protection comes from a new Section 301, targeting 60 countries.

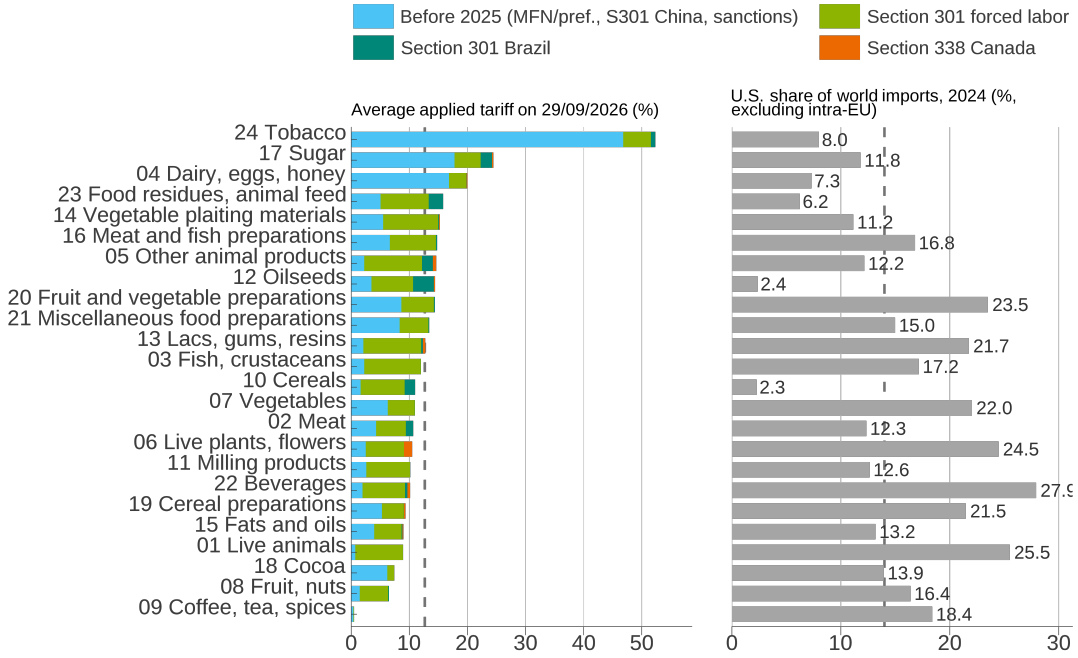
Coffee and cocoa spared, meat, fish and beverages taxed: U.S. agricultural protection picks and chooses. At the end of September 2026, the average tariff on agricultural products stands at 12.7%. That is twice its January 2025 level, but well below the rate on other products. In agriculture, most of the rise in protection comes from a new Section 301, targeting 60 countries.

The United States is the world's largest importer of agricultural products: $231 billion in 2024, or 14% of world imports excluding intra-EU trade. Its agricultural tariff policy therefore weighs on exporters worldwide. At the end of September 2026, the average tariff it applies to agricultural products stands at 12.7%[1], slightly more than twice its January 2025 level, but well below the rate on other products (16.9%). This level rests mainly on a single instrument, the Section 301 "forced labor" duties[2]. It spares the products the United States does not produce, or barely, and hits those that compete with its producers, often in markets where it accounts for a quarter of world purchases.

[1] see Guimbard (2026a) for the database and Guimbard *et al.* (2012) for the weighting method

[2] Duties imposed since 24 July 2026 on some sixty economies that Washington accuses of failing to ban, or to enforce a ban on, imports of goods produced with forced labor.

Graphique 1: Average tariff applied by the United States to agricultural products on 29 September 2026, and U.S. share of world imports in 2024, by chapter



Lecture : on 29 September 2026, the United States applies an average 10.7% to meat imports, of which 5.1 points under Section 301 “forced labor”; it absorbs 12.3% of world meat imports.
Note : agricultural products: chapters 01 to 24 of the Harmonized System, including seafood. Average tariff applied to imports from all origins, broken down by legal basis; “Before 2025”: MFN or preferential tariff, Section 301 on China since 2018-2019 and sanctions. Aggregation by the reference-group method (Guimbard et al., 2012). U.S. share: U.S. imports as a share of world imports of the chapter, excluding trade between EU countries. Dashed lines: left, average U.S. tariff on all agricultural products on 29 September 2026 (12.7%); right, U.S. share of world agricultural imports in 2024 (14.0%).
Sources : IFE-CEPII, “US import tariffs 2025-2026” database (vintage of 20 October 2026); MAcMap-HS6 (ITC-IFE-CEPII) for MFN and preferential tariffs; BACI (CEPII) for 2024 trade; author's calculations., calculs OFCE.

1 The world’s largest agricultural market

The United States is often presented as an agricultural export powerhouse. It is also, by far, the largest importer of agricultural products. In 2024 it bought $231 billion worth, ahead of the European Union ($216 billion, excluding trade between member states) and China ($187 billion). These purchases account for only 7.4% of U.S. imports, but 14% of world agricultural imports.

This weight varies widely across products. The United States absorbs 28% of world imports of beverages, 26% of live animals, 24% of plants and flowers, 21 to 23% of vegetables, fruit and vegetable preparations or cereal preparations, and 18% of coffee, tea and spices. In these markets, a rise in U.S. tariffs bears directly on foreign exporters’ prices and outlets. It weighs little, by contrast, on cereal and oilseed markets (about 2%), where it is mainly an exporter.

2 Tax agriculture like everything else, or spare it?

Before Donald Trump’s second term, agriculture was already more protected than the rest of U.S. imports: 6.2% on average, against 5.3% for non-agricultural products. This

protection was concentrated on a few sensitive products, tobacco, sugar and dairy, subject to specific duties and tariff-rate quotas. In a policy claiming "reciprocity" (taxing each partner in line with the barriers attributed to it, in practice according to the bilateral deficit) and the defense of domestic producers, one could expect agriculture to be taxed like everything else, or even more.

Three arguments pointed the other way:

1. U.S. farmers are exposed to retaliation, as Chinese soybean purchases showed in 2018 and again in 2025.
2. A large share of food imports consists of products the United States does not produce, or produces very little, such as coffee, cocoa, tea, spices or tropical fruit[3]: taxing them protects hardly any producer and directly raises the cost of the household basket.
3. Rising food prices weighed on the political debate: in November 2025, the administration exempted a series of products from the "reciprocal" tariffs, including coffee, tea, bananas, cocoa, spices and beef. The White House cited progress in its trade negotiations and products not grown or produced in sufficient quantities in the United States; the President also expected prices to fall, as beef and roasted coffee prices had risen by 13% and 19% year on year in September 2025.

3 Agriculture first taxed like everything else, then gradually spared

In 2025, the logic of "reciprocity" prevailed at first, and agriculture received no preferential treatment. In the aftermath of Liberation Day (Guimbard, 2026b), the average tariff on agricultural products peaked at 27.0%, the same level as for other products (28.6%). Arguments (2) and (3) only carried weight in the autumn: within a few days, the November 2025 exemptions brought it down from 18.7% (10 November) to 17.2% (14 November), while the tariff on non-agricultural products stood at 18.9%. The Supreme Court's invalidation of the duties based on emergency powers (IEEPA)[4], in February 2026 (see Bouët, 2026), lowered it to 13.9%. On 24 July 2026, the temporary Section 122 surcharge (a ten-point balance-of-payments surcharge) expired; the Section 301 "forced labor" duties took over the same day (Guimbard, 2026c). Since then, the average agricultural tariff has stood at around 12.7%. Agriculture, taxed as heavily as everything else at the height of 2025, is now taxed much less, by more than four points; its tariff is nevertheless slightly more than twice its January 2025 level.

[3] According to FAO food balance sheets for 2023, U.S. production covers less than 3% of coffee, spice, banana or pineapple consumption, and no cocoa or tea production is recorded.

[4] The U.S. President can raise tariffs without Congress only by relying on laws that delegate this power under conditions. IEEPA (International Emergency Economic Powers Act, 1977) allows him to act against an "unusual and extraordinary threat"; it underpinned the Liberation Day "reciprocal" tariffs and the "fentanyl" duties, until the Supreme Court struck them down. Section 122 of the Trade Act of 1974 allows a surcharge of up to 15%, for up to 150 days, to address a serious balance-of-payments deficit. Section 232 of the Trade Expansion Act of 1962 allows duties on imports deemed to threaten national security (steel, aluminum, automobiles, etc.). Section 301 of the Trade Act of 1974 allows sanctions against a partner's practices deemed unreasonable or discriminatory to U.S. commerce: here, failing to fight forced labor and, for Brazil, other grievances (digital trade, preferential tariffs, anti-corruption enforcement, intellectual property, ethanol market access, illegal deforestation). Section 338 of the Tariff Act of 1930 allows additional duties of up to 50% against a country that discriminates against U.S. commerce. Whatever the law invoked, the stated motive serves first as a legal basis: it lets the executive set tariffs without a vote in Congress. For details, see Guimbard (2026a).

4 Protection resting on one main instrument

Of the 6.4 points gained since January 2025, 5.7 come from Section 301 “forced labor” (graphique 1, left panel), 0.6 from the 25% duty imposed on Brazil since July 2026 under another Section 301 investigation (meat, cereals, oilseeds, sugar, animal feed), and 0.1 from Section 338 against Canada. Section 232, which underpins most industrial protection, does not affect agriculture (it has only ever covered one agricultural product, beer, HS 220300, listed from April 2025 to April 2026 among aluminum derivatives because of its cans; it is not counted here).

This outcome was far from obvious. An instrument justified by the fight against forced labor, opened in March 2026 against some sixty economies, has become the main agricultural tariff of the world’s largest importer. It applies broadly to the food products of the targeted countries, among them the European Union, Brazil, China, India and Thailand. The level of U.S. agricultural protection therefore depends mainly on this single procedure: on the products it exempts, on whether it holds up if challenged in court, and on the deals the targeted countries negotiate to escape it.

5 Tax what competes, spare what is missing

The product detail shows a logic consistent with the November 2025 exemptions. Products the United States does not produce, or barely, remain spared, even when they weigh heavily in its purchases. Coffee, tea and spices, of which it absorbs 18% of world imports, have gained only 0.1 point (0.5%); the tariff on cocoa has risen by only 1.2 point. The largest increases, by contrast, hit products that compete with U.S. production, often in markets where the United States is a major buyer: live animals (+8.2 points, 26% of world imports), plants and flowers (+8.0 points, 24%), seafood (+9.7 points, 17%), meat and fish preparations (+8.1 points, 17%). Beverages, of which the United States absorbs 28% of world imports, gain 8.2 points.

The highest levels remain inherited from before 2025: tobacco (52.4%), dairy (20.0%) and sugar (24.5%), where the second term has added only 3 to 7 points. The new agricultural protection is therefore not layered on the old one: it extends to products that were lightly taxed until now, animal proteins (HS 01 to 03 and 16) and processed products (HS 19, 22 and 23).

6 What is at stake?

For foreign exporters, the stakes match the weight of the United States. In markets where it accounts for a quarter of world purchases, an eight-to-ten-point rise in U.S. tariffs cannot be absorbed by turning to other buyers without pressure on prices: part of these flows may be redirected to Europe or Asia. For U.S. households, the increase is contained on tropical products, but not on animal proteins and beverages. For U.S. farmers, finally, the risk has not gone away: durable agricultural protection remains a reason for retaliation by partners that buy their cereals, soybeans or meat.

Agriculture has thus been neither treated like everything else nor kept aside. The world’s largest agricultural importer imposes surcharges on the products its farmers also grow, to shield them from foreign competition, and excludes from the surcharges those they do not produce, or barely. Either way, a tariff raises prices: on the former, U.S. consumers pay for the protection of their producers; on the latter, they would pay with no one protected.

The legal grounds change, but not the choice of products subject to surcharges. Since November 2025, national emergency grounds, balance-of-payments grounds and then forced-labor grounds have followed one another, but coffee, tea, spices or bananas remain excluded from the surcharges, and competing products subject to them. Whether this choice holds will depend on two procedures. The first is the Section 301 "forced labor" duties, which carry most agricultural tariffs: they have been challenged since they took effect before the Court of International Trade, the U.S. court specialized in international trade[5], and can be sidestepped through deals. The second is the Section 301 investigation on overcapacity: it targets manufacturing, but could also affect the food industry (meat preparations, beverages).

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[5] See the case *Burlap and Barrel, Inc. v. Greer*.